



Job Title: Portfolio Manager

Date: January 1, 2021

Department: Portfolio Management

Reports to: Vice President of Portfolio Management

Hours: Full-Time, Exempt

Start Date: Immediate

Job Summary:

Understand and communicate to Highmark and investors strengths and weakness in prospective clientele during underwriting process. While clients occupy a Highmark-developed facility, protect and assist them towards stabilization and buyout through analyzing and monitoring governance, operational, finance, and academic information. This position follows the Portfolio Management Operating Principles and fosters an environment that encourages adherence to those principles.

Educational Requirements:

- Bachelor's degree or three to five years of specific experience in the charter school landscape; with expertise in board governance, academics, budgets, and finance strongly preferred.

Technical Requirements:

- Mac OS, MS Word, Excel, Power Point, and other typical office technologies (video conferencing, shared calendars, etc.)

Travel Requirements:

- This position can expect, on average, two air-travel itineraries per month (i.e., a target of approximately 24 itineraries per year, each of which may require multiple overnight stays).

Qualifications:

- Understand charter applications and authorization processes
- Analyze school budgets, financial statements, and ratios
- Evaluate educational program details and data
- Review school performance metrics
- Recognize sound governance structures
- Familiarity with school facility and/or bond financing
- Multitasking, prioritizing, and accuracy
- Interpersonal skills
- Professional written and verbal communication
- Experience working in a professional office environment

Responsibilities:

- Demonstrate adherence to and support of the Highmark mission, vision, and values.



- Maintain awareness and pursuit of departmental-and company-wide goals. Communicate progress toward department goals as requested by Vice President of Portfolio Management.
- Represent Highmark’s interests with a variety of stakeholders including charter school authorizers, associations, investors, founders, and boards in a variety of settings.
- Incorporate educational, operational, fiscal, and governance best practices when understanding, analyzing, and communicating risks and mitigants of investment opportunities and operational assets.
- Develop, foster, and strengthen key relationships with authorizers, associations, school staff, and board members throughout the life of Highmark’s relationship with a school.
- Serve as the go-to state expert relative to authorization and renewal cycles; funding cycles; funding changes; and legislative landscape.
- Serve as the go-to school expert relative to a school’s history, leadership, operations, program, board composition, compliance, academic performance, and financial health.
- Prepare and present Leaseholder/Mortgagor Handbook to school leadership and board members.
- Analyze school governance, financial, academic, and operational information submitted by school.
- Work closely with administrative assistants to ensure school clients are compliant with lease, loan, and bond reporting requirements.
- Provide monthly documentation on school analysis via the Performance Framework.
- Identify trends, risks, and mitigants using the monitoring process and performance framework. Prepare and present recommendations to Department. Oversee implementation of action plan, and if necessary, engage consultants.
- Collaborate with Project Development to provide school information for the credit/investor package.
- Collaborate with Senior Portfolio Manager to complete a forbearance analysis.
- Facilitate the disposition process with investor and school.
- Coordinate the resolution of insurance claims as necessary.
- Conduct an onsite survey at each portfolio school annually, noting conditions and character of the facility, operations, classrooms, and personnel. Attend and observe board meetings.
- Other duties as assigned.

Physical Requirements:

- Requirements include that incidental to working in an office environment.
- Must be able to sit or stand to do work at desk for long periods of time.
- Occasional lifting of objects up to 25 pounds without assistance.
- Ability to operate a computer, and other traditional office equipment for long periods of time as needed.
- Ability to reach cabinets, answer phones, and communicate clearly with clients and other employees.
- Reasonable accommodations may be considered in accordance with relevant law or regulation.



About Highmark School Development

Our mission is simple – impact the lives of students, teachers, and communities. We drive educational excellence by developing customized facility solutions. This vision to deliver exceptional facility solutions, one school at a time, allows us to partner with schools that deliver quality academics, sustainable financials, and operational excellence. The culture of Highmark is built on a foundation of integrity, discipline, teamwork, quality, accountability, and passion empowering our team to continually strive for excellence.

Founded in 2005, Highmark School Development is the nation’s leading developer of educational facilities. We partner with investors to provide the capital and services necessary to design and build efficient, code-compliant, permanent, and affordable school buildings. Each school facility is designed around the school’s program, growth plan, and budget expectations. We serve new-start and operational charter schools; management companies; and private school programs, including operators of early learning centers. More than a real estate firm; more than a bank; more than a builder, Highmark shoulders the full burden of facility development, allowing our clients to do what they do best: operate schools and teach children.

How to Submit your Application:

Interested parties should send a letter of interest and resume with references both as PDF files only to this secure online location:

Upload.hphx0tm1aazftk53@u.box.com

Each file name must include the first and last name of the prospective candidate. Resumes and letters will be received until 11:59 PM Mountain Time on January 29, 2021.