OFFICE OF THE VICE PRESIDENT FOR FINANCE

Job Description

<table>
<thead>
<tr>
<th>Functional Area:</th>
<th>Office of the Vice President for Finance: Office of the Recording Secretary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title:</td>
<td>Gift Admin Coordinator 1</td>
</tr>
<tr>
<td>Position Title:</td>
<td>Funds Information Coordinator</td>
</tr>
<tr>
<td>MIT Job #</td>
<td>18469</td>
</tr>
<tr>
<td>Reports to:</td>
<td>Associate Director of Funds Information and Stewardship</td>
</tr>
<tr>
<td>Prepared On:</td>
<td>January 2020</td>
</tr>
<tr>
<td>Level:</td>
<td>6</td>
</tr>
<tr>
<td>Duration (if applicable):</td>
<td>Hours per week/status: 40/Exempt</td>
</tr>
</tbody>
</table>

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 Funds Information Coordinator will serve as part of the Office of the Recording Secretary (RSO) team to provide leadership, oversight, and quality assurance that will enable accurate acceptance and recording of gifts to the Institute. Working across all three functional areas within RSO—gift accounting, gift operations, and gift acceptance—the Funds Information Coordinator will work to ensure all aspects of institutional information are captured and formally recorded efficiently and in accordance with donor intent. The ideal candidate will have a strong customer service background, relationship management skills, and excellent writing skills. She/he should be comfortable interacting with a variety of constituents including gift officers, senior leadership, and finance and investment partners.

PRINCIPAL DUTIES AND RESPONSIBILITIES (ESSENTIAL FUNCTIONS)

- Categorize, prepare and maintain documentation on the use of gift funds and commitments, including Pledge Agreements, Gift Memoranda, and Treasurer’s Memoranda for hundreds of donors annually
- Manage intake, tracking, and notification for philanthropic due diligence processes
- Provide quality and in-depth information and risk assessment of prospective donors
- Manage fund set-up process, including management and oversight of data entry for fund set up in MIT’s general ledger system (SAP) and MIT’s gift system (Advance)
- Collaborate with Resource Development and/or gift officers in MIT’s schools and departments and serve as the conduit to the Gift Operations team on information on incoming gifts and pledges
- Work in close collaboration with Resource Development to address complex fund parameters including accuracy of terms and clarity of donor intent to ensure funds are established appropriately in accordance with donor intent and Institute policies
- Advise and educate gift officers and school and department officers on matters relating to donor compliance including requests for fund documentation, determining allowable uses of funds, and other ad hoc requests
- Monitor and review ‘Pending Designation’ funds and take appropriate action with donors, gift officers, and school and department officers to clarify and designate those gifts within the timeframe set by MIT policy
• Review potential agreements with foundations to evaluate and determine if they can be considered gifts or grants
• Perform ad hoc research and investigations of specific endowed and donor-supported funds using Institute records and fund transactions from various databases to trace the source of specific gifts in order to determine allowable uses and identify the need for changes in policies or procedures
• Identify those funds whose original terms are no longer appropriate (e.g. completed projects or outdated technologies) and transform inefficient or obsolete funds into useful resources: determine appropriate means and actions to modify fund terms through internal approval, donor consent, or partnering with the Office of the General Counsel and outside legal counsel
• Act as a resource to provide clarity and explanation on Institute policy on the MIT endowment and perform calculations to assist gift officers in determining appropriate gift levels
• Prepare monthly calculations of unit and income adjustments needed on modified gifts, in collaboration with the RSO Gifts Accounting team and the VPF Controllership team
• Assist in production and distribution of annual financial reports to donors of endowed funds, including management of financial data
• Resolve issues across a broad spectrum of funds-related topics and provide exemplary and timely customer service when handling donor inquiries made by email, phone, or in person
• May help train junior members of the team
• Special projects and other duties as necessary

QUALIFICATIONS
Required:
• A minimum of two years of professional experience in at least one of the following: gift administration, finance, governance of charitable funds or nonprofit operations
• Bachelor’s degree in business administration or related field
• Demonstrated experience working with databases and/or data processing, preferably including familiarity with SQL or other programming languages
• At least one year of demonstrated experience delivering customer service
• Advanced knowledge of MS Excel and a strong level of comfort using MS Word and Outlook
• Demonstrated experience acting as a resource to guide a range of constituents through a complex administrative or financial landscape
• 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 and excellent organizational skills
• Ability to form partnerships with a variety of constituencies including gift officers, senior leadership, legal, and finance and investment partners
• Ability to manage confidential information with discretion and tact
• An exceptional work ethic and track record of personal initiative
• Outstanding interpersonal and communications skills, notably, the ability to listen, speak, and write well
• Must be flexible and adaptable to new programs in an emerging and changing environment

Preferred:
• Familiarity with Ellucian CRM Advance gift system or similar fundraising database
• Experience developing policies and procedures in a legal or fundraising context
• Experience with database querying and data manipulation tools
• Previous professional experience in higher education or non-profit environment

SUPERVISION RECEIVED
Receives supervision from the Associate Director of Funds Information and Stewardship
SUPERVISION EXERCISED
None

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.

MIT considers equivalent combinations of experience and education for certain jobs. All candidates who believe they possess equivalent experience and education are encouraged to apply.

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.