

## **Portfolio Manager Fiscal Sponsorship**

### **Overview:**

Launched in 1983 as Public Interest Projects, a 501(c)(3) public charity, NEO Philanthropy is a New York based national leader in innovative philanthropic solutions. We lead large-scale collaborative grantmaking funds on a range of social justice issues, provide fiscal sponsorship and management to projects and campaigns, manage donor advised funds and develop organization and field-focused capacity building initiatives.

NEO offers fiscal sponsorship services to projects and affinity groups working in the social justice arena that do not have 501(c)(3) tax-exempt status. Fiscal sponsorship broadens the funding avenues that a project can pursue, since nonprofit status is required for funding by most foundations, corporations and government agencies. Alternatively, fiscal sponsorship may also be appropriate for programs that have their 501(c)(3) status but prefer to have NEO handle their back office functions (finance, human resources, legal, etc.). This allows groups to focus on their programs and campaigns. The centerpiece of NEO's Fiscal Sponsorship program is the customized attention we bring to meet the specific needs of projects and special initiatives.

### **Position:**

The Portfolio Manager will be part of a four-member team working with a portfolio of diverse projects within the Fiscal Sponsorship Program which is currently home to 60+ projects. The ideal candidate is an organized, reliable and detail-oriented person with excellent judgment and prior experience in the nonprofit sector. This may include prior experience with a fiscal sponsor, and/or donor advised funds. This position works closely with our Legal, Finance, and Human Resources staff to ensure the highest quality service to our fiscally sponsored projects and their donors. The ideal person will have a basic understanding of nonprofit operations, including legal compliance and human resources with deeper experience in financial management and budgeting. This person has worked in a fast-paced environment, with responsibility for multiple time-sensitive deliverables. They are able to deliver exceptional customer service when faced with challenging demands. They work efficiently, and proactively suggest process improvements.

### **Responsibilities:**

#### Financial Management & Compliance

- Review and process approved payment requests from assigned projects.
- Work with Assistant Director and Finance Team to ensure proper documentation and accurate accounting for all revenue and expenses, including tracking accounts payable and receivable.
- Manage online giving platforms, including Network for Good. Prepare reports for finance team and projects that track online giving.
- Provide financial management assessment and support to assigned projects, including management of the annual budgeting process, monthly financial reports and other support as requested.
- Monitor overall fiscal health of assigned projects and work with NEO leadership to address any identified concerns or needs on behalf of these projects.
- Preparation of financial reports for proposals and grant reports.

#### Grant Administration

- Manage the proposal submission process for our fiscally sponsored projects, ensuring materials are accurate and complete.
- Manage reporting calendar and work with projects to ensure all reporting requirements and deadlines are satisfied.
- For projects engaging in grantmaking, work with the Grants Coordinator to prepare grant agreements, as well as accurate and timely disbursement of grant payments.
- Participate in grantee, donor, and advisory committee meetings, as requested.

#### Project Monitoring

- Serve as primary point of contact for all project inquiries and serve as a link to other internal NEO staff, including finance, HR, legal, etc.
- Provide exceptional customer service to portfolio of assigned projects.
- Lead regularly scheduled check-ins with leaders of assigned projects.
- Serve as a strategic thought partner to projects with regard to operations, finance and HR, as needed.

#### Legal Compliance

- Work with Assistant Director and Counsel to ensure that fiscally sponsored projects comply with all federal, state, and local laws and regulations, including relevant restrictions on lobbying and electoral campaigning activities.
- Draft all vendor and consultant contracts for review by Counsel for assigned projects.

#### NEO Program Responsibilities

- With the Assistant Director, participate in development of programmatic resources and initiatives.
- Support the onboarding of new fiscally sponsored projects.
- Work with NEO leadership to communicate organization-wide policies and procedures to projects.

#### **Desired qualifications:**

1. Bachelor's degree required
2. Master's degree in related field or equivalent experience preferred
3. 3-5 years of foundation, nonprofit, or public service experience required
4. Strong financial management skills, including budgeting, grant reporting and financial forecasting/ planning is a MUST.
5. Knowledge of non-profit management, including legal and financial compliance for nonprofits strongly preferred
6. Strong planning, and organizational skills; the ability to manage time efficiently and meet deadlines
7. Exceptional attention to detail
8. Proven ability to juggle multiple tasks and tolerance for work under pressure
9. Excellent interpersonal and relationship-building skills and proven ability to work effectively across multiple roles with diverse groups of people and customers.
10. Excellent verbal and written communication skills
11. Personal and professional approach of working respectfully, thoughtfully, and collaboratively in a team environment
12. Knowledge of budgeting and financial management
13. Proficient with windows-based word processing, spreadsheets, databases and Internet programs.

#### **How to Apply:**

No calls, please. Interested applicants should send a resume and cover letter with salary requirements to: [eballard@neophilanthropy.org](mailto:eballard@neophilanthropy.org). Salary is commensurate with experience.

**Application Deadline:** Until filled.

**Hiring Policy:** NEO Philanthropy is an equal opportunity employer. We consider applicants for all positions without regard to race, color, religion, creed, gender, national origin, age, disability, marital or veteran status, sexual orientation, gender identity or any other legally protected status.

**Only those whose applications are being considered will be contacted.**