

LADDER UP

Data and Technology Manager

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, 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 800+ volunteers, Ladder Up offers free tax return preparation at more than 15 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, self-sufficient and self-starter individual to serve as a full-time Data and Technology Manager. This position provides support for all of Ladder Up's programs through analysis of data 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.

Management of Equipment and Technology

- Coordinate with Office Manager/Director of Finance and Administration on tech needs
- Provide computer hardware and software technical support for organization (facilitate use of IT equipment for meetings, training, and various events)
- Maintain (run updates), install, and test software applications, collaborate with network and application vendors to identify and solve problems
- Actively participate in hiring and product acquisition decisions for technology and IT support vendors, including soliciting initial bids, and maintain the accounts
- Revise and update technology and equipment troubleshooting user guides.
- Ensure technology at tax sites is fully functioning for tax preparation sessions, troubleshoot and respond to technical issues raised at tax sites
- Work with the Office Manager to ensure the timely deliveries and pick up of computer equipment and materials to tax sites
- Maintain warehouse/storage facility, manage the process of storing client data to ensure security and timely destruction and retention of appropriate files, as per IRS guidelines (should store them for 5-years max)
- Oversee and be POC for equipment configuration and any IT third party (i.e. IT-Framework, ShapeConnect, etc.)
- Administer the imaging of laptops
- Complete full inventory of site supplies and IT equipment pre and post season
- Serve as check for tech-specific invoices; review billing for accuracy and completeness
- Assess, coordinate, and schedule shredding and tech recycling services, storage moves coordination

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E-File

- Collaborate with E-file Coordinators to pursue opportunities to improve e-file procedures and best practices to lower rejection rates
- Correspond with clients via e-mail and phone, following up on issues escalated from E-File Coordinators
- Track e-file rejection error codes and pass the information to leadership team
- Collaborate with TAP Director and ED on interviewing and hiring of seasonal technology positions
- Review and edit the tax client database in collaboration with E-File Coordinators
- Collaborate with TAP Director to set quantities of printed materials for tax season based on postseason inventory

Data (Reporting/Client Management Database)

- Coordinate with IRS SPEC Manager for requirements related to VITA (IRS Forms)
- Ensure that tax preparation data outputs are regularly updated as needed, including pulling raw data, initial data clean up, and import into Access database
- Manage and analyze program data by developing and overseeing data collection efforts ensuring that all data is collected consistently and regularly,
- Provide data and generate monthly, quarterly, and annual reports for leadership teams
- Implement program and process surveys, involving all program stakeholders
- Design, refine, and implement data collection processes and evaluation strategies while collaborating across all departments, enabling the organization to achieve its objectives
- Measure all aspects of Ladder Up's programs' outcomes, including the development of metrics, data collection, internal and external reports, and linkage of program measurement to relevant benchmarks
- Create and update data weekly, conduct field mapping, and prepare data for analysis by incorporating relevant metrics such as CDBG status, income levels (HUD and FPL), and more via Excel and Microsoft Access
- Maintain user guides for data pulls and data entry into databases, collaborating with program and Executive Directors for refinements
- Run queries, perform analyses, and produce reports and stats for quarterly, monthly, year-end reports and grant applications

Requirements:

- Bachelor's Degree or commensurate experience
- High level of organization and attention to detail, self-starter
- Proficient in MS Office including Excel and Access, and able to understand software effortlessly
- Bonus: Basic tax knowledge, other language

Send resume to info@goladderup.org - Subject Line: **Data and Technology Manager Position**