

PORTFOLIO MANAGER (BOSTON, MA)

ORGANIZATION

In September 2002, fifteen families, bound by the common goal of improving the lives of struggling children and families in Massachusetts, launched Strategic Grant Partners (SGP), a foundation and a pro-bono consulting firm. We invest in, and work closely with, great leaders with game changing ideas that have the potential to dramatically improve the lives of children and families in Massachusetts. Through rigorous due diligence and active partnership with entrepreneurial leaders, SGP works to both scale proven programs and create new solutions that address critical societal problems. We provide customized strategic and tactical expertise to identify, design and/or refine interventions that can make a significant difference in lives of children and families. Since inception, SGP has granted over \$70 million to 65 organizations.

Our grant making focuses on the areas of education, college and work readiness for high-risk youth, child welfare and early childhood. SGP remains involved with its grantees once a grant is made, providing support as needed to ensure goals are achieved. SGP supports and values long term relationships with grantees and in many cases provides additional grant funding once initial objectives are achieved and new growth goals established.

SGP's goals are to:

- Incubate promising ideas in Massachusetts with a high potential for impact.
- Invest in strong evidence-based Massachusetts' nonprofits.
- Help local organizations with proven success to disseminate learnings and/or scale their models.
- Invest in national organizations with proven results to expand into Massachusetts.
- Invest in work that alters public systems in ways that address critical challenges and are directly tied to positive changes for children and families.

ABOUT THE POSITION

The Portfolio Manager will be responsible for spearheading select grant making efforts, with a focus on the education sector including K-12, post secondary, and workforce development. The Portfolio Manager will also play a critical role continuing to refine SGP's strategy. S/he will report to the Director.

Responsibilities will include, but are not limited to:

Portfolio Management

- Identify high caliber organizations that align with the foundation's mission and strategy
- Manage all aspects of moving a potential grantee through the SGP due diligence process, including:
 - Assessing the strength of an organization's leadership, strategic plan, if one exists, and developing a project plan outlining how SGP may work with a potential grantee.
 - Leading or co-leading strategic planning sessions, which may focus on issues like theory of change, model codification, strategic priorities, etc.
 - Performing all necessary analyses, which may include benchmarking, financial modeling and competitive assessment.
 - Developing or refining a strategic, business and/or implementation plan in partnership with the organization.
 - Determining, in conjunction with the Director, whether a grant should be pursued, and then designing the grant structure, goals, measures of success, and (if approved) grant contract.
 - Directing and supervising work of the Portfolio Analysts.
 - Drafting a paper that makes the case for a grant and preparing the grantee to present to SGP's partners. Developing and finalizing the grant agreement.
- Build strong relationships with key stakeholders and engage them as collaborators in potential grants.

- Maintain close, positive relationships with grantees, demonstrating commitment to their success by problem solving, offering ongoing advice, and eliminating barriers to their success; foster strong working relationships, a high level of mutual trust, and effective channels of communication.
- Track grantee progress through site visits, data collection, evaluation and candid conversations; keep Director apprised of grantee progress, and seek assistance as needed to ensure grantee success.

Strategy and Foundation Support

- Develop and maintain a breadth of knowledge about existing research, current trends and emerging issues in SGP's areas of concentration.
- Use research and robust data analysis to inform ongoing refinement of SGP strategy.
- Develop, nurture, and access a wide and deep network of operators, leaders, academics and philanthropists that will help inform strategy and identify high caliber emerging organizations.
- Represent SGP at meetings, conferences, and other events.
- Prepare communications and reports for trustees.

PROFESSIONAL QUALIFICATIONS

The Portfolio Manager, Education will identify great leaders and develop grants and partnerships that can affect systemic change and enable entrepreneurial organizations to grow and thrive. The hurdle to become an SGP grantee is high, and the Portfolio Manager must embody SGP's high standard for excellence, rigor, passion and commitment, while working alongside grantees and providing support and skills to ensure their success. Qualified candidates will possess:

- Strategic and business planning leadership and experience; management experience at a top tier consulting firm.
- Operating experience in a district, nonprofit or other mission-driven organization.
- Strong networking and relationship building skills; an established network in education.
- Analytical orientation and the ability to structure investment hypotheses, conduct the associated research, assess programmatic, management and financial information, and unearth relevant implications and opportunities.
- Demonstrated ability to communicate with senior organizational leaders, collaborate effectively and interact with diverse organizations.
- Understanding of the education landscape and/or SGP's other issue areas and populations served.
- A strong belief that the cycle of poverty can be broken, and that life outcomes of children can be dramatically improved, with a high quality education and appropriate supports.
- A love of learning and achievement and the desire and skill to help others succeed.
- A strong willingness to act, break down barriers and be part of the solution.
- Self-motivation and the ability to work independently, take initiative and solve problems.
- Excellent written and verbal communication skills and attention to detail.
- Bachelors degree (required); MBA preferred.

APPLICATION PROCESS

SGP is an Equal Opportunity Employer and encourages candidates of all backgrounds to apply for this position. Interested candidates should send a resume and letter of interest to sgpassist@strategicgrantpartners.org. Salary is competitive and commensurate with experience.