

MARTHA MONTAG BROWN
& ASSOCIATES, LLC

*consultants in executive search
placing leaders with a purpose*



**Portfolio Manager - Washington State
Ballmer Group - Bellevue, WA
June 7, 2021**

About Ballmer Group

Since 2015, Ballmer Group supports 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 co-founders are philanthropist and civic activist Connie Ballmer and her husband Steve Ballmer, former CEO of Microsoft and chairman of the LA Clippers.

Recognizing that the conditions of poverty are complex, we direct our philanthropy and civic engagement to help remove barriers and create opportunities throughout many stages of a young person's life – helping to ensure that a person thrives through a healthy birth and stable family, a safe childhood and adolescence, a good education, and a career that can support a family. We work both locally and nationally, and we engage deeply in three regions – Washington state, Los Angeles County, and southeast Michigan. We focus on community-led initiatives, partnerships with all levels of government, and the use of data and technology to improve the effectiveness and track the impact of our partners.

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 that at Ballmer Group we do work to support communities of color, as we continue to learn more about what it takes in order to deeply and authentically engage in a practice of racial equity.

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

Washington State

The Ballmer Group Washington team invests in strong support systems for kids and families who have experienced systemic barriers to economic mobility. Deepening the Ballmer Group's investment in behavioral health, housing, and aligned grantmaking in adjacent policy areas like education, healthcare, and success in the workforce will be a major focus of this position.

Behavioral health refers to a broad range of conditions, from chronic disorders like schizophrenia and bipolar disorder to more common concerns like depression, anxiety, and substance abuse. Behavioral health greatly impacts Ballmer Group's mission of promoting economic mobility, since we know that poor mental health affects a person's ability to succeed in school, to attend college, to find a job, and adds stress within families. Conversely, we also know that improving a person's economic circumstances – including access to safe and stable housing - can remove stressors and positively impact people's ability to thrive. Studies clearly show that having safe and stable housing leads to improvements in children's health, success in school, and increased stability in employment, and is a key factor for economic mobility.

Put simply, assuring kids and families have strong supports and a sense of well-being is fundamental to their ability to thrive in school, at work, in our communities, and is inextricably linked with Ballmer Group's mission.

The Opportunity

The Ballmer Group is seeking an equity-focused systems thinker to serve as its new Portfolio Manager in Washington State. The Portfolio Manager will be a member of six-person team working collaboratively on philanthropic investments in Washington State.

The Portfolio Manager will: 1) lead Ballmer Group's Washington-based work to support children, young adults, and families to overcome systemic barriers, focused initially in the areas of housing and behavioral health; 2) co-design an investment strategy and oversee a robust investment portfolio by identifying, vetting and recommending new investments and managing and supporting existing investments to intermediaries, government, and nonprofits; 3) work closely with Washington state team members and external partners to identify opportunities to work at the intersection of related investment areas, e.g. housing and K-12, behavioral health and child welfare; 4) identify and support ways to meaningfully improve the use of data to enhance the coordination of service delivery, and ultimately public policy, to the benefit of children and families.

The position reports to the Executive Director, Washington, and is based out of Ballmer Group offices in Bellevue, WA.

Key Responsibilities

Grantmaking

- Identify and analyze organizations and initiatives that are aligned with Ballmer Group strategies and priorities.
- Manage end-to-end grant processes within the investment portfolio, from building a pipeline of investments to managing long-term relationships with funded organizations.
- Develop a deep understanding of the key players within the behavioral health, housing, and related systems, applying rigorous analyses to proposed and existing programs of current and prospective grantees, conduct due diligence on existing and prospective grantees, conduct site visits, make recommendations to the Executive Director, President, and Founders.
- Work closely with national leads on housing and other impact areas to implement investment strategies in Washington.

- Maintain ongoing relationships with prospective and existing grantees, develop and adopt appropriate methods of assessing desired and actual impacts of prospective and existing grants, works with grantees to develop metrics and outcomes, and give grantees strategic counsel.

Strategy and Partnerships

- Work closely with Executive Director and Washington-based colleagues on long-range strategic and growth planning.
- Work with the members of Ballmer Group's national impact team and regional teams to collaborate and share knowledge and assure connection between regional and national efforts.
- Partner with key public sector representatives and elected officials, nonprofit leaders, and our colleagues in philanthropy on programmatic and systems priorities, to cultivate connectivity and shared commitment to enhanced outcomes for Washington's kids and families.
- Partner with leaders with lived experience on specific initiatives impacting thinking and strategic development on Ballmer Group regional priorities.
- Identify opportunities for the Ballmer Group to collaborate and leverage cross-program knowledge, learnings, successful practices, and strengths.
- Manage special projects and initiatives at the direction of the Executive Director.

Qualifications

- A bachelor's degree is required. An advanced degree in a relevant field is highly desirable.
- Six to ten years of progressively responsible work within philanthropic, social service, or public policy settings in Washington state is required.
- Demonstrated knowledge of, and experience working on, a diverse set of policy issues including behavioral health and housing. This includes the basic function of public behavioral health systems as well as other large systems like homelessness/housing, health care, education, criminal justice, etc.
- Knowledge of philanthropic and nonprofit stakeholders and advocates working to advance economic mobility for children, youth, and families in Washington state.
- A track record of, and commitment to, diversity, equity and inclusion.
- A data-driven and systems-oriented approach.
- A highly developed professional network in Washington state and nationally and a track record as a network builder.
- A strong understanding of how public policy is developed and influenced.
- The intellectual capacity to grasp opportunities, self-correct, and anticipate strategic changes within and across portfolios. Demonstrated experience as an analytic thinker.
- Self-aware and able to apply lessons learned to inform future work.
- A self-starter, entrepreneurial, and comfortable working in a lean, intense, results-oriented environment.
- A team player, effective at building and sustaining relationships and contributing positively to team culture.
- Excellent written and oral communication skills for multiple audiences, including trustees, internal leadership, and external partners.
- Important personal characteristics include a collaborative nature, sound judgment, profound commitment to social change, a good sense of humor, and the ability not to take oneself too seriously.

- A key to success in this role is a belief in the value of human dignity, and empathy for people struggling with intergenerational poverty and its related challenges.

Application Process

[Martha Montag Brown & Associates](#), LLC has been retained for this search. Interested and qualified candidates should apply by sending a cover letter, resume, and salary requirements by email to Martha@marthamontagbrown.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.