

## **Gift Compliance Coordinator, University of Colorado Foundation Job Announcement**

**Position Title:** Coordinator, Gift Compliance

**Reports To:** Director, Gift Compliance

**Hiring Salary Range:** \$48,000 - \$54,000

**Position Status:** Non-Exempt

**Posting Dates:** October 10, 2022 – November 11, 2022

### **JOB PURPOSE**

The Coordinator, Gift Compliance will coordinate various Gift Compliance department initiatives with a keen focus on processes and procedures related to charitable contributions received and processed by the University of Colorado Foundation for the benefit of the University of Colorado. The Coordinator, Gift Compliance serves as a key liaison among University Advancement, University campus partners and Foundation Finance & Accounting to ensure gift and grant documentation received through the gift agreement workflow as well as other channels are reviewed in a timely manner, adhere to Foundation policies, IRS rules and regulations, CASE guidelines, as well as other industry standards. This position will assist in gift compliance related projects and assignments that are complex in nature, require considerable judgment, analysis, and initiative to resolve problems. The Coordinator, Gift Compliance is expected to demonstrate curiosity, willingness to learn and make solution recommendations in coordination with other team members and with little supervision.

### **ESSENTIAL DUTIES**

- Monitor and organize the department's email inboxes (compliance & grants) as well as the organization's project management tool (Monday.com) in a timely and efficient manner, including pro-actively doing research, finding answers and possible solutions for questions received, ensuring right team(s) and/or individuals are assigned and helping team members stay organized and on task
- Assist with all facets of the Gift Fund Setup (GFS) workflow such as monitoring the queue, initiating new GFS for fully executed agreements; helping campus partners in submitting change requests; and filing and/or uploading fully executed gift agreements as well as other gift fund documentation
- Assist with all facets of the gift and grant agreement workflow, including monitoring the agreement queue, assisting with the review process, as well as preparing and mailing donor agreements and letters
- Manage DocuSign workflow for gift and grant agreements
- Monitor and organizes the compliance coding workflow in the project management tool; assist with the application/updating of compliance codes and applicable data uploads
- Monitor and organize the Foundation's suspense funds, including research, follow-up and submitting of rev/mods
- Provide a high level of customer service by communicating regularly and efficiently with internal and external customers and helping to develop strategies to meet their needs and/or better support them, always thriving to represent the Foundation and University in a positive and professional manner.

### Other Duties

- Manage projects and/or drive initiatives as assigned
- Perform other duties as assigned

### COMPETENCIES

- Ability to quickly acquire and apply new skills and knowledge for one or more processes or areas
- Ability to work on assignments that are complex in nature where considerable judgment, analysis, and initiative are required to solve problems and make recommendations
- Solid organizational and project management skills, including ability to prioritize and meet frequently changing needs as well as ability to maintain high level of accuracy while meeting deadlines
- Solid customer service skills with the ability to communicate effectively verbally and in writing as well as using good judgment in situations requiring initiative and tact, ability to maintain confidentiality
- Goal oriented with an ability to take initiative both in a team environment as well as independently
- Comfortable to change or challenge decisions
- Solid computer knowledge and ability to use Microsoft Office or similar software programs

### EDUCATION

- Associates Degree OR equivalent combination of education and experience.

### EXPERIENCE

- Minimum of two (2) years' experience in a related field or one (1) year of directly related experience.

### PHYSICAL DEMANDS AND WORKING CONDITIONS

- Work in a normal office environment and / or a combination of office and remote

### COMPENSATION

Starting salary is based on education, experience, skills, and other job-related factors. The hiring salary range for this position is: \$48,000 - \$54,000. This position is eligible for a full and competitive benefits package, which includes:

- **Medical:** Three plan options
- **Dental:** Two plan options
- **Additional Insurance:** Disability, Life, and Vision
- **Retirement 401(k) Plan:** Employer contributes up to 6% of your annual compensation, per plan terms
- **Paid Time Off:**

- Paid Time Off: 25 days (*first two years*)
- Holidays: 12 days
- **In-Office/Remote hybrid schedule offered**

**TO APPLY: Interested applicants should submit a resume, cover letter of interest, and contact information for up to three professional references to [HR@cufund.org](mailto:HR@cufund.org).**

All applications must be received no later than 5:00 p.m. November 11, 2022, to be considered.

**ANTI-DISCRIMINATION POLICY:** The University of Colorado Foundation is an Equal Opportunity Employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion (creed), sex, national origin, disability status, marital status, sexual orientation, military status, gender, gender expression, age, protected status, or any other characteristic protected by law.

The University of Colorado Foundation practices and champions inclusiveness in our community. We honor the diverse strengths, needs, voices, and backgrounds of all members of our community. Black, Indigenous, People of Color, others who identify as nonwhite, people with disabilities, members of the LGBTQIA+ community, and those from traditionally marginalized communities are especially encouraged to apply for this role.

#### **About the University of Colorado Foundation:**

For over 55 years, the University of Colorado Foundation has partnered with the University of Colorado to enhance philanthropic support for CU. The CU Foundation serves as the University's philanthropic portal, enabling CU to transform lives through education, research, clinical care, and community engagement. The Foundation focuses its efforts on donor stewardship through customer service and assurance in gift acceptance, processing, and administration. During the fiscal year ended June 30, 2021, the Foundation processed over 54,000 gifts and commitments. The Foundation allocates gift funds in a manner consistent with the purposes established by donors and distributes dollars from its managed funds to support a wide variety of programs and activities throughout the University system and on its four campuses.

The Foundation has over \$3 billion in assets under management, including more than 3,000 endowment funds. As of June 30, 2021, the Foundation's long-term investment pool was valued at \$2.6 billion, including \$2.1 billion in CU endowments and \$330 million in CU treasury funds. At that date, the Foundation's short-term investment pool comprised of current funds, endowment distributions and unrestricted assets was valued at \$427 million. The Foundation follows an outsourced chief investment officer model and contracts investment services through an investment management firm.



The Foundation's revenue is derived primarily from an annual assessment on its long-term investment pool and a monthly distribution from its short-term investment pool. Of the \$40 million in revenue expected in fiscal year 2022, the Foundation will retain \$5.4 million to fund its operations and it will transfer \$34.6 million to the University to fund CU Advancement's operations and IT investments. CU Advancement leads the University's engagement and fundraising efforts and partners with the Foundation to maximize private support for CU.

The Foundation is a 501(c)(3) public charity governed by an independent Board of Directors. Board committees include an Investment Policy Committee, a Finance/Operations Committee, and an Audit Committee. The Foundation's day-to-day operations are carried out by an administrative staff of approximately 20 individuals overseen by the Foundation's President and CEO.