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: Hourly, Full Time in a Hybrid Office Environment
Posting Dates: January 5, 2023 – February 5, 2023

Position Summary

The Coordinator, Gift Compliance will coordinate various Gift Compliance department initiatives with a keen focus on processes and procedures related to philanthropic 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 requests related to the lifecycle of all gifts to the Foundation successfully complete the gift process workflow in a timely manner and adhere to established Foundation policies, are in compliance with IRS rules and regulations, CASE guidelines, as well as other industry standards. They will also assist in compliance-related projects and assignments that are complex in nature, requiring considerable judgment, analysis, and initiative required to resolve problems and make recommendations in coordination with other team members and with little supervision.

ESSENTIAL DUTIES

- Ensure 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
- Triage the department's compliance email inbox and project management tool in a timely and efficient manner, including pro-actively doing research, finding answers and possible solutions, ensuring the right teams are assigned, and keeping the workflow moving forward
- Assist with all facets of the Gift Fund Setup workflow such as monitoring the queue, answering questions, and training campus partners in submitting requests, with a keen focus on maintaining gift compliance for all change/inactivation requests and fund attributes/purpose language for new requests, applying/updating compliance codes
- Assist with gift agreement workflow including composing donor letters/emails, coordinating DocuSign, and initiating related GFS new fund set-up requests
- Assist with Compliance coding workflow including moving requests from the GFS to the coding boards in our project management tool and performing data uploads into the Financial Edge database
- Serve as a resource for donors, Foundation, Advancement, and other University staff on commitment and gift processing questions

DESIRED KNOWLEDGE AND SKILLS

- Solid customer service skills with the ability to build relationships and follow-through
- Ability to communicate effectively verbally and in writing as well as using good judgment in situations requiring initiative and tact
- Ability to quickly acquire and apply new skills and knowledge for one or more processes or areas
- Ability to work on assignments that are detailed in nature where considerable judgment, analysis, and initiative are required in resolving problems and making recommendations
- Effective interpersonal skills including the ability to maintain confidentiality
- Goal-oriented with an ability to take initiative both in a team environment as well as independently
- Solid computer knowledge and ability to use word processing, email, spreadsheet and database software programs

EDUCATION AND EXPERIENCE

- Minimum of two (2) years experience in a related field and in a professional office environment
- Advancement/fundraising experience desired
- Minimum Associates Degree OR equivalent combination of education and experience. Bachelor's Degree OR equivalent combination of education and experience preferred

PHYSICAL DEMANDS AND WORKING CONDITIONS
Works in a normal office environment:
- Sitting and standing for long periods.
- Using office equipment such as computer, mouse, keyboard, and printer.
- Light physical effort required by handing objects up to 20 pounds.
- Some travel required along the Front Range to University campuses.

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:* Four 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

TO APPLY: Interested applicants should submit a resume, and cover letter to HR@cufund.org

All applications must be received no later than 11:59pm on Sunday February 5, 2023 to be considered.

Please note that while the position description details both minimum requirements as well as desired skills and experience, we want to remind applicants that you do not need to have all the desired skills and experience to be considered for this role. If you have the passion for the work along with experience in a related field, you are encouraged to apply. We can provide on-the-job training for the rest.

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. Private support for the University, given through the philanthropic portal of the Foundation, enables the University 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. The Foundation invests and 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 just under $3 billion in assets under management, including more than 3,000 endowment funds. As of September 30, 2022, the Foundation's long-term investment pool was valued at $2.7 billion. 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 $47.5 million in revenue expected in fiscal year 2023, the Foundation will retain $6.2 million to fund

its operations and it will transfer $35.7 million to the University to fund CU Advancement's operations and IT infrastructure investments.

The Foundation is a 501(3)c 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.