VITA APPOINTMENT SPECIALIST (SEASONAL)
POSITION DESCRIPTION

WHO WE ARE
Greenville County continues to draw national attention as a popular destination for visitors and a magnet for new development. But, even with this success, many experience a different Greenville. Right now, over 50,000 people are living in poverty. As the largest poverty-fighting organization in South Carolina, United Way of Greenville County’s unique ability to take on challenges like affordable housing, education, job training, transportation and other complex community issues—all at the same time—is unmatched.

WHAT WE DO
We mobilize donors and volunteers and convene partner agencies, corporations and community leaders to make broad, systemic change like no other organization can on its own.

United Way values the abilities and perspectives that make each person who they are, empowering our employees to reach higher, think differently, act innovatively, and work collaboratively. People who work here provide the energy, expertise and creativity that is critical to creating the lasting change our community needs—and the opportunities to succeed that everyone deserves.

Vision: A Cycle of Success for everyone in Greenville County.

Mission: Bringing people and resources together to build a Cycle of Success, where:
• all children in Greenville County start school prepared to learn and go on to graduate;
• well-educated graduates find good jobs and create stable homes;
• children from stable homes continue the cycle because they start school on track and prepared for success.

Values: We live united by constantly challenge ourselves to reach higher, think differently, act innovatively, and work collaboratively to build a Cycle of Success for everyone in Greenville County.

Impact: As a funder, partner and convener, United Way of Greenville County works with the entire community to build resources, focus investments, and foster partnerships that create lasting solutions to big community problems. Last year, our work resulted in thousands of individuals receiving assistance with basic needs and advancing along the Cycle of Success.

POSITION SUMMARY: VITA Appointment Specialist
Report to: Craig Shoemaker, Regional VITA Manager

Sponsored by the Internal Revenue Service (IRS), the Volunteer Income Tax Assistance (VITA) program provides free income tax preparation assistance to individuals and families with a household income of approximately $60,000 a year or less. VITA works to ensure everyone in the community receives all of the tax credits and deductions for which they are eligible, with the goal being to help more individuals and families achieve greater financial stability through free tax preparation.

LENGTH OF COMMITMENT
Candidates will need to be available to begin training in mid-December and begin working approximately 30-35 hours per week through April 15th, 2019. Part-time and flexible hours are available for those who are interested. Some evening hours may be required during the season depending on call volume.
ESSENTIAL RESPONSIBILITIES

The VITA Appointment Specialist is responsible for managing incoming calls and scheduling taxpayers at VITA sites across Upstate South Carolina. The position requires the use of computer equipment and software, professional management and interactions with the general public, volunteers, and United Way staff and partners. Responsibilities include, but not limited to:

- Manage large amounts of inbound and outbound calls in timely manner to schedule appointments at various sites that best fit the caller’s needs
- Follow communication “scripts” when handling different topics
- Inform callers by explaining procedures; answering questions; providing information
- Ensure accurate information is recorded and communicated to the caller regarding site location, specific needs, and documents required.
- Enter caller specific information and notes into appointment software which providing excellent and consistent customer service.
- Review appointments set by callers using the self-scheduling feature of the software.
- Conduct follow up calls to confirm appointments previously scheduled.
- Update status of appointments as necessary.

ADDITIONAL RESPONSIBILITIES:

- Take all necessary and/or required certification exams using the Link & Learn Certification website and pass with a score of 80% or higher. This includes the Volunteer Standards of Conduct exam and the Intake/Interview & Quality Review exam.
- Assist with Intake/Greeter responsibilities at site locations.
- Reviewing volunteer schedule to identify staffing needs
- Communication of appointment schedule with Site Coordinators

GENERAL PHYSICAL REQUIREMENTS:

- **Sedentary Work:** Employee is required to exert up to 20 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects. Sedentary work involves sitting most of the time. Walking and standing are required only occasionally, and all other sedentary criteria are met.

- **Physical Activities:**
  - Manual dexterity: Picking, pinching, typing, or otherwise working primarily with fingers rather than with the whole hand or arm as in handling.
  - Talking: Expressing or exchanging ideas by means of the spoken word. Activities must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
  - Hearing: Perceiving the nature of sounds at normal speaking levels or without correction. Ability to receive detailed information through oral communication and make fine discriminations in sound.

- **Visual Acuity:** Employee is required to have close visual acuity to perform an activity such as preparing and analyzing data and figures, transcribing, viewing a computer terminal, and/or expansive reading.

- **Working Conditions:** Employee is subject to both inside and outside environmental conditions.
**Required Minimum Education and Experience**
- Prior experience with the VITA program.
- High school diploma or GED
- Exceptional customer service, active listening, and verbal and written communication skills, professional phone voice.
- Ability to ask prying questions and diffuse tense situations.
- Strong time management and decision-making skills.
- Any combination of education and experience required to perform the Essential Job Functions.

**Preferred Education and Experience**
- Prior experience with the VITA program.
- Three years’ experience as receptionist in busy front office
- Proficiency with computers, especially with CRM software, and strong typing skills.
- Fluency in multiple languages may be desired.
- Proficiency in MS Word and MS Excel software applications

**Compensation**
- The hourly rate for this position $15 per hour. There are no benefits offered for this temporary assignment.

**HOW TO APPLY**
Submit your resume and cover letter to talent@unitedwaygc.org with “Appointment Specialist Position” in the subject line.

*United Way of Greenville is an equal opportunity employer and value diversity. All employment is decided on the basis of qualifications, merit and business need.*