



## Job Description

<b>JOB TITLE</b>	<i>Tax Help Program Manager</i>		
<b>REPORTS TO</b>	<i>Executive Director</i>		
<b>DEPARTMENT</b>	<i>Tax Help 2170</i>	<b>FLSA STATUS</b>	<i>Exempt Full-Time</i>
<b>LOCATION</b>	<i>Great Falls, MT</i>	<b>JE Score / Grade</b>	

### Position Purpose

The Tax Help Program Manager oversees the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs at RDI. This includes recruitment, training, and management of volunteers and staff, ensuring compliance with IRS guidelines, and providing oversight tax sites and Site Coordinator(s). Additionally, the role involves networking with potential partners statewide and delivering presentations and training sessions focused on free tax services. In addition to managing the day-to-day operations of tax preparation sites, this position plays a key role in growing the program statewide through outreach, partnership development, and connection of tax clients to broader financial wellness services. The ideal candidate will possess a deep commitment to social service, particularly supporting low-income and financially distressed individuals.

### Primary Responsibilities & Duties

1. Recruit, train, certify, and manage volunteer tax preparers
2. Monitor tax sites for compliance with IRS VITA requirements, including certification, site operations, and quality review
3. Conduct quality review of tax returns when Site Coordinator(s) are unavailable
4. Answer taxpayer questions regarding tax law and their returns
5. Develop strategies to improve appointment scheduling, return flow, client satisfaction, and connections to other financial wellness services
6. Expand the program through partnerships with community organizations and outreach to increase the volunteer and client base
7. Compile post-season reports and provide recommendations for program improvement
8. Represent RDI at partner meetings, community presentations, and outreach events
9. Keep current with trends and developments related to essential job competencies
10. Other ad hoc duties as requested by leadership

### Professional & Educational Knowledge, Skills & Abilities

- Supervisory or management experience required.
- Multiple years working as an income tax preparer or accountant preferred.
- Proficiency with tax software and general computer literacy (Microsoft Office Suite and Google Suite).
- Ability to work independently while managing a high-functioning team of staff and volunteers.
- Must be dependable and flexible, with the ability to work occasional evenings and Saturdays during tax season as needed.
- Demonstrated ability to work effectively with diverse populations, including people in crisis or transition.
- Excellent communication, customer service, and problem-solving skills.

## Qualities & Characteristics

- *Commitment to Mission:* Passion for serving low-income populations and strong and demonstrated commitment to social justice, various forms of equity, and anti-poverty initiatives. Understanding of the root causes of poverty and systems and structures that perpetuate inequality.
- *Personal qualities:* Rural Dynamics requires the highest ethical standards and integrity in service to our clients and partners. The ideal candidate will possess maturity, self-awareness, empathy, flexibility, cultural humility, and an exceptional capacity for team and community building. Demonstrates a high level of integrity and a positive attitude.
- *Strong interpersonal and one-on-one skills:* Ability to form strong, trusting partnerships and comfortable networking and proactively introducing our organization to strangers. Represents Rural Dynamics in a professional manner and cultivates relationships with partners and prospects.
- *Excellent organizational and communication skills:* Detail-oriented with the ability to complete work accurately and efficiently. Exceptional presentation, organizational, written, and verbal communication skills. Capability to understand and develop processes to make workflows manageable and replicable. Ability to maintain the highest level of confidentiality and discretion.
- *Interest in personal finance and comfort with quantitative calculations:* Strong personal finance competencies are preferred, but not required. Intensive training and certification in personal finance will be provided. Interest in learning about, and building proficiency in, personal and consumer finance.

## Working Conditions & Physical Requirements

**Schedule:** Monday through Friday office hours with occasional evenings and weekends during tax season.

**Travel Requirement:** Must be a licensed driver with full time access to reliable, properly registered, and insured car and be able and willing to travel to locations within organization's service area. Some out of state and overnight travel may be required.

**Physical Demands:** There are no special physical demands required by this position. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of position.

## Direct Reports

# of Non-Manager Direct Reports	0	# of Sr. Mgr Direct Reports	0
# of Manager Direct Reports	0	# of Dir Direct Reports	0

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Rural Dynamics, Inc. (RDI) reserves the right to change this description at any time. RDI practices the concept of equal employment opportunity with respect to hiring, promotions, transfers, pay, discipline, fringe benefits, and all other terms and conditions of employment. No individual will be discriminated against, and no employment decisions will be made on the basis of an individual's race, color, national origin, religion, age, gender, gender identity, protected disability, marital status, familial status, veteran status, height, weight or citizenship.

<b>Reviewed by Employee:</b>	
<b>Approved by:</b>	
<b>Date approved:</b>	