

AARP TAX-AIDE STATE COORDINATOR POSITION DESCRIPTION

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

Purpose of Position: The State Coordinator (SC) directs all activities of the program in a state or, in some states, a designated subdivision of the state (split-state).

Responsibilities of Position: Guided by the policies and procedures of the AARP Foundation, AARP Tax-Aide, and the direction and support of the Regional Coordinator, the SC:

- ⇒ Develops goals and objectives; strategies for program organization, expansion, and assessment; and conducts volunteer performance evaluation.
- ⇒ Provides leadership to the AARP Tax-Aide state/split-state management team in planning and carrying out the activities of the program.
- ⇒ Ensures compliance with program and grant requirements.
- ⇒ Uses demographic and geographic data to divide state/split-state into manageable districts and sites, which ensure service to target and diverse populations.
- ⇒ Recruits, appoints, trains, supervises, and evaluates the state management team specialists, District Coordinators, and Prospective Volunteer Coordinator.
- ⇒ Initiates partnerships and oversees implementation by the Partnership and Communications Specialist and coordinators.
- ⇒ Plans and conducts or attends AARP Tax-Aide leadership meetings as required.
- ⇒ Supervises volunteer expenditures and approves expense statements in accordance with program policies and procedures.
- ⇒ Involves diverse populations in AARP Tax-Aide activities.
- ⇒ Works cooperatively with state AARP particularly the Executive Volunteer for Community Service on the Executive Council, State President, State Director and any Associate State Director assigned as program liaison.

Qualifications: The SC must have the ability to implement and supervise AARP Tax-Aide program and its volunteers in a state/sub-state. The SC must be able to work effectively with diverse populations.

Term of Service: The SC 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 SC may be appointed for a maximum of three full, consecutive, two-year terms.

Eligibility: The SC is not eligible for any other AARP Foundation or AARP volunteer state leadership position, and should not serve in any other AARP Tax-Aide leadership position.

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

Training Required: The SC 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 SC is required to visit sites and training locations to monitor operations, and to attend regional, state, and district meetings as necessary for performance of duties.

Appointed By: The SC is appointed by the Regional Coordinator, with the concurrence of the national office staff liaison.

Supervisor: The SC reports directly to the AARP Tax-Aide Regional Coordinator.

Scope of Authority: The SC manages and implements program policies and procedures within a state/sub-state, and supervises the state management team specialists, District Coordinators and PVC.

Working Relations: The SC works closely with the Regional Coordinator, IRS Territory Manager or Tax Specialist, national office staff, and AARP Foundation or AARP leadership, as required.

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

Available Resources: The SC will be afforded the necessary guidance, training and materials needed to facilitate leadership responsibilities. Additional support and training are provided from the national staff, Regional Coordinator, and, as appropriate, IRS 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.