



## Client Services Program Coordinator

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. **This is currently a hybrid role working at least one day/week in our office in downtown Oakland or downtown Los Angeles.**

### **Summary:**

The Client Services Program Coordinator serves as our external point of contact for our shared portfolio of projects. The Client Services Program Coordinator provides excellent customer service and crucial internal support to the client services team.

### **Essential Job Functions**

#### **Client Service Support (40%)**

- Triage all incoming communications to appropriate staff members
- Ensure all communications are responded to within 24 hours
- Respond to general requests
- Troubleshoot day-to-day client questions and requests related to internal systems and operations
- Support client services team by providing administrative support including: database entry, maintaining client records and handling other administrative requests from senior staff members
- Track and manage document signatures
- Prepare check requests for vendors and projects, as requested
- Support team with annual client survey process, support w/ data collection, review
- Support VP of Client Services in drafting quarterly newsletter
- Develop strong database skills to ensure consistent inputs, run and recommend actionable reporting

#### **New Business (30%)**

- Respond to and schedule new business inquiry calls
- Track and manage prospective projects at various stages of the new business pipeline
- Schedule meetings for prospective clients in various intake stages
- Manage and update various forms and templates as needed
- Review applications for completeness
- Provide initial copyediting and formatting for Board memos and other Board materials

#### **On-Boarding (20%)**

- Oversee the on-boarding process for all new fiscally sponsored projects
- Schedule training and provide one-on-one support for 3<sup>rd</sup> party platforms available to new projects
- Maintain accurate data records for all incoming projects



### **Special Projects (10%)**

- Special assignments, projects and tasks to meet goals and needs of the team.

#### Required Qualifications:

- Demonstrated ability to prioritize amongst multiple commitments simultaneously in a fluid environment
- Project management skills with high attention to details
- Outstanding communication skills, both verbal and written, to effectively communicate complex concepts in a clear, understandable manner
- Strong interpersonal skills and an ability to build rapport with partners and stakeholders
- Analytical abilities and problem-solving skills
- Ability to work as part of a dynamic team
- Thrives in a fast-paced environment
- Flexible, creative, and a quick learner
- Knowledge of MS Office Suite
- 1-3 years of relevant work experience in nonprofit, client/donor focused environment
- B.A./B.S. degree, or equivalent experience
- Solid understanding of Salesforce or similar CRM database platform strongly preferred

### **Working for Community Initiatives**

This is a non-exempt position at \$32-\$35/hour.

This position is currently hybrid with at least one day/week in office – Oakland or Los Angeles

Community Initiatives offers a comprehensive benefits package including:

- Fully paid medical, dental and vision
- 401k and Roth with 5% 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

### **Application Instructions**

Interested candidates should submit a cover letter with salary requirements and resume to [jobs@communityinitiatives.org](mailto:jobs@communityinitiatives.org)

### **Equal Employment Opportunity**

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.