



Client Lead JOB ANNOUNCEMENT

TITLE Client Lead
FLSA STATUS Exempt
PAY CLASS Full-Time
REPORTS TO Manager, Consulting Services
LOCATION Santa Ana, California (Hybrid Schedule- 2 days remote/3 days on-site)

Who is Charitable Ventures?

Charitable Ventures was created to make sure nonprofits are resilient, effective, and empowered so they can serve their communities when they are needed most. Aiming to make our community more socially, racially, and economically just, our employees guide and design strategies to effectively address those needs.

Do you have a passion for ensuring a positive experience for Consulting Services clients to identify and understand their organizational needs?

If so, your passions align with the Charitable Ventures mission!

What are we looking for in our next team member?

Answer the questions below to see if you may be our new team member!

Are you ready to:

- Strategizing with clients to identify and understanding their organizational needs
- Making recommendations for services that would be beneficial towards the client's organizational mission, priorities, and identified needs.
- Creating proposals and scopes of work that support client needs.
- Communicating with clients regularly regarding timelines and deliverables.
- Maintaining and growing a positive relationship with assigned clients.
- Overseeing budgets for assigned clients, including tracking expenses and revenues, and making adjustments and budget modifications when needed.
- Creating, editing, and/or reviewing products and services related to CV service lines.
- Conducting workshops, meetings, presentations, and planning sessions, as appropriate to the scope of work for the assigned project/client.
- Communicating with the Client Lead and Client (as appropriate) regarding project deliverables and status updates.



- Providing recommendations and/or drafting the project scope of work and budget, as requested, and related to the designated service line(s).
- Backup support to Client Leads in tracking the status on all deliverables and timelines for clients.
- Adhering to the established quality processes and ensuring that resulting deliverables meet CV quality standards, prior to delivery to the client.
- Tracking the status on all deliverables and timelines for assigned clients.
- Collaborating with internal and external consultants on deliverables, from planning to completion.
- Collaborating with other divisions to support cross-functionality and full utilization of Charitable Ventures expertise towards supporting the client needs.
- Ensure that tasks follow the established quality processes and that the team creates deliverables meeting CV quality standards, prior to delivery to the client.
- Representing Charitable Ventures at events and supporting marketing and branding efforts.
- Participating in community convenings as relevant to the needs of assigned Consulting Services clients.
- Developing new business opportunities by identifying and soliciting potential community engagement projects in Orange County.
- Responding to inquiries for services from potential Consulting Services clients.

If you answered yes to any of the questions above, your next career may be waiting for you at Charitable Ventures! And we would love to explore it with you.

Job Summary

The Client Lead plays a critical role in the relationship held with Charitable Ventures Consulting Services clients. As assigned by the Manager, Consulting Services, the Client Lead will serve as the primary contact and support to Consulting Services clients.

The primary responsibilities of the Client Lead are to:

- 1) Support the client in strategic identification of needs and use of Consulting Services.
- 2) Ensure the provision of quality and timely consulting services to assigned clients.
- 3) Coordinate and ensure effective execution of contracts and deliverables.

What are the desired qualifications?

Education:

Bachelor degree in relevant field preferred; Master's degree highly desired



Experience:

- Five to ten years of experience in nonprofit field
- Five years experience in working with and maintaining positive relationships with clients
- Knowledgeable in public/private partnerships

Compensation Commensurate with experience, education, and market (\$68,640.00 to \$80,080.00 per year)

Benefits

- All employees: 401(k) voluntary employee contribution
- Full-time employees (30 or more hours per week): health insurance (medical, dental, vision); paid time off; company-wide holidays
- **But the most rewarding benefit is your ability to contribute to building stronger communities!**

Is this job not a right fit for you? Maybe it is for a colleague, friend, or neighbor. Please refer anyone that may be a good fit! And check back for other postings as you may become a team member through *your* unique skills and experiences!

Company Summary

Launched in 2007, Charitable Ventures is a non-profit organization dedicated to creating positive social impact through transformative ideas and investments. The agency provides incubation, sponsorship, and capacity building services such as planning, facilitation, and evaluation for funders, non-profit organizations, government, and community leaders throughout California.

Charitable Ventures maximizes the impact of emerging and established nonprofits, as well as donors and foundations with a passion for change – and is considered an essential part of the nonprofit sector infrastructure in Southern California. Since inception, it has fiscally sponsored more than 60 projects that address a wide array of social issues.

Applications: Please send cover letter and resume to HR@charitableventuresoc.org.

Charitable Ventures is committed to the principle of equal employment opportunity. In all that we do, Charitable Ventures supports its clients, projects, staff and partners through our commitment to equity, economic and social justice, diversity and inclusion, and in ways that uplift our communities' assets and potential.