

## **Senior Portfolio Manager, UCeed**

### **Innovate Calgary**

CALGARY, ALBERTA

Innovate Calgary is the technology transfer and business incubator center for the University of Calgary. As part of the Office of the Vice-President (Research) portfolio, we work with UCalgary researchers, students and other members, to bridge the gap between discovery and creating economic and societal impact.

We provide a unique environment for employees, combining a flexible working environment with significant exposure to the breadth of UCalgary's growing innovation and entrepreneurial ecosystem.

### **ABOUT THE UCEED DIVISION**

Since its inception in 2020 UCeed has become one of the most active early-stage investors in the Alberta. UCeed is the University of Calgary's group of startup investment funds which is managed by a small team of professionals at Innovate Calgary. In addition, the UCeed group is responsible for managing Innovate Calgary's portfolio of equity and royalty holdings and overseeing the development, selection and divestment of investments. Where applicable the UCeed team also takes an active role in coaching and mentorship to assist UCeed investees.

### **SENIOR PORTFOLIO MANAGER, UCEED**

Reporting to the Executive Director, Seed Funds, the Senior Portfolio Manager, UCeed will work closely with the UCeed and Innovate Calgary teams as well as startup clients, including those with the Life Sciences Fellowship program and all UCeed investees. This position is responsible for a diverse set of entrepreneurial-based tasks requiring creativity, sound judgment and strong relationship-building skills, while collaborating within a high-energy environment to help drive Innovate Calgary's client and portfolio successes.

### **KEY ACCOUNTABILITIES**

#### *UCeed & Portfolio Management:*

- Negotiate shareholder and investment agreement terms with portfolio companies on behalf of Innovate Calgary/UCalgary/UCeed
- Work with a small team of individuals to identify, evaluate and make UCeed investments
- Monitor and track UCeed milestone-based investment commitments
- Manage capital calls and associated relationships with the University
- Work with UCeed fund managers to ensure the funds adhere to standardized processes and guidelines
- Attend and participate as needed in Investment Advisory Meetings for all UCeed funds

- Work with the Executive Director of Seed Funds to establish new investment funds
- Support organizational metrics and client surveying initiatives to meet donor and stakeholder requirements
- Ensure the Portfolio has clearly defined goals and measurable outcomes and are properly governed throughout the execution life cycle
- Monitor portfolio positioning to ensure compliance with investment policies, management guidelines and portfolio risk parameters
- Manage and maintain portfolio relationships and associated records and attend board meetings and AGMs as required
- Manage all events pertaining to exits and dividend distributions
- Quarterly & annual reporting on all portfolio holdings

*Other Duties:*

- Provide mentorship and advisory to early-stage portfolio companies
- Contributing to due diligence activities by conducting research and analysis on markets, financial forecasts, management and competition, etc.
- Support and mentorship of existing portfolio companies
- Expansion of marketing and recruitment efforts for future cohorts
- Provide guidance on program design and structure
- Oversee all stakeholder reporting and metrics

**PERSONAL CHARACTERISTICS:**

The Senior Portfolio Manager, UCeed is passionate about deep technology startups and is committed to helping them advance into established companies. They are experienced in the financial aspects of investment funds and portfolio management. Accordingly, the position requires an individual with:

- Exceptional analytical abilities with an entrepreneurial mindset
- Strong interpersonal skills and ability to work collaboratively in an evolving environment with multiple stakeholders
- Excellent oral and written skills specifically on communicating key metrics and data sets
- Proactive business relationship management skills with a commitment to the completion of projects
- Keen attitude and willingness to explore outside of the Senior Portfolio Manager, UCeed's area of expertise
- Ability to work with and organize large volumes of data and manage concurrent projects
- Outstanding time management skills and high attention to detail

**REQUIRED SKILLS/ QUALIFICATIONS:**

- Experienced (CFA preferred) in a financial or business analyst role with incubator, accelerator, investment, startup or related experience is preferred
- Experience with early-stage company agreements and contracts

- Ability to manage multiple projects successfully according to objectives, quality standards and costs
- Degree in business, finance, investment or a related field
- Ability to develop business knowledge to leverage best technologies and practices
- Ability to interact with a variety of cross-functional teams at all levels of the organization
- Knowledge in results-based accountability and metrics
- Ability to create high-level documents and reports
- Experience with university innovation processes and systems is considered an asset

Interested applicants are asked to forward their **resume and cover letter** to [hr@innovatecalgary.com](mailto:hr@innovatecalgary.com). Alternatively, resumes may be mailed to: HR, Innovate Calgary, 3655 36 Street NW, Calgary, AB, T2L 1Y8.

We thank all applicants for their interest; however, only those persons for whom we need further information, or are being considered for an interview will be contacted.

**Application deadline:** End of Day **December 3, 2021**

*Innovate Calgary is an equal opportunity organization committed to building and fostering a fair and inclusive community that values diversity and encourages respect for all. We welcome applicants across any race, colour, religion, sex, sexual orientation, gender identity, national origin, disability, protected veteran status, Indigenous status, or any other legally-protected factors. We recognize the value of identifying and removing barriers for any applicants interested in participating in our programs.*