



University Students' Council of the University of Western Ontario
Position Description
INCOME TAX CLINIC COORDINATOR

EFFECTIVE: February 20, 2015

SUPERSEDES:

AUTHORITY: Executive

RATIFIED BY: Executive

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1.00 POSITION TITLE: INCOME TAX CLINIC COORDINATOR

2.00 POSITION OVERVIEW:

- (1) The Income Tax Clinic Coordinator will plan and oversee an Income Tax Clinic to provide the Western University student body with access to accurate and confidential preparation of their yearly income tax returns.

3.00 PRIMARY RESPONSIBILITIES:

- (1) Recruit an Executive Committee to assist with the implementation of the annual Income Tax Clinic(s)
- (2) Recruit student volunteers throughout the Western campus including students from the Affiliated Colleges
- (3) Organize training sessions and provide training materials to volunteers in preparation for the service through various training modules provided by Canada Customs and Revenue Agency's Community Income Tax Program Coordinator and/or another agency which provides income tax preparation services outside of the USC
- (4) Maintain a complete list of all volunteers with the clinic to be provided the Coordinator for the following year
- (5) Ensure the confidentiality, security and accuracy of communication and income tax preparation between the clinics and its volunteers and the clinic and its clients and reinforce with the volunteers that the obligation to maintain confidentiality continues after the clinic closes
- (6) Comply with all legal requirements wherever the clinic provides its services
- (7) Acquire suitable location(s) for the clinic(s) and training seminar(s) on campus
- (8) Schedule trained volunteers to staff the clinic(s) in consultation with the Secretary-Treasurer
- (9) Provide up-to-date tax forms and equipment for the clinic(s)



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- (10) Publicize recruitment and Income Tax Clinic(s) using all available media on campus (i.e. The Gazette, CHRW, Western News, posters, press releases) in collaboration with the Secretary-Treasurer and the Vice-President Communications
- (11) Provide telephone listings to volunteers and clients for the services provided by Canada Customs and Revenue Agency (CCRA) for inquiries, problem resolution programs and international tax services
- (12) Provide copies of the Declaration of Taxpayer Rights to all volunteers and clients and that all clients have signed the required liability forms
- (13) Ensure that all clients are provided with an electronic copy of their completed tax return after the confirmation of the successful e-filing
- (14) Ensure that all client files are destroyed within the timeframe prescribed by the CCRA
- (15) Ensure that all other records are kept securely and entrusted to the Secretary-Treasurer on completion of the clinics
- (16) Adhere to USC bylaws, policies and procedures.
- (17) Complete an interim report at the end of the fall academic term (December) and a final report at the end of the winter academic term (April) in compliance with the USC's Final Reports Procedure.

4.00 QUALIFICATIONS:

- (1) **Interpersonal Communication:** The Income Tax Clinic Coordinator position requires strong interpersonal communication skills, given the need to work concurrently with a number of project stakeholders. Able to provide constructive feedback to project stakeholders and communicate expectations effectively through written and oral mediums.
- (2) **Project Management:** The Income Tax Clinic Coordinator will act as project manager for all the projects incumbent upon the Executive Committee to accomplish. Strong organizational and time management skills are paramount to the success of these projects. The Income Tax Clinic Coordinator should be flexible, able to critically assess and troubleshoot problems and demonstrate effective problem solving in the role.
- (3) **Finance Acumen:** The Income Tax Clinic Coordinator should be financially literate and have some accounting/budgeting experience



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5.00 TIME COMMITMENT:

5.01 The time commitment for this position will vary throughout the term as follows:

- (1) 3 – 5 hours per week in September and October (recruiting Executive Committee)
- (2) 2 – 3 hours per week in November and December (recruiting volunteers)
- (3) 5 – 10 hours per week in January, February, March (training, planning and the Income Tax Clinic)
- (4) The Income Tax Clinic Coordinator shall participate in the transition of responsibilities with their successor in the months preceding the end of their term.

6.00 TRAINING/SUPPORT:

- (1) The Income Tax Clinic Coordinator will be required to attend all USC-mandated training sessions for Coordinators, as determined by the Secretary-Treasurer and the USC Volunteer Services Department.
- (2) The Income Tax Clinic Coordinator will be expected to attend a mandatory Health and Safety training seminar conducted at the beginning of their term.
- (3) Throughout their term, the Income Tax Clinic Coordinator will have the opportunity to strengthen their leadership, critical thinking, project management, and communication skills through professional development workshops and experiential learning facilitating by the Volunteer Services Department.

7.00 LEARNING OUTCOMES:

- (1) The Income Tax Clinic Coordinator will learn how to develop effective group facilitation skills in addition to becoming more proficient in supervising and managing volunteers.
- (2) The Income Tax Clinic Coordinator will gain technical competencies in income tax preparation and personal budget planning through service-based experiential learning.

8.00 COMMUNITY IMPACT:

- (1) The Income Tax Clinic provides Western students with the opportunity to have their income tax returns prepared in a professional, confidential and convenient location free of charge.



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- (2) The Income Tax Clinic provides Clinic volunteers with gainful and professional experience in preparing income tax returns.

9.00 EVALUATION:

- (1) The Income Tax Clinic Coordinator will participate actively with their supervisors in conducting formative and summative performance assessments.
 - i. Formative Assessment is an ongoing process of dialogue and informal feedback in which Supervisors and volunteers determine their level of satisfaction in the position and identify further learning needs for successful job completion.
 - ii. A summative assessment is conducted at the end of a volunteer's term in order to qualify their volunteer experience, identify individual learning outcomes, and evaluate overall job performance. Two forms of summative assessment will be conducted: Supervisory Assessment and Self-Assessment.

10.00 COMPENSATION

- (1) The Income Tax Clinic Coordinator shall receive two honourarium payments of \$500.00 as compensation for their work.
- (2) In order to receive the first honourarium payment, the Income Tax Clinic Coordinator must:
 - i. Remain within the position until January 1st in the relevant academic year;
 - ii. Submit an interim report to the primary supervisor by the end of the fall term; and,
 - iii. Receive written notice of approval of the interim report, in terms of meeting content and format requirements under the Final Report Procedure, by the primary supervisor.
- (3) In order to receive the second honourarium payment, the Income Tax Clinic Coordinator must:
 - i. Remain within the position until April 30th in the relevant academic year;
 - ii. Submit a final report to the primary supervisor by the end of the fall term; and,



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- iii. Receive written notice of approval of the final report, in terms of meeting content and format requirements under the Final Report Procedure, by the primary supervisor.

11.00 SUPERVISION:

- (1) Primary Supervisor: Secretary-Treasurer
- (2) Secondary support: Coordinator, Volunteer Resources and Manager, Volunteer Services