



**Denver Asset Building Coalition**  
*It Just Takes Cents To Save!*

Fall, 2009

Dear Potential DABC Volunteer,

Denver Asset Building Coalition (DABC) began in July of 2003 as a small coalition of community and government organizations committed to assisting low-income families with their federal and state income tax returns free of charge. In 2006, DABC grew to operate the largest single free tax site in Colorado and provided a variety of educational offerings in addition to tax preparation. In 2009, DABC maintained the status of operating Colorado's largest free tax preparation site, in large part because of our fantastic volunteers. We also expanded our advocacy efforts and were successful in supporting the return of savings bond purchasing directly from the tax form and opened the Colorado Tax Clinic, an IRS-sponsored low income taxpayer clinic that helps educate people about taxpayer rights and responsibilities as well as untangle their issues with the IRS. We also hired Jewell Sudduth, a veteran site coordinator, as Tax Site Operations Manager and are thrilled with her ability to smoothly operate the tax sites. We are optimistic about our continued growth, and excited that you are interested in helping us achieve even more as a DABC volunteer.

Throughout 2009, DABC volunteers assisted nearly 4,000 individuals and families with free tax preparation, saving them almost \$800,000 in tax preparation fees. Those volunteers prepared tax returns with refunds totaling over \$3.2 million, and assisted low-income families in receiving over \$1.8 million in federal Earned Income Tax Credit.

For 2010, DABC will continue to operate the single largest Free Tax SuperSite in Colorado, located at 2980 Curtis at the King Trimble Center in Denver as well as the Wells Fargo – Aurora Free Tax Site located at 9000 E Colfax in Aurora. In 2010, we project that DABC volunteers will prepare up to 5,000 federal tax returns, return nearly \$6 million in refunds and services to taxpayers, allow taxpayers the option of purchasing savings bonds with their refunds, open over 100 new bank accounts and offer free tax assistance by appointment between May and October. In addition, we will continue to expand the impact of DABC by working with local partners in the community to provide tax education and community outreach and better the financial health of our clients through advocacy. These are all ambitious goals that cannot be accomplished without your valuable volunteer skills and assistance.

As we strive to fulfill our mission of providing free tax preparation, financial education, and financial services through accessible sites in Denver to help the underserved build for the future and become economically stable, we look forward to your support as a DABC volunteer during our 2010 tax season.

Welcome aboard!

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Executive Director



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# DABC Volunteer Site Coordinator Position Description

## Purpose of Position:

Provide coordination, organization, and supervision for all aspects of a DABC site location during the filing season.

## Responsibilities:

- Maintain relationship with volunteer coordinator for obtaining site materials and other pertinent information for site operations.
- Develop and maintain schedules for volunteers to work at site location(s).
- Collaboratively work with volunteer coordinator to obtain listing of volunteers that have successfully passed the DABC training.
- Ensure that adequate volunteer coverage (including tax assistants, screeners, quality reviewers, translators), supplies, and equipment is scheduled/maintained at corresponding DABC site.
- Act as liaison between volunteers, the volunteer site(s), and relevant sponsor(s), stakeholders and/or partners.
- Provide tax law and e-file support to volunteers.
- If necessary, compile timely statistical reports and provide to relevant sponsor(s), stakeholders, and/or partners.
- Monitor site(s) to ensure quality review is being conducted, privacy is being maintained and the Site Identification Number is being annotated on each return.
- Maintain confidentiality of taxpayer information.
- Ensure no compensation of any kind is accepted for the volunteer services provided.
- Maintain confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to taxpayer signature.
- Ensure a copy of the completed return is provided to the taxpayer.
- Work accepted and rejected returns as received.

## Qualifications:

- Tax knowledge and return preparation experience (Form 1040, Form 1040A and Form 1040EZ).
- Willingness to share time, skills, and interests.
- Basic computer skills for inputting tax return information.
- Previous experience using TaxWise or another *e-file* software application.
- Pride in performing tasks completely and accurately.
- Ability to deal with the public in a helpful and supportive manner, including interviewing skills. Interviewing skills training will be provided as needed.
- Ability to organize and lead.
- Friendly, dependable, and flexible.

## Training Required:

|                      | Tax Law Online | Tax Law Self-Study | Tax Law Classroom | TaxWise e-file | Site Procedures | Coordinator Procedures |
|----------------------|----------------|--------------------|-------------------|----------------|-----------------|------------------------|
| New Volunteers       | 8 - 16 Hours   | 8 - 16 Hours       | 16 Hours          | 6 Hours        | 2 Hours         | 4 Hours                |
| Returning Volunteers | 4 - 8 Hours    | 4 - 8 Hours        | Not Recommended   | 2 Hours        | 2 Hours         | 4 Hours                |

- Tax Law training online, self-study, or classroom (only one tax law class option is required).
- TaxWise *e-file* training (required).
- DABC site procedures (required).
- Site Coordinator procedures (required).

## Number of Volunteers Needed: 20 Volunteer Site Coordinators

## Time Required:

The exact volunteer time required depends on specific responsibilities, number of other Site Coordinators assigned to the volunteer site, size of the DABC site, and volume of traffic. Time will also be required before February to complete either a basic or refresher tax law course, including the use of electronic filing software and DABC site procedures. For most Site Coordinators training will be between 12 and 30 hours depending on experience. Most DABC Site Coordinators generally offer 4 to 6 hours of time each week during the tax season with a minimum of 80 hours (after training) during the period of January through April.

# DABC Volunteer Tax Assistor Position Description

## Purpose of Position:

To provide FREE tax return preparation and assistance to low-income taxpayers in the Denver community.

## Responsibilities:

- Complete basic and/or refresher tax law training, including the use of electronic filing software and DABC site procedures.
- Successfully pass a test on required tax law knowledge.
- Provide high-quality assistance to all taxpayers. Directly prepare taxpayer's return based on information provided by taxpayer or answer tax related questions.
- Identify all returns with the Site Identification Number assigned to your site.
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed.
- Act as a *Screener* or *Quality Reviewer* as requested.
- Prepare tax returns using electronic filing software.
- Refer taxpayers with complex returns to the IRS web site or help number, or to a tax practitioner or firm. *However, volunteers should never refer taxpayers to a specific practitioner or firm.*
- Ensure no compensation of any kind is accepted for the volunteer services provided.
- Maintain confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to taxpayer signature.
- Ensure a copy of the completed return is provided to the taxpayer.

## Qualifications:

- Basic tax knowledge (Form 1040, Form 1040A and Form 1040EZ). Basic tax training will be provided as needed.
- Willingness to share time, skills, and interests.
- Basic computer skills for inputting tax return information.
- Pride in performing tasks completely and accurately.
- Ability to deal with the public in a helpful and supportive manner, including interviewing skills. Interviewing skills training will be provided as needed.
- Friendly, dependable, and flexible.

## Training Required:

|                      | Tax Law Online | Tax Law Self-Study | Tax Law Classroom | TaxWise e-file | Site Procedures |
|----------------------|----------------|--------------------|-------------------|----------------|-----------------|
| New Volunteers       | 8 - 16 Hours   | 8 - 16 Hours       | 16 Hours          | 6 Hours        | 2 Hours         |
| Returning Volunteers | 4 - 8 Hours    | 4 - 8 Hours        | Not Recommended   | 2 Hours        | 2 Hours         |

- Tax Law training online, self-study, or classroom (only one tax law class option is required).
- TaxWise e-file training (required).
- DABC site procedures (required).

## Number of Volunteers Needed: 150 Volunteer Tax Assistors

## Time Required:

The exact volunteer time required depends on specific responsibilities, number of other Tax Assistors assigned to the volunteer site, size of the DABC site, and volume of traffic. Time will also be required before February to complete either a basic or refresher tax law course, including the use of electronic filing software and DABC site procedures. For most Tax Assistors training will be between 8 and 24 hours depending on experience. Most DABC Tax Assistors generally offer 4 to 6 hours of time each week during the tax season with a minimum of 24 hours (after training) during the period of January through April.

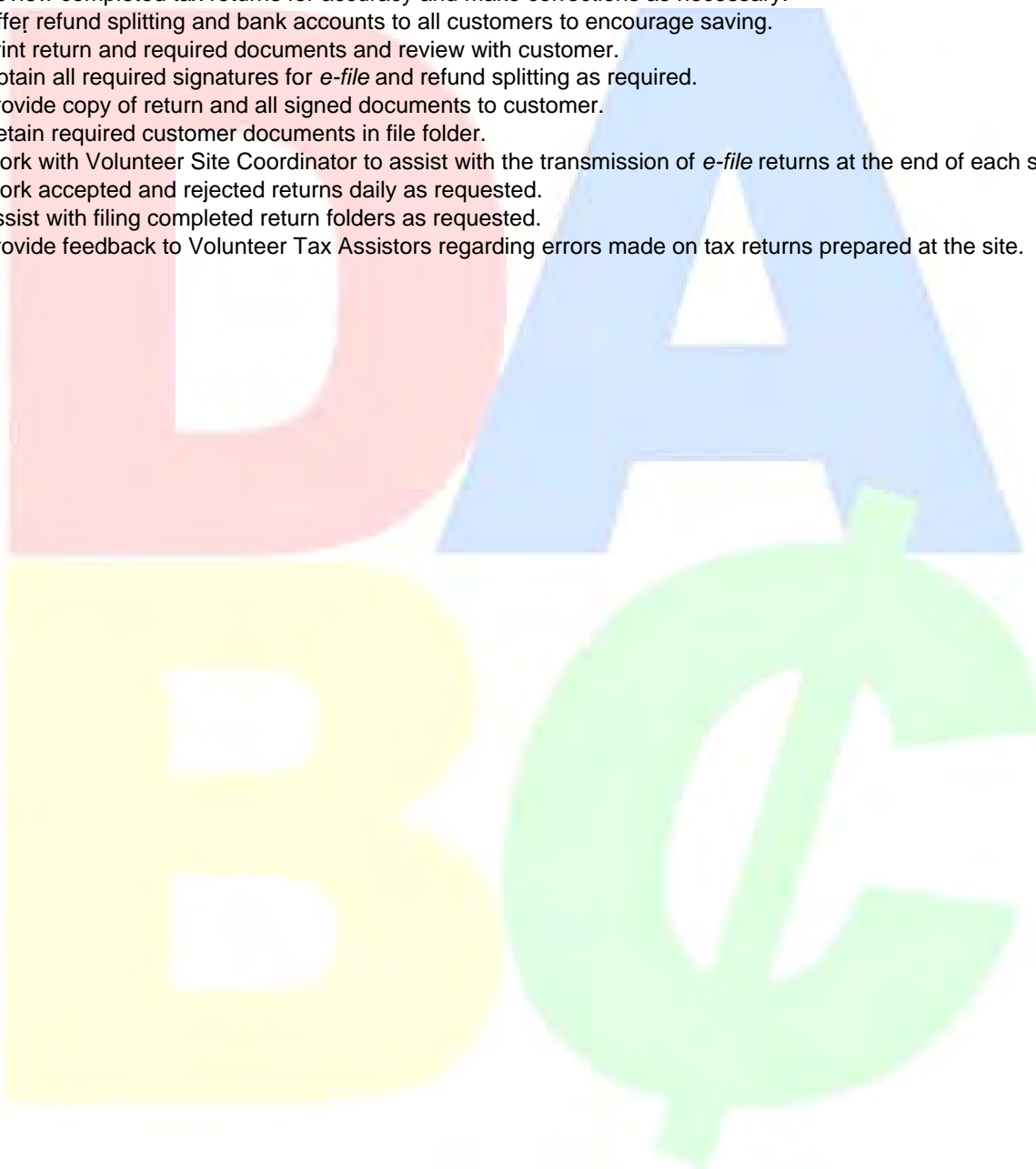
## When Performing as a Screener:

- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Offer customer the ability to open a free bank account with onsite banking partner.
- Complete a check sheet to sign in taxpayers needing assistance.

- Survey taxpayers to determine the type of assistance they will be needing and the tax forms that will be required to complete their tax return.
- Ensure that taxpayer has brought the necessary information (e.g. W-2, 1099's, last year's return) from which a tax return can be completed.
- Complete folder label for Volunteer Tax Assistor's reference.
- Monitor site traffic to ensure that sufficient time is allowed for all taxpayers being checked-in at the site to receive assistance.
- Refer taxpayers with complex returns to the IRS website or toll- free help number, or to a tax practitioner or firm. However, volunteers should never refer taxpayers to a specific practitioner or firm.
- Provide general assistance to site customers.

**When Performing as a Quality Reviewer:**

- Review completed tax returns for accuracy and make corrections as necessary.
- Offer refund splitting and bank accounts to all customers to encourage saving.
- Print return and required documents and review with customer.
- Obtain all required signatures for *e-file* and refund splitting as required.
- Provide copy of return and all signed documents to customer.
- Retain required customer documents in file folder.
- Work with Volunteer Site Coordinator to assist with the transmission of *e-file* returns at the end of each shift.
- Work accepted and rejected returns daily as requested.
- Assist with filing completed return folders as requested.
- Provide feedback to Volunteer Tax Assistors regarding errors made on tax returns prepared at the site.



# DABC Volunteer Translator Position Description

## Purpose of Position:

Provide FREE translation services to taxpayers at a DABC site (e.g., non-English speaking and hearing-impaired).

## Responsibilities:

- Work with Volunteer Site Coordinator to ensure interpreter services are advertised in special DABC site promotions.
- Provide free interpreter services at DABC site(s).
- Ensure no compensation of any kind is accepted for the volunteer services provided.
- Maintain confidentiality of taxpayer information.

## Qualifications:

- Experienced interpreter. Volunteer Interpreter should be proficient in a particular interpreter skill (e.g., speaks and can translate to and from English, sign-language).
- Basic tax knowledge (Form 1040, Form 1040A and Form 1040EZ) is helpful, but it is not required for this position. Basic tax training will be provided if requested.
- Willingness to share time, skills, and interests – e.g., provide interpreter services during the filing season (January through April 15).
- Pride in performing tasks completely and accurately.
- Ability to deal with volunteers, stakeholders, partners, and the public in a helpful and supportive manner.
- Friendly, dependable, and flexible.

## Training Required:

|                      | Tax Law Online                | Tax Law Self-Study            | Tax Law Classroom         | Site Procedures |
|----------------------|-------------------------------|-------------------------------|---------------------------|-----------------|
| New Volunteers       | 8 - 16 Hours<br>(Recommended) | 8 - 16 Hours<br>(Recommended) | 16 Hours<br>(Recommended) | 2 Hours         |
| Returning Volunteers | 4 - 8 Hours<br>(Recommended)  | 4 - 8 Hours<br>(Recommended)  | Not Recommended           | 2 Hours         |

- Tax Law training online, self-study, or classroom (one tax law option is recommended but not required).
- DABC site procedures (required).

## Number of Volunteers Needed: 10 Volunteer Translators

## Time Required:

The exact volunteer time required depends on specific responsibilities, number of other Translators assigned to the volunteer site, size of the DABC site, and volume of traffic. For most Translators training will be between 2 and 18 hours depending on experience and optional tax law training options. Most DABC Translators generally offer 4 to 6 hours of time each week during the tax season with a minimum of 24 hours (after training) during the period of January through April.

# DABC Volunteer Training Instructor Position Description

## Purpose of Position:

Plan and deliver basic tax law, *e-file* software (TaxWise), and site procedures training courses for all DABC volunteers.

## Responsibilities:

- Work with Volunteer Coordinator to establish all tax law, e-file, and site procedures classroom training, including the recruitment, selection and scheduling of instructors to deliver the training.
- Evaluate, coordinate, and manage all phases of DABC training for DABC volunteer site(s).
- Maintain working relationship with local IRS SPEC office to obtain VITA/TCE training materials, updates to tax laws and other pertinent training information.
- Work with Volunteer Coordinator to recruit additional instructors as required.
- Deliver tax law, *e-file*, and site operations training instruction to volunteers in December/January.
- Ensure tax law tests are graded (received) and names are certified and provided to Volunteer Site Coordinator.
- Monitor and evaluate DABC training courses. Provide feedback to the Site Coordinator on volunteers.
- Provide feedback to Volunteer Coordinator on effectiveness of training and future training needs.

## Qualifications:

- Instructor and organizational skills.
- Prior teaching experience helpful, but not required.
- Ability to design and implement tax law and/or *e-file* training.
- Knowledgeable about adult learning and training principles.
- Tax law knowledge (Form 1040, Form 1040A and Form 1040EZ) required for tax law instructors.
- TaxWise software knowledge required for *e-file* instructors.
- Creative nature.
- Willingness to share time, skills, and interests – e.g., volunteer training is generally scheduled for December and January.
- Basic computer skills for developing training modules and training aides.
- Pride in performing tasks completely and accurately.

## Number of Volunteers Needed:

- **4 Volunteer Tax Law Instructors**
- **4 Volunteer *e-file* Instructors**
- **2 Volunteer DABC Site Procedures Instructors**

## Time Required:

The exact volunteer time required depends on background in training and ability to plan and execute tax law and *e-file* courses. Generally, Training Instructors provide 4-24 hours of class preparation time, and an equal amount of classroom instruction time during the period of December and January.

# DABC Volunteer Computer Specialist Position Description

## Purpose of Position:

Assist with electronic filing hardware/software training for volunteers in conjunction with the Volunteer Training Instructor. Provide technical (hardware and software) support to DABC site(s) throughout the filing season.

## Responsibilities:

- Work with the Volunteer Training Instructor in coordinating and delivering electronic filing training (including electronic filing software).
- Work with the Volunteer Training Instructor in recruiting potential hardware/software instructors and ensuring the publicity of electronic filing site(s).
- Work with the Volunteer Site Coordinator to evaluate the need for computer hardware at DABC site(s).
- Solicit hardware donations from community organizations/businesses.
- Install computers and software at identified DABC site(s).
- Maintain electronic filing hardware inventory and specifications of hardware listed by assigned volunteer site, including site information and *e-filing* statistical data.
- Develop sources for hardware maintenance, repairs and upgrading.
- Provide day-to-day technical support for hardware and software needs to DABC site(s) throughout the filing season.
- Complete an Annual Property and Data Deletion Certification form at the end of each filing season. This form certifies that all taxpayer data has been backed-up and removed from all computer equipment and that all data deletion steps have been completed.

## Qualifications:

- Working knowledge of personal computers, software, and communication systems.
- Knowledge of electronic filing procedures and program, including the electronic transmission of tax returns. If necessary, training will be provided by the DABC.
- Ability to plan, design, and implement hardware and software training.
- Basic computer skills for developing training modules and training aides.
- Knowledge of Windows XP professional and creating a network helpful, but not required.
- Tax law knowledge (Form 1040, Form 1040A and Form 1040EZ).
- Creative nature.
- Willingness to share time, skills, and interests – e.g., complete tax software training by January and provide day-to-day computer support throughout the filing season.
- Pride in performing tasks completely and accurately.
- Ability to deal with volunteers, stakeholders, partners, and the public in a helpful and supportive manner.
- Friendly, dependable and flexible.

## Training Required:

|                      | Tax Law Online                | Tax Law Self-Study            | Tax Law Classroom         | TaxWise <i>e-file</i> |
|----------------------|-------------------------------|-------------------------------|---------------------------|-----------------------|
| New Volunteers       | 8 - 16 Hours<br>(Recommended) | 8 - 16 Hours<br>(Recommended) | 16 Hours<br>(Recommended) | 6 Hours               |
| Returning Volunteers | 4 - 8 Hours<br>(Recommended)  | 4 - 8 Hours<br>(Recommended)  | Not Recommended           | 2 Hours               |

- Tax Law training online, self-study, or classroom (one tax law option is recommended but not required).
- TaxWise *e-file* training (required).

**Number of Volunteers Needed: 5 Volunteer Computer Specialists**

## Time Required:

The exact volunteer time required depends on computer knowledge and ability to plan and execute tax preparation software courses. Time may be required before February to attend electronic filing software training.

# DABC Volunteer Administrative Position Description

## Purpose of Position:

To assist in the background administrative work that helps tax site operations run smoothly.

## Responsibilities:

- Assist Site Coordinators in ensuring scheduled volunteers are available for preparation during hours of operation.
- Assist in filing tax returns and maintaining inventory of needed supplies.
- Assist in sending out needed training materials to volunteers
- Maintain confidentiality of taxpayer information.
- Assist Site Coordinator in preparing letters for rejected returns.
- Addressing envelopes, labeling folders, and scanning documents needed for tax preparation.
- Ensure no compensation of any kind is accepted for the volunteer services provided.

## Qualifications:

- Willingness to share time, skills, and interests.
- Friendly, flexible and reliable.
- Good organizational skills.
- Knowledge of basic computer applications and Microsoft Office.
- Pride in performing tasks completely and accurately.

## Training Required:

|                      | Tax Law Online | Tax Law Self-Study | Tax Law Classroom | TaxWise e-file | Site Procedures | Coordinator Procedures |
|----------------------|----------------|--------------------|-------------------|----------------|-----------------|------------------------|
| New Volunteers       | N/A            | N/A                | N/A               | N/A            | 2 Hours         | N/A                    |
| Returning Volunteers | N/A            | N/A                | N/A               | N/A            | 2 Hours         | N/A                    |

- Tax Law training online, self-study, or classroom (not-required).
- DABC site procedures (required).
- Site Coordinator procedures (not-required).
- TaxWise e-file training (not-required).

## Number of Volunteers Needed: 10 Volunteer Administrative Positions

## Time Required:

The exact volunteer time required depends on specific responsibilities, number of volunteers assigned to the volunteer site, size of the DABC site, and volume of traffic. Time will also be required before February to complete DABC site procedures. Most DABC volunteers generally offer 4 to 6 hours of time each week during the tax season with a minimum of 24 hours (after training) during the period of January through April.