

## OFFICE OF THE VICE PRESIDENT FOR FINANCE

### Job Description

<b>Functional Area:</b>	Office of the Vice President for Finance: Gift Administration and Recording Secretary		
<b>Job Title:</b>	HR-PF019 – Accounting Officer	<b>Position Title:</b>	Assistant Manager of Gift Operations
<b>Reports to:</b>	Senior Associate Director of Gift Operations and Accounting	<b>Prepared On:</b>	November 2018
<b>Level: P</b>	<b>Duration (if applicable):</b>	<b>Hours per week/status:</b> 40/Exempt	

### GENERAL OVERVIEW

The Office of the Vice President for Finance (VPF) works to advance MIT's mission by supporting thoughtful stewardship and effective deployment of the Institute's financial resources. Forward-thinking and future-oriented, this 165-person office is working to create a seamless administrative experience for MIT colleagues and make it easier for them to comply with grant, accounting, and other applicable rules. VPF also seeks to enhance the quality of financial information available to MIT and is focused on providing services that are readily adaptable to the evolving demands of an increasingly global Institute. A team-oriented office, VPF strives to exemplify financial and administrative excellence and the highest levels of integrity, inclusiveness, and accountability.

### POSITION OVERVIEW STATEMENT

The Assistant Manager of Gift Operations will oversee the daily operations of gift processing, including managing gift and pledge recording and receipting for the Institute's significant gifts, representing approximately \$500M of new gifts and pledges annually. She/he will manage data workflow and recording, adhering to departmental policies and procedures while working closely with colleagues from Resource Development (RD), the Alumni Association (AA), and the Office of the Vice President for Finance (VPF). The Assistant Manager will skillfully and tactfully speak with donors and their representatives regarding issues of receipting, recording, and gift crediting. She/he is expected to have or quickly develop a thorough understanding of IRS gift regulations, accepted peer and CASE standards and procedures, as well as fundraising database processes and procedures. She/he is responsible for the hiring, performance management, and daily workflow of the Gift Operations team, including establishing standards for quality and processing efficiency.

### PRINCIPAL DUTIES AND RESPONSIBILITIES (ESSENTIAL FUNCTIONS)

- Oversee the accurate and efficient processing, crediting, and receipting of gifts and pledges to the Institute, including contributions made by check, wire, securities, and other emerging methods
- Review recorded gifts and receipts to ensure all transactions are accurately recorded and appropriate receipts and acknowledgments are provided to donors
- Approve modifications to gifts and pledges and oversee the correction process to ensure the accuracy of gift and pledge adjustments
- Provide outstanding customer service to both internal and external constituencies for gift-related inquiries. Ensure all inquiries to the Office of the Recording Secretary (RSO) via e-mail or telephone are appropriately resolved and any critical issues are prioritized
- Act as a resource on gift policies and procedures to multiple constituencies across the Institute
- Supervise and provide guidance to the Gift Operations team on all tasks and projects performed, including establishing priorities and ensuring that all goals and deadlines are met on or ahead of schedule

- Initiate regular meetings with the gift operations team, individually and as a group, to review and introduce new procedures, discuss gift recording topics and questions, and to provide thoughtful feedback on quality and efficacy of work being performed
- Establish and maintain effective relationships with the RSO's financial agents, including Bank of America, Fidelity Investments, and others
- Manage and oversee the scanning and archiving of gift and pledge records, according to Institute retention policies
- In consultation with senior team leaders, ensure that all IRS and Massachusetts regulations pertaining to the processing and receipting of all gifts are met
- Synthesize complex giving histories, interpret data, and compile customized reports for donors and MIT colleagues, perform ad hoc research to provide donor history
- Oversee the pledge reminder process, including review of late pledges, coordination with RD fundraisers, and review of reminder letters
- Document departmental policies and procedures and update the department's manual describing gift and pledge processing policies, procedures, systems, and taxation rules and regulations
- Drive continuous process improvement by proactively and continually assessing workflows to identify opportunities for increased efficiency and data integrity
- Work with the VPF Communications team to ensure the accuracy of all RSO content on the VPF website and related giving websites in order to guarantee that information is useful and readily available to donors and colleagues
- Research new giving vehicles and determine feasibility for Institute's acceptance
- Represent RSO team at events and meetings and by serving on various committees, as needed
- Other duties or projects as assigned

## **QUALIFICATIONS**

### **Required:**

- At least five years of increasingly nuanced finance experience in a complex non-profit setting, preferably in gift operations or gift administration
- Bachelor's degree in Business Administration or related field
- Demonstrated success directing teams and/or individuals to perform and meet mutually agreed upon performance objectives
- Demonstrated experience working with IRS, FASB and CASE guidelines that govern the recording, receipting and reporting of contributions
- Direct knowledge and experience with relational databases such as SAP and/or Advance
- Ability to work occasional evenings and weekends during peak processing seasons at calendar year-end (mid-December to mid-January) and fiscal year-end (late June to early July)
- Ability to think strategically about complex issues and to work with multiple resources to find solutions
- Meticulous attention to detail and the ability to track multiple deadlines at once
- Strong verbal and writing skills, high attention to detail and follow-up, and excellent organizational skills
- Demonstrated superior skill to establish priorities, organize tasks, and direct effective implementation of tasks in a high-pressure environment

### **Preferred:**

- Experience in higher education is strongly preferred
- Familiarity with Ellucian CRM Advance gift system or similar fundraising database

## **SUPERVISION RECEIVED**

Receives supervision from the Senior Associate Director of Gift Operations and Accounting

**SUPERVISION EXERCISED**

Gift Operations staff of three

A background check (including checking criminal records) will be required for the final candidate.

MIT is unable to provide work authorization and/or visa sponsorship for this position.

This position has a 6-month probationary period for new employees to the Institute.

*VPF benefits from a diverse and engaged workplace and seeks to further enhance our community by employing individuals from varied backgrounds. VPF actively supports MIT's commitment to advancing a respectful and caring community that embraces diversity and empowers everyone to learn and do their best.*

*MIT is an equal employment opportunity employer. All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, or national or ethnic origin.*