



POSITION DESCRIPTION



PORTFOLIO MANAGER, U.S. EDUCATION BOSTON, MA

ORGANIZATION

Founded in 2006, The Jacobson Family Foundation (JFF) supports nonprofit organizations in both the United States and Israel. JFF's model is a highly effective philanthropy that combines grant-making and pro-bono consulting with key strategic grantees. Its leaders have been partners in building some of the most important social enterprises and philanthropic initiatives in the United States – particularly in education, family self-sufficiency and youth services.

JFF's mission is to increase the success of nonprofit organizations with the highest potential to achieve breakthrough results on the most pressing problems facing the United States or the Jewish people. It does this by pursuing a venture philanthropy approach – identifying a highly selective set of grantees to support with meaningful funding and deep strategic engagement. The organizations that it believes are most promising have:

- Game-changing ideas
- Excellent leaders
- Measureable results
- Sustainable approaches

The foundation is focused on nonprofits that address the following:

Outstanding Education (U.S. K-12)

- Dramatically alter student outcomes to the highest levels of achievement.
- Facilitate system changes necessary to accelerate adoption of effective policy and practice that impact student outcomes.

U.S. At-Risk Youth

- Keep troubled youth out of government custody by restoring families that can effectively and lovingly care for their children.
- Catalyze system change leading to substantial improvements in accountability, transparency and outcomes of public systems responsible for troubled youth.
- Change at-risk youth's life trajectory through life-changing coaching and mentoring.

850 Piedmont Avenue, Suite 3308 | Atlanta, Georgia 30308

P 404-512-1188 | F 404-521-4488

www.dubrof.com



Jewish Continuity

- Build American Jews' affinity to their religion and culture, with priority on helping young people and young families affiliate.
- Increase opportunities and access to Jewish experiences, education, rituals and communities for secular Israel Jews so they can easily experience and reclaim their religion and culture.

Israel

- Build greater understanding of, support for and affinity to Israel among thought leaders and key sectors of the U.S. population through missions, advocacy and education.
- Help Israel strengthen the cohesion and values of the Israeli society.

The Jacobson Family Foundation will also provide direct support in its local community of Massachusetts to assist families in need and help them improve their own lives. The strategy of JFF will be refined over the next few years based on its experiences and the input of the initial team. JFF is committed to identifying and providing meaningful support to the select set of nonprofits that achieve results and have the greatest potential to create large scale, sustained change.

The principles that guide its work are:

- Research, listen and learn: JFF recognizes that that being informed about the problems and most relevant research is critical to success, and that it cannot be the leading expert on the programmatic solutions. As a result, it puts a premium on developing relationships with experts and gathering their perspectives.
- Clearly assess nonprofits' potential for impact: JFF believes that a clear mission and a programmatic approach that articulate a game-changing opportunity are the foundation for any major impact. However, nonprofits must also have additional characteristics to succeed, including:
 - Excellent leaders: Even the best idea is impotent without strong, capable and decisive leadership.
 - Measurable results: While gathering definitive proof is not always possible, JFF invests based on results and believes that the most effective nonprofit leaders manage their organizations with data on impact.
 - Sustainable approaches: JFF believes that change requires many years and generally cannot be funded by JFF alone. JFF will look at a nonprofit's long-term financial and organizational sustainability up front.
 - Fit with efforts of other key players: JFF values efficiency and recognizes that any change involves many individuals and organizations. It places a premium on interventions that are both



distinctively effective and enhance the on-going efforts of individuals and organizations with similar goals.

- Build organizations: JFF is clear that the agents of change are the nonprofits it supports – not JFF itself. As a result, it identifies organizations with missions, strategies and capacity that are well matched with its goals and then provides organization-wide (not program-specific) support.
- Go deep: JFF believes that focused attention and funding for a small number of organizations allow for the greatest possible results:
 - High standards in selection.
 - Clear investment hypothesis and ambitious goal setting.
 - Meaningful financial investment.
 - Focused consulting and implementation support.
 - Strong, trusting relationships established over time.
- Provide dogged support, strategic assistance and on-going coaching to grantee organizations, in particular:
 - To clarify their theories of change and strengthen their business plans.
 - To communicate their work powerfully to others.
 - To provide “blocking and tackling” problem-solving, ongoing advice and a safe haven for rigorous problem-solving.
 - To advocate for them with other funders, decision-makers and political leaders.

POSITION

The Portfolio Manager will report to the President and drive the foundation’s work in education. S/he will be charged with identifying great leaders, developing grants and providing support to help organizations increase their impact in significant and sustainable ways.

RESPONSIBILITIES

- Identify – through networking, discussions with leaders in the space (e.g., nonprofits, academics and other foundations) and scouring industry literature and research – high caliber organizations with strong leadership to be potential grantees.
- Manage all aspects of moving a potential grantee through the JFF due diligence process, which may include:
 - Assessing the strength of an organization’s leadership and strategic plan (if one exists) and developing a project plan for how JFF might work with the organization if it were to become a grantee.



- Performing all necessary interviews and analyses, which may include benchmarking, financial modeling and competitive assessment.
 - Determining, in conjunction with the President, if a grant should be pursued, and if so, how the grant should be structured, what the goals of the grant are and how success should be measured.
 - Drafting the paper that makes the case for a grant.
 - Leading or supporting JFF's President in facilitating strategic planning sessions, which may focus on issues like theory of change, model codification, opportunities for growth and funding model.
 - Building strong relationships with key stakeholders and engaging them as collaborators in potential grants.
 - Developing or refining a strategic, business and/or implementation plan in partnership with the organization that identifies its own goals (encouraging both creativity and rigor).
- Maintain strong working relationships, effective communication and a high level of mutual trust with grantees that meaningfully contribute to the grantees' multi-year success by:
 - Providing general problem-solving support.
 - Helping grantees execute against and refine their strategic plans.
 - Building the capacity of grantee organizations through coaching and wide-ranging assistance in eliminating barriers to success.
 - Collaborating with partners and co-investors and creating leverage beyond the actual funds awarded.
 - Track grantee progress in relation to its individual goals and relative to JFF's broader portfolio and strategy. Build perspective through site visits, data collection, evaluation and candid conversations. Keep the President apprised of grantee progress and seek assistance as needed to ensure grantee success.
 - Help develop and refine JFF's own strategy and processes.
 - Represent JFF at meetings, conferences and other events.
 - Prepare communications and reports.



PROFESSIONAL QUALIFICATIONS

The hurdle to become a JFF grantee is high, and the Portfolio Manager must embody this high standard for excellence, rigor, passion and commitment.

Qualified candidates will possess:

- 7+ years' experience post advanced degree in the education field.
- Strategic and business-planning leadership and experience; experience at a top tier consulting firm preferred.
- Operating experience in a nonprofit or for profit organization.
- Out of the box thinking with facile, creative problem solving capabilities; someone who thrives in an environment of change.
- A strong willingness and inclination to act, break down barriers and be part of the solution.
- Demonstrated ability to conduct research and to analyze, interpret and assess programmatic, management and financial information; the ability to sift through information and unearth relevant implications and opportunities.
- Strong networking and relationship-building skills particularly in the areas of education.
- Demonstrated ability to collaborate effectively and to interact with diverse organizations.
- A love of learning and self-reflection; the willingness to do extra work and to become versed in new areas; a strong curiosity about a multitude of subjects.
- Acute prioritization skills and structured thinking abilities.
- Self-motivation and a proactive attitude; the ability to work independently, take initiative, break down barriers and solve problems.
- Willingness and desire to “get your hands dirty.” JFF is a flat and lean organization that prides itself on getting the job done as efficiently as possible.
- Deftness in negotiating the power balance between grantees and JFF.
- Excellent written and verbal communication skills and attention to detail.
- Good computer skills including Microsoft Word, Excel and PowerPoint.
- Graduate degree, particularly MBA, preferred.

APPLICATION PROCESS

The Jacobson Family Foundation is an Equal Opportunity Employer and encourages candidates of all backgrounds to apply for this position. All inquiries, nominations and applications are to be directed to JFF's search firm, The Dubrof Group, at JFFPM@dubrof.com. Applications should include a letter of interest and resume in MSWORD. Please indicate in your cover letter where you learned of the opportunity. **NO PHONE CALLS PLEASE.** Please note that only those candidates invited for screening will be contacted.