CA$H Greater Portland IN-PERSON Opportunity Guide Volunteer

Associated Department/Project: Community Impact, CA$H Greater Portland

Location(s): In-person opportunity at UWSM and/or other designated tax sites in Greater Portland; serving Cumberland County clients, primarily

Position Overview:
CA$H Greater Portland (Creating Assets, Savings and Hope) is an initiative of United Way of Southern Maine in partnership with the Greater Portland CA$H Coalition, community leaders and industry experts working together to help individuals and families to achieve long-term financial stability. As part of CA$H's tax preparation service, IRS-certified volunteer tax preparers prepare and file federal and state income taxes for low-to-moderate households for free. Participants often learn that they qualify for tax credits, like the Earned Income Tax Credit, which can put thousands of dollars back into their pockets. Recognizing that tax time can be a great time to save money, Opportunity Guide volunteers meet with clients to discuss their financial goals and challenges and share tools and community resources that can help clients make the most of their money.

Diversity Statement:
Diversity, equity, and inclusion are vital to achieving our mission, living our values, and advancing the common good. United Way of Southern Maine fosters and promotes an inclusive environment that leverages the unique contributions of diverse individuals and organizations in all aspects of our work. We know that by bringing diverse individuals and viewpoints together we can more effectively create opportunities for a better life for all. For our full Diversity and Inclusion statement: https://uwsme.org/diversity-inclusion/

Key Responsibilities:
- Successfully complete the IRS Link & Learn Volunteer Standards of Conduct certification, and (optional) Intake Interview & Quality Review certification, if assisting with the organization and completion of clients' tax documents.
- Become familiar with and keep up-to-date on CA$H Opportunity Guide resources and tax-site policies provided in training and in communications with the Asset Organizer and Tax Site Coordinator.
- Attend 5+ events, unless other arrangements are made with staff, throughout the tax season where you will serve as an Opportunity Guide to discuss financial goals and resources with clients and may also make sure their tax documents are organized for their meeting with the IRS-certified volunteer tax preparers.
- Reference the client's CA$H Maine Intake form while having the Opportunity Guide conversation with the client.
- Using resources provided, refer tax site clients to programs and services based on their financial goals and needs.
- Complete CA$H Maine Google forms to document the conversation and resource referrals.
- Provide high quality assistance to all clients while maintaining client confidentiality.
- Agree to accept no compensation of any kind for volunteer services provided.

Initial Impacts:
- Opportunity Guide volunteers will introduce tax site clients to community resources and opportunities to build savings, improve credit, and address other financial challenges.

Sustained Outcomes:
- In support of Thrive2027's Goal 2, CA$H volunteers' efforts contribute to the financial stability of individuals and families in Greater Portland who may access additional resources as a result of the intake conversation.

Training & Support Provided:

- Volunteers will access free comprehensive orientation and training virtually through the IRS, CA$H Maine, and UWSM, including Volunteer Standards of Conduct and (optional) Intake Interview & Quality Review, and an Opportunity Guide Orientation and Training.

Time Commitment/Schedule:

- Depending on volunteer availability and client demand, volunteers may be asked to attend a minimum of 5 events throughout the tax season. Events at the UWSM Portland office will be held on Wednesday and Thursdays, afternoon and evenings from 2 PM to 5 PM and/ or 5 PM to 8 PM. Additionally, we will be open on Saturday mornings from 9 AM to 12 PM and afternoons from 12 PM to 3 PM from January 22, through April 5, 2025.
- Volunteers may be encouraged to attend Zoom meetups (times TBD) with other Opportunity Guides. throughout the season to share experiences, get assistance, and receive program updates.

Qualifications & Skills Needed:

- Ability to complete the IRS Volunteer Standards of Conduct certification through Link and Learn Taxes, as well as the Intake Interview & Quality Review certification, if applicable, and submit proof via the IRS Volunteer Standards of Conduct Agreement prior to volunteering.
- Ability to pass background screening.
- Comfort communicating with the clients one-on-one, in a friendly, helpful, and supportive manner.
- Attention to detail when organizing documents and completing data entry.
- Comfort with learning how to use new digital communication and client management tools.

Benefits:

- Volunteers will learn about community resources that support financial stability and share them with community members.
- Volunteers will have the opportunity to meet like-minded individuals who care about making a difference in the community.

Staff Liaison/Supervisor: Patrick Robinson, CA$H Greater Portland Tax Site Coordinator; Lucia Rico CA$H Senior Volunteer Manager, and Pamela Bennett additional UWSM contact for the CA$H program.