

## CAF JOB DESCRIPTION

**Job Title:** Investment Executive, Venturesome

**Grade or Grade Range:** Grade C

**Department:** CAF Venturesome, Social Investment

**Main purpose of job:**

To work alongside the Venturesome team in order to develop Venturesome's work of providing risk capital and related advice to charities and social enterprises, and to contribute to Venturesome's policy and advocacy work in building the social investment market.

**Responsible to:** Head of Venturesome and Line Manager: Senior Investment Manager

**Budgetary responsibilities:** n/a

**Responsible for (staff/jobs):** n/a

**Key Job Responsibilities:**

- To support the development of Venturesome as an innovative way of providing financial support and advice;
- To appraise applications from, supply advice to Venturesome applicant charities and organisations;
- To write reports to Investment Committee recommending the amount and terms of a social investment; ensuring financial risk and social impact are balanced appropriately
- Monitor a proportion of Venturesome's portfolio of social investments
- To support the strategic development and growth of Venturesome;
- To market the services of Venturesome to charities and social enterprises, both directly and through intermediaries;
- To assist raising outside financial support for Venturesome from trusts, corporates and individuals
- To contribute to Venturesome's 'action-learning', and to our publication of such learning to the market;
- To contribute to the provision of operational and administrative support to the Venturesome team, including portfolio and other management information
- Build and maintain key relationships within CAF and externally

**CAF Behaviour Framework**

The CAF behaviour framework sets out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This framework is used for the assessment, management and development of performance of all our people across CAF.

Please refer to 'Work the CAF Way' booklet for the CAF behaviour framework.

## Technical Job Related Competencies:

- General appraisal skills – strategic and financial – analysis of applicants’ strategy and financial position, in order to determine appropriate financing and the role (if any) to be played by Venturesome;
- Financial analysis – knowledge and practical experience of interpreting financial information (e.g. balance sheets, profit & loss etc.);
- People skills – ability to work with a wide range of people: in charities; in policy circles and with potential funders in Venturesome (trusts, corporates, high net worth individuals);
- Financial schemes – to develop financing proposals which fit the applicant’s needs and which satisfy Venturesome criteria;
- Presentations – to represent the work of CAF and Venturesome to a wide range of audiences;
- Commitment and motivation –
  - To help CAF Venturesome to deliver greater social impact;
  - To build CAF Venturesome’s role in building the capacity of small and medium sized charities and in developing the social investment market;
  - To work with the Head of Venturesome in advising governmental policy-makers in the UK, European Union and around the world.

**Job Description dated:** 2<sup>nd</sup> May 2015

**Job Holder’s Signature**..... **Date**.....

## CAF job profile section 2 - Person specification

**Job title: Investment Executive**

**Date: 5 October 2015**

<b>Attributes</b>	<b>Essential</b> ✓	<b>Desirable</b> ✓	<b>How Evidenced</b> +
<b>Experience</b> <i>Experience of working in a professional environment</i> <i>1-3 years' experience of working in a financial, business or charity environment</i> <i>Experience of gathering information and using it to form a judgement</i> <i>Experience of convincing and persuading others to buy, invest or fund activities</i> <i>Experience in writing reports</i> <i>Voluntary sector experience gained as either an employee or volunteer</i> <i>Experience of managing people</i> <i>Experience of managing relationships with borrowers</i> <i>Experience of attracting new funders and managing funder relationships</i>	 ✓ ✓ ✓  ✓   ✓ ✓ ✓	   ✓ ✓ ✓  ✓ ✓	 A
<b>Qualifications</b> <i>Degree level qualification or equivalent experience</i> <i>Finance qualifications</i>	 ✓	  ✓	 E
<b>Training</b>			
<b>Specialist Skills/ Ability/Knowledge</b> <i>Able to interpret financial information and assess risk</i> <i>High level of numeracy</i> <i>Confident in presentation skills both internally within CAF and externally</i> <i>Able to influence others</i> <i>Commercially aware and prepared to help create new products or services to meet market needs</i> <i>Able to input into departmental strategy</i>	 ✓ ✓ ✓ ✓	    ✓ ✓	 C / T
<b>Communication</b> <i>Has worked and communicated with a wide range of people and can respond to oral information</i>	 ✓		 C / A
<b>Personal Qualities</b> <i>The ability to confidently develop new relationships with organisations and people that have had no previous contact with CAF</i> <i>Ability to understand and empathise with a range of social needs and charitable activities</i> <i>Committed to continuous professional development</i> <i>Self-motivated and can demonstrate adaptability/flexibility</i> <i>Team player</i>	 ✓ ✓ ✓ ✓ ✓		 A/C/R
<b>Special Conditions</b> <i>On occasions may be required to work longer hours / overnight stays in visiting clients outside of the South East</i>	 ✓		
<b>Prior to Appointment</b> <i>Credit Check</i> <i>Basic Criminal Records Check</i> <i>Employment References</i> <i>Medical Clearance</i>	 ✓ ✓ ✓ ✓		

**Key**

**R** = References

**E** = Evidence/Certificates

**A** = Application

**C** = Competency Interview

**T** = Testing/Assessment