



Community Action Agency of Butte County, Inc.

Helping People. Changing Lives.

VOLUNTEER JOB DESCRIPTION

Position Title	Basic Tax Preparer Volunteer for VITA Program
Volunteer Name	
Supervisor Name & Title	TBD – VITA Site Coordinator
Organizations Mission	
At Butte County CAA we provide hope to people struggling with poverty to become more self-sustaining by meeting tangible needs in the areas of energy savings, affordable food, and housing. At Butte County CAA our mission is to serve as a catalyst to reduce poverty and its symptoms through: <ul style="list-style-type: none">• Providing quality services• Developing resources• Collaborating with others• Advocating on behalf of the economically & socially disadvantaged• Empowering individuals• Improving the conditions in which people live, learn and work	
Objective of Position	
In collaboration with community partners, through the IRS Volunteer Income Tax Assistance (VITA) program, CAA provides no cost tax preparation assistance to families and individuals with household incomes of \$57,000 or less, persons with disabilities, the elderly and limited English speaking taxpayers. We help over 1200 families annually to file accurate tax returns, putting needed money back into their budget and benefitting our local community. The Basic Tax Preparer will prepare tax returns for clients (tax payer) <u>without</u> complicating factors such as: tip income, self-employment, retirement income, income/loss from stocks or real estate, debt cancellation, etc.	
Key Responsibilities / Tasks	
<ul style="list-style-type: none">• Perform intake and interview of clients (tax payers)• Review client tax documents• Schedule phone meeting with clients, as needed• Data entry• Prepare tax returns with tax payer present• Prepare dropped-off tax returns for later review by the client and Quality Reviewer• Provide knowledgeable answers to client questions	
Qualifications / Skills	
Volunteer Criteria: <ul style="list-style-type: none">• Ability to sit for extended periods of time• Basic computer literacy and skills (keyboarding, Windows 10, web browsers)• Must obtain the following VITA Certifications before your first scheduled shift (training and certification provided; requires ~40 hours to complete)<ul style="list-style-type: none">▫ 2021 Volunteer Standards of Conduct▫ 2021 Intake/Interview/Quality Review▫ 2021 Basic Tax Law• Tax professionals or community volunteers who are willing to be trained• Be able to follow detailed instructions• Be reliable and arrive on time to scheduled shifts• Report to the site neatly groomed and wear clothing that is professional, and appropriate for the	

181 East Shasta Ave., Chico, CA 95973
(530) 712-2600

position

- Practice discretion and maintain confidentiality with sensitive/private information
- Have strong written and verbal communication skills
- Ability to communicate and provide assistance to people with disabilities

Location / Setting

Chico, CA / In-door office setting

Schedule

Variable Tuesday-Saturday (Flexible Hours Available)

Training & Supervision

CAA provides IRS approved training and materials

Screening

Volunteers must be over 18 years of age, pass a background check, and complete training and certification for the role(s) they intend to fill.