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Position Description
Senior Portfolio Associate, Evaluation
Blue Meridian Partners

Background

The Edna McConnell Clark Foundation champions economically disadvantaged youth. We partner with other investors to expand programs with compelling evidence in order to help more vulnerable young people become successful adults.

Incubated at EMCF and launched in 2016, Blue Meridian Partners is an independent collaboration of 12 philanthropic institutions and individuals who share decision-making authority. It plans to invest at least \$1 billion in propelling evidence-based programs to a scale that maximizes their impact directly, serving greater numbers of youth from birth to age 30, and indirectly, increasing their influence on the child welfare, educational, judicial, and other systems that affect young people's lives.

For more than four decades, the Edna McConnell Clark Foundation has sought to uphold the values that inspired the Clark family to create it. In our work with grantees and with each other, EMCF and its staff strive to live up to and put into action five core values: humility, belief in people, pragmatism, trust and high standards.

Position Profile

The Senior Portfolio Associate, Evaluation, based in New York, supports and helps develop a portfolio of investments in nonprofit organizations that result in increased positive opportunities for economically disadvantaged youth. The Senior Portfolio Associate's role includes partnering with the Blue Meridian Partners Managing Director who leads the Foundation's evidence-building work in activities related to evaluation, learning, and evidence-building in alignment with the Foundation's overall strategy. The Senior Portfolio Associate is also responsible for supporting all the Blue Meridian Managing Directors across a diverse set of activities, including working closely with Blue Meridian Partners grantees, reporting on performance, and leading key projects relevant to the foundation's strategic priorities.

Position Type

Exempt

Primary Responsibilities¹ include but are not limited to the following:

Grantee & Foundation Evaluation Services (approximately 50%):

- Provide support and thought partnership to the Blue Meridian Managing Director in all activities related to evaluation, learning and evidence building in alignment with the Foundation's strategy; help ensure the Foundation's evaluation and evidence standards are upheld and advanced; take the lead on projects and other work as appropriate.
- Synthesize studies and supporting evidence, and other evaluation-related activities, at all phases of BMP

¹ *This is a guide to the primary responsibilities of the job, not an all-inclusive list of responsibilities, qualifications, physical demands and work environment conditions.*

processes including due diligence, scaling planning, ongoing performance management, and any special initiatives the Foundation launches that require evidence assessments.

- Support BMP Managing Director on the work of the Evaluation Advisory Committee (EAC), by managing agenda setting, committee member assignments and contracts, onboarding of new committee members, and other related duties as appropriate.
- Ensure the highest standards of data analysis; effectively interpret and communicate implications and recommendations internally and, where applicable, to grantees.
- Collaborate with Foundation managers and grantees to clarify and support grantee program evaluation milestones, performance tracking, and other needs.
- Monitor the progress of grantee-conducted program evaluations, and with the support of the Blue Meridian Managing Director and the portfolio team, ensure progress remains on track.

Grantee Relationships & Other Support for the Managing Directors (50%)

Supporting 1-2 Grantee Relationships

With senior team members' direction, guidance and collaboration, and aligned with the Foundation's theory of investment, operating principles, performance behaviors and investment management plans, ensure excellent relationship management with grantees that integrates financial sustainability, evaluation and growth plans.

- Contribute toward grantees receiving excellent relationship management and support from the Foundation. Lead quarterly reporting processes and support the development of financial sustainability plans, evaluation plans and strategic growth plans in coordination with external consulting partners.
- Earn and maintain the respect of grantees; be a trusted point of contact with grantee management teams and a supporting resource for strategy development, refinement, and implementation, performance management and other activities.
- Participate in the development of grantee scaling plans; facilitate sharing high-quality and timely information within the Foundation, draft investment recommendations, and support the team's advancement of investment decisions.
- Help craft performance milestones with grantees that reflect alignment of the Foundation and grantee interests and chart a roadmap for success.
- Take ownership of grantee quarterly performance reports, ensuring documents are current and reflect the team's perspective on grantee performance, risks and potential future investment tracks, and authentically and adequately capture the grantees' current strategic position. Prepare materials and talking points for Partner updates.
- Design, participate in and sometimes facilitate grantee meetings, strategy sessions and performance reviews.
- Lead research, conduct interviews, analyze data to support the Foundation's sourcing and due diligence efforts to explore future investment opportunities.
- Manage projects and initiatives critical to the Foundation successfully implementing its overall strategy and its grantmaking efforts. Develop project plans, manage internal and/or external teams to accomplish project.
- Interact with and support, as needed, other areas of the Foundation's work, including other program teams, Finance, Human Resources, IT and Communications.
- Perform other responsibilities and duties consistent with the achievement of Foundation goals.

Qualifications

The Senior Portfolio Associate, Evaluation, must have strong interpersonal skills and be able to represent the Foundation externally in alignment with its core values and culture. He/she/they should be passionately driven by issues affecting young people and social justice, and have the capacity to work with diverse peers, trustees, consultants, advisers, grantees and communities. He/she/they must also have/be:

- Sophisticated and diverse analytical skills; facility in diverse quantitative and qualitative methods is essential. Able to manipulate databases, use computer-based statistical and analytical applications, and be able to critically assess outcome and impact studies. Comfortable compiling and analyzing disparate and even contradictory qualitative and quantitative information.

- Prior experience teaching generalists about research and evaluation concepts and methods, especially regarding the specification of outcomes and the selection of indicators and measures, is critical.
- An experienced project manager with a demonstrated track record in program impact evaluations, analysis and program management is required. Experience building and maintaining performance measurement systems, and knowledge of youth development field or experience working the public sector is desired.
- At least 7 years of professional experience in public policy, social justice, youth development or a related field in the private or public sector is required. An advanced degree with a concentration in statistics, quantitative methods, research and evaluation is preferred, but not required.
- A strategic and highly rigorous professional approach, balanced by a flexible and empathetic demeanor that is responsive to the needs of grantees, teammates and partners. Able to develop strong grantee relationships, while remaining objective and committed to meeting established goals.
- A professional and genial demeanor with the ability to forge strong relationships with EMCF staff that support Blue Meridian, and to work effectively within the larger Foundation structure.
- Skilled at thinking independently while carefully considering and engaging colleagues' points of view.
- Sound judgment and the ability to use discretion, seek input and feedback, listen well and make sometimes difficult decisions independently while understanding the need for collaboration and leadership's endorsement of final results. Open to finding creative, alternative solutions to challenges and disagreements that may arise.
- Results-oriented with a track record of charting a clear course of action that requires both multi-disciplinary and complex team delivery with the measurement of results against goals.
- Experience in managing and organizing projects and priorities through time sensitive and at times short deadlines while maintaining a strong attention to detail, a positive attitude and producing effective, professional and timely results; able to contribute as a lead or participant.
- Strong oral and written communication skills are essential, including the ability to speak up and present in group settings that may include senior executives and boards of directors, as well as to draft agendas, letters and memoranda, assist with document and report content, and produce and proofread materials.
- Strong computer skills with extensive knowledge of Microsoft Outlook, Word, Excel and PowerPoint, and the ability to master new software quickly; experience with Microsoft Dynamics CRM and SharePoint is a plus.
- Able to travel approximately 20% of work time.

Salary & Benefits

Total compensation includes an annual base salary that falls in the \$90,000 to \$100,000 range, the potential for an annual incentive award based on performance, and an exceptional benefits package that includes medical, dental, vision, 403b retirement plan with employer contributions and generous time off. Base salary will be set commensurate with chosen candidate's knowledge, skill and experience.

How to Apply

For consideration, please include the following in your application:

- cover letter
- resume
- writing sample

Please send your application to EMCFcareers@emcf.org. Be sure to include "Senior Portfolio Associate, Evaluation" in the subject line and let us know where you found our job post.

No phone calls or in-person applications, please.

The Edna McConnell Clark Foundation is an equal opportunity employer and encourages people of color, women, LGBTQ, elderly and disabled candidates to apply. We appreciate all applicants, but due to the anticipated volume of submissions, we will only be able to respond to those who are best qualified for the position.