

AARP Tax-Aide Local Coordinator Position Description

**Program &
Purpose of
Position**

AARP 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 Tax-Aide program policies.

**Responsibilities of
Position**

- * Sets goals and implements program plans for assigned geographic locality(ies).
 - * 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 test and all site volunteers have signed the Volunteer Standards of Conduct form prior to assisting any taxpayers (the forms must be held until December 31 by a local leader).
 - * Maintains and ensures all site volunteers maintain the strict confidentiality and protects the security of all taxpayer information and records at all times.
 - * Ensures all sites' volunteers have received copies of, and understand, the Confidentiality and Security of Taxpayer Data section of the *Counselor Digest*.
 - * Establishes 2nd person (Counselor) on-site quality review measures to ensure accuracy of returns.
 - * Works with all EROs at site to ensure process exists and is followed to verify that all e-file returns are transmitted, rejects worked, and acceptances received.
 - * Updates All Volunteer Roster and completes personnel forms to ensure all volunteers reporting to the LC are accurately recorded in the database at the National Office.
 - * Confirms and evaluates existing sites, opens new sites, merges sites as appropriate, prepares site schedule, updates site lists & forms to ensure sites are accurately reflected in the National Office database for uploading to the Web and 888-227-7669 public access site locators.
 - * Collects Site Sign-in Sheets, summarizes the data, and submits monthly totals via the Internet submission process.
 - * Ensures notation of the IRS Site Identification Number (SIDN) on all tax returns (paper and e-filed) prepared at the site
 - * Orders site material from IRS and AARP Tax-Aide National Office, according to the state's procedures.
 - * Ensures posting of AARP Tax-Aide program poster with civil rights language (#D143) at all sites during operating hours.
 - * Ensures sites use IRS Intake Forms and AARP Tax Record Envelopes exclusively.
 - * Coordinates with District Coordinator and Communications Coordinator (where appointed) to implement local program publicity.
 - * Submits approved Counselor, ERO, SCO, and Client Facilitator expenses to the National Office, in accordance with the state's procedures.
 - * Attends meetings as scheduled by the State or District Coordinators.
 - * Works well with diverse populations
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Qualifications, Length of Service & Eligibility	The LC must have the ability to implement program policy and provide direct oversight of the program and its volunteers in a geographic locality. 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, & Travel Required	Time commitment varies according to geographic area and number of volunteers. The position demands more time 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.
Appointed By, Supervisor, & 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 & Progress Review	The LC works closely with the District Coordinator, Counselors, EROs, SCOs, Client Facilitators, Instructors, Technology Coordinators, and the Administrative Specialist. Performance monitoring is on-going 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, National Office staff, and the IRS. AARP 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.
