

TCL Core Values...

Respect

Collaboration

Focus on Results



*Your essential place to thrive in a
changing world*

*We connect you with resources, people
and learning*

Volunteer Position Description

Client Coordinator

Purpose of Position : Serve community tax return needs by providing free, IRS certified, tax return preparation and filing. Directly assist hundreds from the community with their tax returns.

Qualifications : Computer and Smart Phone literate. Able to: complete IRS online training & certification, learn/work with Google Workspace apps (including Google Voice), follow direction/rules/processes, and work with Site team. Need attention to detail and accuracy; discretion and confidentiality. Ability to do home on-line sign-ups, ZOOM meetings, email, internet, and work at Site (TCL Auditorium).

Responsible To: VITA Site Coordinator, TCL Volunteer Coordinator, Site Admin Management

Responsibilities :

1. Study and complete test for IRS Standards of Conduct and Intake/QR. online
2. Manage and coordinate arriving clients and their needs with Site tax preparers and Site Admin.. Track and organize/process clients at the Site.
3. Answer/manage client phone calls while at the Site. Site phone, Google Voice
4. Support Intake of client packets (interview forms, tax documents, ids), as determined by your individual capability.
5. Work with all-in-one copier/scanner.
6. Perform odd jobs at the Site, as needed. (Eg: assemble packets for clients, make copies of client IDs, tally survey results, etc)
7. Tax Season program coordination/on-going training with ZOOM meetings. online, recorded
8. Adhere to IRS/VITA policies and guidelines, including those for Privacy, Confidentiality and Civil Rights.
9. Log volunteer time. online
10. Sign-up for your Site support schedule. Online
11. Support set-up/take-down of Site equipment and tables.
12. Encourage community members to use library services and programs. Encourage new volunteers and donor/funding support of the library.

Training Provided : TCL volunteer orientation/training. Standards of Conduct and Intake/Quality Review training/test (on-line), Site training (1/18/2023), and on-the-job). Continual learning throughout tax season with emails and ZOOM sessions (on-line).

Time Commitment : Standards of Conduct and Intake/QR training/test (~4 hours, by start of Site work (~end of January)). See [2023 Teton VITA Site Calendar](https://tclib.org/tax) (at tclib.org/tax) for tax session dates/times. Site support time is flexible (volunteer signs- up for Site support time), nominally 5-7 hours/week.

Length of Commitment : Late January through April 13.

Benefits of Volunteering : Assist our community with their taxes. (Clients are respectful and appreciative-a positive atmosphere.)Work with collegial, supportive team of experienced volunteers and Library staff. Interact with community members.

Contacts: TCL Volunteer Coordinator (volunteer@tclib.org), VITA Site Coordinator (tvitasc@gmail.com)

Application: [Click here to complete and submit an application](#) . We will then contact you to coordinate.