

Summary



Learning and Development Framework

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Knowledge – What excellence looks like

1 Tackling the social problem

Social issues

Has an understanding of a broad range of social issue areas including current opportunities and challenges for each and where applicable specialist knowledge in specific social issue area(s).

Social impact management

Has a detailed understanding of a range of social impact management and data approaches, and fully understands the circumstances when it is most appropriate to use each.

2 Finding sustainable enterprise solutions

Enterprise models

Has a robust understanding of the breadth of enterprise models adopted by organisations with a social purpose, their relative merits and limitations, and when it is most appropriate to use each to address a social issue.

Legal forms, governance and accounting

Has an understanding of the key structural, governance and accounting considerations for the different legal forms adopted by organisations with a social purpose, and of best practice governance.

3 Connecting investors and investment products to enterprises

Investors

Has a clear understanding of asset owners' financial and non-financial objectives and constraints.

Impact asset classes

Has a detailed understanding of impact asset classes and how to appropriately use each.

Legal, regulation and compliance

Has a robust understanding of the core legal documents and key clauses for all types of transactions, and understands the regulatory regime, governance and compliance responsibilities applicable to own organisation, and where applicable other stakeholders.

4 Delivering in the social impact investment ecosystem

Social impact investment market and organisations

Has a good understanding of trends in the UK and global social impact investment markets, and a deep understanding of different social impact investment wholesale and intermediary business models and organisations.

Social sector

Has a good awareness of the trends and issues affecting the social sector, including the current policy and funding environment.

Government

Has a good understanding of how national, local and devolved government operates including budget setting and policymaking approaches, and awareness of the current political landscape.

Financial systems

Has a broad understanding of how the financial system operates, including the drivers and historical trends.



Strategic problem solving – What excellence looks like

1 Framing problems

Identify and define problems

Can clearly identify, shape and define challenging problems within a broader context.

Prioritise problems

Can effectively break down complex problems and prioritise the areas to address.

2 Tackling problems

Problem solving

Can apply a rigorous, evidence-based approach to problem solving, considering problems from multiple perspectives.

Creativity and innovation

Can approach complex problems with creativity and reach innovative solutions.

Collaboration

Can effectively collaborate with others, both internally and externally, to find solutions to complex problems.

3 Communicating and influencing

Communication

Can confidently and clearly communicate complex issues, adapting to different audiences with ease.

Influencing

Can clearly identify stakeholders to influence and easily adapt the message to maximise receptiveness of the audience.



Investment management skills – What excellence looks like

1 General transaction skills

Project management

Can effectively manage complex transactions, drawing on project management skills to bring all stakeholders efficiently through the process to achieve specific goals within a designated timeframe.

Relationship management

Can effectively build strong and lasting relationships with multiple stakeholders at all levels.

2 Pipeline development and management

Pipeline development

Can take a client centred approach to seek out and/or develop investment proposals with partners, effectively using a range of communication tools to articulate own organisation's offer.

Pipeline management

Can effectively prioritise opportunities using appropriate tools and take potential investees through the investment process efficiently.

3 Investment analysis

Market analysis

Can confidently assess whether an investment proposal will likely meet the identified market gap or opportunity, and the key externalities that may affect the delivery or outcome of the investment.

Organisational analysis

Can confidently undertake a broad analysis of an organisation (either an Investment Manager or enterprise), using judgement to determine its ability and the risk in it delivering the intended social and financial outcomes of an investment.

Financial analysis

Can confidently undertake robust financial analysis on all investment proposals, using a range of tools and analysis methods, as appropriate.

Social impact and system change analysis

Can effectively identify and assess social impact on people and targeted system change in a range of circumstances, applying appropriate methods and/or frameworks.

4 Structuring and legal process

Structuring

Can confidently structure investments commercially and legally and critically assess others' investment structures, to ensure the appropriate mechanisms are included to meet the commercial and social impact intentions of an investment.

Legal process

Can confidently engage and instruct legal counsel to ensure the commercial intentions of investments are met, and lead transactions through the legal process to signing.

Negotiation

Can comfortably negotiate with integrity to ensure a suitable outcome for all parties in line with the commercial and social impact intentions of the investment.

5 Investment decisions

Investment decision making and portfolio allocation

Can confidently make investment decisions in the context of an overall portfolio based on robust analysis, in particular balancing financial risk and return, expected social impact outcomes and where appropriate systems change.

Presenting and recommending investment decisions

Can confidently present analysis to support considered and clear recommendations for decision makers.

6 Portfolio management

Portfolio management

Can proactively manage multiple investments, monitor performance, maintain the terms of each, and resolve any issues that occur.

Business development

Can effectively provide support to investees to maximise performance and organisational effectiveness, using own experience and drawing in other specialists as necessary.

Exit

Can effectively manage different exit processes and work to ensure the preservation of the investees' social mission in the long-term.