

Community Initiatives Job Description

Job Title: Client Services Program Coordinator

Summary:

This position provides administrative support to the client services team. The Client Services Program Coordinator acts as an internal service provider to the client services team, executes routine tasks, escalates service issues to appropriate managers as required, and manages extensive inputs into the Community Initiatives database. Over time, the Client Services Program Coordinator will provide insight and recommendations on improving services with a priority on high customer satisfaction.

Essential Job Functions

- Support client services team by providing administrative support including: database entry, triaging email to appropriate person, scanning and copying documents, completing check log and scanning checks, maintaining client records and handling other administrative requests from senior staff members
- Schedule and document new business inquiries with the VP of Client Services
- Schedule meetings for prospective clients in various intake stages
- Collaborate with the Finance and HR Departments to support clients' financial needs, organizational effectiveness and capacity
- Ensure the back-up of our Salesforce database on a weekly basis; upload to our servers at a predetermined location
- Coordinate contract and grant management within Salesforce & DocuSign
- Develop strong database skills to ensure consistent inputs, run and recommend actionable reporting
- Create and update Salesforce records
- Design and improve Salesforce reports
- Act as a point of contact for all technical needs related to internal system use including, but not limited to, Salesforce, DocuSign, Form Assembly, Survey Monkey, and TaskRay
- Manage users of Project Portal

Document Retention

- Develop and improve saving protocols
- Responsible for storing all documents within Salesforce
- Manage and update various forms and templates as needed
- Update Project Portal on a regular basis with new and updated forms
- Audit the inventory of forms

Contract Management

- Ensure contracts are formatted correctly for signature
- Manage the full signature process including coordinating and communicating with all parties to gather signatures, ensuring all parties receive copies of agreement, and ensuring an executed copy of all agreements is gathered and saved appropriately.

Systems Improvement

- Manage backend updates and improvements to systems
- Support the integration of system use
- Act as liaison with tech consultants on various systems
- Develop workflows and support process improvements
- Make recommendations for system improvements

Qualifications:

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

CI 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

Application Instructions

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