



## **Director of Service Delivery - Finance Focus**

### Job Description

**Position Summary:** The Acceleration Project (TAP) is a non-profit organization dedicated to supporting under-resourced small businesses experiencing unprecedented growth. We are seeking a highly skilled individual to join us as the Director of Service Delivery-Finance Focus (DSD-FF). This individual will be a part of the Service Delivery team and report to the Senior Director of Service Delivery. The DSD-FF will be responsible for supervising service delivery to multiple TAP clients and partners and participate directly as a lead finance consultant on projects where the scope of work requires finance expertise. The DSD-FF's main responsibility will be to support the successful design, execution, and delivery of TAP's Finance Services (e.g., loan-readiness, credit building, post loans advisory, fractional CFOs, exit/buying businesses, among others). In this role, the DSD-FF will maintain engaging and proactive relationships with existing TAP partners when managing client projects and oversee the delivery of other TAP services when needed if capacity allows.

### **Service Delivery**

The DSD-FF will lead and oversee projects by providing strong strategic financial guidance and business diagnostic skills to the consultant teams and serve as a content expert whenever needed. You will be responsible for acting as a sounding board for consultants and must possess the desire to mentor consultants and provide constructive feedback. When paired with a pro-bono consultant, the DSD-FF will act as a lead on the project and “train” the consultant on the process and the substance of the work. You will be responsible for managing the process of all projects and formats (1:1, 1:3, 2:1, etc.), ensuring milestones are met and timelines are adhered to. You will interact with the client from the scoping call and consultant introduction through project completion and impact measures. You will be responsible for client satisfaction, from the initial diagnosis of client needs and agreement on TAP deliverables through project delivery and conclusion. In addition, she will support the Senior Director of Service Delivery in her understanding of the depth and breadth of the financial skills of the pro-bono team, identifying needs or gaps and proposing initiatives and professional development sessions to close the gaps. You will collaborate with the Staffing Director to identify the right consultants for different projects and draw on specific team expertise to bolster the quality of our services.

### **Program Design**

The DSD-FF will collaborate with the Senior Director of Service Delivery and the Service Delivery Team to design new service formats to meet the needs of our partners and clients. You will also participate in designing new services for different areas of interest to close gaps in the finance area in the small business ecosystem (e.g., preparing for acquiring real estate). You will also: aid in the development and implementation of the program and evaluate how to bring it to market; suggest new tools and aid in their development and implementation; participate in training development and delivery for new consultant cohorts; master the use of Salesforce to manage TAP processes and access data; provide regular updates to management team; and translate results into TAP KPIs and



metrics to be used for marketing and other purposes.

Additionally, given the nature of working for a nonprofit, we will ask you to support our end-of-year giving and spring benefit fundraising efforts annually by providing names of potential donors and partners to expand our audience. Your assistance in expanding our contact list with mission-aligned individuals and corporations will enable us to create a larger impact within the communities we serve.

### **Responsibilities**

#### ***Service Delivery and Consultant work (90% time)***

- **Project Oversight (in-depth)**
  - Scope client projects, including diagnosis of specific needs and delineation of TAP deliverables to meet these needs.
  - Collaborate with staffing decisions
  - Create and implement structure for consultants to successfully execute projects and suggest improvements to the process. Depending on the project, it may include the following:
    - Initiate project folders on Google Drive, ensuring all necessary information is available to consultants, and they are aware of resources available
    - Ensure consultants adhere to TAP's process, including proper use of documents and communication mechanisms
    - Debrief regularly with consultants to ensure deliverables will be met; troubleshoot where necessary; provide guidance on best practices
    - Check-in with partners/clients at designated checkpoints to address issues in a timely manner and ensure satisfaction throughout engagements
    - Leverage previous TAP work, share learnings across projects, and use specific consultant expertise to enhance client work during SAPs
    - Identify and organize opportunities to expand engagement with the larger TAP team as appropriate to leverage available expertise
    - Update Salesforce daily to keep the management team informed and track important information
  - Identify gaps in the Consultant Toolbox and update with new tools created by you or the team
  - Distribute, collect, and analyze client and consultant satisfaction surveys and provide post-project reviews
  - Collect post-project metrics at pre-established intervals
- **Project Oversight (other formats)**
  - Plan, design, and implement any other TAP formats or create new formats for partners in order to serve an increased number of business owners when time allows
  - Manage, troubleshoot, and continuously ensure that intake forms, worksheets, and surveys are improved so that impact is continuous even at a scalable level
  - Help ideate new products and services, evaluate and bring to market



- **Project Delivery**
  - Serve as the lead consultant on financially focused projects (1+) and provide content expertise as needed.
- **Training**
  - Identify opportunities for improved/ new training and participate in improvement /adjustment and delivery of training
  - Identify needs for Professional Development based on Consultant interaction and Consultant satisfaction surveys
- **Marketing/Development**
  - Create project summaries for marketing purposes (videos, testimonials), including, but not limited to, case studies that need to be distributed among TAP Management
  - Create reports from our client work for current and potential partners and donors; support PR and marketing materials
  - Identify high-quality stories for marketing and development use

***Relationship Management (10% time)***

This DSD-FF will support the Senior DSD in maintaining and augmenting relationships with established partners to support increased businesses served every year.

**Skills and Qualifications**

- Proactive, self-starter, comfortable in an entrepreneurial setting
- Proven relationship-builder with the ability to identify, facilitate, and deepen connections
- Prior experience successfully delivering TAP advisory services
- Familiarity with TAP process, tools, and deliverables
- Attention to detail and project management skills
- Desire to mentor consultants and comfort with providing constructive feedback
- Strong strategic and financial skills; use of Excel or Google Sheets for modeling, etc.
- Comfortable across all business functional areas
- Excellent business diagnostic abilities
- Positive collaborator
- Confident, caring leader
- Strong written and oral communication skills
- Creative and open-minded
- Strong sense of integrity
- Demonstrate flexibility in adapting to changing job responsibilities and a willingness to upskill as needed to meet evolving organizational demands and challenges
- Actively participate in growing the TAP's donor base, reinforcing the entire team's collective responsibility in achieving the TAP's fundraising goals.



### **Requirements**

- Bachelor's Degree or equivalent from an accredited college/university
- Fluent in another language, a plus
- MBA or other advanced degree is a plus but not required
- Proficient in Microsoft Office Suite (Word, Excel, PowerPoint) and Google Workspace; willing to learn other tech platforms including Salesforce and Trello
- Able and willing to participate in occasional events outside traditional work hours
- Flexible with respect to hours and will respond to communications within 24 hours

### **Work Environment**

TAP operates in a remote-first, hybrid work environment. Our staff predominantly work from home, with mandatory co-working days approximately four times per month in Westchester County for those in the Tri-State area. While we encourage additional in-person connections, attendance is mandatory only for these co-working days. As our work model continues to evolve, there may be occasional requirements for attending in-person events and meetings in the Tri-State area. Additionally, we expect all staff to be present at our bi-annual retreats.

### **Time Requirement**

4 days/week, the equivalent of 32 hrs per week; candidates must be available for daily touchpoints and occasional travel anywhere in the US for conferences.

### **Compensation**

- Salary: \$52,000 per year (the pro-rated salary based on a 4-day workweek schedule or 32 hours per week). The full-time salary for this role is \$65,000 annually
- Health and dental insurance
- Generous PTO

**To apply:** Please submit a resume (informal is acceptable), up to 3 professional references, and answer the following questions:

- Why are you interested in the position?
- Why are you a good fit for this role?

Please send all materials to Natalie Rawlinson ([natalier@theaccelerationproject.org](mailto:natalier@theaccelerationproject.org))

**Application Deadline is May 15, 2024**

*TAP is an equal-opportunity employer with a strong commitment to diversity and inclusion. We prohibit discrimination on the basis of race, color, religion, sex, age, national origin, sexual orientation, gender identity or expression, disability, veteran status, marital status, or any other legally protected status. Applications by members of all underrepresented groups are encouraged.*