

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

INTAKE SPECIALIST VOLUNTEER POSITION DESCRIPTION

The intake specialist provides support to customers at Prepare + Prosper (P+P). Working closely with the intake manager, the intake specialist keeps the multi-step process running smoothly. The intake specialist plays an integral role to ensure a positive experience for P+P's customers. Develop new skills and gain valuable experience working with diverse customers, volunteers, and staff.

Role and responsibilities:

- Be the initial and final “friendly face” for customers
- Help with customer intake, ensuring customers meet eligibility requirements and have necessary paperwork
- Answer customer questions and act as a navigator through the multi-step process
- Assist in the overall operation and flow of the tax clinic
- Present completed tax return to customers and secure necessary signatures
- Maintain customer confidentiality, providing as much privacy as logistically possible
- Work cooperatively with P+P staff and other volunteers to deliver high-quality service

Skills required:

- No previous tax experience is necessary!
- Passion for connecting with people
- Strong leadership skills and ability to work independently
- Ability to relay information in a clear manner
- Ability to multi-task in a fast-paced environment
- Bilingual in Spanish, Somali, Hmong, Amharic, or Oromo is helpful!

Commitment and timeline:

November - December, 2017

Attend one volunteer info session

January 2018

Complete 6-8 hours of in-person and online training

January 20 - April 15, 2018

Volunteer one 4-hour shift per week

Locations

P+P operates 8 tax sites across the Twin Cities metro area, with locations in Minneapolis, St. Paul, Bloomington and Hopkins. Volunteers select a location that is convenient to work, home or school. Our main office is in St. Paul near the intersection of University Avenue W & Highway 280.

