

JOB ANNOUNCEMENT: Client Services Assistant

Project Equity grows community wealth by retaining successful local businesses through employee ownership transitions

Do you want to see a world where the average employee has economic security and businesses help build resilient communities? We do too! Project Equity helps employees become owners of the businesses where they work. We raise awareness of employee ownership as a business succession strategy, conduct business outreach and education, and provide direct support for business owners and employees to transition to employee ownership. Project Equity is currently expanding into multiple regions around the country.

Help us tap incredible momentum

Project Equity's early success and significant attention from media outlets such as Forbes, NPR and the Washington Post have propelled Project Equity forward as a national leader in the movement to harness employee ownership to maintain thriving local business communities, create quality jobs, and address income and wealth inequality.

Your role

The Client Services Assistant will play a key role on Project Equity's Client Services Team, reporting to the Director and working closely with our Client Services Team. The Assistant will take the lead on strengthening the infrastructure to support our clients (businesses that are transitioning to worker ownership), providing direct support to Client Services Managers leading client projects, and helping to support the broader organization's administrative needs.

How you will support Project Equity's clients and Client Services team to advance employee ownership

Administrative

- Utilize project management and scheduling tools to help us run smoothly
- Coordinate and schedule meetings with large client groups
- Draft and help finalize meeting agendas, gather and share resources, and follow up on action items
- Manage Zoom rooms and other meeting platforms
- Engage in meetings with clients in a supporting role (note-taking, research support, etc.)
- Provide administrative support to Leadership Team members periodically

Organizational

- Organize and expand our resource library related to employee ownership transitions, governance, technical aspects of various forms of employee ownership, and training

- Envision and implement other improvements to infrastructure to position us for growth and sustained excellence in service to clients
- Maintain and improve our client files, ensuring thoroughness and clarity
- Support Project Equity's overall operations as requested

Technical

- Support team members with and help maintain our Salesforce database
- Generate reports using Salesforce to inform program evaluation, analysis of conversions pipeline, and other strategic needs
- Support client data collection to inform our impact evaluation activities
- Coordinate with other team members and service providers

How you work

- You are a highly organized and detailed-oriented person.
- You are a great communicator: written, email, presentations, phone and in person. People enjoy engaging with you.
- You make things happen. When you say it's taken care of, it is.
- You're hungry to learn and want to understand the "employee ownership conversion" process, so that you will be able to identify, develop and organize team infrastructure to ensure smooth functionality, and to grow to provide direct support to a growing number of clients.
- You're 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.

Areas where you shine

- You take pride in helping things run well, and enjoy and value administrative work (we consider it to be vitally important to achieving our mission, and seek someone in this role who feels the same way).
- You love setting up and managing systems so things run smoothly and can be easily understood by others.
- You're a creative thinker and "do-er," and look for opportunities to suggest and take the lead on making improvements, whether small or large.
- You're excited to work with a small, agile, fast-moving team. We're looking for somebody who is a self-starter, works really well independently, but also knows when and how to effectively loop in other team members for input, guidance, collaboration, and sign off. Our team works virtually.

Requirements

- At least 2 years experience in an administrative role

- You have had some exposure to business operations and financial analysis and enjoy learning about business.
- BONUS: Bilingual in Spanish and English.
- BONUS: Experience with employee ownership or cooperatives.

This position is envisioned as a full-time role, preferably in California, in our innovative, growing organization. Compensation is commensurate with experience.

Project Equity is an independent operating project of the nonprofit umbrella organization, Multiplier, a nationally recognized nonprofit with a growing portfolio of innovative initiatives that conserve and protect a sustainable and resilient world (www.multiplier.org)

Multiplier and Project Equity celebrate diversity and are committed to building teams and partnerships that represent a variety of backgrounds, perspectives, and skills. Multiplier and Project Equity are also committed to providing an environment of mutual respect that is free from discrimination and harassment. Multiplier and Project Equity prohibit discrimination in its governance, programs and activities on the basis of race, color, national origin, age, disability, religion, gender, sexual orientation, gender identity, genetic information, political beliefs, reprisal, marital status, amnesty, status as a covered veteran, because all or part of an individual's income is derived from public assistance, or for any other non-merit based factor.

APPLY HERE: Please be sure to upload your resume and cover letter. 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.

Learn more at www.project-equity.org.