

AARP Foundation Tax-Aide Position Description: **Local Coordinator**

PROGRAM

AARP Foundation Tax-Aide provides free personal income tax counseling and tax preparation to middle- and low-income taxpayers, with special attention to those age 50 and older.

POSITION SUMMARY

The Local Coordinator (LC) implements program plans in one or more assigned geographic localities and ensures site compliance with AARP Foundation Tax-Aide program policies and IRS Quality Site Requirements.

RESPONSIBILITIES OF POSITION

- Resolve problems and report incidents
- Ensure supplies needed for tax preparation at the site are available
- Ensure all IRS Quality Site Review (QSR), AARP Foundation, and Tax-Aide (National, State and District) policies and processes are in place and followed at the site
- Identify and develop leaders and mentors
- Nurture and encourage volunteers
- Ensure physical location is safe and secure for both taxpayers and volunteers
- Work with site host to comply with AARP Foundation Tax-Aide policies and procedures
- Work with District Coordinator to arrange for volunteers, equipment and materials for the site
- Ensure timely approval of site volunteer reimbursement requests

SKILLS & TRAITS

- Conflict resolution skills
- Ability to keep strict confidentiality
- Provide positive reinforcements to volunteers
- Strong communication skills
- Team building skills
- Ability to compromise
- Ability to work with others
- Dedication and commitment to Tax-Aide and its mission
- Ability to respect and work with others without bias
- Ability to delegate
- Service oriented mind set
- Strong people skills

TERM OF SERVICE AND ELIGIBILITY

The LC is appointed for a one-year term, contingent upon satisfactory annual review, and may be reappointed for subsequent one-year terms. The LC is eligible for other AARP / AARP Foundation volunteer positions, including those within AARP Foundation Tax-Aide.

TIME, TRAINING, AND TRAVEL REQUIRED

Time commitment varies according to geographic area and number of volunteers. The position usually requires more time from September to May. The LC must acquire the knowledge of all procedures associated with the program, and attend district meetings. LCs must annually re-familiarize themselves with the "Policies and Procedures" training. This PowerPoint presentation is available on the Portal>Libraries> Tax-Aide: Tax Law and Training. This training is the AARP Foundation Tax-Aide equivalent of the IRS-required Site Coordinator training.

APPOINTMENT, SUPERVISION, AND 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, SCO, and Client Facilitators and administers the program policies at the tax assistance sites.

AVAILABLE RESOURCES: This position description is a high level overview and is designed to be used in coordinator with the LC Guide. 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/state level leaders, National Office, and IRS