LADDER UP

Reporting and Data 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 900+ volunteers, Ladder Up offers free tax return preparation at more than 20 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

Reporting to the Development Director and working with the Development, Volunteer Engagement, Tax Assistance Program (TAP), Tax Clinic, and Financial Capability departments, the Reporting and Data 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 TAP, Tax Clinic, and Financial Capability programs' outputs and 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 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 Responsibilities

Data Collection Support (30%)
- Act as Ladder Up's Salesforce Administrator and one of the organization's Salesforce Power Users to train current and new departmental staff on Salesforce by using and updating the standards manual and other Salesforce training materials
- Seek out and regularly engage in training opportunities to maintain and increase proficiency with Salesforce
- Develop data collection tools and manuals that promote consistencies across programs
- Support data collection for the Tax Assistance Program by coordinating with the E-File team on data exports and supervising seasonal Data Entry Associates

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- Support the Volunteer Engagement team by regularly pulling reports from the volunteer scheduling platform and learning management system regarding volunteer hours, certifications, and any other volunteer data that may be needed
- Develop and maintain the data collection structure for financial coaches (staff and volunteers) and clients
- Support data collection and management for the Tax Clinic
- Provide data as needed for external and program audits

Reporting (30%)
- Manage all data reporting for internal and external consumption, including reports for grantors, corporate and community partners, boards, and directors throughout the year
- Provide tax-season specific reports to TAP partners during the tax season
- Ensure data transfer between systems— volunteer scheduling platform, learning management system, tax preparation software, Microsoft Access, Salesforce, etc.— and internal recordkeeping is clean and up to date

Database Management (20%)
- Work with TAP, the Tax Clinic, and the Financial Capability Program to develop sustainable data collection processes
- Implement program and process surveys, involving all program stakeholders
- Conduct quality assurance to confirm that all systems are working correctly and provide troubleshooting assistance with Salesforce and other tools as necessary
- Coordinate with TAP staff to create and pull client data reports from Microsoft Access client databases
- Support TAP by providing weekly or bi-weekly reports from the volunteer scheduling platform and learning management system used for volunteer data management during the tax season and training months immediately preceding (typically mid-November through the end of April)

Program Improvement (15%)
- In coordination with respective program staff and directors, use analysis to inform recommendations and strategies that support program improvements
- Provide audit of data collection to ensure efficiency and constant improvement of programs
- Work with the team to provide program design suggestions as they relate to evaluation results

Other (5%)
- Convene and lead internal data working group with staff from other departments 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

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publications; maintaining personal networks; participating in professional organizations where applicable
- Perform other duties as assigned by supervisor and other staff members

Position Qualifications
- Proficiency with Salesforce required
- Excellent attention to detail, highly organized with experience making data-driven decisions
- Familiarity with Microsoft Office suite preferred, including high proficiency with Microsoft Excel and Access
- Demonstrated ability to effectively integrate and present data within written reports
- Previous experience in data collection and/or outcome evaluation and bachelor's degree in related field preferred
- Excellent interpersonal and communication skills
- Enthusiastic and positive attitude

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