

AARP Tax-Aide Volunteer Position Description: Regional Coordinator (RC)

Program: The AARP Tax-Aide program 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 Regional Coordinator (RC) leads the AARP Tax-Aide volunteer structure, with primary operational responsibility for the program in each of ten multi-state regions. RCs also serve (along with National Committee Chair volunteers and key National Office staff) on the National Leadership Team (NLT) deciding program policies and high level procedural matters.

Responsibilities of Position: Guided by the policies and procedures of the AARP Foundation and AARP Tax-Aide, and the direction and support of the Assistant National Director the RC:

- The Regional Coordinator (RC) leads the AARP Tax-Aide volunteer structure, with primary operational responsibility for the program in one of the ten multi-state regions including regional planning (and fall meeting), monitoring, and evaluating state/split-state program activities .
- Participates as a member of the NLT, sharing regional assessments, best practices, ideas for improvement, and deciding program policies and high level goals and procedural matters.
- Advises AARP Tax-Aide staff (usually assigned Assistant National Director) on assigned state program operations including volunteer personnel and sensitive taxpayer's matters, training, administrative procedures, program evaluation, and overall management and administration of program policies and procedures.
- Recruits, trains, provides direct support, supervises evaluates and provides constructive feedback to State Coordinators on an ongoing basis and within an assigned region. Establishes on-going communication to identify and resolve problems as efficiently as possible.
- Encourage "out of the box" thinking and allowing the testing of new ideas and best practices with concurrence of the AND assigned to that Region.
- Support State Coordinators in setting program goals, planning, monitoring and evaluating their program operations including program expansion, recruitment and publicity strategies, adherence to policy and reporting requirements, training needs, and overall volunteer management. Provides coaching to reach goals and objectives set forth by the states.
- Works closely with IRS SPEC personnel assigned in that Region.
- Also supports State Coordinators by ensuring that each has a well functioning Management Team and District Coordinators.
- Promotes the program goals, policies and procedures with program volunteers as well as AARP Foundation and AARP leadership and outside organizations.
- Actively encourages the involvement of diverse populations in AARP Tax-Aide activities.

- Monitors State Coordinators' and states expenses and approves expense statements in accordance with program policies and procedures.

Qualifications: The RC must be able to evaluate, implement, support, communicate and supervise AARP Tax-Aide programmatic needs in a designated number of states. The RC must be skilled in management principles, effectively communicate, and work well in collaborative situations. The RC must be able to work well with diverse populations.

Term of Service: The RC is appointed for a two-year term in odd-year cycles, contingent upon satisfactory annual review. Mid-cycle appointments are effective to the end of the current cycle. The RC may be appointed for a maximum of three full, consecutive, two-year terms.

Eligibility: The RC is not eligible for any other AARP Foundation or AARP volunteer state leadership position.

Time Required: Time commitment varies according to geographic area and number of state assignments and volunteers. The position demands more time from September to May, with the greatest commitment during fall planning and spring evaluation.

Training Required: The RC must acquire knowledge of all procedures associated with the program, as well as general orientation to the AARP Foundation and AARP. Familiarity with tax procedures is helpful but detailed tax knowledge is not required.

Travel Required: The RC attends national, regional, and state meetings as well as attends trainings as necessary to monitor operations. Occasional other ad hoc travel may be needed for performance of duties.

Appointment and Supervision: The RC is appointed by the, Assistant National Director, for that region with concurrence from the National Director, and reports directly to the Assistant National Director.

Scope of Authority: The RC leads and manages program operations in a multi-state region. The RC supervises State Coordinators and oversees program implementation in accordance with program policies and procedures.

Working Relationships: The RC works closely with program volunteers at the state and sometimes district level, national office staff, national committee chairs, IRS area directors, relationship coordinators and Territory Managers, and AARP Foundation and AARP (including state level) leadership as required.

Progress Review: The RC's performance is monitored on an on-going basis and reviewed annually by the Assistant National Director for that Region.

Available Resources: The RC will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. The Policy Manual is the main

resource for RC's. Additional support is provided from the national office staff, national committees, IRS staff and AARP Foundation or AARP leadership, as required.

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.

