

LADDER UP

Data and Evaluation Coordinator

Organizational Background

Ladder Up is an entrepreneurial, Chicago-based nonprofit dedicated to providing free financial services to hardworking, low-income families and individuals. Through free tax return preparation, college financial aid application assistance, financial education, and legal representation, Ladder Up helps its clients access the resources they need to move up the economic ladder. The organization offers three free programs to Chicago-area clients:

- **Tax Assistance Program (TAP):** By training and deploying 1,400+ volunteers, Ladder Up offers free tax return preparation at more than 25 Chicagoland tax sites
- **Financial Capability Program**
 - **Financial aid:** Ladder Up helps low-income, minority, and first-generation students access financial aid for higher education
 - **Financial education:** Ladder Up provides one-on-one financial coaching to individuals and on-site financial education workshops for partners
- **Tax Clinic:** Ladder Up offers free legal representation to low-income taxpayers to resolve tax controversies

Data and Evaluation Coordinator

Position Description:

Reporting to the Development Director and working with the Development, Tax, and Financial Capability departments, the Data and Evaluation Coordinator designs and implements data collection processes and provides evaluation support to help the organization achieve its objectives. The coordinator will oversee all aspects of Ladder Up's Tax and Financial Capability programs' outcomes including the development of metrics, data collection, internal and external reports, and linking program measurement to relevant local and national benchmarks. Additionally, the position contributes to any data and evaluation products including but not limited to written publications, public presentations, and working groups and coalitions with external and/or internal partners.

Position Qualifications:

- Excellent analytic ability with advanced qualitative and quantitative skills
- Enthusiastic and positive attitude
- Strong research and writing skills with demonstrated ability to effectively integrate and present data within written reports
- Highly organized and detail-oriented with experience making data-driven decisions
- Proficiency with Salesforce (required) and database management
- Proficiency with MS Office Suite, Excel and/or Google products 1-3 years of employment experience in data collection and/or outcome evaluation
- Bachelor's Degree in related field preferred

Position Responsibilities

Client Management Database System (20%)

- Serve as the lead staff member (the "Power User") in Salesforce for Ladder Up, overseeing the management of the Salesforce database. Work to develop sustainable data collection processes for the Tax and Financial Capability programs
- Manage program data by developing and overseeing data collection efforts ensuring that all data is collected consistently and regularly
- Analyze programmatic data, both client-related and performance-based, to ensure that goals and objectives are met
- Transfer data from tax preparation software into Salesforce. During the tax season,

produce weekly reports showing results against program goals for Tax Assistance Program Director

- Implement program and process surveys, involving all program stakeholders
- Provide troubleshooting assistance with Salesforce and tax preparation software as necessary

Reporting (25%)

- Run queries, provide analysis, produce dashboard reports, and other reports as requested by the Executive Director and other departments Directors, as well as external parties, as necessary
- Develop quarterly and year-end reports for internal and external use of results tracking
- Produce weekly reports showing results against goals. Provide those reports to the Tax and Financial Capability Directors

Program Improvement (25%)

- Use analysis to inform recommendations and strategies that support program improvements
- Provide audit of data collection to ensure efficiency and constant improvement of programs
- Implement program and process surveys, involving all program stakeholders
- Work with the team to provide program design suggestions as they relate to evaluation results

Data Collection Support (25%)

- Develop data collection tools and manuals that promote consistencies across programs
- Develop and maintain data collection structure for Financial Capability program coaches (staff and volunteers) and clients
- Develop and maintain data collection for Tax and Financial Capability departments
- As the Power User for Ladder Up, train current and new departmental staff on Salesforce, following the standards manual and other training materials. Seek out training opportunities to increase proficiency with Salesforce.

Other (5%)

- Convene and lead internal working data group with staff from other departments (Tax, Tax Clinic, Financial Capability) to help identify best practices and insights
- Provide specified data points to the Executive Director and Development Director as necessary
- Attend and actively participate in required educational programs and departmental and staff meetings
- Protect organization's value by keeping information confidential
- Update job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations
- Perform other duties as assigned by supervisor

To Apply

Please send a cover letter and resume to Kate Hermann Stone, Ladder Up Development Director, at khermannstone@goladderup.org.

For more information about Ladder Up, please visit www.goladderup.org