



# Lead, Global Assessment and Advisory Services

Candidate Brief

March 2022



THE CENTER  
FOR EFFECTIVE  
PHILANTHROPY



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# WELCOME



Thank you for your interest in joining our efforts to lead philanthropic foundations and major donors to take on pressing challenges that have defied government and business solutions.

Being effective in this work is uniquely challenging.

To make every dollar count, foundations and major donors need to continually assess their performance, learn from data and exemplars, and adapt their practices in ways that are consistent with effectiveness.

We are guided by an evolving understanding of **philanthropic effectiveness**, and everything we do is in service of helping more funders exemplify best practices. Our work inspires us, and as you find out more about our mission and the meaningful changes it drives in philanthropy through this document, we hope it will inspire you, too.

Our fee-for-service assessment and advisory services draw upon two decades of experience to help funders listen to authentic feedback from stakeholders, assess their own work, learn from their engagements, and improve.

Building upon the success that we have achieved in the US and increasingly around the world, we now see great opportunity to further expand our reach globally, with a particular emphasis in Europe. Our aim is to apply what we have learned in partnership with foundations and major donors in pursuit of greater philanthropic effectiveness and a profoundly better world.

Underpinning everything we do is our working culture, which is characterized by entrepreneurialism, accountability, teamwork, collegiality, diversity, and mutual respect. We value our team members and take pride in fostering their success.

I look forward to meeting you soon.

**Kevin Bolduc**

Vice President, Assessment and Advisory Services



# ABOUT US



For two decades, CEP has led the movement to improve philanthropy through a powerful combination of dispassionate analysis and a passionate commitment to helping funders create a better and more just world.

Today, over 350 foundations around the world have used CEP's assessments and advisory services to gather honest feedback from their stakeholders in an effort to learn how to be even more effective. CEOs and trustees have come to rely on our research for insights into foundation effectiveness on a wide range of topics, from assessing performance to developing strategy to managing stakeholder relationships.

Our highly regarded programming – including our biennial conference – gives foundation leaders an exclusive and unprecedented opportunity to connect with their peers. CEP is based in Cambridge Massachusetts, with a second office in San Francisco, California.

View the [video](#) about our work and why we do it.



## OUR MISSION

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness.

## WHY IT MATTERS

We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

Philanthropy can take on pressing challenges that other actors in society cannot, or will not. Given this unique opportunity to deploy charitable resources for good, individual and institutional givers alike have an imperative to maximize their effectiveness, and therefore, their impact.

But what does effectiveness mean, and what does it look like? How do Philanthropists know if they are being effective?

Our definition of philanthropic effectiveness details four mutually reinforcing elements that are essential across all funders – no matter their goals and strategies or the issues and communities that they seek to support.



Effectiveness must be grounded in the social, cultural, and historical context of the issues being addressed.

Effectiveness also requires an understanding that while a sense of urgency is crucial, results do not always come easily or quickly.

Effectiveness necessitates an understanding of the ways in which disparities – including those brought about by discriminatory policies, approaches, and systems – have influenced societal outcomes.

Finally, little is accomplished alone; individual and institutional givers should strive to be effective themselves and also in the way they work collaboratively with others.

Download our position paper on [Philanthropic Effectiveness](#).



## OUR IMPACT

While it's difficult to precisely know CEP's ultimate impact on influencing foundations and major donors to be more effective, we monitor a set of indicators and commission third parties to conduct external evaluations of our work to gauge our performance.

We make every one of these third-party evaluations public. Download our latest [Impact Report](#).

## CEP GLOBAL

We work with over 350 funders all over the world. Our primary assessment and advisory work outside of the US focuses on the [Grantee Perception Report](#), and more than [40 funders](#) headquartered outside the U.S. have participated (with more than 30 headquartered in Europe). Increasingly we have a robust set of benchmarking data for these funders outside the U.S. that allows them to access unique insights into their effectiveness, and in the past several years we've begun profiling case studies of exemplary performance this data helps identify.

## OUR ASSESSMENT SERVICES

Our Grantee Perception Report (GPR) is a research-based assessment that provides foundations with a chance to learn and improve by listening to and benchmarking candid feedback from their grantees. Given its wide use, including in Europe, this is likely to be the primary approach and assessment that will drive our global growth and the Lead, Global AAS will be the primary engagement leader for these GPRs.

What makes CEP's assessments so uniquely insightful? The enable foundations and major donors to:

- **CANDID AND CONFIDENTIAL FEEDBACK:** Gather vital feedback from key stakeholders through a trusted third party.
- **RIGOROUS METHODOLOGY:** Learn about the practices most connected to effectiveness through our extensively tested and research-informed survey instrument.
- **RELEVANT BENCHMARKING:** See their results in a comparative context among data collected from hundreds of peer funders.
- **INTERACTIVE RESULTS AND ANALYSIS:** Take a deep dive into their results with our interactive online reporting system.
- **EXPERT SUPPORT:** Guide them through the process, from survey design and implementation to helping you act on their results.
- **DRIVEN BY EVIDENCE:** Discover actionable insights in data amassed over a decade from hundreds of funders.



## OUR ADVISORY SERVICES

Our advisory services draw from nearly two decades of experience to help foundations and major donors find solutions to the most pressing challenges in their work. Currently, this work has been somewhat more limited outside the US. Examples of customizable engagements include:

- **CUSTOMIZED SURVEYS, INTERVIEWS, AND FOCUS GROUPS OF KEY STAKEHOLDERS:** CEP surveys diverse groups of stakeholders on their perceptions of a funder's impact, communications, grantmaking practice, and more.
- **SUPPORTING IMPLEMENTATION:** CEP works with boards and staff as they develop plans to implement effective practices, often following an assessment engagement.
- **ASSISTING IN THE CREATION OF PERFORMANCE INDICATORS:** CEP structures efforts to develop and use organizational performance indicators to help funders track progress, learn from experience, and modify plans as appropriate.
- **BUILDING CAPACITY:** CEP designs and delivers workshops and group learning opportunities for foundation boards and staff.
- **OVERALL ASSESSMENT OF EFFECTIVENESS:** CEP collects and analyses information a funder needs to determine its capacity, effectiveness, and opportunities for improvement.
- **BENCHMARKING:** CEP supports groups of peer funders in collecting and sharing internal operational and structural data.



# CONTEXT FOR THE APPOINTMENT

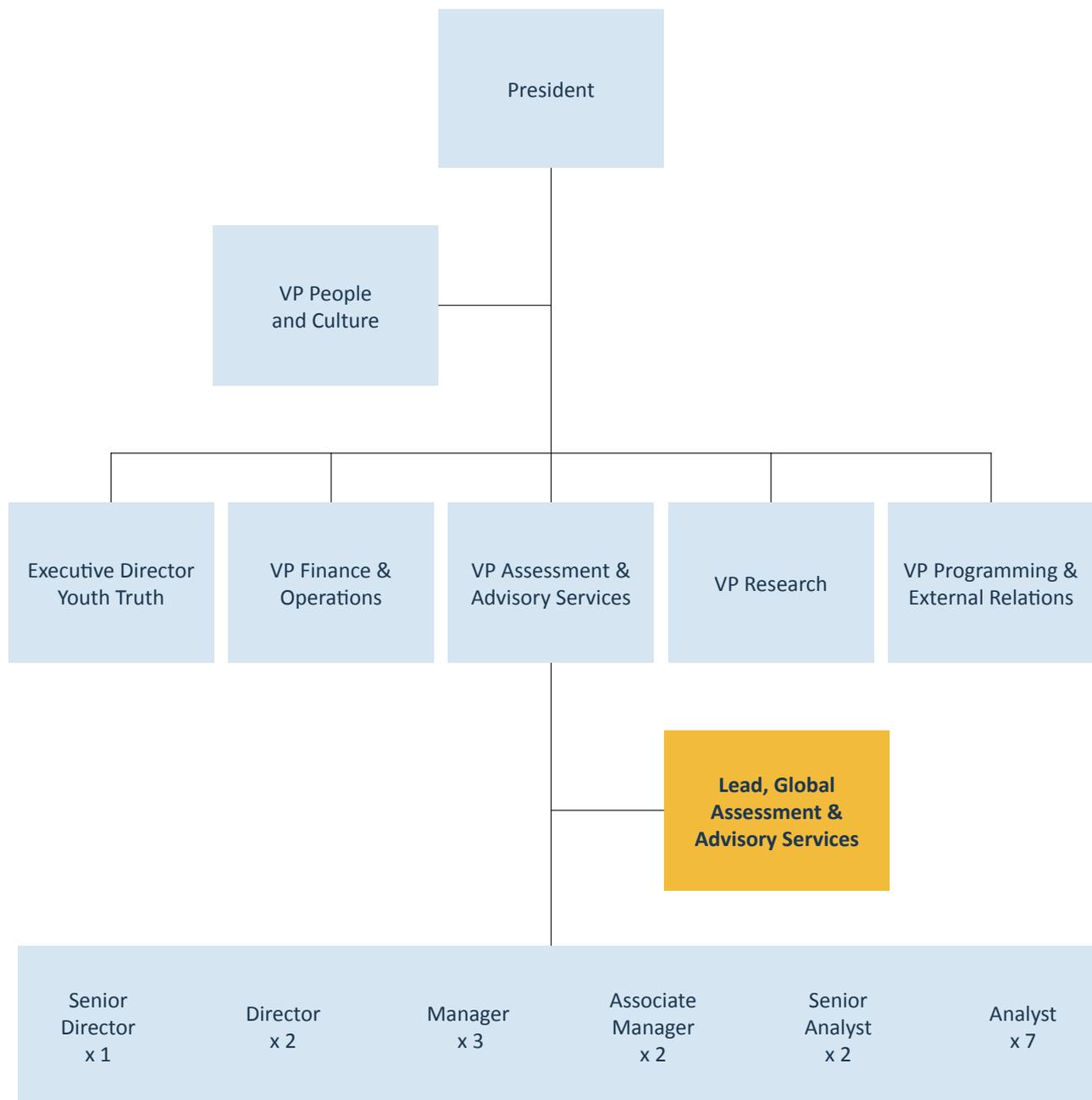
CEP is seeking a dynamic and skilled relationship development lead to take forward the execution of CEP's efforts and expand our global work with a particular emphasis in Europe.

Reporting to the Vice President, Assessment and Advisory Services, the position is responsible for setting the approach to build CEP's fee-for-service assessment and advisory work outside of the US and will be the primary business development engagement leader for CEP's assessment tools with both existing and new clients located outside the US.

Externally, the position builds and maintains relationships with foundation leaders, leads the execution of CEP engagements with funders, represents CEP in meetings, presentations of assessment and advisory project results, and at conferences and speaking engagements. Internally, the post-holder will lead assessment and advisory engagement teams (staffed by US-based analysts) and collaborate with other leaders on the direction and continuous improvement of the Assessment and Advisory Services department.



# ORGANISATIONAL CHART





# ROLE DESCRIPTION

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<b>Job title:</b>	Lead, Global Assessment and Advisory Services
<b>Remuneration:</b>	\$150,000 – \$160,000, to be invoiced biweekly (assuming a 40-hour work week for 48/52 weeks per year)
<b>Contract:</b>	Permanent, full-time
<b>Location:</b>	Remote position with easy access to major European Centers of Philanthropy (e.g., London, Amsterdam, Geneva). An occasional presence in the US will be required from time to time.

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## DELIVERABLES

A successful Lead, Global Assessment and Advisory Services will achieve the following outcomes:

- Lead a portfolio of client engagements, driving the customization of assessments and advisory engagements, working with US-based teams to oversee data collection and analysis processes, guiding the creation of insight from collected data and analysis, presenting results to clients, and ultimately building a trusted advisory role with major funders
- Develop new business for CEP's Assessment and Advisory Services – particularly expansion of the Grantee Perception Report – and identifying opportunities for CEP to meet foundations' needs related to performance assessment, learning, and change
- Foster high performance and individual development among CEP's analysts through effective coaching, and collaboration, and by promoting a positive environment working across CEP's offices



## KEY RESPONSIBILITIES

In order to achieve these outcomes, the post-holder will:

- Work closely with the Vice President of Assessment and Advisory Services and building on outreach efforts underway, guide strategy for CEP's client-oriented work outside the US (with particular emphasis on Europe), prioritize highest value marketing and client engagement activities, and expand our base of knowledge and examples of effective global philanthropy
- Create, over time, an economically self-sustaining portfolio of fee-for-service assessment and advisory engagements
- Cultivate new client relationships outside of the U.S. based on trust, communication, and a commitment to service excellence
- Engage current base of several dozen global clients, including the Assessment and Advisory Services Global Advisory Group
- Oversee the development of high-quality assessment and advisory engagements by appropriately scoping projects, executing against CEP standard processes, and by managing project-based teams to effectively choose what paths of analysis to pursue, focus interpretation on the most important findings, and center results and analysis in values of equity and inclusion
- Discern how best to communicate results through semi-standardized interactive online reports, customized narrative reports, and virtual and in-person presentations for clients
- Facilitate funder organizational learning by helping clients deeply understand assessment results, demonstrating patience, empathy, and an appreciation for organizational dynamics and the psychological barriers to change and improvement
- Attend conferences and create interest in CEP's work through public speaking and generating word-of-mouth buzz about the accomplishments and goals of CEP
- Participate on the AAS client leadership team, which manages the strategy, content, and continuous improvement of CEP's assessments, participates in the development of new approaches, and identifies opportunities to provide advisory services
- Contribute positively to the organization's culture by demonstrating a commitment to the organization's mission, its belief in the power of good data to improve decision-making, and its commitment to excellence



# ROLE REQUIREMENTS

## EXPERIENCE

- Substantial experience, with previous consulting, foundation, and/or other nonprofit experience highly desired
- Experience developing new and managing existing client relationships with responsibility for deliverables and presentations
- Experience leading teams and mentoring and training junior staff members, with the ability to collaborate effectively with remote colleagues

## SKILLS

- Demonstrated strong analytical ability and commitment to data-driven insight, facility with interpretation of basic statistical analyses (i.e., T-tests, ANOVA) a plus
- Excellent writing and communication skills
- Detail-oriented and organized, with the ability to manage multiple priorities simultaneously
- Desire to work both independently and to build engagement and partnership with remote colleagues
- Comfort interacting with high-level senior executives in high-stakes settings
- Comfort communicating in at least one language in addition to English is a plus

## PERSONAL ATTRIBUTES

- Excitement about improving the effectiveness of philanthropy and of the nonprofit sector broadly
- Highest level of personal integrity and commitment to excellence

We believe diversity and inclusion are key drivers of creativity and innovation, and we actively seek out candidates from many types of diverse backgrounds to apply for this exciting role.

## SPECIAL CONDITIONS

- Travel annually of up to 30% will be required of this position



# TERMS AND CONDITIONS

A successful candidate will take on an independent contractor status, enter into an agreement as such, and will not be an employee of CEP. Therefore:

- taxes will not be withheld, and tax payments will not be made on the selected person's behalf, and
- you will not be eligible to participate in any employee pension, health, or other fringe benefit plan and insurance coverage of any kind will not be provided.

Salary above is adjusted to reflect the independent contractor status of this position.



# HOW TO APPLY

For an informal conversation, please contact our recruitment partners, NFP Consulting:

**Simon Lloyd** Director | NFP Consulting  
07961 988 523 [simon.lloyd@nfpconsulting.co.uk](mailto:simon.lloyd@nfpconsulting.co.uk)



Application is by way of a CV and a Supporting Statement.

For more information and to apply online, please visit:

[www.nfpconsulting.co.uk/cep](http://www.nfpconsulting.co.uk/cep)

## Applications will be reviewed on a rolling basis

The selection process will be conducted online with the preferred candidate being invited to visit our office in Cambridge MA prior to a formal offer of appointment.

### ACCESSIBILITY

Please let us know if you have any special requirements which we might need to consider in relation to the selection process. Any requests will not affect the decision making itself.

Please let us know if you would like to receive this information in a different format.