

## **Portfolio Coordinator Donor Services and Special Projects**

### **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.

Over the past 35 years, NEO Philanthropy has helped all types of donors maximize their resources, support work they could not do on their own and gain access to strategic and cutting-edge advice around issues and philanthropic practice. NEO offers donors a range of ways to work with us – through donor advised funds, pooled funds, specialized grant programs and initiatives. All of these are customized programs that allow our donors to minimize their administrative costs in order to maximize their impact. They also get to leverage the expertise and depth of NEO's senior staff, as well as gain access and benefit from our extensive networks in the philanthropic and grantee communities.

### **Position**

Reporting to the Program Manager, the Portfolio Coordinator role is the entrance point to a team working with a portfolio of diverse projects within the Donor Services and Special Projects (DS) department, which is currently home to 50+ projects. In the context of the team, the Portfolio Coordinator will work closely with DS program staff to provide mid-level administrative support based on the needs of projects. The ideal candidate is an organized, reliable, and detail-oriented problem-solver with excellent judgment. They should have experience working in a fast-paced environment and be able to exercise good judgment when juggling multiple time-sensitive deliverables. Prior experience in the nonprofit sector is preferred though not required.

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. They work efficiently, independently, and proactively suggest process improvements. This is a great position for anyone who is looking to transition into the non-profit space and learn about the ins and outs of non-profit management through the perspective of an intermediary.

### **Working Arrangements**

NEO Philanthropy has its headquarters in New York City and had a hybrid work model. As a result of COVID-19, the NEO Central staff has adopted a hybrid work remote structure with staff having 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 New York City.

### **Responsibilities**

- In coordination with Donor Services program staff, prepare grant agreements, as well as accurate and timely disbursement of grant payments and collection and review of grant reports for projects engaging in grantmaking.
- Serve as the primary point of contact on the Donor Services for the NEO grantee portal, including working with other departments to ensure the smooth rollout of the portal
- Generate and draft contracts for consultants and external vendors.
- Review and process weekly payment requests from DS projects as needed.
- Work with the DS and Finance Teams to ensure proper documentation, accurate accounting, and reconciliation for all revenue and expenses, including tracking accounts payable and receivable through Salesforce.
- Manage department-wide and assigned portfolio specific online giving platforms, including Network for Good. Prepare reports for finance team and projects that track online giving.
- As requested by projects, collate, generate, and send donor acknowledgement letters on behalf of NEO.
- Oversee and ensure that all data within Salesforce and Dropbox are up-to-date.
- Ensure timely and regular updates of databases across NEO's systems, including Salesforce, Dropbox, UKG (formerly UltiPro), and Nexonia.
- Prepare documentation and manage online resources for the department.
- Provide out-of-office coverage for department.

### **Desired qualifications:**

1. Bachelor's degree required.
2. At least two years of foundation, nonprofit, or public service experience required.
3. Strong planning and organizational skills; the ability to manage time efficiently and meet deadlines.
4. Curiosity and a willingness to learn in a fast-paced environment that is experiencing tremendous growth.
5. Exceptional attention to detail and receptive to feedback.
6. Proven ability to juggle multiple tasks, tolerance for work under pressure, and ability to work independently.
7. Excellent verbal/written communication skills and interpersonal/relationship building skills.
8. Personal and professional approach of working respectfully, thoughtfully, and collaboratively in a team environment and across departments.
9. 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 \$60,000 to \$70,000 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: [jobs@neophilanthropy.org](mailto:jobs@neophilanthropy.org). Please include “Portfolio Coordinator – [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.