



PEACE & EQUITY FOUNDATION

Transforming Poor Communities Through Sustainable Social Enterprise

JOB DESCRIPTION

JOB TITLE : **SENIOR OFFICER, PORTFOLIO MANAGEMENT**
Department : Partners and Programs

ORGANIZATIONAL RELATIONSHIP

- 1.1 Reporting to : Partners & Programs Manager
- 1.2 Supervising : Portfolio Specialist
- 1.3 Coordinating with : All Units

JOB SUMMARY

The Senior Portfolio Officer is responsible for developing pipeline of investor ready projects and partners through monitoring of industry trends and opportunities; meeting with potential partners to develop appropriate technical, managerial, and financial package; writing and presenting reports to clients and PEF management; overseeing team of specialists and resource groups in the delivery of appropriate interventions to the SE organization/project; supervising performance of partners and SE projects; and developing linkages with resource institutions and experts.

DUTIES AND RESPONSIBILITIES

1. Planning and Implementation

- 1.1. Prepare annual plan and budget for assigned cluster of projects (e.g., C5, Basic Social Services, and Disaster Risk Reduction) with corresponding financial and non-financial requirements.
- 1.2. Ensure that project risks are identified and appropriate systems and processes to manage these risks are incorporated in the work plan.
- 1.3. Monitor progress of implementation of approved plan and budget.
- 1.4. Submit annual report on the status of assigned portfolio.
- 1.5. Submit a mid-term evaluation report (15 months operation) on the status of portfolio vis-à-vis the 30-month work plan and the 5-year program (2016-2020).

2. Opportunity Spotting and Industry Scanning

- 2.1 Spot potential SE implementers in an identified industry, analyze present marketing/ financial/ environmental conditions and recommend possible PEF intervention.



PEACE & EQUITY FOUNDATION

Transforming Poor Communities Through Sustainable Social Enterprise

- 2.2 Organize events with potential partners and industry players to generate project leads or pipeline projects, contacts for support intervention, and network development.
- 2.3 Develop innovative strategies in fund management, i.e., utilization, disbursement, monitoring.
- 2.4 Track proactive SE projects and prepare concept papers for possible expansion and/or replication.

3. Enterprise Development Packages

- 3.1 Develop and recommend appraisal tools and techniques for evaluating SE projects as needed.
- 3.2 Based on existing or learned from training programs/ experience SE knowledge and skills, draft and submit policy recommendations on project development and management as needed.
- 3.3 Ensure that proposed projects conform to PEF's strategic directions and outcomes of project proposed can be measured against outcome indicators identified in the 2016-2020 strategic plan.
- 3.4 Subject all proposals received to a screening process according to established or agreed criteria.
- 3.5 Validate findings and analyze recommendations of Portfolio Specialist for Social Enterprise, PRIME Officer and Specialist, Consultants or Technical Service Contractors.
- 3.6 Propose changes in the design of project proposals in cases where evaluation reports recommend such changes.
- 3.7 Establish benchmarks, timelines and milestones for each project.
- 3.8 Conduct preliminary gridding of projects with Portfolio Specialists.
- 3.9 Endorse and submit worthy and viable project proposals to the Grid Committee with recommendations on financing instruments and non-financial interventions (using the SE ecosystem) appropriate to the proposed project.
- 3.10 Develop a project organizational structure, enterprise and operational plan (learning objectives, budget, entry and exit strategy) in the management of techno farms to include staff supervision, security and upkeep of facilities.

4. Technical Assistance

- 4.1 Based on the result of monitoring and evaluation, design technical assistance or capacity building interventions for project partners.
- 4.2 Coordinate with SE Academy for provision of development programs or outsourced technical assistance providers or mentors.



PEACE & EQUITY FOUNDATION

Transforming Poor Communities Through Sustainable Social Enterprise

- 4.3 Monitor progress of the project partner after provision of technical assistance or mentoring program.
- 4.4 Supervise documentation and capture of lessons that will feed into Knowledge Management process.

5. Project Management, Supervision and Coordination

- 5.1 Ensure that projects are managed to achieve the intended results.
 - 5.1.1 Monitor and evaluate regular update on approved projects.
 - 5.1.2 Conduct regular and emergency financial and management audit of project partners in assigned industry or areas.
 - 5.1.3 Maintain cordial and professional relationship with project partners and beneficiaries.
 - 5.1.4 Assist project holders by providing coaching and recommend solutions on organizational and financial management on field level.
- 5.2 Propose changes in the design and implementation of existing projects in cases where evaluation reports recommend such changes.
- 5.3 Maintain and update documentation (pictures and reports) of all client/partners project portfolio.
- 5.4 Document successful projects, draw out success factors and examine possibilities for replication and/or multiplication. And feed these relevant information into the Knowledge Management process of the Foundation.
- 5.5 Maintain a healthy SE Portfolio by keeping payments defaults at low levels.

6. Resource Leveraging

- 6.1 Create partnerships with donors and funders for each project partners.
- 6.2 Track project partners counterpart for the SE projects.
- 6.3 Document and monitor total funding for the SE project including investments from other investors and lenders.

7. Knowledge Management

- 7.1 Contribute learning based on knowledge, evidence and collective experience gained through management of assigned portfolio and projects.

8. Supervision and Coordination

- 8.1 Manage the performance of Portfolio Specialist.
- 8.2 Provide clear operational directions and regular monitoring and feedback on performance.
- 8.3 Provide coaching and mentoring to team and individuals and ensure continuous learning and development.



PEACE & EQUITY FOUNDATION

Transforming Poor Communities Through Sustainable Social Enterprise

- 8.4 Coordinate with the support units in ensuring that support services are provided.
- 8.5 Plan requirements for Consultants or Service Contractors to undertake specific tasks in PDME.
- 8.6 Prepare terms of reference of Consultants or Service Contractors based on established policy, criteria and approved budget.
- 8.7 Source, monitor, and evaluate final output of accredited Consultants or Service Contractors hired for a specific project.

JOB SPECIFICATION

1. EDUCATION AND EXPERIENCE

- Education – Bachelor’s degree
- Experience – 7 years work experience in similar positions

2. KEY COMPETENCIES

- Calm; confident
- Thorough; very organized
- Excellent communication and presentation skills
- Good team leader
- Critical thinking skills
- Strong multi-tasking skills
- Highly skilled in investment assessment and project packaging
- Strong project management skills
- Working knowledge of organizational development