



## POSITION DESCRIPTION

Position: Tax Credit Specialist  
Program: Senior Housing Program  
Reports to: Community Administrator

Status: Non-Exempt  
Date Prepared: 03/15

### POSITION SUMMARY:

The Tax Credit Specialist is responsible for assuring regulatory compliance for all residents living in the senior housing facility. The Specialist will be responsible for helping to successfully review resident applications to determine income compliance and qualifications. The Specialist assures that all work is performed in a cost effective and service oriented manner in accordance with negotiated contracts, appropriate procedures and established organizational standards.

### OBJECTIVES/ACTIVITIES:

- A. Responsible for the development and management of all financial and contractual aspects of the program services.
  - 1. Assist the Community Administrator in the development and monitoring of annual budgets working towards goal achievement.
  - 2. Provide quality program services within established budgets.
  - 3. Analyze resident applications to determine income compliance and qualifications.
  - 4. Conduct periodic random audits of resident tax credit files and maintain database to track audit results.
  - 5. Provide analysis, conclusions and recommendations based on audit results including development of specific action plans for non-compliant residents.
  - 6. Provide all documentation to comply with contractual agreements.
  - 7. Participate in developing community relations and maintain positive image of the program.
  - 8. Assist with registration and admission of new residents.
  - 9. Complete monthly, quarterly, and annual reports for the funding sources.
  - 10. Refer new sources of funding to senior management and assist, as possible, in securing such funds.
  - 11. Develop and implement Volunteers of America Tax Credit Handbook of forms, policies and procedures.
  
- B. Responsible for all senior housing government compliance.
  - 1. Ensure all federal and state regulatory tax compliance.
  - 2. Attend affordable housing compliance training sessions on regular basis and stay current on all policy and regulatory changes.
  - 3. Develop working relationships with state tax credit agencies.
  - 4. Assist with timely submission on all annual and/or periodic tax credit compliance reports and manage required record maintenance.

- C. Responsible for property management.
  - 1. Support Community Administrator with day-to-day resident issues.
  - 2. Interact with consultants, auditors, and contractors to maintain property for best cost, efficiency, quality, and utilization by clients of Volunteers of America.
  - 3. Share in weekend call on a rotation basis with other residence staff.
  - 4. Identify resources necessary to attain necessary facility improvements.
  
- D. Responsible for assisting in the development and motivation of staff.
  - 1. Provide necessary training to staff as it applies to tax compliance requirements.
  - 2. Participate in the establishment of program goals and objectives in achievement of established goals.
  - 3. Identify appropriate ongoing training for existing staff as it applies to property management and compliance.
  - 4. Maintain an above average working knowledge of fire, safety, and health standards to assure safe work environment for all personnel.
  
- E. Responsible for self-development
  - 1. Continually learn and enhance technical and interpersonal skills.
  - 2. Attend all fair housing compliance training sessions on a regular basis and keep current on all policy and regulatory changes.
  - 3. Attend all staff meetings.
  
- F. Responsible for the dissemination of information to staff and senior management on new developments and the status of activities as it applies to the overall company operations.
  - 1. Inform senior management of the status of potential compliance and property management problems, allowing senior management to assist to meet program objectives.
  - 2. Communicate new compliance policies to the staff and insure proper implementation.
  - 3. Serve as part of the organization management team by providing information and support for the development of quality operations.
  - 4. Maintain a professional working relationship with other tax compliance specialists.

**EQUIVALENT EDUCATION AND EXPERIENCE:**

A minimum of five years' experience is required in property management, including tax credit and HUD affordable housing. He/she must have the ability to work as an effective member of team in a collaborative manner with internal and external vendors. Ability to communicate clearly both verbally and in writing, including the ability to provide technical assistance on complex compliance issues in a simple, straight forward manner. Prior experience is required in the human services field dealing with issues and challenges unique to the elderly and/or persons with disabilities. A college degree is preferred or a combination of education and experience. Tax Credit Specialist certification is required. Additionally, experience and knowledge of Fair Housing Laws, and state landlord/tenant rights and obligations is required. Knowledge of Section 8 housing, Certified Occupancy Professional, CMH designation certification is preferred. Must be able to complete yearly continuing education for recertification. Must have a valid Driver's License.

**SPECIFIC SKILLS REQUIRED:**

Detail-oriented and able to work independently  
Excellent oral and written communication skills  
Ability to work flexible hours  
Organizational skills  
Analytical and decision making ability  
Statistical and mathematical skills  
Computer Skills including Excel, Access, Word, Microsoft Office and Outlook as well as other housing database applications.

**PHYSICAL REQUIREMENTS**

Lift and move up to 10 pounds  
Stand, walk and sit frequently  
Bend and stoop occasionally

**NATURE OF SUPERVISION RECEIVED:**

Daily activities are performed independently with direction from the V.P./Chief Operating Officer, and guidance from the Community Administrator, President/Chief Executive Officer, Chief Financial Officer, Manager of Development/Community Relations, and Manager of Human Resources. Must be able to work independently toward attainment of operational goals and contract compliance.

**SUPERVISION EXERCISED:**

None

**RESPONSIBILITIES FOR BUSINESS CONTACTS:**

This position requires daily contact with county/state/city and business entities, clients, and all levels of support staff. The Tax Credit Specialist is responsible for promoting company image and providing advice on company practices and procedures, while establishing and maintaining good working relationships with all clients. Tact, discretion, and resourcefulness are required at all times.

**FINANCIAL RESPONSIBILITY:**

Substantial financial loss through loss of business contracts is possible. Responsible for actively participating in the development and adherence to program budgets.

**NUMBER OF EMPLOYEES**

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**This job description does not constitute a written or implied contract and may be changed as business needs arise.**

Indicate anything that would keep you from meeting the job duties as outlined above.

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Employee Signature \_\_\_\_\_ Date Signed: \_\_\_\_\_