
FREE TAX PREP CLIENT SERVICE ADMINISTRATOR

COMPANY INFORMATION

At United Way California Capital Region (UWCCR), we believe creating stronger, healthier, more compassionate communities starts at Square One: Helping every family succeed so their community can too. Families know what they need to thrive. We are their partners on that path, connecting them with resources to achieve their goals. United Way California Capital Region is now working on an even larger scale to help families heal and meet our 20-year promise to significantly reduce poverty in the Capital Region. We are laying solid steppingstones on our path to help every family thrive and build a healthy community

FLSA Status: Non-Exempt
Reports to: Free Tax Prep Manager
Department: Community Impact
Time base: Part-Time (24 hrs/week)
Tenure: Temporary/ grant-funded position through May 2023
Prepared Date: October 2022
Salary: \$18.00 - \$22.68 per hour

JOB SUMMARY:

Reporting to the Free Tax Prep Manager and working collaboratively with the Free Tax Prep Program Staff, the Free Tax Prep Client Service Administrator will primarily be responsible for monthly reporting tasks relating to several Free Tax Prep grants, serving as the program's client service representative, and assisting with coordination of the Virtual VITA program. The Administrator will also help with organizational tasks for overall Free Tax Prep program operations.

This position consistently exercises a high degree of attention to detail, procedures and deadlines.

RESPONSIBILITIES:

Essential Duties

- Work with key United Way staff and partners to develop and implement process for monthly grant reporting.
- Compile and submit report information in advance of monthly due dates.
- Assist clients over the phone and email with questions and general information about the Free Tax Prep program.
- Work with key United Way staff to develop and implement process for tracking and communicating with clients participating in the Virtual VITA program.

Additional Duties

- Assist with miscellaneous projects and requests on an as needed basis.

DESIRED EDUCATION AND EXPERIENCE:

- 1-2+ years of customer service
- 1-2+ years of data entry, tracking, and reporting
- Knowledge of Free Tax Preparation program a plus
- Familiarity with community resources in the Sacramento/Capital Region a plus

KNOWLEDGE, SKILLS AND ABILITIES:

- Excellent communication skills, verbal and written, including the ability to communicate well in a variety of settings with a variety of community and funder partners
- Strong troubleshooting and problem-solving abilities
- Able to react, organize and prioritize within a high pressure, fast paced environment
- Outstanding work ethic and willingness to do what it takes to get the job done
- Ability to work independently with a high attention to detail
- Constant decision making and concentration
- High level of proficiency in various Microsoft Office applications
- Ability to maintain a polished professional appearance
- Ability to maintain a high level of confidentiality
- Work in an office environment, lift and move objects up to 40 pounds such as large binders, books, boxes, and small office equipment

SPECIAL REQUIREMENTS

Possession of an appropriate California operator's license issued by the State Department of Motor Vehicles, and adequate automobile insurance; possession and maintenance of a good driving record (as evidenced by the absence of multiple or serious traffic violations for at least a two-year duration) that does not contribute to an increase in UWCCR insurance rates.

ANTI-RACISM, DIVERSITY, AND INCLUSION

UWCCR recognizes and affirms that all people are created equal and are entitled to all rights afforded by the Constitution of the United States. Our Human Resources and Executive Team are committed to promoting Anti-Racism, Diversity, and Inclusion efforts to address the inequalities and disparities amongst race. We live these values by improving equity, diversity, and inclusion in recruitment, selection, and employment practices. We aspire to recruit, employ, retain, and promote talented individuals representing the full spectrum of our community, and welcome all candidates, including candidates of any race, religion, national origin, gender, gender identity or expression, sexual orientation, and age, and candidates with disabilities.