

POSITION DESCRIPTION: INSTRUCTOR

Program: AARP Tax-Aide provides free personal income tax preparation and assistance to low- and middle-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: Supported by the policies and procedures of the AARP Foundation and the Policy Manual, the Instructor:

- ⇒ Attends Instructor workshop and passes all three sections of the test for IRS certification.
- ⇒ 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.
- ⇒ Reviews test results with Counselors and provides guidance for identified weak areas.
- ⇒ Submits a list of Counselors who successfully pass the IRS test to the state Training Specialist (TRS), District and Local Coordinators.

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

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 for Multiple Volunteer Positions: 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 as 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 passing the IRS certification exam) as well as knowledge of AARP Tax-Aide program policies.

Appointed & Supervision: Instructors are appointed by the District Coordinator (DC) in consultation with the State Coordinator and TRS. Instructors report directly to DCs.

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 AARP Tax-Aide volunteer position.

Working Relations: Instructors work closely with the TRS, DC, Technology Coordinator (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 AARP Tax-Aide State Coordinator, the IRS and National Office staff. AARP 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.