



CHARLES AND LYNN SCHUSTERMAN FAMILY FOUNDATION

Job Description

JOB TITLE: Portfolio Manager

Exempt: Yes

Location: San Francisco, CA

Division: CLSFF

Department: Education

Effective Date: 2016

FOUNDATION SUMMARY:

The Charles and Lynn Schusterman Family Foundation is a global organization that seeks to ignite the passion and unleash the power in young people to create positive change. We pursue our mission by working collaboratively with others to support and operate high-quality education, identity development, leadership training and service programs designed to help young people cultivate their growth as individuals and as leaders.

Our goals are to improve public education in the United States, strengthen the global Jewish community and Israel, and enhance the quality of life in our founders' hometown of Tulsa, OK. Established in 1987, the Foundation has offices in Tulsa, OK; Washington DC; Atlanta, GA; San Francisco, CA; and Jerusalem, Israel.

Focus on Education

Our aim is to significantly increase the number of students – especially those growing up in low income communities – who graduate from high school with the content knowledge, confidence, critical thinking and conceptual understanding skills necessary for success in life. Many factors affect this outcome; our focus is on developing teachers who are able to facilitate student learning at the level required by Common Core or similarly rigorous college and career ready standards. Our primary investment areas are: pre-service, professional learning for current teachers and school leaders, and instructional materials that are aligned to the standards and user-friendly for teachers. Our grantees represent leaders in innovative, outcomes-based approaches to developing and supporting teachers and school leaders, both directly and via professional learning systems. We also fund research to increase knowledge about effective professional learning.

We are committed to expanding the number and role of leaders of color in education reform and teachers of color in classrooms across the country. We recognize the importance of public support for education reform efforts; some of our grants support teacher voice, parent information, and advocacy organizations.



Our approach to grants-management is hands-on. We coach CEOs, join boards of directors, and engage in strategic planning processes of our grantees. In addition to making grants, we build communities of practices where leaders work together on common challenges.

Our national educational team launched in December 2014. We are nimble and entrepreneurial, and improve our strategy as we learn about what will get us closer to our goals.

JOB SUMMARY

The Portfolio Manager will join a National Education Team comprised of ten people. The Portfolio Manager's primary responsibility will be to support CLSFF leadership in cultivating and assessing potential investment opportunities, providing support to grantees post-investment, and planning and running convenings. Participants in the convenings represent some of the nation's leading entrepreneurial professional development and teacher preparation organizations, practitioners, and thought leaders. The grantees that comprise this portfolio include organizations focused on: providing professional development, creating online teacher communities, as well as some for-profit companies focused on improving teaching and learning. Additionally, the Portfolio Manager will be a strategic thought partner to CLSFF leadership, and an important contributor to the internal culture and overall impact of the Foundation.

Responsibilities

The Portfolio Manager will work closely with CLSFF Directors to:

- Lead thorough and rigorous due diligence and grant evaluation by:
 - Assessing potential grantees against selection criteria;
 - Performing qualitative and quantitative analyses including business plan analysis, interviewing experts, benchmarking and financial modeling
 - Writing investment recommendations
 - Conducting site visits to observe programs; and,
 - Developing grant terms, milestones and a strategy for ongoing engagement and support for each grantee
 - Planning for and leading learning and support meetings with current/potential grantees
- Strategically support grantees in non-monetary ways, including strategic planning, systems development, data analysis and connecting to partners
- Monitor grantee progress against milestones and outcomes
- Prepare reports for Directors based on board meeting documents and other key materials
- Project-manage, assist in content development for, and help run convenings
- Represent the Foundation at meetings, conferences and other events
- Develop and leverage a network of operators, leaders, academics and philanthropists in the education reform sector to advance CLSFF's goals and accelerate our collective impact
- Support CLSFF's overall strategy implementation, including the creation of systems for



assessing impact and progress against strategic priorities

PROFESSIONAL EXPERIENCE

The successful candidate will have the following experience:

- Five or more years work experience in an education organization and/or consulting firm
- Experience working with budgets
- Proven ability to distill key insights from large amounts of data and information
- Bachelor's degree required; Advanced degree preferred

Skills

The successful candidate must possess the following skills:

- Strong quantitative and qualitative analytical skills
- Proficiency in financial modeling and operational analysis
- Understanding of business models and effective strategic planning for organizational growth, development, and health
- Excellent project management skills and attention to detail while managing multiple priorities
- Personal presence and communication skills necessary to build relationships with grantee staff and other colleagues across the education sector
- Insightful strategic thinking
- Ability to thrive in a small collaborative setting, where teamwork, passion, positivity and resourcefulness are highly valued
- Experience designing and/or delivering professional development (training, mentoring, coaching, etc.) in a K-12 context considered a bonus.

Attributes

The successful candidate must possess the following attributes:

- Passion and demonstrated commitment to significantly improving K12 education for students in low-income communities
- Alignment with our core values: Joy, Catalytic Impact, Humility, Stewardship, Authenticity, Learning and Sharing, and Agility
- Team-orientation
- Recognition of the complexity of the challenges to changing education, humility around grantee and other organizations' approaches to addressing these challenges, and a sense of urgency to find and scale promising solutions
- Action-orientation and willingness to take smart risks
- A high level of initiative, integrity, trust and accountability

Reporting Relationship



The Portfolio Manager reports to the Director who leads our professional learning portfolio. Additionally, this person will work closely with other members of the leadership team on some of their grants. This role will provide experience with multiple types of organizations and exposure to leaders across these areas.

Location

San Francisco

Travel

This role involves approximately 25% travel

Compensation

A compensation package, including a competitive salary and benefits package, will be provided commensurate with experience.

To Apply

Interested candidates should submit a resume and one-page cover letter via e-mail with the title, "Portfolio Manager Candidate", to Michelle Boyers (mboyers@schusterman.org). Applications will be reviewed in a rolling basis until the position is filled.

*The Charles and Lynn Schusterman Family Foundation is
an Equal Opportunity Employer
and encourages candidates of all backgrounds to apply.*