



Position Title: Client Advisor

About Oak Rose Group

Oak Rose Group (ORG) is a mission-driven consulting firm that advances policies, ideas and organizations that lead to human flourishing. ORG works at the intersection of philanthropy, social entrepreneurship, and public policy to generate meaningful improvements in education, workforce development, health, and economic mobility in communities across the country. In everything we do, we share a vision of a world in which each individual and family can discover their potential and fulfill their purpose.

ORG has four Partners: Jason Gaulden, Katherine Haley, Myles Mendoza, and Jonathan Tee, who work remotely from Arizona, Colorado, and Illinois. ORG launched in 2021 and has quickly gained exciting national momentum. Our Client Advisors play a vital role in supporting our growing portfolio of clients in non-profit education, workforce, health, and other sectors. To learn more about us, visit www.oakrosegroup.com.

Position Overview

As a Client Advisor, you'll be instrumental in shaping and delivering top-tier services to ORG clients, utilizing your expertise in communications, public policy, philanthropic advisement, strategic planning, or related fields. Acting as a high-level strategic thought partner, the Client Advisor leads or co-leads client engagements – often collaborating with a Partner and an Associate – to ensure seamless execution of the project scope.

Responsibilities vary depending on Client Advisor experience and skillsets, but may include developing tailored deliverables such as memos, reports, SWOT analyses, strategic plans, and other materials that address client needs. The Client Advisor participates in bi-weekly client calls and works closely with the Associate and Partner to maintain a productive client-consultant relationship. This role requires a balance of strategic insight and hands-on execution to meet ORG's standards for delivering results.

Knowledge, Skills, and Abilities

- Unwavering support of the mission of Oak Rose Group to advance the ideas, policies and organizations that lead to human flourishing.
- A belief and optimism in people and their ability to create positive change.
- Demonstrated ability to synthesize complex information and data, and to produce clear, compelling documents, reports, and presentations.
- Strong interpersonal skills along with excellent verbal and written communication skills.



- Ability to work closely with team members to achieve strategic objectives in a remote setting.
- Effective and timely communication with teammates, clients, and other key contacts.
- Ability to think quickly and use thoughtful problem-solving skills.
- Strong work ethic, cheerfulness, and overall professionalism.
- Transparent and high integrity.
- Ability to handle sensitive and confidential matters.

Minimum Requirements

- Bachelor's Degree or four years equivalent work experience.
- 10+ years of experience in related fields with specific expertise in areas such as communications, strategic planning, education or workforce public policy, and philanthropic advising.

Location and Travel

This is a remote position. Some travel will be required for team meetings and retreats, and in support of client events. Travel will be planned well in advance.

Employment Status and Compensation

This position is a part-time contract position (approximately 10 to 15 hours per week) and a monthly retainer will be negotiated based on background and experience.

Application Process

To be considered for a position, please send a cover letter explaining your background and why you are interested in joining Oak Rose Group, along with your resume to hello@oakrosegroup.com.

Openings

ORG may not have current openings, but we are always eager to discuss potential Client Advisor roles with interested individuals.

We look forward to connecting with you!