

## **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:**

Reporting to the Assistant Director, the Portfolio Manager will be a seasoned member of a team working with a portfolio of diverse projects within the Fiscal Sponsorship Program which is currently home to 50+ projects. In the context of the team, the Portfolio Manager receives support, manages a complex portfolio, and experiences moderate room for internal growth. The ideal candidate is an organized, reliable, and detail-oriented problem-solver with excellent judgment and significant 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, Operations, 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 finance, grants administration, legal compliance, and human resources. Experience with 501(c)(3) permissible lobbying is a plus. 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, independently, and proactively suggest process improvements.

### **Working Arrangements:**

NEO Philanthropy has its headquarters in NYC and the other members of the Fiscal Sponsorship team are based in that office. As a result of COVID-19, the NEO Central staff are working fully remote through Tuesday, September 7, 2021 (Labor Day) although staff do have the option to work from the office upon request on a limited basis. In non-pandemic times, NEO HQ has a hybrid work remote structure based on job function. It is our expectation that this role will be able to be fully remote with in-person meetings required 4-6 times per year; however, staff will have the option to select a partially or fully in office schedule if they are based in NYC.

## **Responsibilities:**

### Project Monitoring & Support

- Serve as primary point of contact for assigned portfolio of projects, serving as a link to other internal NEO staff, including finance, HR, Legal, Operations etc.
- Provide exceptional customer service to portfolio of assigned projects.
- Lead regularly scheduled check-ins with leaders of assigned projects and hold projects accountable to compliance and operational requirements and deadlines.
- With some support from the Assistant Director, serve as a strategic thought partner to projects with regard to operations, finance, grants management, and HR, as needed.
- Ensure timely processing and updates of workflows across NEO's systems, including Salesforce, the Project Portal, UKG (formerly Ultipro), and Nexonia.

### Financial Management & Compliance

- 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 and maintaining appropriate financial and project coding.
- With some support from the Assistant Director, provide financial management assessment and support to assigned projects, including management of the annual budgeting process, monthly financial reports, revenue and expense projections, 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.
- Review and process approved payment requests from assigned projects.
- Manage online giving platforms utilized by assigned portfolio of projects, including Network for Good. Prepare reports for finance team and projects that track online giving.

### Grant Administration

- Manage the proposal submission process for assigned portfolio of fiscally

sponsored projects, ensuring materials are accurate, 501(c)(3) compliant, and complete. Advise on budget preparation that is in line with NEO's financial systems.

- Manage reporting calendar and work with projects and Finance team to ensure all reporting requirements and deadlines are satisfied.
- Review incoming grant agreements, work with Legal and project to resolve any problematic requirements.
- For projects engaging in grantmaking, work with NEO departments to prepare grant agreements, as well as accurate and timely disbursement of grant payments and collection and review of grant reports.
- Participate in grantee, donor, and advisory committee meetings, as requested by assigned projects or NEO leadership.

#### Legal Compliance & HR 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 as well as labor laws.
- Draft all vendor and consultant contracts for review by Counsel for assigned projects.
- In conjunction with NEO's HR team, ensure effective communication with project teams about HR requirements, timelines, and policy updates. With some support from HR and the Assistant Director, provide performance management and hiring support as needed.

#### NEO Program Responsibilities

- With the Assistant Director, participate in development of programmatic resources and initiatives.
- Support the onboarding of new fiscally sponsored projects, as assigned.
- Work with NEO leadership to communicate organization-wide policies and procedures to projects.
- Engage with and support NEO's DEII efforts following recommendations from the ELG and NEO's leadership.

#### **Desired qualifications:**

1. Bachelor's degree required
2. Three to five years of foundation, nonprofit, or public service experience required
3. Knowledge of non-profit management, including legal and financial compliance for nonprofits strongly preferred
4. Master's degree in related field or equivalent experience preferred
5. Strong planning, and organizational skills; the ability to manage time efficiently and meet deadlines
6. Exceptional attention to detail
7. Excellent interpersonal and relationship-building skills and proven ability to

work effectively across multiple roles with diverse groups of people and customers

8. Proven ability to juggle multiple tasks, tolerance for work under pressure, and strong ability to work independently
9. Excellent verbal and written communication skills
10. Personal and professional approach of working respectfully, thoughtfully, and collaboratively in a team environment
11. Knowledge of budgeting and financial management
12. Proficient with windows-based word processing, spreadsheets, databases and Internet programs. Experience with Salesforce is a plus.

**Compensation:**

Compensation for this role will vary depending on the experience of the candidate and resulting title. The salary range for this position is \$75,000 to \$82,500 per year. NEO provides generous benefits, which includes medical, dental, vision, life, long term disability, and pet insurance. We also administer FSA, Commuter benefit, and 401k retirement plans and have generous Paid Time Off and an Employee Assistance Program (EAP).

**How to Apply:**

Interested applicants should send an application that includes a resume and cover letter to: [fiscalsponsorship@neophilanthropy.org](mailto:fiscalsponsorship@neophilanthropy.org). Please include "Portfolio Manager – [your name]" in the subject of your email. No phone calls please.

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

**NEO Philanthropy Careers**

NEO Philanthropy is committed to attracting, developing and retaining exceptional people, and to creating a work environment that is dynamic, rewarding and enables each of us to realize our potential. NEO Philanthropy's work environment is safe and open to all employees and partners, respecting the full spectrum of race, color, religious creed, sex, gender identity, sexual orientation, national origin, political affiliation, ancestry, age, disability, genetic information, veteran status, and all other classifications protected by law in the locality and/or state in which you are working.