



Client Services Manager

Description:

Community Initiatives is a California-based nonprofit organization providing more than 160 different nonprofit projects 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 – and operate both locally in the San Francisco Bay Area and Los Angeles County, as well as across the United States and international locations.

Summary:

Community Initiatives' Client Services Department delivers high-quality project relationship management to our nonprofit projects. Serving as the primary point of contact from the Client Services Team for an assigned portfolio of Fiscal Sponsored Projects (FSPs), the Client Services Manager provides exceptional service, support, and guidance to help projects achieve their goals while operating in compliance with Community Initiatives' policies and procedures.

The Client Services Manager works both independently and collaboratively to support a diverse portfolio of projects that vary in size, complexity, and stage of development. This position is responsible for building strong client relationships, assessing and addressing operational and administrative needs, and providing practical guidance to support project success. The role requires critical thinking, sound judgment, and the ability to analyze issues, identify solutions, and coordinate with internal teams to resolve challenges effectively.

This position follows a hybrid work model with a minimum of one on-site day per week. Regular attendance at in-person client meetings and team meetings is expected. The preferred work location is our Los Angeles office; however, we may also consider qualified candidates based near our Oakland office who are able to meet the on-site requirements for their location.

Essential Job Functions:

Client Service Portfolio Management

- Manages an assigned portfolio of Fiscal Sponsored Projects (FSPs) and serves as a primary point of contact for routine client service needs.
- Proactively nurtures portfolio relationships to anticipate project needs and align resources through clear communication and strategic partnership.
- Provides high-quality service to meet portfolio's operational needs, including navigating CI's policies, procedures, and services.
- Resolves client issues promptly or escalate as needed, ensuring timely and proactive problem solving.
- Supports successful service delivery by coordinating with internal teams and following established processes.
- Oversees contracts and grant management for assign FSP portfolio.



- Schedules regular in person and virtual meetings with assigned portfolio to deepen knowledge of programmatic activities to anticipate future needs.
- Contributes feedback on client needs and process improvements to management.
- Identifies recurring issues and recommends process enhancements to improve client experience and operational efficiency.
- Supports the use and maintenance of client service systems and tools (Salesforce, TaskRay, Asana) to ensure accurate records and effective workflows.
- Represents Community Initiatives on a periodic basis by attending and presenting at conferences, gatherings, professional associations, and other external events.
- Engages with the broader fiscal sponsorship community to stay on top of sector patterns, trends and best practices.

Operational Support

- Supports implementation of Community Initiatives' fiscal sponsorship policies and procedures.
- Monitors client activities for adherence to established guidelines and escalates potential compliance concerns.
- Assists with communicating and implementing policy updates across client portfolios
- Reviews contracts and agreements for standard requirements and refers complex legal or risk-related concerns to leadership.
- Assists with special projects related to risk management, client feedback, and operational improvements.

Problem Solving and Team Support

- Serves as a resource for team members on routine client service questions and processes.
- Researches issues, gathers relevant information, and recommends solutions within established guidelines.
- Resolves day-to-day client concerns independently and escalates more complex or sensitive issues when needed.
- Collaborates effectively with colleagues across departments to support client needs and organizational objectives.
- Shares knowledge and best practices to contribute to team success and continuous improvement.
- Coordinates with Finance and other departments to address routine compliance-related questions.

Qualifications:

Required

- Bachelor's degree in a related field.
- Five years of professional experience in nonprofit operations, client services, account management, program management, grants administration, fiscal sponsorship, or a related field.
- At least three years of the five years must be working in a nonprofit, philanthropic, social impact, or mission-driven organization.



- Experience managing multiple client relationships or stakeholder groups simultaneously.
- Experience reviewing contracts, grant agreements, or other organizational documents.
- Experience working with diverse stakeholders and navigating complex organizational structures.
- Proficiency with CRM and project management platforms, such as Salesforce, TaskRay, Asana, or similar systems.
- Strong Microsoft Office skills, including Word, Excel, and PowerPoint.
- 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.
- Project management skills to lead a team, prioritize personal and team tasks, and see projects through from inception to completion.
- Strong coaching and relationship-building skills with the ability to support projects and communicate complex concepts in a clear and understandable manner.
- Strong analytical and problem-solving skills with the ability to assess issues, evaluate options, and recommend practical solutions.

Skills

- Strong customer service and relationship management skills, with the ability to build trust and maintain productive working relationships.
- Excellent verbal and written communication skills, including the ability to communicate complex information clearly and professionally.
- Strong analytical and problem-solving skills with the ability to assess issues, identify options, and recommend solutions.
- Ability to exercise sound judgment and discretion when handling sensitive or confidential information.
- Excellent organizational skills and ability to manage competing priorities in a fast-paced environment.
- Demonstrated ability to work independently while also collaborating effectively across teams.
- Ability to interpret and apply policies, procedures, and guidelines consistently and thoughtfully.
- Ability to work across departments to provide excellent service to projects.
- Commitment to providing equitable, inclusive, and client-centered service.

Preferred Qualifications:

Experience with fiscal sponsorship strongly preferred. Experience managing fiscally sponsored projects with advanced knowledge in federal, state, and local law/regulations to evaluate compliance risks and to apply industry theories into best practices. Demonstrated experience and knowledge of strategic planning, fundraising, grantmaking, nonprofit governance, and/or budgeting a strong plus.

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 working in a hybrid mode with one day/week in the Los Angeles or Oakland office.

Community Initiatives offers a comprehensive benefits package including:

- Fully paid medical, dental and vision
- 401k and 5% employer match
- Basic life insurance, AD&D, STD & LTD
- 4 weeks of paid vacation
- 12 days of paid sick leave
- 14 paid holidays
- 4 floating holidays

Interested candidates should [apply with resume, cover letter and salary requirements here.](https://recruiting.paylocity.com/recruiting/jobs/All/5afcfc77-1bbf-4541-97d9-3e5c607f0c09/Community-Initiatives)

<https://recruiting.paylocity.com/recruiting/jobs/All/5afcfc77-1bbf-4541-97d9-3e5c607f0c09/Community-Initiatives>

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.