

AARP Tax-Aide Volunteer Position Description: Training Coordinator (TrC)

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 Training Coordinator (TrC) is responsible for coordinating and managing all phases of training for the Instructors and Counselors in a District. This is done in cooperation with the District Coordinator (DC), the State Training Specialist (TRS), Local Coordinators (LC), the District's Technical Coordinator (TC), Administration Coordinator (AC) and Communications Coordinator (CC).

Responsibilities of Position: Guided by the policies and procedures of the AARP Foundation and AARP Tax-Aide, under the direction of the District Coordinator, the Training Coordinator (TrC):

- Recruits and trains Instructors in tax law, tax return preparation and Electronic Filing procedures. (Federal and State)
- Establishes Instructor assignments
- Coordinates the certification of Instructors and provides listings to the DC, AC, TRS and ADS.

- Ensures that AARP Tax-Aide administrative policies and procedures, especially those related to security, are incorporated into Counselor training.
- Arranges for training sites and establishes the training schedule.
- Establishes syllabus for class presentation for Counselor classes.
- Assist Instructors in ordering training resources.

- Establishes guidelines for and manages the grading of Counselor tests.

- Maintains a record of Counselor certifications.

- Provides the names of certified Counselors to the DC, the AC, the ADS and the TRS in a timely manner.

- Coordinates ordering of training materials and supplies.

- Monitors instruction during Counselor classes.
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Qualifications: The TrC must have the ability to organize the efforts of the Instructors to provide high quality instruction to the Counselors. It is highly desirable that the TrC have tax assistance experience and he/she must have passed the IRS certification exam. They must be familiar with computer software for tax preparation to support those Districts with e-filing capabilities.

Term of Service: The TrC is appointed for a one-year term, contingent upon satisfactory annual review and may be reappointed for subsequent one-year terms

Eligibility: The TrC is eligible for other AARP and AARP Foundation volunteer positions.

Time Required: Time commitment varies according to District size. The position demands more time from October to January, in planning and organizing training programs within the District.

Training Required: The TrC must acquire knowledge of tax training procedures associated with the program as well as a basic orientation to AARP, as provided by the National Office and the SMT. The TrC attends tax training activities (Instructor Workshops) at State and District level meetings.

Travel Required: Travel within the District during the training period is necessary.

Appointment and Supervision: The AC is appointed by the District Coordinator with concurrence by the State Coordinator and reports directly to the District Coordinator.

Scope of Authority: The TrC assists the DC in all matters relating to training and directs and supervises the efforts of all Instructors in the District.

Working Relationships: The TrC works closely with the District Coordinator and the TRS.

Progress Review: The TrCs performance is monitored on an on-going basis and reviewed annually by the DC.

Available Resources: The volunteer in this position will be afforded the necessary guidance, training and materials needed to fulfill their responsibilities. Additional support and training are provided from the National Office Staff, Training Specialist, and 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.