

**Tax Site Manager**  
**Seasonal/ Part-time / Chicago and Suburbs IL**  
**Date Posted: September 15, 2014**

The Center for Economic Progress (CEP) is seeking highly organized and motivated individuals to support our programs by managing one of our tax sites that provides free tax preparation services to low income families and individuals. This is a part-time seasonal position (December 1, 2014 through April 30, 2015).

CEP provides free tax preparation, tax-related legal assistance and financial coaching services that assist low-income clients in accessing significant financial resources, improving their credit status and building savings. Annually the CEP staff and 1,200 volunteers provide high-quality tax preparation and tax-related legal and financial services to over 20,000 clients in Chicago and surrounding communities.

**Position Description**

The Tax Site Manager is responsible for overall management of a community-based, volunteer-driven tax return preparation site operated by the Center for Economic Progress (CEP). The Tax Site Manager oversees all aspects of the operation to ensure superior quality and fair service to all clients, including appropriate application of tax law, professional management and interactions with volunteers; application of high ethical standards, and adherence to CEP and Internal Revenue Service (IRS) policies, procedures, and guidelines. The Tax Site Manager ensures effective integration of tax and financial services onsite, including tax preparation, financial partnerships, and the prepaid debit card, maximizing client opportunities and enrollment.

**Responsibilities**

- Maintain clear understanding of available tax and financial services onsite, and ensure smooth integration into site flow and operations
- Ensure effective implementation of backup plans to provide coverage for unfilled site roles, including the financial institution partners
- Implement and oversee effective quality review procedures in accordance with CEP and IRS guidelines
- Ensure accurate tax return preparation by on-site tax preparers
- Delegate responsibilities and tasks to volunteers and staff based on site needs and volunteer roles, interests and abilities
- Ensure clients are treated fairly and professionally, with courtesy and respect
- Ensure adherence to the highest standards of conduct
- Ensure timely communication and responses to CEP staff, specifically in the critical areas of technology, supply management, tax law, on-site incidents, volunteer and staff management, financial services activities and attendance conflicts
- Ensure staff coverage for all assigned shifts

**Qualifications****Experience:**

- Previous tax return preparation required
- Previous work experience with CEP or another tax assistance program strongly preferred
- Experience working with diverse populations of clients and/or volunteers in a customer service context preferred

**Demonstrated Competencies:**

- Works well with diverse populations of clients and volunteers
- Displays supportive and professional conduct in high pressure, fast-paced environment with multiple priorities
- Able to translate complex tax law into understandable concepts for clients and volunteers. Displays a supportive and professional disposition
- Preference is for individuals familiar with the community where the site is located.

**Specialized Skills:**

- Basic computer skills
- Strong preference for individuals with knowledge of professional tax preparation software
- Good working knowledge of federal and Illinois state tax law, particularly areas that impact low-income families
- Preference is for individuals with ability to speak a second language. Specific language skills may be required for employment in some locations.

***Successful candidates must pass a tax preparation certification test. Tax Site staff are also required to attend training determined by CEP.***

**Physical Requirements of Position**

Ability to work evenings and/or weekends throughout the tax season as scheduled

**Compensation**

This position is temporary/seasonal, with part time hours and a competitive hourly rate

**To Apply**

Submit a cover letter and resume by October 17, 2014 to:

Cheryl Travers, Human Resources Business Partner

Mail: 567 W. Lake Street Ste. 1150, Chicago IL 60661

E-mail: [jobs2@economicprogress.org](mailto:jobs2@economicprogress.org) Fax: (312) 630-0276

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**\*\*\* No Phone Calls Please\*\*\***

