

AARP TAX-AIDE SHIFT COORDINATOR (SCO) POSITION DESCRIPTION

**Program &
Purpose of
Position**

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. Under the direction of the Local Coordinator, the Shift Coordinator (SCO) is responsible for coordinating and managing all phases of site operations at a specific site during an assigned period of time (shift) acting for the Local Coordinator (LC).

**Responsibilities of
Position**

In accordance with the policies and procedures of the AARP Foundation Tax-Aide program, the Shift Coordinator (SCO):

- Manages site operations for a specific shift, including physical setup, following local and district policies.
- Manages the activities of the Counselors, Client Facilitators, and ERO assigned to the shift. Arranges for substitutes as needed.
- Oversees the flow of clients to Counselors considering the difficulty of the return and the experience of the Counselor.
- Provides or directs other Counselors to provide quality reviews for all returns.
- Reports issues/problems to Local Coordinator.
- Ensures that all AARP Tax-Aide data security procedures are followed.
- Ensures that completed and quality reviewed returns are promptly transferred to the ERO and transmitted in accordance with the schedule established by the Local Coordinator.
- Ensures that all client material is properly secured, including during and at the end of the shift.
- Ensures that equipment is properly secured and that host-provided equipment has been arranged or stored as agreed upon at the end of the shift.
- Completes the Sign-in Sheet(s) as directed by the Local Coordinator.
- Advises the Local Coordinator of the need for supplies for future shifts.
- Reports equipment problems and status to the Local Coordinator and/or the District Technology Coordinator as appropriate.

Qualifications

The Shift Coordinator must have the ability to implement program policy and provide direct oversight of the program and its volunteers at a site. SCOs should be an experienced Counselor and experience as an ERO is most desirable. The SCO must have passed the IRS certification exam.

**Term of Service &
Eligibility**

The SCO is appointed for a one year term, contingent upon satisfactory annual review, and may be re-appointed for subsequent one-year terms. The SCO is eligible for other AARP or AARP Foundation volunteer positions.

Time, Training, & Travel

The position requires major effort during the tax filing season, February to April. Some time will be required prior to the start of the season for management training. The SCO must acquire a current knowledge of operational and administrative procedures associated with the program as well as a basic orientation to AARP, as provided by the National Office, DC, and LC. There is no responsibility beyond the site to which assigned.

Appointment and Supervision, & Scope of Authority

The SCO is appointed by the Local Coordinator with the concurrence of the District Coordinator and reports directly to the Local Coordinator. The SCO assists the LC in matters relating to the operation of the site and manages the activities of the ERO, Counselors, and Client Facilitators assigned to their shift. The LC remains the supervisor of all volunteers assigned to a site.

Working Relations & Progress Review

The SCO works closely with the Local Coordinator and with members of the district staff as needed. The SCO's performance is monitored on an ongoing basis and reviewed annually by the Local Coordinator.

Available Resources

The SCO will be afforded the necessary guidance, training, and materials needed to facilitate leadership responsibilities. AARP Tax-Aide reimburses volunteers for reasonable covered program related expenses as set forth in the Policy Manual. SCO is reimbursed similarly to Counselors, EROs, and Client Facilitators.

Volunteer Policy

All 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.