

# LADDER UP

## Volunteer Engagement Coordinator

### **Organizational Overview**

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 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 1,000+ volunteers, Ladder Up offers free tax return preparation at more than 25 tax sites
- **Financial Capability**
  - **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 partner organizations
- **Tax Clinic:** Ladder Up offers free legal representation to low-income taxpayers facing tax controversies

### **Position Description and Responsibilities**

Working together with the Tax and Financial Capability program teams, the Volunteer Engagement team is responsible for helping to grow and strengthen Ladder Up's volunteer program, through which Ladder Up works with more than 1,000 volunteers. Under the leadership of the Volunteer Engagement Manager, the Volunteer Engagement Coordinator will help to identify and cultivate working relationships with individuals, faith-based and nonprofit organizations, professional associations, and corporate partners.

We are looking for a friendly, professional, and detail-oriented individual who can actively participate in external-facing programs and events, and provide volunteers with a high-quality experience. The anticipated start date for this role is July 2019.

### **Position Qualifications**

- Excellent interpersonal and customer service skills
- Excellent oral and written communication skills
- Quick learner who can adapt and work well in new situations or under pressure
- Minimum of one year of experience working with volunteers in community programs, or other relevant experience
- Ability to effectively acknowledge and address client and volunteer complaints and issues
- Proficiency in Microsoft Office applications
- Salesforce experience preferred
- High level of organization and attention to detail
- Bachelor's Degree or commensurate experience

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### **Position Responsibilities**

#### **Volunteer Relationship Stewardship (approximately 40%)**

- Support volunteers requiring assistance with registration for sessions, navigating the online training modules, and logging their hours
- Check volunteer helpdesk (e-mail and phone inbox) daily and work with the Volunteer Engagement team to ensure that volunteer questions and issues are resolved in a timely manner
- Help execute volunteer appreciation/recognition events for volunteers active in various Ladder Up programs. Most of these appreciation events take place during May-June and September-October on weekends and weeknights.
- In collaboration with other departments, create content for the volunteer newsletter and distribute to volunteers.
- Assist with creating and distributing volunteer surveys, mailings, and other projects as assigned by the Volunteer Engagement Manager and/or Tax Assistance Program Director
- Participate in developing and implementing strategies for volunteer stewardship, management, and retention that promote high levels of volunteer satisfaction and retention

#### **Volunteer Training and Tax Assistance Program Support (approximately 35%)**

- Work with the Volunteer Engagement staff to plan and coordinate logistics for volunteer orientations and trainings for all Ladder Up programs. During tax season (January-April), most of those sessions take place on weeknights and Saturdays.
- Conduct weekly tax site visits during the regular tax season to meet with volunteers, check in on their experience, and provide support at tax sites in various tax site roles as needed.
- Learn to use Ladder Up's tax software and complete the IRS Volunteer Income Tax Assistance (VITA) certification at the Advanced Level (note: prior tax preparation experience is not required – training will be provided)
- Assist tax site staff with tracking volunteer sign-ups and logging volunteer attendance

#### **Volunteer Database (approximately 25%)**

- Help to manage volunteer program data, including purging lists, creating records, maintaining volunteer contact information, records of volunteer service, and data on volunteer shifts using VolunteerHub and Salesforce
- Assist other Ladder Up staff members with use of Salesforce, following the standards manual and other training materials. Seek out training opportunities to increase proficiency with Salesforce.
- Assist the Data and Evaluation Coordinator with running queries, providing analysis, and producing dashboard reports and other reports related to volunteer engagement as requested by the Executive Director and other department Directors
- Utilize and set up Salesforce and VolunteerHub so that volunteers can sign up for available training and volunteer shifts
- Assist the Volunteer Engagement Manager with volunteer list management to facilitate delivery of communications to specific segments

And other duties as assigned.



## **Volunteer Engagement Coordinator**

This is a full-time, exempt, entry-level position. The Volunteer Engagement Coordinator will be expected to work between 35-40 hours each week, with slightly longer hours before and during the tax season (December-April). Some early mornings (7am), evenings, and weekends will also be required at times, due to the nature of the volunteer training schedule and tax site service hours.

### **To Apply**

Please send a cover letter and resume to Lilly Lavner, Ladder Up Tax Assistance Program Director, at [llavner@goladderup.org](mailto:llavner@goladderup.org).

Candidates who do not submit a cover letter as part of their application materials will not be considered. The anticipated start date for this role is July 2019.

For more information about Ladder Up, please visit [www.goladderup.org](http://www.goladderup.org)