

Institute on Taxation and Economic Policy
Position Title: Operations and Development Associate

Position Overview: The Institute on Taxation and Economic Policy seeks an individual who has a passion for non-profit office operations and fundraising. They should be motivated to work for an organization that believes the nation will be at its best when it lives up to the ideal of broadly shared prosperity for all.

The Operations and Development Associate is a valued member of ITEP's team (15 staff) with responsibility across various functions of the organization ensuring it is an effectively run, managed organization. The Operations and Development Associate supports administrative functions such as payroll processing, financial management, office management, human resources, accounts payable, vendor management, and executive support to the executive director and board of directors. Additional core responsibilities support ITEP's fund development work, including but not limited to, donor systems management, donor research, donor cultivation, events coordination, as well as grants management support.

The position requires strong organizational and administrative skills and attention to detail because of financial, personnel and bookkeeping tasks and responsibilities. The position must take care to keep confidentiality as corporate financial data, donor information, human resources materials require trustworthy and mature professional to manage the work accordingly.

Duties and Responsibilities

1. Administration

- Provides executive support to executive director and board of directors
- Acts as a liaison with executive director, board chair, and full board, assisting with communications, meeting coordination, recording minutes, materials development, documentation and corporate identity
- Processes payroll with outside payroll service, updates payroll system for new employees and any changes of existing employees; tracks and enters sick and annual leave
- Tracks and manages vendors, vendor contracts and negotiates pricing on behalf of ITEP
- Manages and liaise with vendors who provide benefits, insurance, and coordinates renewals and payment
- Prepares quarterly payments to employees SEP-IRA accounts
- As needed works with building management and tech support (phone/internet company, printer company, IT consultant)
- Serves as office manager, coordinating procurement of supplies, mailing, mass printing and mailing efforts, distributes mail in office as required, keeps office orderly and professional and ensure smooth execution of office operations.
- Prepares appropriate human resources documents, reports and materials for executive director, board and staff as needed.

2. Financial Management

- Serves as main point of contact for organization's bookkeeper and CPA
- Supports and ensures all tax forms and files from staff, vendors, consultants are recorded and filed in compliance with audit rules.

- Coordinates paperwork with bookkeeper and auditor for smooth completion of financial audit, to include, but not limited to: Obtaining form W-9 from all new vendors who perform a service; handling all vendor inquiries regarding payments; assisting outside accountant with preparation of 1099's; coordinating review with auditors during audit field work including providing documents; working with bookkeeper to reconcile end of year reports
- Performs routine accounts payable/receivable bookkeeping onsite that supports the external accountant. Duties include, but are not limited to: Enters bills, expense reimbursements and check requests into QuickBooks (QB); processes checks for mail or delivery; files disbursement documents; gets approval and signature of ED on all invoices before printing checks; provides printed checks and related documents to executive director
- Coordinate check signing for checks payable to Executive Director or over Executive Director's authorized amount
- Maintains in a locked file all blank checks and undeposited checks
- Manages and prepares deposits and remittance of checks to the bank
- Maintains deposit records- Attaches to a copy of the deposit slip copies of the checks and copies of related correspondence (such as letters and check stubs); takes deposit to bank; attaches deposit receipt to the check copy package; files deposit documents

3. Development

- Manages donor database (NeonCRM)
- Creates donor reports and lists as needed
- Assists in donor research, donor prospecting and securing sponsorships of major events
- Manages development mailings by developing mailing lists, procuring supplies, preparing mail merge, folding and stuffing and coordinating staff involvement as needed
- Records donations received in database and donation binder
- Processes donations through NeonCRM
- Communicates with donors as needed
- Assists Executive Director in implementation of fundraising plan
- Sends timely thank you letters to donors and sponsors

This position is full-time and is based in Washington, DC. Salary will be based on experience and includes outstanding retirement, health and dental benefits, and paid time off. Applications will be accepted until the position is filled. To apply, send a resume, cover letter, and three references as a pdf attachment with the subject line, Operations and Development Associate to alan@itep.org

The Institute on Taxation and Economic Policy (ITEP) is an Equal Opportunity Employer that values and welcomes diversity in the workplace and strongly encourages all qualified persons to apply regardless of any protected status under federal or local law including Minorities/Women/Disabilities/Veterans.