



W.K. Kellogg Foundation
Investment Analyst- Private Investments

Battle Creek, MI (headquarters)/Hybrid Model



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About W.K. Kellogg Foundation

The W.K. Kellogg Foundation supports children, families, and communities as they strengthen and create conditions so all children can achieve success as individuals and as contributors to the larger community and society. Upon establishing the foundation in 1930, breakfast cereal innovator W.K. Kellogg instructed future trustees and staff to “Use the money as you please so long as it promotes the health, happiness and well-being of children.” To this day, the foundation envisions, and works toward, a nation that marshals its resource to assure that all children have an equitable and promising future – a nation in which all children thrive.

To advance this mission, the foundation implements an array of change-making tools – grantmaking, impact investing, communications, contracting, networking, and convenings – and uses an innovative networked organizational design to prioritize investment decisions and maximize effectiveness toward achieving the desired ends and improvements for children and their families. A commitment to racial equity, community engagement and leadership development is woven into each endeavor as essential to the creation of a social context in which all children can thrive. Their grant-making focuses on education and learning; food, health, and well-being; and family economic security.

The overall work of the foundation is guided by the following values:

- We believe in helping people help themselves through the practical application of knowledge and resources to improve their quality of life and that of future generations.
- We believe all people have the inherent capacity to effect change in their lives, in their organization, and in their communities. We respect individuals and value their collective interests, strengths, and cultures.
- We believe stewardship requires fidelity to the spirit and to the intent of the founder and the wide use of resources. We believe in being responsible, prudent, selfless, and exercising good judgment.
- We believe innovation of thought and action leads to enduring and positive change in both formal and informal systems.
- We value integrity of purpose and action, and believe it is essential to all of our affairs.

This is a powerful time to be on the front lines of innovative philanthropy and we hope you'll consider joining us! To learn more about the foundation, please visit www.wkkf.org and everychildthrives.com.

The Opportunity

The Investment Analyst - Private Investments will play an important role in the execution of the Foundation's investment strategy and achievement of both its financial and impact goals. The Investment Analyst will support and collaborate with the investment team on private equity and real assets investment decisions. Reporting to the Managing Director – Private Investments, the role will provide the opportunity to evaluate potential investments, work closely with investment managers around the globe, monitor performance, conduct market research and prepare reports for leadership. This is an exciting opportunity to join a high-functioning investment team and contribute to the Foundation's mission by supporting the prudent management of assets.

Responsibilities:

- **Asset class knowledge:** Support senior private investment team members in executing the long-term investment strategies and objectives.
- **Manager knowledge and relationships:** Develop and maintain a database of qualitative and quantitative information on external private investment managers. Conduct analyses to identify best-in-class managers through asset class benchmarking, aligned with WKKFT's investment strategy and philosophy. Through apprenticeship with senior investment staff, develop and strengthen relationships and strategic partnerships with existing and potential managers, supporting consultants, and other third-party entities.
- **Investment opportunity analysis and execution:**
 - Support senior investment team members with conducting investment, risk, legal, and operational due diligence to identify and recommend managers most likely to deliver the highest risk-adjusted returns for the Trust, consulting with more senior investment team members as needed.
 - Formulate and clearly communicate considerations, investment merits, and concerns relevant to making an informed investment recommendation.
 - Coordinate with relevant parties (e.g., managers, accountants, custodian, legal, consultants) to manage the process of compiling, organizing, storing, and sharing relevant materials to support new manager onboarding.
- **Portfolio monitoring:** Support senior investment team members in overseeing investments as needed, including regular reviews, *ad-hoc* analyses, periodic site visits, attending annual meetings, and recording work in the KFIO's systems.
- **Portfolio reporting:** Assist senior team members in compiling portfolio performance and attribution analysis.
- **People leadership:** Demonstrate WKKF's core values of diversity and inclusion, intercultural awareness, openness, collaboration, and stewardship.
- **Organization building:** Contribute to KFIO's ongoing development as a best-in-class investment organization through initiatives such as:
 - **Thematic research:** Research and share cross-asset class themes with the broader investment team, focusing on their wider implications for asset allocation and investment manager selection (e.g., rise of artificial intelligence, inflation, risk management).
 - **Continuous improvement:** Identify and suggest improvements in the team's processes, tools, and technology solutions to further enhance due diligence, portfolio monitoring, and portfolio reporting.

Candidate Profile

The ideal candidate will have the following professional and personal qualities, skills, and characteristics:

Core Capabilities

- **Asset class knowledge and abilities:** Eagerness to expand understanding of the relevant concepts and strategies of the respective asset classes.
- **Theoretical / conceptual skills:**
 - Willingness to assess the quality of own judgment by consulting with other team members, seeking out feedback, and incorporating learning into future decisions.
 - Eagerness to learn and continuously improve investment philosophy and strategies underpinned by academic theories and the latest institutional knowledge.
- **Analytical and technical skills:** Ability to gather evidence and develop sound judgment about the merits and weaknesses of investment opportunities. Existing or willing to learn strong technical and statistical skills, including PowerPoint and advanced Excel.
- **Interpersonal abilities:**
 - Ability to build relationships with a variety of internal and external contacts, such as managers, peer institutions, other Foundation staff, and external advisors.
 - Strong written and verbal communication skills, including the ability to produce investment memos and participate in both internal investment team and external manager meetings.
 - Team player who thrives in a collaborative environment, both within and outside of the private investment asset class and can complete assignments independently and in a timely manner.
- **Personal abilities:**
 - High ethical standards and commitment to WKKFT's fiduciary duties.
 - Ability to make high quality decisions in uncertain situations.
 - Willingness to learn and apply different investment strategies thinking to help the team maximize returns for WKKFT.
 - Proactive drive to discover and understand the root causes and solutions for various investment scenarios KFIO will face.

Desired Qualities and Characteristics

- Strong alignment with WKKF's values and DNA
- Intercultural competence
- Openness / self-awareness
- Ego-management
- Systems thinker
- Brings people together
- Collaborative
- Conflict competence
- Active listener
- Talent architect / people developer
- Empowers leadership
- Builds trust

- Shares accountability and responsibility

Results-oriented Education/ Experience

- Undergraduate degree required. 2-5 years' work experience (including internships) in fields relevant to assigned responsibilities with investments and/or finance emphasis preferred.
- Good understanding of the private investment markets.
- Prior experience with Burgiss or other private investment software preferred.
- CFA designation or progress towards CFA designation preferred.
- Experience working effectively with persons from diverse cultural, social, and ethnic backgrounds and ability to drive strong relationships.

Compensation and Benefits

Salary is competitive and commensurate with experience. The salary range for this role is \$95,200 - \$119 with a generous benefits package. The exact salary that will be offered to the Investment Analyst will be determined based on a consideration of the successful candidate's skills, experience, and aligned with the foundation's compensation policies.

Contact

DSG | Koya has been exclusively retained for this engagement, which is being led by Erin Reedy. Submit a compelling cover letter and resume by [filling out our Talent Profile](#). All inquiries are strictly confidential.

The W.K. Kellogg Foundation is an equal opportunity employer and strongly encourages applications from people of color, persons with disabilities, women, and LGBTQ+ applicants.

About DSG | Koya

DSG | Koya, a DSG Global company, is the nation's premier search firm dedicated to mission-driven leadership. Since its founding in 2004, DSG | Koya has had an exclusive focus on mission-driven clients and was founded on the belief that the right leader can transform an organization and have a deep and measurable impact on our world. DSG | Koya works with nonprofits & NGOs, responsible businesses, and social enterprises in local communities and around the world.

DSG Global is consistently recognized by Forbes on its top 10 list of "America's Best Executive Recruiting Firms" and is an industry leader in recruiting transformational leaders for a changing world. The firm is deliberately different in its approach, with best-in-class teams who have decades of experience in cultivating inclusive leaders, understanding the dimensions of diversity, and building equitable teams.

Learn more about DSG | Koya via the [firm's website](#).