



Position Opening

Position Title:	Senior Investment Officer
Reports To:	Chief Investment Officer
Pay Grade G:	\$86,015 - \$102,384
Position Status:	Full Time
FLSA Status:	Exempt
Posting Dates:	March 1, 2024 – March 15, 2024

About KZCF:

KZCF, established in 1925, has the vision of Kalamazoo County being the most equitable place to live, with the mission to mobilize people, resources, and expertise and to advance racial, social, and economic justice. Learn more at kalfound.org.

Core Values:

Center Anti-Racism and Equity
Advance Racial Justice
Nurture Healing and Love
Cultivate Transformative Relationships
Serve the Greater Good
Learn and Grow
Embrace Joy

Position Summary:

The Investment Officer will be a key member of the investment team. The Senior Investment Officer will be responsible for a full range of monitoring, analysis, and reporting functions for a complex, mission-focused portfolio. This position works with KZCF staff and external partners to source and close on investments in the KZCF impact investment pool and support investment functions that advance the Foundation's strategic priorities. This position manages deal identification and oversees underwriting, risk assessment, deal structuring, and closing processes.

Essential Functions & Responsibilities:

Investment, Leadership, and Strategic Planning

- Develop and manage a portfolio of direct impact investments (e.g., low-interest loans).
- Conduct thorough investment due diligence to assess both financial risk and mission-aligned impact of potential investment opportunities.
- Develop and present critical, analytical, and concise investment recommendation memos for the CIO, CEO, and Board of Trustees.
- Cultivate and manage a diverse network of partners working within the impact investment arena (e.g., real estate developers, nonprofit leaders, entrepreneurs).

- Research and prepare memos for CIO on specific topics and special opportunities as requested.
- Develop a deeper understanding of portfolio construction and endowment management.
- Serve as the investment team contact and resource for external auditors.
- Actively contribute to cross-office learning and strategy development

Development and Continuous Improvement

- Supervise the routine operations of third-party partners, custodian banks, and other key vendors to support impact investment operations.
- Manage the execution of investments, account openings, capital calls, rebalancing, corporate actions, vendor notification, and similar duties.
- Work in close partnership with the CIO and Director of Finance on organization-wide investment strategy.
- Oversee impact investment portfolio reporting and attribution, including performance analytics, exposures, and benchmarks.
- Integrate technology systems and improve data management to ensure efficient operations.
- Assist with operational due diligence, compliance, budgeting, and data management.

Other Duties

- Please note that this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Diversity, Inclusion, Equity, and Anti-Racism:

- Apply an equitable and anti-racist analysis to all functions to achieve organizational goals.
- Embrace, support, and integrate Community Foundation philosophies related to diversity, inclusiveness, and anti-racism with a willingness to acknowledge and address other forms of bias.
- Ability to confront personal, individual, and internal systemic bias regarding race, age, gender, gender-identity, sexual orientation, ability, etc., which will require sharing and discussing personal identities related to the work environment.
- Ability to work and navigate emotionally taxing conversations related to power, privilege, racism, and oppression on a regular basis.
- Must have strong emotional intelligence and resiliency skills to lead and/or actively participate in advancing our work relative to racial, social, and economic justice.

Professionalism:

- Support the mission, vision, and strategic goals, as a part of the Performance Excellence Model of the Community Foundation, to serve both internal and external customers.
- Follow and support Community Foundation policies and procedures.
- Evaluate own performance and assume responsibility for professional development.
- Embrace philosophy of one actively engaged in lifelong learning.
- Demonstrate and models Process documentation for clarity and consistency.
- Maintain current knowledge of all changes affecting the area of work.
- Conduct self in a professional manner and follow and support the core values, commitments, and behaviors.

- Maintain appropriate professional appearance and confidentiality.

Engagement/Participation:

- Actively represents KZCF at community-based meetings and events which may require evening and weekend engagement throughout the year.
- Actively participate in meetings, committees, and volunteer opportunities within the organization
- Apply an anti-racism analysis and engage with others in support of learning ways to advance collective DEI understanding and skills.
- Participate as a team member utilizing a collaborative style to achieve mutual goals.
- Provide proactive, creative cross-functional thinking and ideas to enhance services to customers.
- Demonstrate ability to work effectively with others.

Knowledge, Skills & Abilities:

Required:

- Bachelor's degree in business administration or finance or an equivalent combination of training and relevant experience in consulting and facilitation skills with individuals, groups, and organizations; program planning, development, and administration; and knowledge of impact investments.
- A minimum of 5 years' experience in banking, investments, management consulting, investment research, or a field that involves significant analytical work or a more experienced professional exploring a transition to a career in impact investing.
- Minimum of 3 years' experience of underwriting or financial due diligence to support investment recommendations.
- Excellent research and analytical skills that demonstrate an ability to analyze data, identify financial risks, and produce reports to guide decision-making.
- Ability to source, analyze, synthesize, and effectively present information for a variety of audiences.
- Excellent relationship-building skills and ability to collaborate on internal teams as well as with external stakeholders.
- In-depth knowledge/understanding of computers including general business software (i.e., Word & Excel).
- Demonstrated ability to effectively interact, communicate, and collaborate with people from all cultural backgrounds.
- Must have the ability, judgement, poise, and personal capabilities to build and maintain trust.
- Ability to work & navigate emotionally taxing conversations/contexts related to power, privilege, racism, oppression with diverse stakeholder groups.
- High personal resiliency skills and tools
- Deep personal commitment to addressing racism with an orientation toward the Kalamazoo community.
- Ability to work both independently, as a team member, and with a broad range of constituencies.
- Ability to prioritize multiple projects and work under pressure.
- Willingness to learn and be adaptive to support a complex and evolving body of work.
- A high degree of personal integrity and ethics

Preferred:

- MBA with a concentration in investments, finance or economics; or CFA

Additional Eligibility Qualifications

The Kalamazoo Community Foundation shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations. These activities include hiring and termination of staff, selecting volunteers, selecting vendors, and providing services.

Please apply through our online application portal, www.kalfound.org/about/careers.