

**Job Description – MIT Job # 22520**

<b>Functional Area:</b>	<b>Office of the Vice President for Finance, Office of the Recording Secretary</b>		
<b>Job Title:</b>	<b>Gift Admin Coordinator 1</b>	<b>Position Title:</b>	<b>Funds Information Associate</b>
<b>Reports to:</b>	Funds Information Manager	<b>Prepared on:</b>	March 2023
<b>Salary Grade: 6</b>	<b>Salary Range: \$60,000-\$70,000</b>	<b>Hours per week/status: 40/Exempt</b>	

**Funds Information Associate**

**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, the 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**

The Funds Information Associate 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. The Funds Information Coordinator will 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. The person in this role should be comfortable interacting with various constituencies, including gift officers, senior leadership, and finance and investment partners.

**Principle Duties and Responsibilities**

- 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
- Provide quality information and an in-depth 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. Serve as the conduit to the Gift Operations team on information about 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 and in line with 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 those agreements should be considered gifts or grants
- Research specific endowed and donor-supported funds (using Institute records and fund transactions from various databases) to trace the source of specific gifts, allowable uses, and to identify the need for changes in policies or procedures
- Identify 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 gift policy and perform calculations to assist gift officers in determining appropriate gift levels
- 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
- Special projects and other duties as assigned

### **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 a related field
- Familiarity with legal issues surrounding 501(c)(3) organizations and IRS Pub 526 for charitable contributions
- Demonstrated experience working with databases and 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, close attention to detail and follow-up, and excellent organizational skills
- Ability to form partnerships with a variety of constituencies, including gift officers, senior leadership, legal and finance/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 and with direct knowledge and use of relational databases

### **Supervision Received**

Reports to the Funds Information Manager

### **Supervision Exercised**

None

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### **Additional Information**

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.

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

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

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

### **Remote Work**

MIT is committed to supporting a safe and equitable workplace. MIT and VPF are developing guidance, policies, and models for returning to work on campus. As of February 2023, this position is designated as one that can be performed in a hybrid model of four days per week remote, one day in the office (Tuesdays). Once routine and rapport are established, the position is eligible to work one day in the office every other week (every other Tuesday). Hybrid arrangements are subject to change.

### **Covid Policy**

MIT currently requires Covid-19 vaccination for all MIT employees who work in the United States. Individuals may request an exemption from the vaccine requirement for medical or religious reasons. See [MIT Now](#) for more information on MIT's Covid policies. Offers of employment are contingent on an applicant's compliance with MIT's Covid-19 vaccine/exemption requirements.

### **Diversity, Equity, & Inclusion**

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.