

JOB ANNOUNCEMENT: Client Services Manager

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.

Project Equity's current programs include:

AWARENESS RAISING & REGIONAL ENGAGEMENT: we work with partners and businesses throughout California, and in the Twin Cities, Miami, Arizona and a growing list of regions around the country. From awareness raising to community partnership and client services, we address the full spectrum of strategies needed to change employee ownership from a "best kept secret" to "business as usual."

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.

CLIENT SERVICES: we support businesses converting to employee ownership through our suite of Client Service offerings including: 1) Feasibility (focused on helping business owners decide whether to sell the business to their employees), 2) Transition (focused on taking the business owner and a group of employee representatives through the design of the future business, negotiation of the sale, and closing of the financing and sale), and 3) Thrive (post-transition support to ensure the now employee-owned company can succeed). Throughout, we bring other technical assistance providers to the projects to ensure a seamless and effective experience for our clients.

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 Manager** will play a key role on Project Equity's Client Services Team, reporting to the Director. The Manager will be primarily client facing, managing a portfolio of client work spanning all of our service areas and geographies, leading project and client teams, coordinating technical assistance providers, and contributing to improving Project Equity's approach, tools, and intellectual capital.

How you will support Project Equity's mission to advance employee ownership

- Manage client projects in each of our three service areas (Feasibility, Transition, and Thrive, as defined above), inclusive of the client relationship, project execution, and team management (including external technical assistance providers).
- Be/become technically proficient in the key elements of our service offerings including:
 - Debt capacity analysis
 - Employee-owned business design (e.g. worker cooperatives, ESOP, perpetual trusts)
 - Business sale financing and deal structure
 - Negotiation
 - Governance
 - Employee engagement and participatory management.
- Educate, consult and coach business owners through the process of selling their business.
- Educate, consult and coach employee groups through the process of becoming business owners.
- Deliver dynamic, effective training sessions on both technical employee ownership topics and cultural, organizational and group dynamics.
- Work with other Managers to continuously share learning and refine our services to ensure efficiency, effectiveness and excellence. Additionally, support our work to make our services are replicable and scalable nationally for greater social impact.
- Support the maintenance and expansion of a strong network of technical assistance providers (including lawyers, CPAs, and organizational consultants) who can support our companies with the services we don't directly provide.
- 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!

How you work

- You are passionate about making a difference and supporting employee-owned businesses.
- You are flexible, agile, and mission-driven. (We have service programs that are well developed, and that need to be customized to each client situation.)
- You make things happen. When you say it's taken care of, it is.
- 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.
- You are goal-oriented. You are able to stay focused on and successfully achieve milestones.

- You feel comfortable engaging with many types of people, with different backgrounds, values, and experiences.

Areas where you shine

- You understand small businesses, and will quickly gain respect from business owners who have poured 20+ years into their companies, and the employees who will be stepping into new shared ownership roles.
- You have some experience analyzing businesses from a financial performance stand-point.
- You want to dive in and master the “employee ownership transition” process.
- 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 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.

Requirements

- You have 7-10 years of professional experience.
- HIGHLY DESIRED: experience with employee ownership, governance / boards of directors, business sales, and/or organizational development.
- BONUS: Master’s degree in business, finance/accounting, organizational development. Corporate legal background. Business valuation experience. Bilingual in Spanish and English.

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.