

Client Services Manager

Community Initiatives is an Oakland based nonprofit organization providing more than 110 different nonprofit clients with fiscal sponsorship, including tax-exemption, accounting and financial oversight, risk management and insurance, legal compliance, grants management, and human resource services. Our fiscally sponsored projects (FSPs) represent various nonprofit sectors—arts and culture, education, environment, health, human services, and public affairs.

Summary:

Community Initiatives Client Services Department delivers high quality client relationship management to our nonprofit clients. Serving as the main point of contact for a portfolio of clients, the Client Services Manager provides exceptional service, support, and guidance to ensure that clients' missions are met. This position works collaboratively across Community Initiatives' departments to support diverse projects of all levels of complexity and maturity which involves critical analysis of issues and proposals of solutions. In addition, the Client Services Manager ensures that FSPs follow Community Initiatives policies and procedures while providing advice on operations, administration, and risk mitigation.

Essential Job Functions:

- Builds relationships with FSPs, learning about their programs, staffing and revenue structures, etc. to provide tailored service and support.
- Independently identifies and matches appropriate services to FSP needs, such as diversified fundraising strategies, programmatic support, legal aid, etc.
- Oversees FSPs compliance with policies and procedures.
- Designs and leads client training on Community Initiatives' services.
- Verifies that documentation is collected and reported according to organizational standards for accuracy, completeness, and timeliness.
- Collaborates with CI team on identifying/evaluating potential risks and reporting to management.
- Reviews revenue contracts and grants.
- Administers FSP grantmaking programs and supports audits.
- Works with FSPs and insurance brokers to ensure they are adequately covered, e.g. business property coverage, waivers, planning events, etc.
- Contributes to the creation and completion of Client Services and organizational goals, such as increasing FSP retention, satisfaction, and stability.
- Supports leadership team in evaluating potential clients by conducting analysis of overall fit with Community Initiatives' mission.
- Provides support to Client Services Management and executive leadership by providing information and feedback.
- Provides data analysis, research, and reporting as it relates to FSP satisfaction and improving Client Services.
- Communicates across departments on Client Service-related issues and projects.
- Provides guidance regarding fiscal sponsorship compliance and industry best practices.

- Communicates regularly with management on activities and on pertinent operational or human resource issues.

Qualifications

Required Qualifications

- BA/BS Degree in a related field.
- 3-5 years of non-profit experience.
- Experience managing fiscally sponsored projects with advanced knowledge in fiscal sponsorship, including federal, state and local law/regulations, preferred, and previous management or leadership experience in the nonprofit sector required.
- Ability to evaluate compliance risks and apply to industry theories into best practice.
- Ability to read and understand legal contracts and provide opinions for contract, grant administration and insurance issues.
- Advanced coaching/mentoring skills with the ability to develop projects and convey complex concepts in a clear, understandable manner.
- Outstanding communication skills, both verbal and written to effectively communicate through all mediums one-on-one and with small groups while displaying the ability of active listening to understand varying viewpoints and receive feedback.
- Ability to work across departments to provide excellent service to clients.
- Project management skills to lead a team, prioritize personal and team tasks and see projects through from inception to completion.
- Advanced analytical abilities and problem-solving skills to quickly evaluate complex issues, identify options for resolution.
- Ability to work independently and be part of a dynamic team.
- Thrives in a fast-paced environment.
- Consultative, flexible and creative.
- Knowledge of spreadsheet applications and other office software, Excel, Word, Power Point, and Salesforce.

Physical Demands

- While performing the duties of this Job, the employee is regularly required to sit, use hands to finger, handle, or feel and talk or hear. The employee is occasionally required to stand; walk and reach with hands and arms. The employee must occasionally lift and/or move up to 30 pounds.

Working for Community Initiatives

This is a full-time, exempt position that includes extensive benefits and a competitive salary commensurate with experience. \$75,000-\$85,000/year. This position is currently remote during the COVID pandemic but will be located at our office in Oakland when safely possible. There is the possibility of working remotely one or two days a week post-COVID. COVID vaccination or regular testing may be required.

Community Initiatives offers a comprehensive benefits package including:

- Fully paid medical, dental and vision
- 401k and 3% employer match
- Basic life insurance, AD&D, STD & LTD
- 4 weeks of paid vacation
- 12 days of paid sick leave
- 11 paid holidays
- 4 floating holidays

Interested candidates should submit a cover letter with salary requirements and resume to jobs@communityinitiatives.org

Community Initiatives is an equal opportunity employer and gives consideration for employment to qualified applicants without regard to age, race, color, religion, creed, sex, sexual orientation, gender identity or expression, national origin, marital status, disability or protected veteran status, or any other status or characteristic protected by federal, state, or local law.