

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

SPECIAL TAX PROGRAMS MANAGER

Salary range: \$55,000 – 60,000

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 who use our programs.

Learn more about P+P at prepareandprosper.org.

POSITION AT A GLANCE

- Our preferred candidate comes with basic understanding of tax returns for low-to-moderate income self-employment tax filers, experience in project and program management, and a passion for people and relationships.
- This is an exempt, full-time position with a comprehensive benefits package.
- Work is performed in-person and remotely. Must be able to work Monday and Wednesday evenings during the tax season and other evenings throughout the year.
- This position reports to the Tax + Financial Services Director. Supervises the remote tax prep coordinator.

ABOUT THE POSITION

The Special Tax Programs Manager provides oversight and implementation of the day-to-day operations of the self-employment (SE) program to support high-quality, volunteer-based, tax and financial services. The priorities of this position include management of the SE tax clinics, scheduling appointments, responding to customer inquiries, and supervising and training volunteers and seasonal staff. This position also supports the Remote Tax Prep, Do-It-Yourself (DIY), tax prep, and self-preparation tax programs.

HOW TO APPLY

Please submit resume and cover letter by November 30 to jobs@prepareandprosper.org with the subject line "Special Tax Programs Manager." Indicate in your email where you heard of the position opening. Anticipated start date is mid-December 2023.

HOW THE POSITION BREAKS DOWN

Program management and support (70%)

- Manage and coordinate tax and financial services at SE clinics.
- Oversee the remote tax preparation and DIY tax prep program, and support the remote and DIY coordinators.
- Coordinate self-tax preparation opportunities for the community through internal programming or external referrals.
- Coordinate with others to produce practical customer tax tools such as organizers, and income/expense worksheets.
- Answer customer questions, provide support and advocacy, and prepare additional tax documents as needed.
- Facilitate the e-filing process and resolve rejected returns.

Training and knowledge development (15%)

- Successfully complete the IRS Advanced level certification test each year.

- Work with a team to produce training materials and training content for volunteers.
- Deliver trainings to SE and other tax volunteers.

Community outreach and partnerships (10%)

- Represent P+P in media and community outreach events when audience has SE focus.
- Conduct customer workshops on tax and financial issues for self-employed entrepreneurs.
- Maintain partnerships that support P+P's special tax programs.

WORK ENVIRONMENT

- This position has the option to work remotely for a portion of the work week when programming allows and with supervisor approval.
- This position operates primarily in an office environment that is accessible.
- This role routinely uses standard office equipment.
- While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to move around the office and between offsite meetings; grab, move, and manipulate objects, and operate a computer.

HOW WILL YOU KNOW IF YOU ARE A GOOD FIT?

Overall, P+P seeks candidates who are smart thinkers, are self-directed yet collaborative, and care about making people's lives better.

- Basic understanding of preparing tax returns is required in potential candidates. This includes general understanding of filing statuses, tax credits such as the EITC, and familiarity with tax preparation software. Upon hire, candidates will be expected to bring their understanding to intermediate or advanced levels. Training and support will be provided.
- Understanding of Schedule C filing and other self-employment tax issues highly desirable.
- Two to four years of experience in program management.
- Excellent customer service skills are essential.
- Strong organizational skills, keen attention to detail, accuracy, and follow-through.
- Proficiency in using general office software, such as MS Office, and Google Docs.
- Bilingual/Bicultural is desirable.
- Excellent written and verbal communication skills. Experience training and presenting to groups.

BENEFITS THIS POSITION OFFERS

Our benefits package for this position includes:

- Health, dental, vision, life, and short/long term disability insurance
- Generous PTO accrual rate
- Paid holidays
- Retirement plan (SIMPLE IRA)
- Mileage reimbursed for work-related travel

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.