



PEACE & EQUITY FOUNDATION

Transforming Poor Communities Through Sustainable Social Enterprise

JOB DESCRIPTION

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

ORGANIZATIONAL RELATIONSHIP

1.1 Reporting to : Senior Officer, Portfolio Management
1.2 Supervising : n/a
1.3 Coordinating with : All Units

JOB SUMMARY

The Portfolio Officer is responsible for handling projects under specific industry/sector by: (1) screening possible projects, conducting due diligence on prospective SEs, write and present project approval documents; (2) monitoring progress of approved projects; and (3) providing needed interventions.

DUTIES AND RESPONSIBILITIES

1. Enterprise Development Packages

- 1.1. Screen proposals received and ascertain proponent eligibility with PEF program criteria; recommend appropriate actions.
- 1.2. Gather necessary documents and information to ascertain eligibility and worthiness for SE financing, investments and support.
- 1.3. Research and analyze the business viability of the proposals.
- 1.4. Conduct field project appraisal when necessary.
- 1.5. Present worthy and viable project proposals to the Grid Committee with recommendations on financing instruments and non-financial interventions appropriate to the proposed project.
- 1.6. Consolidate all proposals and other relevant materials needed by the Executive Director or concerned Board Committee for final approval.
- 1.7. Conduct orientation and communicate terms of project agreements and requirements with project partners.

2. Enterprise Financing/Investment Monitoring and Supervision

- 2.1. Oversee loans and grants released in assigned industry or area.



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- 2.1.1 Monitor and evaluate regular update on approved projects.
- 2.1.2 Conduct regular and emergency financial and management audit of project partners in assigned industry or areas.
- 2.1.3 Maintain cordial and professional relationship with project partners and beneficiaries.
- 2.1.4 Assist project holders by providing coaching and recommend solutions on organizational and financial management on field level.
- 2.2 Oversee the monitoring of projects, audit and provision of technical assistance.
- 2.3 Monitor critical projects and initiates/ recommend interventions that are unique to the industry or area.
- 2.4 Process project agreements and review per standard requirements in the Operations Manual and request for check releases.
- 2.5 Ensure that proponents comply to the terms of approved project prior to release of funds.
- 2.6 Facilitate check releases and payments of partners.
- 2.7 Track the status of project related payments.
- 2.8 Maintain and update documentation (pictures and reports) of all client/partners project portfolio.
- 2.9 Spot possible opportunities to establish techno demo farms.
- 2.10 As may be assigned, manage techno demo farm based on the approved plan.

3. Technical Assistance

- 3.1 Based on the result of monitoring and evaluation, recommend technical assistance or capacity building interventions for project partners.
- 3.2 Coordinate with SE Academy for provision of development programs or outsourced technical assistance providers or mentors.
- 3.3 Prepare terms of reference of technical assistance providers or mentors according to established policy of contracting of Consultants.
- 3.4 Monitor progress of the project partner after provision of technical assistance or mentoring program.
- 3.5 Supervise documentation and capture of lessons that will feed into Knowledge Management process.

4. Resource Leveraging

- 4.1 Track project partners counterpart for the SE project.



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- 4.2 Document and monitor total fund for the SE project including investments from other investors and lenders.

JOB SPECIFICATIONS

1. EDUCATION AND EXPERIENCE

- Education – Bachelor’s degree in Business Management; Accounting; or Economics
- Experience – 5 years work experience in similar positions

2. KEY COMPETENCIES

- Good communication and presentation skills
- Analytical thinking skills
- Adept in project evaluation in the areas of working capital management; capital investment decisions; inventory control and project packaging
- Strong project monitoring skills
- Has background in risk management