



## **Community Initiatives**

### **Senior Client Services Manager**

#### **Description**

Community Initiatives is an Oakland-based nonprofit service organization providing over 150 nonprofit projects with fiscal sponsorship services including tax-exemption, accounting and financial oversight, risk management and insurance, legal compliance, grants management, payroll, and human resource services. Our fiscally sponsored projects (FSPs) represent all nonprofit sectors—arts and culture, education, environment, health, human services, and public affairs. While many of our projects are in the San Francisco Bay Area, others operate in various states and international locations.

The Senior Client Services Manager operates within a team-based framework, overseeing a diverse and multifaceted portfolio of FSPs that span various issue areas and complexities. This role demands a high degree of autonomy, includes staff supervision, and plays a crucial role in evaluating potential new business opportunities. The Senior Client Services Manager significantly influences Community Initiatives' programs and services, particularly in expanding our client base.

The Senior Client Services Manager is an excellent communicator and thoughtful collaborator, adept at building strong relationships with FSP leaders. A successful candidate will have excellent analytical skills and the ability to propose creative solutions to the unique administrative and operational challenges faced by developing organizations. This position must exercise judgment and engage empathetically when implementing Community Initiatives' policies and external regulations. This role involves maintaining a portfolio of complex clients, with a strong preference for candidates who have prior experience in fiscal sponsorship and a deep understanding of the lifecycle of nonprofit organizations.

#### **Essential Job Functions:**

##### **Client Service Portfolio Management and Process Improvements**

- Serve as relationship manager for highly complex clients that require experience navigating ambiguity, managing expectations, relationship management, and strategic advising
- Functions as a lead, identifying resolutions for escalated issues to support successful delivery of services to FSPs
- Regularly provides strategic guidance to leadership team on plans to meet Client Services objectives, influencing on standard, goal, planning, and metrics to measure success.
- Instrumental in providing feedback and developing client services department annual plans
- Identifies patterns and trends in issues arising and proposes changes to processes and service offerings
- Supports development and implementation of infrastructure (Salesforce, TaskRay, Asana) that drives internal efficiency and seamless client interactions



### New Project Pipeline Support

- Supports intake of new FSPs by meeting with prospective clients to determine readiness and fit
- Reviews applications and conducts due diligence process to assess charitability and risk
- Coordinate across departments to determine FSP alignment with internal policies
- Works to support network-building opportunities and convenings, strengthening Community Initiatives brand and voice in the sector

### Compliance

- Ensures consistent implementation of Community Initiatives' fiscal sponsorship policies
- Identifies potential compliance risks and recommends areas for improvement
- Works across teams to operationalize new policies
- Understands and responds to a range of legal concepts and issues that arise including Unrelated Business Income Tax, Private Benefit Issues and revenue schemes in collaboration with Finance
- Applies understanding of options to support clients in riskier revenue opportunities
- Reviews complex, long contracts, identifies issues/risk and suggests solutions
- Works on special projects with outside consultants such as with insurance brokers to understand and reduce risk; evaluation firm to update, distribute and analyze annual survey, etc.

### Supervision and Problem Solving

- Supervises other Client Services team members. Functions as a lead, coaching and mentoring staff by providing guidance and direction. Serves as a resource on challenging or complex issues
- Proactively resolves problems. Asks the right questions, gathers information, research as necessary, and identifies potential options for resolution
- Serves as a resource on escalated issues with the ability to resolve most issues including problems that are unprecedented and complex
- Assist in planning and executing team retreats and planning sessions

### **Qualifications:**

#### Required Qualifications

- BA/BS Degree in a related field
- Seven years of non-profit experience
- Knowledge of fiscal sponsorship, fiscally sponsored projects, and/or nonprofit infrastructure
- Excellent communicator who can convey complex information in a clear and concise manner
- Active listening skills with an open mind to consider all points of view
- Strong manager with the ability to maintain relationships with the Client Services Team, cross-functionally, and with clients
- Demonstrated collaboration skills to solicit and incorporate ideas when appropriate, be critical about information/apply it appropriately and promote and develop others
- Sharp analytical aptitude with critical thinking skills to challenge conventional practices and apply knowledge to recommend innovative, industry leading improvements



- Consistently deliver high quality work on time and follow through on commitments with the knowledge to take steps to correct mistakes and make improvements
- Highly skilled, flexible and adaptable project manager who can lead teams and direct projects from inception to completion on schedule while anticipating and handling change effectively
- Demonstrated diplomatic direct approach when utilizing verbal/written communication skills to address critical, sensitive situations such as client issues and complaints
- Ability to assess systems and policies to provide recommendations for ongoing system or policy improvements
- Ability to ask questions and understands not just what clients say but what they truly want and help meet their needs
- Enjoys working in a fast-paced fluid environment

**Preferred Qualifications:**

- Salesforce experience, track record of supporting successful technology implementations
- Master's Degree in non-profit management
- 2 years of experience working in fiscal sponsorship

**Working for Community Initiatives**

Currently, we're working in office (Downtown Oakland - 12th Street BART) at least one day/week and that may increase in the future. This is a full-time position that includes excellent benefits and a competitive salary commensurate with experience (\$85,000-\$95,000/year).

Comprehensive benefits package including:

- Fully paid medical, dental and vision
- 401k with 5% employer match
- Fully paid basic life insurance, LTD, STD coverage
- 4 weeks paid vacation
- 14 paid holidays
- 4 floating holidays

**Application Instructions**

Interested candidates should submit a resume and cover letter with salary requirements 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.