



City of Phoenix

VITA Volunteer Training Instructor Job Description and Responsibilities

The City of Phoenix VITA Training Instructor position is critical to the preparation and success of the volunteer tax preparers for the program. Instructors are instrumental in effectively teaching tax law and the TaxSlayer software program to volunteers with different levels of experience and comprehension. All volunteers answering tax law questions, teaching tax law, preparing or correcting tax returns, and/or conducting quality reviews of completed tax returns must be IRS-certified in tax law.

Training Instructor Volunteer Job Description and Responsibilities:

- Required to pass the online IRS certification(s) to at least at the Advanced level. Additional certifications such as Military, HSA, and International are highly encouraged are but optional.
- Attend the Network-Wide Site Coordinators and Instructors TaxSlayer Training and Certification training to study course curriculum, learn appropriate teaching techniques and understand the presentation standards and skills required to successfully train VITA volunteers.
- Review the IRS Form 6774, VITA/TCE Test Retest guide to ensure you understand the certification requirements and procedures necessary for the IRS certification exam.
- Coordinate with co- instructor to discuss how you will operate as an instructional team prior to your first class.
- Utilize lesson plans, practice materials and homework assignments based on curriculum developed by the Maricopa County VITA Network (MCVN) and approved by the Internal Revenue Service.
- Allow two hours of preparation time for every hour of instruction (at a minimum).
- Ensure the training classroom is set and presentation equipment is functioning properly prior to the start of each class.
- Record attendance.
- Demonstrate to students how to use Publication 4012, VITA/TCE Volunteer Resource Guide and encourage usage throughout your lesson plans.
- Utilize the IRS Link & Learn website for system training and case study work to confirm student volunteers' knowledge and readiness for IRS certification exams and performance as certified tax volunteers.
- Assists students in understanding how their efforts impact each taxpayer they serve. Ensures students understand all aspects of the Volunteer Standards of Conduct.

- Encourages study outside the classroom setting.
- Communicate with the city of Phoenix VITA Program Coordinators on progress of students, additional materials needed and any challenges encountered.
- Communicates with the Site Coordinator if unable to volunteer for designated scheduled shift.
- Adheres to the VITA/TCE Volunteer Standards of Conduct- Ethics Training, Publication 4961, IRS Quality Site Requirements, and the City of Phoenix VITA Program Policy and Procedures manual.

I have read and agree to abide by this volunteer job description:

Please sign and date