

## Site Coordinator Timeline: General and Year-Round

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### Ongoing

- ✓ Communicate with EKS Site Lead (if separate role from Site Coordinator) and Financial Program Officer
- ✓ Attend Coalition Meetings (third Friday of every month from September through May)
- ✓ Assist with volunteer outreach for your site
- ✓ Schedule & manage volunteers
- ✓ Track Site Coordination hours
- ✓ Track volunteer hours for all volunteers
- ✓ Collect *IRS forms 13615* from all volunteers throughout tax season and submit as you receive to UWWC
- ✓ IRS Site Reviews (Happen at random times throughout tax season)

### September

- ✓ Register as a Site Coordinator via [www.unitedwaywinecountry.org](http://www.unitedwaywinecountry.org)
- ✓ Set site schedule (open & close dates with days & times of operation). Also determine whether or not site will accept walk-ins. **DUE SEPTEMBER 30: Completed *IRS Form 13715* to UW Community Benefit Coordinator- Kelsey Cupples**
- ✓ Determine volunteer needs per hour based on site schedule and notify UW Community Benefit Coordinator.
- ✓ Begin local volunteer outreach and direct volunteers to register via [www.unitedwaywinecountry.org](http://www.unitedwaywinecountry.org)
- ✓ UW Community Benefit Coordinator will contact prior year volunteers to determine ongoing participation
- ✓ Schedule a volunteer orientation to be held at your site during October or November.

### October

- ✓ Continue volunteer recruitment

### November

- ✓ Volunteer orientations begin
- ✓ Complete required online IRS trainings (Intake/Interview, Site Coordinator, Standards of Conduct, & Quality Review) via Link & Learn at [www.linklearncertification.com](http://www.linklearncertification.com)
- ✓ All Site Coordinators must certify in Advanced Tax Law by end of December and submit *IRS Form 13615* to UW Community Benefit Coordinator
- ✓ Sites must submit *IRS Form 13533* (in order for IRS to order TaxSlayer software)
- ✓ **DUE NOVEMBER 30: Submit 2-1-1 Site Information Form to UWWC & 2-1-1**
- ✓ Continue volunteer recruitment
- ✓ Send any changes in your site schedule (Sent updated *IRS Form 13715* if any changes)
- ✓ IRS Form W-9 for yourself if you will be paid a stipend by United Way instead of site organization where you served

### December

- ✓ First round of volunteer trainings are offered
- ✓ **Mandatory Site Coordinator Training held**
- ✓ Sites must submit *Site Coordinator Agreement(s)* and *Partner Acknowledgement* form to UW Community Benefit Coordinator
- ✓ Submit Virtual VITA/TCE Taxpayer Consent *IRS Form 14446* to UW Community Benefit Coordinator

- ✓ If any changes to site schedule, days of operation, or location are made submit an updated *IRS Form 13715* to UW Community Benefit Coordinator
- ✓ Continue volunteer recruitment
- ✓ Begin contacting potential ad hoc sites to schedule tax season event(s)
- ✓ Finalize how many volunteers are needed per hour at your site and notify UW Community Benefit Coordinator

### January

- ✓ Final round of volunteer trainings offered
- ✓ Hold Tax Site Orientations for all volunteers if your site is opening this month
- ✓ Prepare site for operation, posting all IRS required signage visible to clients
- ✓ Ensure that all required materials have been stored at site in a secure location
- ✓ Kick-Off Event held in late January at Empire College or your regional site
- ✓ Open sites:
  - Submit Volunteer Assistance Summary Report (Form 13206) to IRS
  - Administer client surveys and IRS Form 13614-C (Intake & Interview) to each taxpayer

### February

- ✓ Hold Tax Site Orientations for all volunteers if your site is opening this month
- ✓ Open your site by early February if you haven't already done so
- ✓ Open sites:
  - Administer client surveys and IRS Form 13614-C (Intake & Interview) to each taxpayer
  - Submit Volunteer Assistance Summary Report (Form 13206) to IRS, only with new volunteers information

### March

- ✓ Open sites:
  - Administer client surveys and IRS Form 13614-C (Intake & Interview) to each taxpayer
- ✓ Submit Volunteer Assistance Summary Report (Form 13206) to IRS, only with new volunteers information
- ✓ Participate in Mid-Season Quality Site Review with United Way Program Staff

### April

- ✓ Open sites:
  - Administer client surveys and IRS Form 13614-C (Intake & Interview) to each taxpayer
- ✓ Submit Volunteer Assistance Summary Report (Form 13206) to IRS, only with new volunteers information
- ✓ Close Sites (typically on the week of April 15<sup>th</sup>)
- ✓ Tally Volunteer hours logged in the Volunteer Sign-in Binders and submit to UW Community Benefit Coordinator
- ✓ Submit Site Coordinator Timesheet to UW Community Benefit Coordinator
- ✓ Submit completed client surveys to UW Community Benefit Coordinator (please mark with site name)
- ✓ Collect and submit to UW Community Benefit Coordinator:
  - Publication 4012's from volunteers who do not want them
  - Site Coordinator Binders
- ✓ Submit TaxSlayer acknowledgements and final Form 13206 to IRS
- ✓ Volunteer appreciation for your site's volunteers (note, gift, party, etc.)
- ✓ Attend Site Close-Out Meeting with UW Staff Person
- ✓ Mendocino/Lake County Close-Out/Planning Meeting
- ✓ Humboldt/Del Norte County Close-Out/Planning Meeting

**May**

- ✓ UWWC Annual Celebration Event for all program volunteers
- ✓ Submit Request for Qualification and Letter of Support for next tax year to UWWC by deadline