

**Who is OnTrack WNC Financial Education & Counseling?**

OnTrack WNC helps people achieve their money and housing goals so they can live out their values. We've been around for 48 years and are committed to innovation. Our values include a supportive working environment, ongoing quality improvement, respect for our clients' wisdom, and meaningful diversity. We currently have a staff of 14.

**Who are we looking for?**

We are seeking candidates with the cultural competency and experience needed to effectively serve all clients, particularly communities of color, as well as support and manage Tax Program Volunteers. Fluent Spanish speakers will be given special consideration.

You will be trained on all aspects of the job but must have the aptitude to learn both the technical aspects of the job (e.g. IRS tax site regulations, foreclosure prevention, and program documentation) as well as the ability to communicate clearly and compassionately. Attention to detail, ability to effectively shift focus while managing a multi-faceted job, an organized work style, and intermediate proficiency with Microsoft Word and Excel are also a must. More details are in the job description below.

**What is the position?**

This fulltime position is a combination of (1) Volunteer Income Tax Assistance (VITA) Tax Program Coordinator, (2) Financial/Housing Counselor. At present, tax coordination accounts for about 40% of the position and counseling for the remaining 60%; this varies seasonally and may change with funding/demand. Currently the position is remote (with agency technology provided) due to the COVID pandemic. (If working remotely is a hardship, alternate arrangements can be made.) In the future, the position will work from the OnTrack office in Asheville, NC.

You'll coordinate a team of approximately 15 Volunteer Tax Preparers to deliver our free tax preparation program. You'll also work as a member of our counselor and educator team, individually presenting information and options to people working towards various financial goals including: building credit, handling debt, buying a house, and avoiding foreclosure.

**Why work at OnTrack WNC?**

You will be supported, learn a lot, and grow professionally while working with people who care about their jobs and serving our community. The starting pay rate will be \$37,988 (\$18.26 hourly), unless there is *considerable* relevant prior experience. Additionally, you'll be eligible for paid-time-off (PTO) and medical insurance after three months and 401k retirement benefits after 1 year. Fluent Spanish speakers will be compensated an additional \$3,500 per year for these language skills.

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*Our non-profit mission is to help people achieve their money and housing goals through financial education, counseling, and support.*

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## **Job Description**

The VITA Tax Program Coordinator & Financial/Housing Counselor must have the ability and desire to relate to a wide demographic of clients, discover their particular needs and challenges, and adapt interactions to effectively help the client move towards greater financial wellbeing.

This person is responsible for coordinating the tax program and providing one-on-one counseling sessions consistent with the organization's mission. The employee ensures service quality by listening to clients and volunteers, adhering to agency policies and procedures, managing data collection and reporting, and fostering continuous improvement. Though functioning in tax program coordination and financial counseling sessions autonomously, the person is also part of team and is responsible for collaborating to continually develop our programs and to support peers.

To fulfill these roles, the person must have good interpersonal skills; be able to convey suggestions/ideas in a constructive, nonjudgmental manner; be an effective problem-solver; and (once fully trained) possess a working knowledge of finances, credit, housing, and IRS regulations governing our tax site. The employee support clients and volunteers in feeling comfortable and must be organized and efficient in time/work management.

## **Job Duties**

### **1. Actively participates in initial and ongoing training:**

- Engages in peer and supervisor shadowing, training, and feedback to reach basic proficiency in job duties listed below.
- Asks questions and seeks support when needed.
- Obtains and maintains required certifications, including HUD (Housing and Urban Development) and NFCC (National Foundation for Credit Counseling). Certification preparation support will be provided and fees are paid by OnTrack.

### **2. Provides comprehensive coordination and supervision of the Volunteer Income Tax Assistance (VITA) program:**

- Fosters an upbeat, collaborative environment and ensures a fulfilling experience for a team of approximately fifteen engaged, professional volunteers.
- Coordinates with the IRS Relationship Manager to ensure adherence to the IRS Quality Site Requirements; and
- Coordinates all tax program logistics with Volunteers and OnTrack WNC staff, including:
  - Organizing trainings for Tax Volunteers and ensuring that all Volunteers attain required IRS certifications;
  - Working with Tax Shift Supervisors to develop and update procedures for tax preparation and quality review; and
  - Developing shift schedules and coordinating with the Client Services team to populate the scheduling system.

### **3. Provides financial/housing counseling:**

- Conducts up to 12 appointments per week depending on level of tax coordination work, including at least one evening per week, one Saturday every other month, and other weekends and evenings infrequently, as needed, and
- Conducts counseling for budgeting, credit building, debt, student loan, foreclosure prevention, homebuying, and other financial/housing counseling needs.

### **4. Manages counseling client caseload, which includes:**

- Develops strategies for addressing financial/housing issues based on the client's needs and capabilities;

- Interacts with clients in a responsive, helpful, positive manner within scheduled appointments as well as in follow-up calls and correspondence; and
- Ensures all documentation and data entry is complete.

**5. Participates as an active and engaged member of OnTrack WNC staff:**

- Attends program and staff meetings, actively participates, provides thoughtful input, and makes presentations as assigned;
- Participates in group and independent projects as needed to further team or agency objectives.
- Thinks broadly and creatively about how we can do our work better.
- Respects and contributes to OnTrack's commitment to racial equity, diversity, and inclusion.

**6. Takes ownership of work and communication:**

- Learns procedures precisely and incorporate any updates into your work.
- Learns tax preparation and site coordination content, consistently incorporates new knowledge into service delivery, and uses support when needed;
- Respectfully engages in open and honest communication with coworkers, tax volunteers, and supervisor.
- Shares and accepts ideas and feedback.
- Provides timely and thoughtful responses to internal and external emails;
- Takes full ownership of work and asks for help when needed; and
- Maintains an organized work system to effectively manage job responsibilities.

**7. Conducts other duties as assigned.**

**COVID-19 Policy**

Out of concern for vulnerable populations whom we serve including those who are unable to vaccinate due to health reasons and based on feedback from our staff, OnTrack *strongly* encourages employees to be fully vaccinated against COVID-19 before interacting with clients or coworkers. After being fully vaccinated, staff may choose between the following incentives: \$100 or one additional day of PTO.

**We center equity in our hiring process.**

OnTrack strives to foster leadership and raise the voices of historically marginalized people, including but not limited to Black people and people of color, indigenous and native people, LGBTQ and gender non-conforming people, disabled people, immigrants, and low-income people. We strongly encourage candidates of these and other diverse backgrounds to apply.

**Application Instructions**

**Cover Letter and Resume:** Cover letter must accompany the resume. In your cover letter:

- Help us make the connection between what you have done and what we are looking for.
- List aspects of previous work, school, or volunteer experience that will help you succeed in this job.
- Tell us about your commitment to communities of color, racial equity, and/or experience within the Black community in North Carolina.
- Let us know why you are interested in the job!

**Subject line:** "Tax Coordinator & Counselor – Your Last Name". No phone or drop-in inquiries please.

**Submission:** Email your cover letter and resume to Emily Matthews at [emilym@ontrackwnc.org](mailto:emilym@ontrackwnc.org).

**Deadline:** Monday, August 2nd at 8:00 AM. Interviews will be scheduled as applications are received and until the position is filled.