

NEW COMMONWEALTH FUND

Manager of Operations & CRM Systems

Department: Operations

Reports To: Vice President, Operations

Status: Full-Time, Exempt

Contribution Lens: Infrastructure — Creates Stability

Partners With: Deputy Chief of Advancement; Managing Partner for Donor Growth; Senior Director of Institutional Philanthropy; Senior Director of Board Engagement; Program and Finance teams

Supervises: No current supervision

Salary range \$75-90K commensurate with experience;

Benefits: Benefits include health care, retirement, and generous vacation leave, sick leave, and generous holiday schedules. NCF maintains periods of time that the office operations are closed and offers this as compensated hours to each employee.

About This Role

The Manager of Operations & CRM Systems is the operational and data backbone of the New Commonwealth Fund. The role owns NCF's CRM/Salesforce environment as the organization's shared system of record—supporting grantee relationships and payments, vendor payments, donor management, event participation, and the data that connects them—and runs the day-to-day operations that keep the organization accurate, responsive, and well-supported.

Reporting to the Vice President, Operations, the Manager serves the entire organization as a shared resource: Program relies on the role for grantee records and grant payments; Finance relies on it for vendor payments and reconciliation; Advancement relies on it for gift processing, acknowledgments, solicitation support, and events. Within NCF's shared accountability model, this role carries the Infrastructure lens—it creates the stability and data integrity on which impact, intelligence, advancement, and stewardship all depend.

To apply: email [Yvonne Montilla](#) with your resume and cover letter. Submissions will be reviewed on a rolling basis.

CRM & Database Management (Organization-Wide)

The Manager is NCF's primary CRM/Salesforce administrator, responsible for a single, trusted database that spans the full organization—not fundraising alone.

Responsibilities include:

- Administering NCF's Salesforce environment—users, permissions, page layouts, objects, and configuration—as the organization-wide system of record.
- Maintaining a unified database across grantees, donors, prospects, vendors, board members, advisors, and program participants.
- Supporting grantee relationship management and outreach records alongside donor and prospect records.
- Maintaining data quality standards, deduplication, and ongoing data hygiene across all record types.
- Building and maintaining reports and dashboards for Program, Advancement, Operations, and leadership.
- Managing integrations with email, event, payment, and wealth-screening platforms.
- Supporting user adoption through training, documentation, and day-to-day help.
- Partnering with the Senior Director of Institutional Philanthropy on data governance and reporting standards.

Payments & Transaction Operations

The Manager supports the accurate, well-documented movement of money in and out of NCF, in close partnership with Finance.

Responsibilities include:

- Supporting grant payment processing and tracking against grantee records and award schedules.
- Supporting vendor payment setup, tracking, and documentation in coordination with Finance.
- Processing and recording incoming gifts accurately and on time.
- Maintaining coding, reconciliation, and audit-ready records across grantee, vendor, and donor transactions.

Donor Acknowledgments & Records

The Manager ensures every donor is thanked promptly and personally and that donor records stay accurate.

Responsibilities include:

- Generating timely, accurate acknowledgment and tax-receipt letters (target: within 48 hours).
- Ensuring acknowledgment quality, personalization, and consistency across giving levels.
- Maintaining accurate donor records, giving histories, and relationship notes.
- Maintaining gift coding standards in partnership with Finance.

Solicitation & Appeal Support

The Manager provides the operational engine behind NCF's solicitations, appeals, and stewardship communications.

Responsibilities include:

- Building audience segments and pulling accurate mailing and email lists for appeals.
- Coordinating production and distribution of the quarterly written appeal and digital campaigns.
- Supporting solicitation logistics—pledge tracking, follow-up reminders, and acknowledgment cycles.
- Maintaining the solicitation and stewardship calendar in coordination with the Deputy Chief of Advancement.
- Tracking campaign performance and producing follow-up reporting.

Event Operations

The Manager owns the logistical execution of NCF's events end to end—from giving circles and stakeholder convenings to the signature gala—serving as the operational lead who turns event plans into smoothly run gatherings with clean follow-up data.

Responsibilities include:

- Owning event logistics end to end—venue, vendors, contracts, materials, and run-of-show support.
- Administering RSVPify and event registration, invitations, RSVPs, attendee tracking, and check-in.
- Coordinating giving circles, house parties, donor dinners, stakeholder convenings, and the signature gala.
- Partnering with the Senior Director of Board Engagement on board- and advisor-hosted events.
- Managing vendor payments and event budgets in coordination with Finance.
- Ensuring all event data, new contacts, and follow-up actions are captured accurately in Salesforce after each event.
- Coordinating post-event stewardship and acknowledgment cycles.

Cross-Functional Coordination

The Manager works across Operations and Advancement to keep fundraising infrastructure aligned and reliable.

Responsibilities include:

- Partnering with the Deputy Chief of Advancement on pipeline data and moves-management hygiene.
- Supporting the Managing Partner for Donor Growth with stewardship and renewal operations.

- Coordinating with the Senior Director of Board Engagement on board and donor event logistics.
- Partnering with Finance on gift reconciliation and reporting.
- Escalating system, process, or capacity issues to the Vice President, Operations.

What Success Looks Like

Salesforce is accurate, current, and trusted as NCF's organization-wide single source of truth.

Grantee, vendor, and donor records and payments are clean, documented, and audit-ready.

Every gift is acknowledged within 48 hours and appeals go out on schedule with correctly segmented lists.

Events run smoothly end to end and all attendee data is captured completely.

Program, Advancement, Finance, and leadership can rely on operations and data without friction or rework.

Who NCF Is Looking For

The ideal candidate is a detail-driven operations professional who takes ownership of systems and data and treats reliability as a form of stewardship. The role rewards someone equally comfortable in a Salesforce admin console, a payment-and-reconciliation queue, and an event load-in.

Successful candidates will demonstrate:

- Hands-on Salesforce administration experience (nonprofit/NPSP a plus).
- Strong data-management, reporting, and transaction/reconciliation skills.
- Experience supporting grantee, vendor, and donor operations and payments.
- Event-logistics ownership and registration-platform experience (e.g., RSVPify).
- Exceptional attention to detail, follow-through, and discretion with sensitive data.
- A service orientation toward the colleagues, grantees, and donors the role supports.

The strongest candidates understand that operational excellence is what makes the mission possible—that accurate data, reliable payments, prompt thanks, and well-run events are how an organization earns and keeps trust.

The content is intended to describe the general nature and level of work being performed by persons assigned to this job. It is not intended to constitute an exhaustive list of all responsibilities and duties required.

External and internal applicants, as well as position incumbents, who are or become disabled as defined under the Americans with Disabilities Act or applicable state law, must be able to perform the essential functions of the job (including those listed above) either with or without reasonable accommodation. Reasonable accommodation, if any, will be determined by management in consultation with the employee on a case-by-case basis.

This job description is intended to be general and may be revised from time to time. At management's discretion, the employee may be assigned different or additional duties from time to time.

The New Commonwealth Fund is an equal opportunity employer committed to building a team that reflects the communities it serves.

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