

## **AARP Foundation Tax-Aide Training Specialist (TRS) Position** **Description**

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

**Purpose of Position:** The Training Specialist plans and implements necessary training and tax law certification for Instructors in the state or split state and, in consultation with the State Management Team, develops a training plan for the program volunteers in the State.

**Responsibilities of Position:** Guided by the policies and procedures of AARP Foundation Tax-Aide, and the direction and support of the State Coordinator, the TRS:

- Evaluates training needs, and coordinates, manages and evaluates training for Instructors in the state.
- In conjunction with the Administration Specialist (ADS), ensures that administrative policies and procedures are incorporated into Instructor Workshops.
- In conjunction with Technology Specialist (TCS), ensures that e-file training and procedures are incorporated into the Instructor Workshops.
- Develops in consultation with the State Management Team, a training and certification plan for program volunteers in the state for federal and any appropriate state tax law. Applies adult learning principles in the conduct of training.
- Serves as a member of the State Management Team (SMT) and communicates as appropriate on any training issues that come up within the state.
- Assists DCs and Local Coordinators (LCs) as requested, with the recruitment and selection of Instructors.
- Evaluates the need for Instructors, Instructor Workshops, and develops a training plan. Conducts and/or coordinates the Instructor Workshop.
- Oversees the counselor certification process and ensures that the names of certified Instructors and Counselors are submitted to the IRS Tax Specialist, ADS and appropriate coordinators. Monitors and evaluates quality, to the extent possible, of Counselor Classes.
- Ensures that all appropriate Instructors are invited to attend the Instructor workshops and are certified in tax law.
- Maintains the state's instructor records, including a roster of instructors and certification information, reporting their certification to the ADS and a list limited to names only to the IRS contact.
- Acts as a liaison to the SMT, IRS and state tax departments on tax training issues.

**Qualifications:** The TRS must be certified annually and have the ability to design and implement required tax training in a state. The TRS must acquire a current knowledge of tax training procedures associated with the program. The TRS must be knowledgeable

about adult learning and training principles. The TRS must be able to work effectively with diverse populations.

***Term of Service:*** The TRS is appointed for a two-year term, in even-numbered years, contingent upon satisfactory annual review. Mid-cycle appointments are effective to the end of the current cycle. The TRS may be reappointed for subsequent two-year terms.

***Eligibility:*** The TRS is eligible for other AARP and AARP Foundation volunteer positions, but may not hold any other AARP Foundation Tax-Aide State Management Team position.

***Time Required:*** The position demands the greatest time in late fall and winter as Instructors and Counselors are trained.

***Training Required:*** The TRS must acquire knowledge of Policy and Procedures associated with the program especially related to certification, scope of program, quality and security of tax payer data initiatives and a basic orientation to AARP and AARP Foundation.

***Travel Required:*** The TRS attends state training activities and meetings as well as any necessary national and or regional meetings.

***Appointment & Supervision:*** The TRS is appointed by the State Coordinator with concurrence by the Regional Coordinator and reports directly to the State Coordinator.

***Scope of Authority:*** The TRS develops and monitors tax training in accordance with program procedures.

***Working Relationships:*** The TRS works closely with the State Management Team, DCs, Instructors, the State Management Team, the IRS and any state tax department.

***Progress Review:*** The TRS's performance is monitored on an on-going basis and reviewed annually by the State Coordinator.

***Available Resources:*** The TRS will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from the National Tax Training Committee, national office staff and/ or the Regional Coordinator. 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.