



## Chief of Staff – Investment Office

### Public Position Description:

<b>Company:</b>	University System of Maryland Foundation, Inc.
<b>Status:</b>	Full-Time Employee
<b>Location:</b>	Dupont Circle, Washington, DC
<b>Experience:</b>	Senior Hire with 5-10 Years Prior Experience Supporting an Asset Management Organization and C-Suite Professionals
<b>Education:</b>	Bachelor's Degree and PMP Certification Required, with Preference Given to Certified Professional Organizers (CPOs)
<b>Compensation:</b>	Based upon experience and career progression
<b>Begin Date:</b>	December 2017 / January 2018

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The University System of Maryland Foundation is seeking a Chief of Staff (COS) within its Investment Office. The ideal candidate is well organized, independent, able to delegate, qualified, discrete, and demonstrates initiative.

### **Broad-Based Description**

The Chief of Staff is a highly organized individual with exceptional project management, data organization, and gatekeeping and delegation skills. The COS will concurrently manage the daily non-investment/operational aspects of the Investment office.

#### *Project Management*

The COS will work with the Investment team to map out project progression while keeping colleagues accountable and on task to complete assignments. In accomplishing this ongoing duty, the COS will serve as the administrator of project management and goal progression software, updating these tools on a daily basis. The COS will also work with team members to schedule their asset management/service provider meetings and invite the appropriate personnel. The COS will inform the CIO of team member progress and independently work with team members to ensure that project progression is well documented.

#### *Data Organization*

The COS is an exceptional organizer of physical print and digital information. The COS will collect, catalog, and maintain the appropriate database and/or file management system to warehouse the Investment Team's physical print, digital media, team member notes, and external/internal contact information of firm's/people to which team members come in contact. The COS will also work closely with the CIO to keep his files and office organized in a timely manner.

#### *Gatekeeping and Delegation Skills*

The COS will serve as the primary gatekeeper to the CIO for both external and internal parties. The COS will triage all requests, and be able to discern from requests that require the CIO's time versus requests that can be satisfied by delegating to other members of the team. Additionally, the COS will be the first line of contact for external managers, funneling information and meeting requests to the appropriate personnel.

### *Daily Operational Aspects*

This COS will oversee the daily operational aspects of the Investment Office. This professional will also support the Chief Investment Officer (CIO) and Investment Team in other administrative and ad-hoc activities, maintaining efficiency and accountability within the Investment Office. The COS will facilitate the daily operations of the Investment Office, including, but not limited to:

- Developing and executing policies and procedures for the office, managing external vendors and building facilities relationships, procurement of all office supplies and equipment, and assisting with the on-boarding and off-boarding of Investment Office employees and interns.
- Oversee the Investment Office's structured internship program.
- Update client and committee information in a variety of internal databases, MS PowerPoint Presentations, and MS Excel.
- Service as the Washington D.C. Investment Office liaison to the Foundation's Business Office in Adelphi, Maryland.
- Assist in ad hoc research projects as needed.

### **Specific Responsibilities**

- Serve as the central point of contact to the Investment Office. Within the office, acting as the primary gatekeeper to the CIO. Use reasonable and professional judgment in providing concise and actionable intelligence to the CIO, distributing information and/or delegating tasks to the team members.
- Develop and regularly maintain use of Gantt charts (or other project management tools) to describe and report on the activities, projects, and tasks of each member of the investment team and its interns.
- Maintain various internal databases of the Investment Office (e.g., Oracle Taleo goal management).
- Work with the Board Relations Associate in supporting the CIO and Investment Staff.
- Manage the Investment Team's contacts in a general office database.
- Function as the CIO's email and phone triage system, serving as a gatekeeper to the CIO with both internal and external requests for his time.
- Maintain organization and cleanliness of the CIO's office.
- Scan and organize, within internal databases, any of the Investment Staff's handwritten and/or electronic notes, files, and business cards.
- Manage the office supply room and all office purchases – negotiating favorable terms with vendors.
- Tend to any ad-hoc and Business Office data request.
- Provide the first response for all onsite IT issues and coordinate a timely resolution with the appropriate IT service desk.
- Oversee the production, distribution, and filing of portfolio performance reports (to clients, committee members, and staff), liquidity analysis, and investment recommendation memorandums – assisting in editing first drafts, quality checking performance numbers, and ensuring timely distribution.
- Perform spot reconciliations of externally produced performance/risk reports to the custodial bank, strategic partner/consultant, and internal staff developed reports.
- Draft all Investment Committee and Investment Committee subgroup meeting minutes.
- Manage, along with the Board Relations Associate, the planning and execution of quarterly Investment Committee board meetings, including material production and event services.
- Manage the internship program with the University of Maryland at College Park (UMCP) – hiring, scheduling, and assigning daily tasks; continuing to develop the relationship between the Investment Office and various UMCP schools and departments.

### **Qualifications**

- Exceptional delegator, project manager, and information organizer.
- Excellent communicator with a strong customer service orientation.
- Impeccable writing and editing skills, with a meticulous attention to details.
- Advanced proficiency in spreadsheet and database management.
- Strong propensity and appetite for self-learning of new technologies – especially those that enhance Investment Office efficiencies and transparency efforts with stakeholders.
- Skillful in keeping team members organized and on-task.
- Ability to work efficiently and independently in a small team atmosphere.

- Self-starter who does not require constant direction; rather, is able to identify where assistance is needed and provide that assistance to members of the team.
- Expresses views in a professional, collegial manner.
- Strong proficiency in Microsoft Office Suite, project management software, and goal-tracking software skills (preferably Oracle Taleo).
- The highest level of integrity and professional standards.
- Positive attitude, sense of humor, and interests outside of the workplace appreciated.

The Foundation serves as the investment manager for the endowments of institutions within the University System of Maryland and other public higher education institutions in Maryland. The Foundation's long-term strategic mission is to provide spendable income to the educational institutions it serves while maintaining the real purchasing power of the corpus and adding growth through appreciation. As of June 30, 2017, the Foundation oversaw more than \$1.3 billion in long-term endowment assets and short-term funds.

Resumes must be accompanied by a cover letter addressing the candidate's interest in the position and qualifications. Candidates should also include a statement indicating their current salary and compensation expectations. Candidates considered for the position will be contacted for interviews.

Please submit applications via e-mail to [resumes@usmd.edu](mailto:resumes@usmd.edu)

The University System of Maryland Foundation is an equal opportunity employer.