

AARP Foundation Tax-Aide Local Coordinator Position Description

Program and Purpose of Position	AARP Foundation Tax-Aide provides free personal income tax assistance to low- and moderate-income taxpayers, with special attention to those 60 and older. The Local Coordinator (LC) implements program plans in one or more assigned geographic localities and ensures site compliance with AARP Foundation Tax-Aide program policies and IRS Quality Site Requirements.
Responsibilities of Position	<ul style="list-style-type: none">➤ Sets goals and implements program plans for assigned geographic location(s).➤ Recruits, appoints, supervises, and evaluates Counselors, Electronic Return Originators (EROs), Shift Coordinators (SCOs) (as needed), and Client Facilitators, ensuring IRS certification, as required, and program policy training for all.➤ Confirms Counselors have passed the IRS tax law test, including the IRS Volunteer Standards of Conduct test, and all site volunteers have signed the IRS Volunteer Standards of Conduct Agreement (IRS Form 13615) prior to assisting any taxpayers (the forms must be held by the LC or their supervisor until December 31 of the year of certification).➤ Maintains and ensures all site volunteers maintain the strict confidentiality and protect the security of all taxpayer information/records at all times. All sites' volunteers must have received copies of, and understand, the Confidentiality and Security of Taxpayer Data section of the <i>Client Service Provider Digest</i>.➤ Confirms that a second certified Counselor conducts a quality review of every tax return in the presence of the taxpayer, to ensure accuracy of all returns.➤ Works with all EROs at the site to ensure a process exists <i>and is followed</i> to verify that all e-filed returns are transmitted, rejects worked, and acceptances received.➤ Ensures all volunteers reporting to the LC are accurately recorded in a volunteer roster provided by the DC/ADS.➤ Confirms and evaluates existing sites, opens new sites, merges sites as appropriate, prepares site schedules, updates site lists to ensure sites are accurately recorded in the National Office VMIS.➤ Collects site activity logs, summarizes the data, and submits monthly totals via the Portal-based site activity reporting system.➤ Ensures notation of the IRS Site Identification Number (SIDN) on all tax returns (paper and e-filed) prepared at the site➤ Orders site materials from IRS and National Office, according to the state and local procedures.➤ Ensures the program poster with civil rights language (D143) is visible at all sites during operating hours and that sites use IRS Intake and Interview Forms (13614-C) and AARP Tax Record Envelopes

- (D12225) exclusively.
- Coordinates with the District Coordinator and Communications Coordinator (where appointed) to implement local program publicity.
- Approves and submits approved Counselor, ERO, SCO, and Client Facilitator expenses to the National Office, in accordance with existing procedures.
- Reviews and abides by the Policies and Procedures PowerPoint.
- Attends meetings as requested by the State or District Coordinators.
- Reviews incidents per the Incident Review Protocol and elevates to a volunteer supervisor as necessary.
- Works well with diverse populations and treats taxpayers and other volunteers with respect.

Qualifications, Length of Service and Eligibility

The LC must have the ability to implement program policy and provide direct oversight of the program and its volunteers in a geographic location. The LC is appointed for a one year term, contingent upon satisfactory annual review, and may be re-appointed for subsequent one year terms. The LC is eligible for other AARP or AARP Foundation volunteer positions.

Time, Training, and Travel Required

Time commitment varies according to geographic area and number of volunteers. The position usually requires a higher level of engagement from September to May. The LC must acquire the knowledge of all procedures associated with the program, visit training locations and tax assistance sites, and attend district meetings. LCs must annually re-familiarize themselves with the “Policies and Procedures” training. This PowerPoint presentation available on the Volunteer ShareNet > Policies and Procedures is the AARP Foundation Tax-Aide equivalent of the IRS required Site Coordinator training.

Appointment, Supervisor, and Scope of Authority

The LC is appointed by the District Coordinator with concurrence of the State Coordinator and reports directly to the District Coordinator. The LC supervises Counselors, EROs, SCOs, and Client Facilitators and administers the program policies at the tax assistance sites.

Working Relations and Progress Review

The LC works closely with the District Coordinator, Counselors, EROs, SCOs, Client Facilitators, Instructors, Technology Coordinators, and the Administrative Coordinator. Performance monitoring is ongoing by the DC.

Available Resources

The LC will be afforded the necessary guidance, training, and materials needed to facilitate leadership responsibilities, with support from the District Coordinator and other district level volunteer leaders, state/split-state volunteers, National Office staff, and the IRS. AARP Foundation Tax-Aide reimburses volunteers for covered program

related expense 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.
