



INVESTMENT ANALYST/ASSOCIATE FULL-TIME POSITION

Open Road Alliance is a hybrid philanthropic and investment initiative focused on advancing solutions to Keep Impact on Track.

Our Investment Model

The world is unpredictable – from delays in committed funding to government policy changes, impactful organizations can run into unexpected roadblocks through no fault of their own. Open Road provides the fast, flexible funding necessary to overcome these roadblocks. Working through a grant and a loan portfolio, Open Road does not operate on a traditional grant or investment cycle. Proposals are accepted on a rolling basis throughout the year and the application itself is a concise, three-step process: an initial conversation, short written application, and final interview. Both grant and loan applications are subject to a strict and common set of criteria. We have no sector or geography focus – our focus is to keep impact on track. This approach ensures that the impact of the original project preserves the ROI of the original funder’s investment, and generates significant leverage for Open Road. As of December 2019, Open Road has disbursed \$38.5 million and has leveraged \$411.8 million in original project funding.

In addition to its portfolio of investments, Open Road conducts research, develops tools, and generates data on best practices for risk management in philanthropy. By disseminating learnings around risk management and advocating for the adoption of best practices, Open Road is working to make risk management as commonplace in philanthropy as monitoring and evaluation so that the impact of philanthropic investments is maximized across the sector.

Job Description

Open Road’s Investment Analyst/Associate will work and support all aspects of the investment process from pipeline management to diligence and investment monitoring and reporting. Investments include both loans and charitable grants. All investments follow Open Road’s targeted investment criteria and strategy.

The Investment Analyst/Associate will be an integral member of the Social Investments team, working with Investment Officers to evaluate financial, business and social impact criteria, as well as helping to build and maintain tools for monitoring and reporting on Open Road’s investment portfolio.

Position Responsibilities

Portfolio Origination – Intake and Outreach

- Regularly speak with potential applicants and referrals to explain Open Road’s investment strategy and criteria;
- Support and eventually lead the due diligence process including; conducting initial conversation, provide feedback on draft applications, conduct reference checks, coordinate final interviews, prepare briefings for investment team, participate in all aspects of vetting, and make investment recommendations;
- Help build, maintain and improve pipeline tracking and reporting systems in ORA’s Salesforce CRM;
- Build and maintain strong and productive relationships with clients, co-investors and partners.
- Represent ORA at external events such as conference, meetings, etc.

Portfolio Management

- Serve as a secondary point of contact for grantee/borrowers, maintain an open line of communication with partners at all times and acting as a backstop to Investment Officers;
- Monitor repayment process for all loans;
- In conjunction with the Portfolio Administrator and Investment Officers, manage reporting on the portfolio including weekly, monthly and quarterly reports in Excel, Salesforce and Tableau.
- Portfolio Analysis, including: sector/market analysis; organization/ borrower analysis (including credit analysis financials and financial modelling); macro-economic analysis.
- Maintain and improve Risk Scorecards for internal credit analysis and decision making;
- Manage reporting on social impact metrics for internal and external audiences.

Qualifications

- Bachelor’s degree required; master’s degree in relevant field a plus though not required
- Two to four years of work experience, preferably in impact investing, finance, philanthropy, and/or consulting;
- Strong analytical and quantitative skills; including accounting and financial analysis
- Demonstrated passion for impact investing, social entrepreneurship and social impact;
- Strong interpersonal and communication skills (oral and written);
- Ability to work on multiple opportunities across products and sectors while working to deadlines and managing time effectively;
- Highly proficient with Microsoft Office applications, specifically Excel for financial modeling
- As a member of a small team, a flexible and “hands on” approach is a prerequisite;

Skills, Abilities, and Personal Characteristics

- Exceptional critical thinker that is hungry to learn;
- Excellent written and verbal communication skills
- Excellent attention to detail, time management and organizational skills
- Highly communicative, proactive approach
- Very strong ability to self-manage in remote work environments;
- Proven ability to successfully work with a team of stakeholders based in various locations;
- Reliable and deadline-driven;

- Humble and compassionate;
- Good sense of humor;
- Absolute and unquestioned integrity

Location & Travel

As a 21st Century Office, we do not operate out of a fixed location. All employees work from home offices or shared workspaces, as appropriate. Bottom line, we encourage employees to work where they will be most effective, whether that is at a home office, external office space, coffee shop, or park bench. For its part, Open Road ensures that all employees have access to appropriate workspaces to facilitate maximum effectiveness and productivity.

This position will ideally be based in **Washington DC**, to enable regular in-person meetings with other Open Road staff.

Must be able and willing to travel up to 20% for in-person meetings, conferences, and/or other events.

Compensation

Open Road pay rates are informed by a written job description, periodic market analysis against that job description, individual experience, and a deep commitment to equity.

Given the interdisciplinary nature of our work, Open Road uses a 'blended market' approach to define and identify comparative market rates on a national basis. Open Road looks to ensure that all pay rates are placed at or above the 70th percentile for a given position.

This is a full-time, salaried position with comprehensive medical, retirement, and other benefits. The salary for this position is dependent on the individual candidate's qualifications and experience.

How to Apply

- Email résumé and cover letter to info@openroadalliance.org
- Ensure the subject states "Investment Analyst/Associate - [YOUR NAME]"
- Successful candidates will be contacted for an interview. Please allow up to six weeks to be contacted. We regret that we are not in a position to personally respond to all applicants.
- Applications received by April 24, 2020 will be given priority.