



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 three Partners: Katherine Haley, Myles Mendoza, and Jonathan Tee, who work remotely from Arizona, Illinois and Colorado, respectively. 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.

Vision: A world without barriers so everyone can fulfill a higher calling

Mission: To advance the policies, ideas, and organizations that lead to human flourishing

Internal Values

- **Service:** The commitment to providing exceptional support and assistance to others, grounded in respect for their needs and faith in the positive impact of our actions. It involves going above and beyond and building trust.
- **Excellence:** The pursuit of the highest standards in all endeavors, characterized by integrity in our actions and decisions. It means consistently striving for quality, improvement, and outstanding performance.
- **Entrepreneurship:** The spirit of innovation and initiative, driven by curiosity, creativity, and a focus on growth. It involves taking calculated risks, exploring new opportunities, and fostering a culture of continuous improvement and adaptability.
- **Courage:** The strength to face challenges and take bold actions, supported by faith not just in our abilities, but in a calling to do what is right and a commitment to growth. It involves stepping out of our comfort zones, embracing change, and persevering in the face of adversity.
- **Ownership:** The sense of accountability and responsibility for Oak Rose Group's success as a mission-driven business including our actions and outcomes. It means taking initiative, being proactive, and ensuring the success of our endeavors.



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 to the mission and vision of Oak Rose Group, and a commitment to our values.
- 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 others.
- 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.
- 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 contract position. ORG's partners office in Arizona, Colorado, and Illinois.

Employment Status and Compensation

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

Application Process

To be considered, 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!