Community Initiatives
Senior Client Services Manager

Description

Community Initiatives is an Oakland-based nonprofit service organization providing over 100 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 works in a team-based model in service of a diverse, complex portfolio of FSPs that range in issue area and level of complexity. This position functions with a high degree of autonomy, supervises staff, and has a significant influence on Community Initiatives programs and services.

The Senior Client Services Manager is an excellent communicator and thoughtful collaborator. A successful candidate will have excellent analytical skills and the ability to propose creative solutions to administrative challenges. This position must apply deep knowledge and exercise judgment when implementing Community Initiatives’ policies and external regulations. This role will hold a limited number of complex clients. A candidate with strong database experience is preferred.

Essential Job Functions:

Client Service Portfolio Management and Process Improvements

- Responsible for a discrete set of FSPs with complex administrative needs
- Performs strategic counseling/advising with clients
- Functions as a lead, identifying resolutions for escalated issues to support successful delivery of services to FSPs
- Supports intake of new FSPs by meeting with prospective clients to assess operations and risk
- Regularly provides strategic guidance to leadership team on plans to meet Client Services objectives, influencing on standard, goal, planning, and metrics to measure success.
- Identifies patterns and trends in issues arising and proposes changes to processes and service offerings
- Instrumental in providing feedback and developing client services department annual plans
- Supports development and implementation of technological infrastructure (Salesforce, Intacct, TaskRay) that drives internal efficiency and seamless client interactions

Compliance

- Ensures consistent implementation of Community Initiatives’ fiscal sponsorship policies
- Identifies potential compliance risks and recommends areas for improvement
- Works with Legal Director 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 with insurance brokers to understand and reduce risk

Supervision and Problem Solving
• Supervises Client Services Managers. 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, researches 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

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 delivers 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 effectivity
• 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 non-profit management
**Working for Community Initiatives**

This position is currently remote during the COVID pandemic but will be at our office in Oakland when safely possible. There is the possibility of working remotely one or two days a week post-COVID. This is a full-time position that includes excellent benefits and a competitive salary commensurate with experience.

Comprehensive benefits package including:
- Fully paid medical, dental and vision
- 401k and 3% employer match
- Fully paid basic life insurance, LTD, STD coverage
- 4 weeks paid vacation
- 10 paid holidays
- 4 floating holidays

**Application Instructions**

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