



ASSOCIATE PORTFOLIO MANAGER, NATIONAL IMPACT

*Reports To: Executive Director, National Impact
Status: Full Time/Exempt
Preferred Location: Bellevue, WA*

About Ballmer Group

Since 2015, Ballmer Group (BG) has supported efforts to improve economic mobility for children and families in the United States who are disproportionately likely to remain in poverty. Ultimately, we envision a country where every child, regardless of background and circumstance, has an equal chance to achieve the American Dream – the promise of moving up from one generation to the next through effort and talent. Our work must tackle the systemic racism and inequities that have made the American Dream historically inaccessible to many.

Our co-founders – philanthropist Connie Ballmer and her husband Steve Ballmer, former CEO of Microsoft, and chairman of the LA Clippers – are committed to impacting economic mobility and encourage innovative thinking to move the needle and drive systems and policy change. BG focuses on multiple intersectional issues such as early learning; K-12 education; youth development; college and career pathways; housing; health; and criminal justice. We are both a national and regional funder – we have a presence and invest deeply in Washington state, southeast Michigan, and Los Angeles County.

We acknowledge that systemic racism makes it harder for people of color to move up the economic ladder and we seek to address barriers to racial equity in all we do. This means we do work to support communities of color, as we continue to learn more about what it takes to engage in a practice of racial equity.

For more information about BG Philanthropy, please visit: www.ballmergroup.org.

The Opportunity

BG seeks a proactive, collaborative, and detail-oriented Associate Portfolio Manager (APM), National Impact, that functions as part of BG'S Philanthropy Team. Reporting to the Executive Director, National Impact (NI), the APM will, preferably, already be based near BG'S Bellevue, WA, headquarters or will be willing to relocate. The APM, NI will support the entire NI team on research, analysis, and grantmaking and grants management, and supporting cross-team work. The emotionally intelligent and customer focused APM will also draw upon skills as an effective communicator to create and present visualization of data and insights. This position joins an evolving team of high impact subject matter experts who take initiative in driving opportunities to strengthen impact across the country while partnering with BG'S regional teams focused deeply on Southeast Michigan, Los Angeles County, and Washington State. The APM will be an analytical yet creative self-starter helping

the NI team manage the complexities of internal performance tracking; grant sourcing and monitoring; and defining and executing projects including externally focused convenings. The APM will also have the opportunity to engage collaboratively with other APMs and Directors across the organization and to represent BG in meetings interfacing with strategic partners.

This role is designed for a humble, mission-driven leader who is excited to learn and grow yet confident in their ability to implement projects, gain trust with diverse constituencies, and bring thought partnership to the team and organization in a way that pushes the work forward. The APM should have deep alignment with and passion for BG's critical work on Racial Equity, Diversity, and Inclusion (REDI) and desire to drive change and impact at scale and with innovation.

Essential Functions and Responsibilities

The APM, NI, will provide support inclusive of the following critical functions and responsibilities:

Research & Analysis: Conduct desktop research and trend analyses that inform grantmaking for existing and emerging strategies and translate complex information and data into easily consumable presentations for an executive audience.

- Track and monitor impact area ecosystems (for example: peer funders, public sector, business sector, and other relevant stakeholders) relevant to directors' work to help identify opportunities, anticipate shifts, and expand networks.
- Create easy-to-digest presentations to illustrate research that match the needs of the audience, which may include BG team members, external partners, Co-founders, or President of Philanthropy.
- Capture and codify key lessons from NI team's strategy and grantmaking portfolio.
- Support convenings of grantees on specific topics of interest both to promote knowledge sharing and to inform investment strategy.
- Collaborate and share learnings with BG colleagues.

Project Management: Ensure successful and timely completion of projects within scope and within budget.

- Design and manage work plans, deadlines, responsibilities, progress reporting, and final deliverables to support the execution of one-time assignments that advance the NI team's priorities.
- Collaborate with teammates to successfully manage, track, and support both cross-team work and inter-team coordination.
- Co-design work plans with team members to meet specific project deliverables and timelines.
- Support the creation and management of contracts with vendors and ensure their timely execution of deliverables.

Grantmaking & Learning: Expedite and ensure BG's qualitative standards are met throughout the grantmaking process.

- Help facilitate and expedite NI team grantmaking and liaise with BG's Grants Management Team to ensure an efficient pathway for grantees and grant applicants, including:
 - Draft grantmaking documents and write clear grantmaking rationale for recommended new and renewal grants.
 - Track progress of prospective grantees, guiding the process from initiation to final decision.
 - After approval, finalize grants and track progress on deliverables, including all grant reports and internal processing.
 - Anticipate upcoming grant renewals so that grantees do not have a lapse in funding between the end of a grant and any renewed funding.
 - Conduct financial summaries and draft progress reports for director review.
 - Respond to various grant inquiries as requested by members of the NI team.
- Support analysis and assessment of grant portfolios – such as the performance and geographic patterns of the NI team portfolio.
- Track active grants, document insights from grantee reports and interactions, and aggregate and share knowledge to inform work across the team.
- Support all grantee engagement activities and NI's learning and strategy goals.
- Facilitate coordination with colleagues across BG to learn, share lessons, and make strategic connections across issue areas, geographies, and levers.

Administrative Support:

- Provide limited administrative support to the Directors of National Impact.
- Coordinate logistics, A/V needs, and related responsibilities of NI team virtual and in-person meetings.
- Manage internal knowledge sharing site for the team, including updates on materials that are part of the grants management process and lifting up examples/articles/work products from grantees that could be informative to the team as a whole.

Knowledge, Skills, and Qualifications

To succeed in this role, the ideal candidate will possess many of the following attributes and qualifications:

- A minimum of 3 to 5 years of direct experience managing projects and conducting data analysis in relevant roles and sectors such as private industry data analysis, finance, evaluation, and/or management consulting. Experience in highly collaborative or matrixed environments like BG or in philanthropy, public policy, and/or the nonprofit sector is a plus.
- Strong data visualization and analytic capabilities, including interpretation of data,

representation of trends, and identification of patterns and themes across different topics/projects.

- Highly skilled using Microsoft Office products, including PowerPoint and Excel, to create effective presentations and communications materials.
- Proven ability to work independently and monitor various projects and initiatives and report progress to senior leadership.
- Intellectually curious self-starter, possessing both initiative and drive to exceed expectations of the role.
- Eager to learn, share, and collaborate to help define and support national work.
- Able to manage internal and external relationships working with diverse constituencies and build strong working relationships with deep commitment to contributing to a great team culture and managing expectations around BG Philanthropy with external partners.
- Highly emotionally intelligent with sound judgement; capable of handling confidential and sensitive information and of discerning when to escalate issues/concerns to directors or leadership.
- Exceptional communication skills: written, verbal, and presentation abilities.
- Energetic, flexible, and has a good sense of humor.
- Strong commitment to BG mission.

Compensation and Benefits

As a mission-driven organization and culture, Ballmer Group invests in employee success and satisfaction. We support employees to strive and achieve, and we give recognition for contributing to our impact. We offer a total rewards package that includes competitive cash compensation and benefits, plus additional perks.

Compensation

The pay range for the Associate Portfolio Manager role based in Bellevue, WA, is \$90,000 to \$150,000. We aim to hire new employees between \$95,000 to \$120,000 allowing future compensation growth within the range based on aptitude in the role and context, and progress and performance against goals over time.

Featured Benefits & Perks

- Medical, dental, and vision insurance with employee and dependent premiums entirely paid for by Ballmer Group.
- 3 weeks per year of paid vacation annually.
- 11 paid holidays, plus paid days off for the weekdays between Christmas and New Year.
- 80 hours of paid sick leave annually.
- 401(k) with 6% employer contribution.
- 2:1 Ballmer Family Giving Match for charitable contributions.
- Professional development reimbursement up to \$2,000 per year.
- \$300 monthly incidentals stipend.

- Tax-Free Flexible Spending Account (FSA) and Dependent Care (DCFSA) plans offered.
- Parking and transportation (Orca card) up to \$250 monthly.

Application Process

Ballmer Group is partnering with Black- and women-owned strategic management consulting and executive search firm [Walker and Associates Consulting](#) for this search. To apply, email a single PDF file containing a cover letter, resume, and a list of three references (candidates will be notified in advance of any outreach to your references) to ballmergroup@walkeraac.com. Use the subject line: APM, National Impact.

Questions or Nominations? Contact Jeannine N. Walker, President and CEO, at jwalker@walkeraac.com.



Ballmer Group is an equal opportunity employer and is dedicated to building an inclusive workforce where diversity is valued. Individuals seeking employment at Ballmer Group are considered without regards to race, color, religion, national origin, age, sex, marital status, ancestry, physical or mental disability, veteran status, gender identity, or sexual orientation.