



DATE	November 2, 2021
TIME	12:00 pm
LOCATION	Teams Meeting / 5005 Business Park North Bakersfield, CA 93309
TEAMS LINK	Click here to join the meeting
PHONE NUMBER	(213) 204-2374 / ID: 163 456 910#

Personnel & Affirmative Action Committee Agenda

Per Governor's Executive Order N-29-20, Meeting to be held via Tele-Conference. Members of the public may join the tele-conference or listen to the call from the CAPK office at 5005 Business Park North, Bakersfield, CA 93309

1. Call to Order

2. Roll Call

Fred Plane (Chair)
Jimmie Childress

Craig Henderson
Michelle Jara-Rangel

Yolanda Ochoa

3. Approval of Agenda

4. Public Forum

The public may address the Board of Directors on items not on the agenda. Speakers are limited to 3 minutes. If more than one person wishes to address the same topic, the total group time for the topic will be 10 minutes. Please state your name before making your presentation.

5. New Business

- a. VITA New Job Title and Job Description (Quality Reviewer) – **Action Item (p. 2-5)** Freddy Hernandez, Director of Youth & Community Services
- b. CAPK DEI Committee Formation – **Info Item (Verbal Report)** Traco Matthews, Chief Program Officer
Lisa McGranahan, Director of Human Resources

6. Committee Member Comments

7. Next Scheduled Meeting

Personnel & Affirmative Action Committee
12:00 pm
To be determined
5005 Business Park North
Bakersfield, CA 93309

8. Adjournment

This is to certify that this Agenda Notice was posted in the lobby of the CAPK Administrative Office at 5005 Business Park North, Bakersfield, CA and online at www.capk.org by 12:00 pm, October 28, 2021. Paula Daoutis, Administrative Coordinator.



MEMORANDUM

To: Personnel Committee

From: Freddy Hernandez, Director of Youth & Community Services

Date: October 27, 2021

Subject: *Agenda Item 5a*: VITA New Job Title and Job Description (Quality Reviewer) – **Action Item**

The Volunteer Income Tax Assistance Program (VITA) is requesting approval for a new Quality Reviewer job title and description for the current VITA program. The new job description and title was approved by Human Resources and pointed at a Grade 4 in the CAPK compensation schedule. The VITA program offers Volunteer Income Tax Assistance services to low-income individuals and families throughout Kern County.

The addition of this job position will support our program goal of making sure our volunteers continue to provide quality tax preparation services for our clients as we aim to expand services into new Kern County areas. The second goal of this new position is to make sure that our client's taxes are prepared with minimum to no errors and processed in a timely manner.

Upon approval from the Board of Directors, staff will begin the hiring process. Funding is available within the current IRS budget to support this new position. The VITA program received an award of \$200,693 from the Internal Revenue Service in order to provide free tax assistance services throughout Kern County from October 1, 2021, through September 30, 2022.

Recommendation:

Staff recommends the Personnel Committee approve the new Quality Reviewer Job Title and Description.

Attachment:

Quality Reviewer Job Description



VITA Quality Reviewer

Disclaimer: Job descriptions are written as a representative list of the ADA essential duties performed by a job class. They cannot include nor are they intended to include all duties performed by all positions occupying a class.

Salary Range: Grade 4

FLSA Status: Non-Exempt

Date Approved: TBD

SUMMARY:

The Quality Reviewer is responsible for the general administration, clerical, and program support for the VITA program. Required to provide excellent customer service when assisting clients with their tax return preparation and frequently communicate with clients to ensure that their information and data is collected. Adhere to the programs site requirements, standards of conduct, and follow the agencies taxpayer privacy and confidentiality standards.

SUPERVISION RECEIVED:

Receives supervision from the VITA Program Manager.

SUPERVISION EXERCISED:

None

DUTIES AND RESPONSIBILITIES:

Disclaimer: This list is meant to be representative, not exhaustive. Some incumbents may not perform all the duties listed or may perform related duties as assigned. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

Essential Job Specific Duties:

- Perform the required responsibilities in order to have a safe and efficient operational site for the VITA program.
- Assist with outreach throughout Kern County in order to inform the community and increase awareness of the VITA program.
- Assist with the recruitment, retention, and the scheduling of volunteers according to the specified tax sites throughout Kern County.
- Implement and oversee the quality review process already established by the VITA program in order to ensure that all TAX Volunteers are aware if the current quality review process.
- Review tax returns for accuracy in a timely manner before they are return to the customer or electronically filed. Take the necessary actions to fix any filling problems and resubmit the tax returns as seen fit. Inform the customer within 24 hours if their taxes have been rejected and maintain confidentiality.
- Ensure that all program records are maintained in compliance with the reporting and auditing requirements as needed.
- Ensure that all client data is submitted into the VITA program database and that client information is updated and accurate when uploading into the management system.
- Review information and verify data entry on a regular basis for accuracy.
- Provide administrative and clerical support duties as needed or other like duties as assigned by the Program Manager.
- Answer phones and schedule client appointments.
- Maintain a safe and functional work environment.

- Attend meeting, trainings and conferences as required.
- Must be able to work alternate hours as required, including nights and weekends.

MINIMUM QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skills, and abilities required to satisfactorily perform the essential duties and responsibilities.

Knowledge of:

- Agency policies and procedures.
- Applicable federal, state, and local laws, codes, and regulations.
- Modern office practices, methods, procedures, and equipment.
- Word processing, spreadsheets, database, and other related software applications.
- Problems and challenges related to families of different social and economic backgrounds.

Ability to:

- Ability to deal with conceptual matters.
- Ability to communicate effectively.
- Good interpersonal skills.
- Provide public presentation and outreach.
- Establish professional working relationships with clients and staff.
- Bilingual (English/Spanish) desirable.
- Type 35 wpm.

EDUCATION AND EXPERIENCE:

The following requirements generally demonstrate possession of the minimum requisite knowledge and ability necessary to perform the duties of the position.

- High school diploma or equivalent
- Two (2) years paid or volunteer experience in a highly responsible data entry position with secretarial and/or general clerical support function in a human or health service public or nonprofit agency is desirable.
- IRS Certifications – Training and Testing Provided Upon Employment and must be completed within six months of hire.

OTHER REQUIREMENTS:

- Completion of fingerprint clearance, physical, TB and substance abuse screening upon offer of employment.
- Possession of a valid California driver’s license and state automobile insurance with an acceptable driving record, substantiated by a DMV printout.
- Bilingual language fluency (English/Spanish) desirable.

WORK ENVIRONMENT:

The work environment characteristics described are representative of those an employee encounters in performing the essential functions of this job.

- Work is primarily performed indoors.
- Noise level is quiet to moderately quiet.
- Hazards are minimal.

ESSENTIAL PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable employees with disabilities to perform the essential duties.

POSITION TITLE VITA Quality Reviewer				
Activity	Hours Per Day	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS
Sitting				X
Walking				X
Standing				X
Bending (neck)				X
Bending (waist)				X
Squatting			X	
Climbing		X		
Kneeling			X	
Crawling		X		
Twisting (neck)				X
Twisting (waist)				X
Is repetitive use of hand required?				X
Simple Grasping (right hand)				X
Simple Grasping (left hand)				X
Power Grasping (right hand)			X	
Power Grasping (left hand)			X	
Fine Manipulation (right hand)				X
Fine Manipulation (left hand)				X
Pushing & Pulling (right hand)			X	
Pushing & Pulling (left hand)			X	
Reaching (above shoulder level)			X	
Reaching (below shoulder level)			X	

	LIFTING			CARRYING		
	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS	NEVER 0 HOURS	OCCASIONALLY UP TO 4 HOURS	FREQUENTLY 4-8 HOURS
0-10 lbs			X			X
11-25 lbs		X			X	
26-50 lbs		X			X	
51-75 lbs	X			X		
76-100 lbs	X			X		
100+ lbs	X			X		