



Job Description: GHR Investment Analyst Position

Organization Background

[GHR Foundation](#) is an independent philanthropy of service to people and their limitless potential for good. Alongside our partners around the world, we reimagine what's possible when pursuing impact on issues related to Children in Families, Education, Racial Equity, Alzheimer's Disease and more.

For more than 50 years, the design-build legacy of Opus Group founders Gerald and Henrietta Rauenhurst (GHR) has guided our optimistic and transformational philanthropic approach. To achieve GHR's purpose, we are guided by shared values calling us to lead with love, reimagine what's possible, partner boldly, navigate and adapt. In working this way, our external impact extends beyond programmatic funding to influential leadership within philanthropy and across the social sector. Internally, we nurture an inclusive and anti-racist organizational culture centered around curiosity, courage, and trust that values both the individual and team.

The Foundation's \$1.0 billion portfolio is primarily invested through external managers and is currently allocated across a diversified range of asset classes and strategies including domestic and international equities, marketable alternatives, private capital, and fixed income.

Position Summary

GHR's investment function is in a formative stage of its development, having been recently established within the Foundation in 2017. Having completed the process of consolidating the Foundation's assets under the oversight of its own investment team, GHR's investment office is now fully focused on developing and executing upon a successful long-term investment strategy consistent with the organization's mandate to provide charitable funds in perpetuity. This environment should present the successful candidate with a unique opportunity for professional growth in the form of direct involvement in the design, implementation, and ongoing maintenance of critical investment office data and analytics infrastructure as well as in providing assistance to the investment team's sourcing, due diligence, and ongoing monitoring of new and existing investment strategies.

The Investment Analyst will join GHR's three-person investment team managing an endowment-style portfolio invested across public and private traditional and alternative investment strategies. The investment office deploys capital primarily through investment funds/portfolios managed by external managers but also has the flexibility to pursue direct investment opportunities such as co-investments. The portfolio is and will remain equity-biased, but the successful candidate will bring experience working with, or will demonstrate the capacity to develop a working knowledge of, a broad range of asset classes including fixed income and real estate.

The Investment Analyst will be expected to support a variety of investment and operational functions within GHR's investment department and the successful candidate will demonstrate proficiency in investment performance calculation and attribution concepts, past experience using and/or implementing investment risk

and performance analytics systems, and the intellectual capacity to create novel solutions to complex investment problems. At the outset, the Investment Analyst will be heavily involved in supporting the investment office's implementation of a robust investment risk and performance analytics platform. The Investment Analyst will also have primary responsibility for the ongoing maintenance of this platform once implemented, serving as the team's subject matter expert for investment portfolio performance reporting and analysis and the management and oversight of the investment department's external and internal relationships related to investment operations.

Critical to the Investment Analyst's success will be the ability to ensure accurate, high quality output from an investment reporting system in addition to the ability to communicate the implications of that output into informative, actionable investment insights. The Investment Analyst role should also provide the successful candidate with direct exposure to the investment department's investment sourcing and due diligence activity, particularly with respect to the analysis of new and existing investment strategies' performance and risk. While the Investment Analyst's primary role will be to serve as the investment department's subject matter expert on investment risk and performance analytics, engagement in the underwriting and monitoring of investment strategies could increase over time as the investment office's systems infrastructure implementation and automation opportunities are achieved. The Investment Analyst will report to GHR's Investment Director and collaborate with the Chief Investment Officer and Investment Analyst

Primary Responsibilities

- Assist in the implementation of an enhanced investment risk and performance analytics platform including direct involvement evaluating existing vendor relationships and onboarding of new vendors
- Manage external vendor relationships related to GHR's investment operations and due diligence infrastructure including GHR's custodial bank, performance and analytics provider, and manager and benchmark database providers
- Provide oversight to GHR's external service providers involved in investment reporting and data management, including reconciliation of investment accounting and performance data between investment managers, custodial bank, and portfolio reporting system
- Liaise with GHR's grants management, finance and accounting, and investment departments to support internal GHR processes including financial reporting, cash management, and budget forecasting
- Assist in the creation of presentation materials for GHR's Investment Committee and Board of Directors
- Prepare monthly flash reports on investment performance and allocation for the internal management team and quarterly reports for the investment committee to aid in evaluating investment results and the portfolio's risks and exposures
- Help maintain documents and investment department research output in an easily accessible manner
- Support the investment team's sourcing and due diligence of new and existing investment strategies
- Travel to attend manager meetings and industry conferences, as appropriate

Qualifications

Candidates for consideration should be motivated self-starters possessing the following:

- Strong interpersonal skills including an affinity for teamwork, learning through networking, and developing relationships
- Willingness to bring a high-energy focus and dedicated effort to producing work of the highest quality and accuracy for the investment department, investment committee, and board
- A sincere interest in the non-profit sector
- Respect for the importance of a diverse and inclusive anti-racist work environment
- A passion for investing
- Honesty, integrity, and sense of financial stewardship

In addition, the successful candidate will meet the following qualifications:

- Undergraduate degree with a record of academic achievement. Preference will be given to candidates with progress toward relevant industry designations or certificates, including the CFA and/or CIPM designations.
- 0 – 3 years relevant professional experience preferred. Preference will be given to candidates with prior direct experience in investment management, investment performance measurement, investment operations, and/or investment consulting.
- Excellent organizational, problem solving, mathematical, interpersonal, and communication (oral and written) skills. Preference will be given to candidates with demonstrated project management skills and ability to meet strict deadlines.
- Strong technical skills, including adept proficiency with Microsoft Office tools, including Microsoft Excel, and investment portfolio performance and analytics software such as Solovis, Novus, Bloomberg and/or similar software.
- Eligible to work in the United States without employer sponsorship.
- Willingness to travel domestically and abroad as needed, approximately 15%.

Working Conditions

This is a typical office environment in which employees use office equipment like personal computers, copiers, telephones; stand or sit at a desk for long periods of time (2-3) hours; may need to lift and move documents and supplies (not to exceed 25 lbs.); and bend to file or retrieve documents. Occasional domestic and international travel may be required.

GHR Foundation places a high priority on the health and safety of its employees, guests, external partners and broader community. In response to the COVID-19 global pandemic, GHR management made the determination to transition to a remote work environment. The Foundation intends to reopen its physical office when it is deemed safe to do so. However, given the evolving health situation, the Foundation is not able to provide specific guidance on when its office will reopen, and it is possible that the successful candidate will work remotely for an extended period.

GHR is an equal opportunity employer and will not discriminate against any applicant for employment because of race, color, religion, sex, national origin, disability, age, genetic information, or any other status protected by state or local law for an individual who falls within the jurisdiction of such law.

We respect and seek to empower each individual and support the diverse cultures, perspectives, skills and experiences within our workforce.

To Apply

Send resume and cover letter to jlynch@ghrfoundation.org. Application review and interview process will begin by September 11, 2020.