

ROLE TITLE	Investment Manager
DEPARTMENT	Community Investment
OPERATING ASSOCIATION/ DIRECTORATE	People
RESPONSIBLE TO	Head of Community Investment (Orbit)
RESPONSIBLE FOR	-

ROLE PURPOSE	<i>One or two sentences giving a simple statement of why the role exists</i>
<p>To lead and develop an innovative Partnership approach, across 4 leading UK housing associations to start making social investments:</p> <ul style="list-style-type: none"> • Building relationships within the VCSE sector, investing and managing investments from the fund and any future social funds. • Actively developing new and existing networks of contacts within the sector that may benefit from social investment. • Managing a portfolio of social investments throughout the whole investment cycle. Working across the partnership to coordinate pipeline development, portfolio management and social investment learning. 	

ACCOUNTABILITIES / RESPONSIBILITIES	<i>Statement of the main areas of accountability and responsibility</i>
<ul style="list-style-type: none"> • Working with teams across the Partnership to promote awareness of the Fund to the sector, creating strong relationships with VCSE organisations and their support networks. • Work across key pipeline partners and the Partnership to generate deals and support applicants. the organisation's current team to promote awareness of, and access to, the fund. • Coordinate work across the Partnership to support investment contract readiness programme with procurement teams and identifying external funding opportunities. • <i>Managing enquiries from potential applicants</i> providing advice on the formation of proposals to the fund, including support needs of applicants to enable successful investments • To appraise investment applications undertaking detailed analysis of business capability, skills, track records and likelihood of success in returning the investment • Describe process / working alongside the Partnership on social impact assessment to identify the impact from potential investees to form part of the overall social impact framework. • Prepare all relevant documents for investment recommendations and present to the fund's Investment 	

Committee.

- Lead deals through the legal process to closing. Working with internal teams/staff and specialist legal advisers to scrutinise investment legal documentation to ensure consistency with the commercial terms agreed.
- Supporting organisations throughout the period of the loan, ensuring they are achieving the desired impact and repayments and developing plans where remedial action is required, including coordinating ongoing support needs as appropriate to ensure successful return
- Maintain an overview of the aggregate portfolio. Expand on the post investment performance of investees and coordinate ongoing support needs as appropriate to ensure repayment
- Provide regular reports to the Investment Committee and trustees including preparation of financial and impact information across the portfolio
- Work with Partnership leads to share learning with key stakeholders and funders
- Coordinate the outsourced fund administration function in undertaking the relevant due diligence assessments of investees.

General duties

- Location - Willingness and ability on occasion to work away from normal office location and to travel within the region/England.
- Some flexibility over working hours is necessary to meet the requirements of the job.

KNOWLEDGE/SKILLS/EXPERIENCE/PHYSICAL REQUIREMENTS	<i>The tools needed to do the role</i>
	<p>Qualifications, Skills and Experience</p> <p>Essential</p> <ul style="list-style-type: none"> • Experience of making and managing investments, and specifically loans • A proven ability to generate practical solutions from complex situation, often with competing agendas and with a range of possible outcomes • Highly developed and proven project management skills • Strong analytical skills and problem solving skills, particularly relating to financial statements, models and risk analysis • Experience of fundraising, assessing grant applications and /or assessing loan applications and business planning • Ability to work within a complex working structure • Ability to work independently in a start-up project • Ability to communicate with a wide variety of people including investees, stakeholders and intermediaries • Self-administering and able to use a range of ICT systems including Word,

	<p>PowerPoint, Excel and Salesforce or similar CRM data system</p> <p>Desirable</p> <ul style="list-style-type: none">• Experience of making investments in a scale and context relevant to this role• Experience of working in the voluntary sector.• Experience and / or understanding of the public sector• Experience of making investments with social and / or environmental objectives
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