



## BACKGROUND

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Valhalla Foundation (“Valhalla”) is the private foundation of Scott Cook (co-founder of Intuit) and Signe Ostby. Valhalla invests in and supports innovative organizations aligned with its mission to *drive measurable and meaningful improvement in outcomes that matter*.

In that spirit, five key issue areas comprise Valhalla’s main portfolio: early childhood development, K–12 education, data science, medical research and talent, and environmental innovation. Additionally, Valhalla is an active participant in collaborative philanthropy efforts through The Audacious Project, and is a General Partner in Blue Meridian Partners.

Valhalla applies a data-driven and highly rigorous approach to grant-making and provides ongoing non-monetary support to help portfolio organizations scale their impact.

Within the medical research and talent portfolio, Valhalla works to identify medical breakthroughs for the treatment of multiple sclerosis and related autoimmune diseases by funding leading researchers in the field with early, consistent, meaningful, and catalytic funding. Valhalla also works to accelerate medical breakthroughs across a range of diseases by funding promising scientists early in their careers at institutions that can nurture their talents.

## CONSULTING ENGAGEMENT

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Valhalla is seeking a nine-month consulting engagement to summarize learning from our current medical research and talent portfolio, synthesize key trends from the sector to inform our strategy, and analyze grant and investment opportunities to grow the portfolio. The specific activities and deliverables of the consulting engagement will include:

**1. Portfolio analysis:**

- Perform in-depth analysis of Valhalla’s existing portfolio of grants and investments, distilling insights on performance and impact.
- Effectively and efficiently share insights and learnings with the Valhalla team and Trustees.

**2. Trend identification and synthesis:**

- Analyze global developments in medical research and talent sectors using a combination of research methodologies, including quantitative analysis, expert interviews, and market analysis.
- Craft reports and presentations that articulate how these trends could influence Valhalla’s strategy and highlight potential areas for new grants and investments.

**3. Due diligence and investment advisory:**

- Conduct due diligence and present recommendations on whether to reinvest in existing grantees/portfolio companies, including analysis of the appropriate amount, structure, and key risks.
- Source and lead diligence on potential new grant and investment opportunities.

## QUALIFICATIONS

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We are seeking a consultant with the following qualifications and skills:

### **Subject Matter Expertise:**

- Strong background in the medical, biomedical, or applied sciences fields with preference for research or clinical experience related to autoimmune diseases
- Deep knowledge of the latest medical research studies, trends, and key players in the field (including but not limited to researchers, funders, companies, etc.)

### **Opportunity analysis and strategy development:**

- The ability to analyze data and research, and appropriately assess impact, scale trajectory, financial sustainability, leadership/team strength, and other key success factors of potential portfolio organizations
- The capacity to derive important insights from the analysis above, name strengths, weaknesses, and assumptions, and, ultimately, to make sound recommendations on investment approach

### **Communication:**

- Demonstrated capability to translate research findings into effective written reports, and present findings clearly and succinctly.

## COMPENSATION

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Valhalla anticipates the consulting engagement will require 50 to 70 hours per month over the next nine months. The Consultant will be compensated on an hourly basis commensurate with their qualifications.

## PROPOSALS

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For more information and to submit a proposal and qualifications, contact My Johnson at [info@valhalla.org](mailto:info@valhalla.org)