



Tax Assistance Program - Site Manager **FY 2021-2022**

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 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 to thousands of clients at multiple tax sites

Site Manager Seasonal Position (January 2021 - April 2022)

Position Description and Responsibilities:

The Site Manager plays a vital role in keeping the tax site operating smoothly throughout the duration of the tax season. The Site Manager oversees all aspects of site operations, including set up and break down of site materials for each session, and supervises the intake and site flow processes to make sure that clients understand what to expect and that the site stops taking in additional clients once the site has reached capacity for the session.

The Site Manager sets expectations for how the site will run and checks that the site meets all IRS Quality Site Requirements. This individual is responsible for ensuring that clients and volunteers are always treated fairly and professionally, and that volunteers and site staff apply tax law appropriately so that returns are prepared accurately and efficiently. This individual also acts as the main Tax Assistance Program (TAP) liaison to the Ladder Up office staff, and as the point of contact for volunteers, site staff, clients, and site host representatives. The Site Manager also ensures that client's data and information are kept confidential. We are looking for friendly, professional, and detail-oriented individuals who will provide clients with a high-quality tax preparation experience.

Tax Site Operations (60%)

- Arrive 60-90 minutes prior to the posted opening time to set up the site
- Assist volunteers with logging their hours using the online VolunteerHub Kiosk
- Monitor the flow of the site, volunteer turnout, and client volume, and monitor site capacity for the session
- Address questions that volunteer and site staff have about the application of tax law and/or and on-call "Tax Experts" available by phone during the session
- Perform data reconciliation and electronic file all tax returns at end of session.
- Break down site materials and put away at the end of the session as needed

Customer Service (30%)



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- Always treat clients professionally, with courtesy and respect
- Protect and maintain confidentiality of client information
- Lead Intake Meeting at the start of each session to provide information and resources to volunteers
- Always comply with IRS Quality Site Requirements
- Check that all new volunteers at the site have completed their certifications
- Encourage Quality Reviewers to provide feedback to Tax Preparers as part of the review process

Tax Preparation and Review (10%)

- As needed, assist in any of the open tax site roles including Client Case Reviewer, Tax Preparer, and/or Quality Reviewer
- Promptly and accurately complete and/or review client returns while at a tax site as needed
- Review client returns and paperwork to ensure that all documents have been filled out by clients, Tax Preparers, and Quality Reviewers, and that the tax return reflects the information shared by the client
- Support the skill building of peer tax preparers and volunteers by providing guidance and educational support

Position Qualifications:

- Excellent leadership and customer service skills
- Enthusiastic and positive attitude
- Highly organized, detail-oriented and flexible in a dynamic environment
- Open to working at multiple tax sites
- Experience or background in taxes and/or VITA preferred
- Able to set up laptops, printers, and troubleshoot tech

The position is active from January through the end of the filing season (typically on or around April 15). Ladder Up tax sites are located all over the greater Chicago area and in Springfield, and can be viewed on the Ladder Up website (www.goladderup.org/locations).

Available shifts will vary based on the tax sessions calendar and the candidate's willingness to travel to open tax sites. As part of the hiring and on-boarding process, all successful candidates must complete the online training modules and pass the IRS Volunteer Income Tax Assistance (VITA) certification at the Advanced Level. The starting pay rate is commensurate with experience.

To Apply

Please send a resume to:

Evelyn Espinosa
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Tax Assistance Program Manager

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