

AARP Foundation Tax-Aide Instructor Position Description

Program: AARP Foundation Tax-Aide provides free personal income tax preparation and assistance to low- and moderate-income taxpayers, with special attention to those age 60 and over.

Purpose of Position: The Instructor has responsibility for Counselor training and certification as determined by the State Coordinator and the State Management Team.

Responsibilities of Position: In accordance with the policies and procedures of the AARP Foundation and the Policy Manual, the Instructor:

- Attends Instructor workshop, if within the reimbursement guidelines as stated above, and passes all three sections of the test for IRS certification.
- Is familiar with the problems required by the District for certification of a Counselor, from the IRS Pub 4491-W Comprehensive Problems and Exercises Workbook or other defined problems.
- Schedules Counselor training classes, as required.
- Provides instruction on income tax information and tax return preparation, as well as the need to maintain the confidentiality of taxpayer data at all times, ensures that instruction is provided to all site level volunteers on program policy and administrative procedures, especially confidentiality and security.
- Grades and returns IRS test to Counselors and marks up the assigned problems required by the District.
- Reviews test results and assigned problems with Counselors and provides guidance for identified weak areas.
- Signs the Volunteer agreements for Counselors who have passed the IRS Test and have completed the required problems – this means that they are certified.
- Submits a list of Counselors who successfully certified to the District and Local Coordinators who follow the SMT procedures for notifying the IRS of the names only of the certified Counselors.

Qualifications: Instructors must have the ability and knowledge to train volunteers in tax law and preparation of tax returns within a district (sub-state geographic area), and must work effectively with diverse populations.

Term of Service: The Instructor is appointed for a one year term, contingent upon satisfactory annual review and certification, and may be reappointed for additional one year terms.

Eligibility: Instructors are eligible for other AARP or AARP Foundation volunteer positions.

Time Required: The position requires the greatest time in the late fall and early winter when instructors and Counselors are trained.

Travel Required: The Instructor must attend district and or local meetings as well as training sessions as necessary for performance of duties.

Training Required: Instructors must acquire tax proficiency sufficient to train others (as determined by the District, including passing the IRS test) as well as knowledge of AARP Foundation Tax-Aide program policies.

Appointment and Supervision: Instructors are appointed by the District Coordinator (DC) and report directly to the DC.

Scope of Authority: Instructors train Counselors to assist in the preparation of tax returns for the target population in accordance with program policy. They do not supervise another volunteer position.

Working Relationships: Instructors work closely with the TRS, DC, TrC, TC (where e-filing), Local Coordinator and other AARP volunteers as required.

Progress Review: Instructor performance is monitored on an on-going basis, and reviewed annually by DC with input from the TRS.

Available Resources: Instructors will be afforded the necessary guidance, training and materials needed to fulfill their responsibilities. Additional support and training are provided from the T State Coordinator, the IRS and National Office staff. AARP Foundation Tax-Aide reimburses volunteers for covered program related expenses as set out in the Policy Manual.

Volunteer Policy: AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.