

LADDER UP

Tax Assistance Program 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

Ladder Up seeks a highly organized, detail-oriented, and self-motivated individual to serve as a full-time Tax Assistance Program (TAP) Coordinator. The Coordinator supports the Tax Assistance Program team through administrative and operational support as well as project management. This individual will have the primary responsibilities as listed below and will provide additional support as needed.

Position Responsibilities

Program Administrative Support & Project Management (approximately 40%)

- Project manage the regular maintenance of the training modules that are made available online, including:
 - Managing the developers and voice-over talent
 - Copyediting and proofreading training documents for online and in-person trainings
 - Serving as the liaison with consultants and the volunteer resource team to ensure all published content is accurate and informative
- Review and provide content for the online and in-person training curriculum, as needed
- Work with the TAP team to ensure that materials are ordered and printed on time to meet program needs
- Serve as a liaison with the graphic designer to ensure that site publications and other materials are created and sent to the printer on time to meet program needs
- Assist with creating and distributing client surveys, executing mailings, and helping with other recruitment projects
- Participate in developing and implementing processes and strategies that promote the success of the Tax Assistance Program



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Tax Site Operations and Site Staff Support (approximately 40%)

- Help to manage the planning and logistics related to Site Manager training
- Serve as a primary or backup tax trainer as needed
- Work with the TAP team to develop and conduct performance evaluations for trainers and Tax Site staff
- Oversee individual site hospitality budgets
- Review and approve requests from Tax Site staff for reimbursements for appropriate purchases and for additional site material shipments, as needed
- Visit tax sites regularly during the regular tax season to provide support and ensure that sites are running smoothly, 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)
- Fill in as Site Manager at tax sites during the season, as needed

Volunteer Engagement Team Support (approximately 20%)

- Work with the Volunteer Engagement staff to plan and coordinate logistics for volunteer orientations and trainings. During tax season (January–April), most of these sessions take place on weeknights and Saturdays.
- Collect aggregate data through platforms utilized by the Volunteer Engagement staff (including Salesforce, VolunteerHub, and Intellum Exceed) regarding volunteer and Tax Site staff certifications
- Assist Volunteer Engagement staff and Tax Site staff with tracking volunteer sign-ups and logging volunteer attendance
- Assist Volunteer Engagement staff and Tax Site staff with navigating the online training modules
- In collaboration with other team members, create and share content for the volunteer newsletter and Ladder Up's social media accounts

And other duties as assigned.

Position Qualifications

- Strong organizational skills and attention to detail
- Ability to prioritize competing priorities and deadlines
- 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 in an office environment
- Project management experience and/or expertise in logistics preferred
- Ability to effectively acknowledge and address client and volunteer complaints and issues
- Proficiency in Microsoft Office applications
- Bachelor's Degree or commensurate experience

This is a full-time, exempt position. The Tax Assistance Program 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 training schedule and tax site service hours.



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To Apply

Please send a cover letter and resume to Lilly Lavner, Ladder Up Tax Assistance Program Director, at 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 August 2019.

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