

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

DO-IT-YOURSELF TAX PREPARATION COORDINATOR

Salary range: \$15.50 - \$16.50

ABOUT PREPARE + PROSPER

Prepare + Prosper (P+P) is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. We are committed to the principles of diversity, equity, and inclusion in our work and are particularly interested in receiving applications from people of color and those with lived experiences similar to the people in our programs. Learn more about P+P at prepareandprosper.org.

POSITION AT A GLANCE



Our preferred candidate has strong customer service and organizational skills.



This is a seasonal part-time position. 15-20 hours per week from Jan 31 to Apr 15, 2022, and 15-20 total hours of tax training starting early Jan 2022.



The office is located near University Avenue West and Highway 280 in St. Paul with free parking and public transit options available.



This position can work primarily or entirely on a remote basis.

ABOUT THE POSITION

The Do-It-Yourself (DIY) Tax Preparation Coordinator is responsible for supporting customers using Prepare + Prosper's DIY tax preparation program. This will include presenting weekly online trainings for taxpayers accessing free tax preparation software to prepare their own tax returns and taking the lead on 1:1 customer support via phone and email. The coordinator will also manage a small group of volunteers who will assist with direct customer support. The coordinator will be expected to work independently on projects with strong support from the Engagement Manager and Training + Learning Manager. The work for this position can all be done remotely.

HOW THE POSITION BREAKS DOWN

Direct Customer Support (approximately 50% of the position)

- Lead weekly webinar trainings for customers starting their own tax returns.
- Communicate accurate tax and financial information to customers in user-friendly terms.
- Work with customers via phone, e-mail, and Zoom video conferencing to answer tax questions or software questions.
- Follow and enforce data privacy procedures at all levels of service.

Volunteer Management (approximately 35% of the position)

- Direct the work of and provide feedback to volunteers working with the program.
- Support and answer questions from volunteers as they connect with customers who are doing their own tax returns.
- Build relationships with volunteers and ensure all volunteers have a positive experience.

Program Improvement (approximately 10% of the position)

- Provide regular feedback about the DIY tax preparation process.
- Request and assist with developing new tools or resources for customers or volunteers.
- Edit documents for customers or volunteers to improve accuracy or clarity.

Other (approximately 5% of the position)

- Attend P+P tax training and complete IRS certification test.
- Protect P+P's value by keeping information confidential.

WORK ENVIRONMENT

- Due to the COVID-19 pandemic, this position will work primarily or entirely on a remote basis.
- This role routinely uses standard office equipment such as computers and phones. Prepare + Prosper will provide a laptop if needed.
- While performing the duties of this job, the employee is regularly required to talk and hear.
- The employee must frequently see, describe, and interpret images.
- Night and weekend hours can be arranged as part of a regular schedule and may occasionally be required throughout the duration of this commitment.

HOW WILL YOU KNOW IF YOU ARE A GOOD FIT?

- Work or volunteer experience in customer service (preferred).
- Strong organizational skills with keen attention to detail, accuracy, and follow through.
- Strong customer service skills and ability to adapt to specific customer needs.
- Experience working effectively in a collaborative team environment, specifically as a team lead.
- Prior experience with tax preparation (especially using TaxSlayer software) is helpful but training will be provided.
- Experience in and comfort using Microsoft Office Suite products (like Microsoft Word, Microsoft Teams, and Outlook) and the video meeting platform, Zoom.
- Demonstrated experience communicating and working effectively with others whose identity and background may differ from your own.

BENEFITS THIS POSITION OFFERS

- Paid sick and safe time (SST), accrued at 1 hour of SST for every 30 hours worked.
- Mileage reimbursed for work-related travel.

HOW TO APPLY

- Please submit resume by Monday, Nov 29, 2021, to jobs@prepareandprosper.org with the subject line "DIY Coordinator."
- Indicate in your email where you heard of the position opening.

In your email, we encourage you to write about:

- What interests you in working for P+P, what you are passionate about, and highlights of your personal and professional background that would help us see you as an outstanding candidate.

OUR COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY

P+P continues to work towards a more inclusive workspace, and as such, we are an equal opportunity employer and do not discriminate against any employee or applicant for employment because of race, skin color, ethnicity, religion, gender, sexual orientation, national origin, disability, age, marital status, military status, pregnancy, or parenthood.