



Family Financial
Literacy Coalition
Building Knowledge, Building Wealth

Community Link Family Financial Literacy Coalition Internship Program Handbook

2011-2012



Duties and Responsibilities

The Family Financial Literacy Coalition (FFLC) is a group of nonprofit, business, and government organizations working together to increase wealth for low income families in the Charlotte Metropolitan area. In partnership with the IRS Volunteer Income Tax Assistance Program (VITA), the FFLC provides free tax preparation to low income individuals and families during the tax filing season.

As the Host Company we will provide the Intern the opportunity to serve on the Earned Income Tax Credit (EITC) Day Planning Committee, develop power-point presentations for outreach purposes and prepare basic taxes at various locations during the VITA period. Some seniors and Graduate level students may also participate as Presenters on various financial topics commensurate with their experience such as budgeting and other assets building strategies. The Interns will fall under the direction of the Family Financial Literacy Coalition headed by Tameka Gunn, Program Manager.

Performance Goals

1. Increase awareness of VITA Program
2. Expose Interns to prospective employers
3. Cultivate new relationships of Partners to serve as Financial Coaches
4. Serve a target of 2, 800 customers an increase of 30% from previous year
5. Increase Interns ability to work with the public, provide excellent customer service, understand the confidentiality and ethical implications of their work
6. Increase Interns ability to network and collaborate on teams and committees
7. Provide a learning environment where Intern can gain practical knowledge of collaboration, marketing, scheduling, and planning of events
8. Increase Interns knowledge base of Tax Preparation and understanding of its' basic concepts
9. Provide candid feedback to ensure an open working relationship is maintained to cultivate an easy flow of creative ideas and a rich learning environment

Community Link - What We Do

Travelers Aid: Crisis assistance for individuals or families needing relocation to a safe, stable, and supportive home. Prevalent issues include escaping domestic violence or experiencing a major medical crisis. You might like to know that Travelers Aid was our namesake when we opened in 1929 and we now remain a local chapter.

Homeless to Housing: Helping working homeless (or at-high-risk for homelessness) individuals and families find and keep rental housing. Services include counseling, employment and temporary financial assistance, basic financial education and budgeting, comprehensive housing assessment, education and counseling, and linkages to other appropriate community resources.

Homeownership: Educating and counseling for first time homebuyers through comprehensive homeowner classes, one-on-one counseling, seminars, credit report analysis, budget planning, and linkages to additional resources.

Family Financial Literacy Coalition: Collaboratively providing low to moderate income individuals and families with free tax preparation and filing services as well as basic financial education to help them build assets and achieve financial stability.

Our Roots

Community Link began in Charlotte in 1929 as a chapter of the National Travelers Aid Society. The all-volunteer agency was made up of a group of women who staffed booths at train and bus stations to help transient, lost, abandoned, or ill strangers. Though the agency now resides in downtown Charlotte, it is still a chapter of the National Travelers Aid Society.

During the same decade, requests for housing and employment assistance from local families rapidly increased. Programs were designed to provide families with the skills needed to find and keep affordable housing. The agency began collaborating with other local agencies to link families to job training, counseling and other programs to help individuals and families become self-sufficient.

Duties and Responsibilities

Personal Income Tax Analyst

Under Grad/Graduate Level Description

Support the EITC Planning Committee to design strategies of a successful delivery of services.

- Provide feedback and participate in work teams
- Assist with the setup and delivery of EITC Day
- Network and collaborate with our professional partners
- Design and implement ideas to serve the community

Develop Power Point presentations to assist in the recruitment of volunteers and present at different recruitment venues for the FFLC

- Develop power point presentations
- Act as presenters for volunteer recruitment
- Assist with the setup of recruitment events
- Construct marketing materials for mass production
- Develop a plan to assist with the future recruitment of interns/volunteers

Prepare taxes for the community during the VITA period and assist with setup and delivery of services

- Act as support staff during VITA period
- Complete VITA Tax Preparation Training
- Prepare and file taxes for the community
- Conduct quality review of all tax returns
- Assist with coordinating VITA Volunteer schedules
- Screen filers to make sure they qualify for the service
- Provide supervision and coordination of VITA site operations
- Compute taxes owed by utilizing computers, and tax software
- Engage with public and answer basic questions concerning returns
- Make sure filers have all documents needed to complete their return
- Consult resource guide, tax alerts to assist with preparation of returns
- Use all appropriate adjustments, deductions, and credits to keep clients' taxes to a minimum
- Furnish taxpayers with sufficient information and advice to ensure correct tax form completion
- Interview clients to obtain additional information on taxable income and deductible expenses and allowances
- Review financial records such as income statements and documentation of expenditures to determine forms needed to prepare tax returns

Abilities and Skills

Reading Comprehension — Understanding written sentences and paragraphs in work related documents.

Active Listening — Giving full attention to what others are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

Speaking — Talking to others to convey information effectively.

Complex Problem Solving — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Mathematics — Using mathematics to solve problems.

Service Orientation — Actively looking for ways to help people.

Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.

Duties and Responsibilities

Financial Para Professional

Graduate Level and/or Career Professionals Description

Develop Power Point presentations to assist in the recruitment of volunteers and present at different recruitment venues for the FFLC

- Conduct information sessions on credit
- Develop and present workshops on budgeting
- Develop and present workshops in assets building
- Develop a plan to assist with future recruitment of interns/volunteers
- Develop alternative training methods if expected improvements are not seen
- Present information, using a variety of instructional techniques and formats such as role playing, simulations, team exercises, group discussions, videos and open discussion
- Organize and develop, or obtain, training procedure manuals and guides and course materials such as handouts and visual materials
- Recommend strategies clients can use to achieve their financial goals and objectives, including specific
- Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives
- Monitor training costs to ensure budget is not exceeded, and prepare budget reports to justify expenditures
- Present at various speaking engagements exposing FFLC consumer to budgeting and other financial literacy strategies

Prepare taxes for the community during the VITA period and assist with setup and delivery of services

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- Assist with coordinating VITA Volunteer schedules
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Abilities and Skills

Written Comprehension — The ability to read and understand information and ideas presented in writing.

Inductive Reasoning — The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).

Oral Expression — The ability to communicate information and ideas in speaking so others will understand.

Speaking — Talking to others to convey information effectively.

Learning Strategies — Selecting and using training/instructional methods and procedures appropriate for the situation when learning or teaching new things

Deductive Reasoning — The ability to apply general rules to specific problems to produce answers that make sense.

Originality — The ability to come up with unusual or clever ideas about a given topic or situation, or to develop creative ways to solve a problem.

Persuasion — Persuading others to change their minds or behavior.



Duties and Responsibilities

Benefits and Support Provided

Assigned an Email

Free IRS tax law and software training

Provided parking when at our downtown location

Invitation to the annual volunteer appreciation event

Letter of Support of Program Manager FFLC

Letter of Completion Appreciation from CEO of Community Link

Online **OR** classroom training-Average training time **24-48 hrs**

Trained on the agencies that aid with financial needs such as credit counseling, emergency services, savings, and home ownership-**1 hr training time**

Network with Fortune 500 Companies and other large Charlotte, NC area employers

Duties and Responsibilities

Internship Performance Measurement Matrix

Name:
Institution/Organization:

Date:

If goal not met (box does not have an x), value in actual column s/b 0

Growth Measures	MET	Actual	Goal
Training	<input type="checkbox"/>	0%	5.0%
Attendance	<input type="checkbox"/>	0%	5.0%
Professionalism	<input type="checkbox"/>	0%	5.0%
Knowledge of Job	<input type="checkbox"/>	0%	5.0%
Team Collaboration	<input type="checkbox"/>	0%	10.0%
Marketing Committee	<input type="checkbox"/>	0%	20.0%
Recruitment Committee	<input type="checkbox"/>	0%	20.0%
End of Service Committee	<input type="checkbox"/>	0%	20.0%
Present Public Presentations 1-2	<input type="checkbox"/>	0%	5.0%
Present Public Presentations 3-4	<input type="checkbox"/>	0%	5.0%
Present Public Presentations 5-6	<input type="checkbox"/>	0%	5.0%
VITA Tax Hours 10 hours Per Week	<input type="checkbox"/>	0%	20.0%
VITA Tax Hours 15+ hours Per Week	<input type="checkbox"/>	0%	20.0%
Total		0%	145.00%

Tameka Gunn
Program Manager

Date

Success in completing the internship is based on the percentage of Growth Measures that are “Met”.

Satisfactory Performance	75%-85%
Good Performance	90%-105%
Outstanding Performance	110%-125%
Exemplary	130%-145%



Duties and Responsibilities

Community Link Programs of Travelers Aid Society of Central Carolinas, Inc. Business Practices Policy

As approved by the Board of Directors of Community Link, Programs of Travelers Aid Society of Central Carolinas, Inc. ("Community Link" or the "Agency") on November 28, 2006.

Honest and Ethical Conduct

Integrity is one of Community Link's core values. The Agency strives to be worthy of the trust placed in it by its donors, business partners, volunteers and customers by being straightforward and honest. Accordingly, it is critical to the current and future success of Community Link that the Agency's actions are always above reproach and that Community Link's best interests are the focus of all the decisions it makes and the actions it carries out. All directors, officers, employees, volunteers and agents ("Representatives") of Community Link are expected to act ethically and in good faith, with honesty and integrity, when engaging in business or other activities on behalf of Community Link or in connection with Community Link's donors, business and operations.

Adhering To the Law

The Agency has to earn the trust and confidence of our donors, business partners, volunteers and customers each and every day. It is therefore critical that each of its Representatives conducts his or her professional and personal life in a responsible manner and abide by all federal and state laws, rules and regulations so as not to impugn the reputation and goodwill of Community Link. Representatives also are prohibited from taking any action, either personally or on behalf of Community Link that would violate any law, rule or regulation affecting Community Link.

Confidential Information

As set forth in the Confidentiality Policy and other applicable policies in the Community Link Handbook, each employee agrees to maintain and protect the confidentiality of confidential customer information. By this Policy, each Representative agrees to maintain and protect the confidentiality of all of Community Link's Confidential Information (as defined below) at all times during and after his or her service to Community Link, except as otherwise used or disclosed in the course of performing his or her duties for the Agency or as required or permitted by law. Confidential Information includes, without limitation, criminal or credit histories, personal histories and records, financial information and data regarding Community Link, and certain personnel information.

Proper Accounting and Record-Keeping

Each Representative is expected to record and report financial transactions and operating information fully, accurately and honestly. All travel expenses, credit card transactions and other requested reimbursements must be supported by adequate documentation, and no relevant information is to be omitted, altered or concealed. Business and financial records are to be retained in accordance with federal and state law. Documents should never be altered or destroyed in anticipation of an internal or external audit or in response to a request for such documents by any government or regulatory agency or court of law.

Community Link Property

Community Link's assets, equipment, vehicles, facilities, resources and other property represent a substantial investment and are to be used by Representatives for the sole purpose of carrying out work- or volunteer-related activities for Community Link. Unauthorized use of such property to further a Representative's own or others' personal, business or financial interest is strictly prohibited, whether during or outside of regular work hours and regardless of whether such property is owned, leased, rented or otherwise held by Community Link.

Duties and Responsibilities

Conflicts of Interest

Each Representative has an obligation to avoid conflicts of interest involving Community Link and its business. A potential “conflict of interest” arises when a Representative has an interest in any business, property, or an obligation to any person or entity that could affect, or appear to affect, such Representative’s judgment in fulfilling his or her responsibilities to Community Link, its donors, business partners or customers. A potential conflict of interest may also arise when a Representative is in a position to influence a decision that may result, as a result of Community Link’s business dealings, in direct or indirect financial or other personal gain or advantage for such Representative or his or her immediate family, business partner or organization in which he or she is a director, officer, employee or agent.

Each Representative is required to disclose all conflicts or potential conflicts of interest to Community Link’s President in writing at the time such Representative is hired or volunteers with Community Link and/or as soon as possible after any actual or potential conflict of interest arises so that appropriate safeguards can be established to protect all parties.

Without limiting the generality of the foregoing, when a conflict of interest involves, in any way, a director and a matter requiring action by the Board of Directors, the involved director(s) shall call it to the attention of the Board of Directors and said director(s) shall not vote on the matter. In addition, said director(s) shall not participate in the deliberation regarding the matter under consideration and shall retire from the room during the vote of the Board of Directors. When there is a doubt as to whether a conflict exists, the matter shall be resolved by vote of the Board of Directors, excluding the director(s) concerning whose situation the doubt has arisen.

Community Involvement

Community Link encourages employees to participate in civic and charitable activities. Any activities, or assignments within such activities, that are likely to significantly encroach on working time, interfere with regular job duties, adversely affect the quality of work performed, involve use of Community Link’s equipment, supplies, or facilities, imply Community Link’s sponsorship or support of a company, or adversely affect Community Link’s good name, either must be avoided or approved by the employee’s supervisor and the President prior to acceptance.

While Community Link may support certain charitable organizations, employees may not coerce other employees into contributing to such organizations.

Violations and Disclosure

Suspected violations of this Policy will be investigated, and every violation will be considered valid grounds for corrective action, up to and including termination of employment or volunteer status. Failure to comply with the standards contained in this Policy may also result in criminal prosecution and reimbursement to Community Link or other parties for losses or damages resulting from such violation.

Each Representative also is expected to remain alert to situations that could cause illegal, unethical or improper actions under this Policy and to report such situations and any violations or suspected violations of this Policy, other Community Link policies and procedures, or any applicable law or regulation to the President and/or any member of Community Link’s Board of Directors as soon as it is discovered. All such reports will be treated confidentially to the extent practicable under the circumstances and in accordance with Community Link’s legal obligations.

No one has the authority or right to order, direct, request or influence someone else to violate this Policy or the law. In addition, any retaliation or threat to retaliate against any employee for refusing to violate this Policy or for reporting in good faith a violation or suspected violation is itself a violation of this Policy, may be a violation of the law, and will not be tolerated.

All Representatives will be required to certify their compliance with this Policy annually. Any questions about this Policy or its application should be addressed with a supervisor or the President of the Agency.

Staff Contacts

Tameka Millner-Gunn
FFLC Manager
Tmillner-gunn@communitylink-nc.org
(704)943-9635

Shawn Grady
FFLC Community Outreach Coordinator
sgrady@communitylink-nc.org
(704)943-9637