



TAX SITE MANAGER

Program Description: The CASH Campaign of Maryland (CASH) provides direct services and advocates for policies that increase the financial security of low to moderate-income individuals and families in Baltimore City and across Maryland. In collaboration with a broad set of partners and volunteers, The CASH Campaign provides a range of high impact programs that help people build financial security, reduce poverty and return millions of dollars back to low income people and communities. These programs reach over 20,000 households annually and include free tax preparation, financial coaching, financial education, and public benefits assistance. The CASH Campaign works to build a network of organizations and practitioners dedicated to promoting financial security and economic mobility for low income people in Maryland and across the region. This is accomplished by hosting convenings, providing technical assistance, and supporting the growth of other coalitions.

Position Description: **Site Manager (Temporary Contract Position – up to 40 hours/week)
January 2022 to April 2022**

Manage or assist the manager of a tax site which prepares free returns for working families. This is an exciting, rewarding and challenging position which interacts with many clients and dedicated volunteers while developing tax skills. The site manager is ultimately responsible for maintaining the quality procedures and processes required by the IRS and CASH to ensure the accuracy and proper filing of tax returns at the site.

In response to COVID-19, CASH may have sites with in-person, drop-off, or virtual services. Taxpayers who use the drop-off service will bring documents to the site but will have limited contact with the Site Manager or preparers. When using the virtual service, taxpayers upload documents and sign their returns virtually, so there is no contact. Site Managers are expected to be available for all types of programs.

Responsibilities:

- **SITE OPERATIONS**
 - Oversee proper operations of a tax program including the intake, preparation, quality review and filing of tax returns
 - Mentor volunteer tax preparers
 - Prepare individual (Form 1040) tax returns for clients with incomes under \$57,000
 - Maintain accurate and complete tax files
 - Manage electronic filing of tax returns

- Promote client use of refunds to access savings bonds, credit union accounts, prepaid cards, and other savings promotions.
- **IRS COMPLIANCE AND QUALITY CONTROL**
 - Responsible for maintaining compliance with IRS quality procedures and guidelines
 - Responsible for maintaining quality procedures, accuracy and security of tax files
- **SUPERVISION AND RETENTION OF VOLUNTEERS**
 - Support all volunteers by providing tax assistance as required
 - Work with the Tax Associate to proactively manage volunteers.
 - Focus on volunteer retention and satisfaction to ensure future volunteer availability and ongoing support for the tax site

Qualifications:

- Commitment to the mission of the CASH Campaign of Maryland and the community it serves
- Tax, legal, financial or similar training and/or experience
- Knowledge of Form 1040 helpful. CASH Campaign provides training needed to pass required IRS exams
- Ability to work with the public, volunteers and campaign partner staff
- Most managers must be available to work evenings and Saturdays
- Must be available to attend training sessions for Site Managers in December 2021
- Candidate must be able to successfully achieve IRS advance level preparer certification through an IRS developed exam for volunteer tax preparers (VITA) as a condition of employment

Interested candidates should forward a cover letter and resume to:

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