

LADDER UP

Ladder Up Bilingual Office Assistant – Full Time

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 who have tax controversies

Position Qualifications:

- Fluent in Spanish
- Customer service and/or other office (including scheduling and telephone) experience
- Excellent oral and written communication skills
- Ability to communicate effectively and respectfully with diverse populations
- Flexibility and adaptability
- High level of motivation and interest in learning new skills
- Proficiency in Microsoft Office applications
- High level of organization and attention to detail
- Ability to follow up on client complaints and issues
- Quick learner that can work well in new situations or under pressure

Position Description and Responsibilities:

Ladder Up is looking for a highly organized and self-motivated individual to serve as a full-time office assistant. Fluency in Spanish is required for this position. This individual will have the following responsibilities:

General Office Administrative and Human Resources Support (60%)

- a. Assist staff in maintaining the office supplies storage space and tracking IT and other office supply inventory
- b. Answering phone calls, transferring callers as appropriate
- c. Greeting customers and visitors to the office, ensuring guests are comfortable and are connected with the right office personnel
- d. Managing schedules for conference and community spaces
- e. Monitoring and ordering inventory for office and break room supplies

LADDER UP

- f. Managing incoming and outgoing correspondence, including emails, faxes, mail and packages
- g. Filing and organizing records, invoices and other important documentation
 - a. Scanning reimbursement checks, vendor checks, and bi-monthly payments for independent contractors
- h. Submitting work orders and scheduling repairs for general office space and equipment
- i. Ordering repairs for office equipment and maintenance, connecting with and escorting vendors
- j. Act as liaison to designers and other consultants who developing printed materials for the office
- k. Act as main point of contact for vendors and printing companies (solicit for quotes for large projects and coordinate a clear timeline of projects across the office)
- l. Review client materials that have been translated into Spanish
- m. Assist tax sites as needed during the tax season on Saturday mornings (January – April)
- n. Attend off-season tax sessions and assist with e-filing client returns and following up on rejected returns (May–October)

Development and Finance Administration Support (15%)

- a. Help the Director of Finance and Administration file financial statements
 - a. Organizing records, invoices, and other important documentation
 - b. Scanning and mailing reimbursement checks
 - c. Maintaining employee Ventra database

Program Support (25%)

- a. Work with Directors of TAP, Tax Clinic, Financial Capabilities, and Development to update client-facing communications
- b. Work with TAP Team to identify and develop communication strategy to engage more community partners and clients during the spring and summer
- c. Work with Volunteer Engagement Team to create volunteer-facing communications for upcoming sessions (flyers, e-mails, postcards, newsletter, etc.) during the spring and summer
- d. Assist with in-person tax training set up, registration, and reception of volunteers during November – February
- e. Attend all off-season tax sessions (May – October) and assist with E-filing client returns, following up with rejected returns
- f. Assist with data entry related to tax program clients as needed
- g. Check and return hotline calls to answer client questions regarding tax site locations, schedule, and required documents
- h. Answer ITIN hotline calls and schedule appointments for CAA Agent
- i. Learn to use Ladder Up's tax software and complete IRS VITA certification at the Advanced Level (Prior tax preparation experience is not required)
- j. Provide general administrative support to TAP team staff during the tax season

And other duties as assigned.

LADDER UP

This is a full-time position. The Office Assistant will be expected to work between 35-40 hours each week, with slightly longer hours during the Tax Season (January – 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 open hours throughout the year.

Candidates who do not submit a cover letter as part of their application materials will not be considered. Interested candidates should send a resume and cover letter to:

Becky Santiago
TAP Engagement Sr. Manager
bsantiago@goladderup.org

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