

JOB ANNOUNCEMENT: Director of Client Services

ORGANIZATION OVERVIEW

At **Project Equity**, we re-envision community economic development to shift control locally and build economic resiliency in low-income communities. We envision a future where business decisions are made through a lens of what is good for workers and communities, leading to businesses that are more successful, communities that are more resilient, and workers who have stable jobs and economic security. Our **mission** is to foster economic resiliency with low-income communities by demonstrating and replicating strategies that increase worker ownership. Our **clients** are unique local businesses (most with 25-50 employees, but increasingly larger companies as well) that are assessing or implementing transitions to broad-based employee ownership (e.g. worker cooperatives, democratic ESOPs or other forms of employee- or stakeholder ownership). Project Equity's current **programs** are:

- **BUSINESS OUTREACH AND EDUCATION:** we raise awareness and educate business owners and community leaders through professional marketing and PR strategies and by partnering with municipal economic development staff, small businesses networks, and professional service providers such as CPAs, M&A advisors, and exit planners.
- **BUSINESS TRANSITION PROGRAM:** we support businesses converting to employee ownership through our Business Transition Program and its three distinct phases: feasibility assessment, transaction and conversion, and our “Thrive” post-conversion support for the new employee-owners. We deliver a custom service package that includes hands on education as well as technical assistance.
- **REGIONAL EXPANSION:** we are creating repeatable processes for our Business Outreach and Business Transition programs and replicating them with regional partners around the country, with strategic partnerships in the Twin Cities and Western North Carolina, outreach partnerships in two other cities, and other regional expansion efforts in the works.

Learn more at www.project-equity.org.

POSITION SUMMARY

The Director of Client Services will provide critical leadership and be a driver of growth for Project Equity's Client Services Team and our ability to achieve our mission. S/he will be a seasoned professional with experience in business consulting, management, and social impact, and ideally also product/service management or development. This director position is new for our growing organization, and the person who fills it will be a key partner in our success. If you are a seasoned professional looking for an opportunity to have an impact, this might be the position for you!

KEY RESPONSIBILITIES

- Play a leadership role, working closely with co-founders, to help us grow our impact over the next 5 years.
- Oversee and support a small team that:
 - Conducts financial analysis on current client companies
 - Provides training, facilitation and design services for companies considering or transitioning to employee ownership, and those in our Thrive program post-conversion
 - Ensures all client services operate smoothly via strong project management and a good balance of standard templates and customer-specific tailored services
 - Maintains and further develops a strong network of service providers (lawyers, CPAs, consultants) who can support our companies with the services we don't directly provide
- Envision and develop other improvements to position us for growth and sustained excellence in service to clients; create a team culture focused on continuous improvement.
- Directly engage with companies pursuing employee ownership transitions:

- Support our most strategic and complex clients in assessing and implementing employee ownership transitions
- Advise, coach and train key leaders within our client companies
- Plan and deliver dynamic services to business owners and new employees-owners.
- Have your ear to the ground to really listen to and hear the needs and feedback of clients and potential clients to help guide the development of our programs.
- Support Project Equity's mission, fundraising and program evaluation.
- Carry out other responsibilities as needed. We are a dynamic, all-hands-on-deck kind of team!

THE IDEAL CANDIDATE

Our ideal candidate will excel at organizational development, change management, and coaching; have strong financial analysis chops; and have experience with employee ownership. A great candidate might have two of the three and be able to learn the third. **Does the following describe you?**

- You work strategically and bring vision, leadership, and results-oriented collaboration. You are strategic and capable of wearing many hats and mentoring others to provide great services to our clients. Our client work is hands on, 1:1, but always with an eye to repeatability and replication. You seek opportunities to take it to the next level, whether in the nitty-gritty or the big picture. You keep the vision and strategy of the organization always front of mind, and help bring the Client Services perspective into organization-level strategy discussions, and vice-versa.
- You understand small businesses, and will quickly gain respect from business owners who have poured 30+ years into their companies, and the workers who will be stepping into new shared ownership roles.
- You want to dive in and master the “employee ownership conversion” process, so that you will be able to identify, develop and organize the most useful set of resources for businesses, owners, employees, and other service providers, and provide game-changing direct support to businesses.
- You are a great communicator: written, email, presentations, phone and in person. People enjoy engaging with you. You can communicate complex concepts simply to diverse audiences (think: everyone from business owners to front line workers, 8th grade to MBA education, with a wide range of backgrounds).
- You are skilled at helping small groups navigate difficult conversations, helping organizations manage change, and inspiring leaders and people at all levels of an organization to create great cultures.
- You’re very self aware of what you know, and what you don’t know, and are great at bringing in other people to round out your personal expertise.
- You make things happen. You are courageous, ambitious, and humble. You are great at collaborating, coaching and delegating, and also happy to get things done yourself.
- You’re excited to work with a small, very agile, fast-moving and sophisticated team. We’re looking for somebody who will bring impactful leadership and also integrate well into our team. We work virtually, coming together once or twice a week for in person or online meetings.
- HIGHLY DESIRED: experience with employee ownership, boards of directors and governance.
- BONUS: Bilingual in Spanish and English

This position, based in Oakland CA, is envisioned as a full-time leadership role in our innovative, growing organization. Compensation is commensurate with experience.

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TO APPLY: Please submit a resume and cover letter to Hilary Abell, Project Equity Co-founder, at info@project-equity.org. In your cover letter, please explain what motivates you to work with Project Equity, and how your experience, skills and commitment will advance our work to create a more equitable economy.