

Job Description: Social Investment Manager

Job Description

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| Job Title: | Social Investment Manager |
| Location: | Office Based – Hybrid Worker Status |
| Reports to: | Head of Foundation |
| Staff Responsibilities: | n/a |
| Hours of work: | 35 hours per week |
| Salary Range: | £40,000 - £50,000 |

Summary of Position:

The Fusion21 Foundation is the charitable arm of the Fusion21 Group. Reporting directly to the Head of Foundation and working closely with the Group Executive Director (Business Services), the role will lead the day-to-day management of the foundation's social investment activities. The Social Investment Manager is responsible for identifying suitable funds, overseeing the due diligence process, managing the existing portfolio, and ensuring financial and social performance targets are met. Additionally, the role includes providing regular reports to internal stakeholders on the portfolio's impact and financial returns. The role will also focus on networking and identifying and managing potential pipeline opportunities to expand the foundation's social investment activities.

Primary Responsibilities

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| Social Investment Management | <p>Manage and develop the foundation's social investment portfolio.</p> <p>Contribute to the development of the foundation's social investment strategy and policies.</p> <p>Ensure the foundation's investments meet both financial and social targets, with a clear performance management approach</p> <p>Oversee the social investment process, ensuring effective management of stage gates and structured decision-making</p> <p>Present investment proposals to internal stakeholders including the Executive Leadership Team (ELT) and the Investment Committee (IC)</p> <p>Stay informed of market trends (investor and investee), regulatory changes, and emerging opportunities in social investment.</p> |
| Opportunity identification and analysis | <p>Identify and assess fund investment opportunities that align with the foundation's strategic priorities.</p> <p>Oversee the commissioned due diligence process, ensuring comprehensive financial analysis, risk assessment, and impact evaluation to support informed investment decisions.</p> <p>Work closely with external fund managers to ensure strong governance, impact measurement, and financial sustainability</p> |

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| <p>Monitoring and Evaluation</p> | <p>Monitor and manage the foundation’s portfolio of social investments, including performance tracking and reporting</p> <p>Provide insightful reports to internal stakeholders, demonstrating the impact and financial performance of investments.</p> |
| <p>Relationship Management</p> | <p>Develop and maintain relationships with key stakeholders, including fund managers, co-investors, and social finance networks.</p> <p>Actively participate in networking and sector engagement to enhance the foundation’s profile and investment opportunities.</p> |
| <p>Additional Responsibilities</p> | <p>To be a Fusion21 ambassador.</p> <p>To operate in a professional and safe manner at all times in line with statutory duty and the policies and procedures of Fusion21.</p> <p>To adhere to Financial Regulations and company policies at all times.</p> <p>To undertake any additional duties that may be deemed appropriate from time to time.</p> <p>To ensure that the promotion of Equality, Diversity and Sustainability are central to the organisation’s activities.</p> |

Personal Specification

Post holders that do not meet the essential criteria will be given an appropriate period of time to meet the essential criteria. Fusion21 will support individuals in their learning and development to achieve this.

| | Essential | Desirable |
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| Skills, Qualifications & Training | <p>Proven experience in social investment, impact investing, fund management, or a related field.</p> <p>Strong analytical skills, with experience in financial due diligence, impact assessment, and risk analysis.</p> <p>Ability to engage and influence fund managers and other stakeholders.</p> <p>Excellent written and verbal communication skills, with experience in producing investment reports and presenting to senior stakeholders.</p> <p>Commitment to the foundation's mission and a strong understanding of impact measurement frameworks.</p> <p>Graduate calibre- Degree or equivalent</p> <p>Skilled networker, able create and manage networks with diverse people and groups.</p> <p>Proven ability to negotiate and agree terms of investment, ensuring a balance between financial returns and social impact while aligning with organisational priorities and stakeholder interests</p> <p>Strong risk management skills, including the ability to identify, assess, and mitigate financial, operational, and impact-related risks in social investments.</p> | <p>A formal management qualification</p> <p>Professional qualification in finance, investment, or a related discipline (e.g., CFA, ACA).</p> <p>Experience in fund structuring and governance.</p> <p>Understanding of ESG and responsible investment principles.</p> |
| Knowledge | <p>Knowledge of the UK social investment landscape, including key players, regulatory considerations, and market trends</p> <p>Knowledge of the UK social investment landscape, including key players, regulatory considerations, social policy and market trends.</p> | |

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| Experience | <p>Experience of operating within a social investment setting, either as a fund manager or social investor</p> <p>Experienced in using Information Systems as a vehicle for innovative, effective and efficient methods of working. Understanding the potential of Information Systems for the Fusion21 Foundation and the ability to apply this to the development of new services and systems.</p> | |
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| Behaviours, Qualities and Attitude | <p>A strategic thinker with a proactive and results-driven approach.</p> <p>Strong interpersonal skills with the ability to build and maintain relationships across diverse stakeholders.</p> <p>High levels of integrity, accountability, and sound judgement in decision-making.</p> <p>A collaborative team player with a flexible and adaptable approach.</p> <p>Excellent organisational skills, with the ability to manage multiple priorities effectively.</p> <p>Passionate about social impact and committed to driving positive change through investment.</p> <p>A problem-solver with a keen eye for detail and a structured approach to challenges.</p> <p>Resilient and self-motivated, with the ability to work independently when required.</p> | |
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Prepared by

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| Name: | Mark Chadwick | Signature: | | Date: | |
| Title: | Group Executive Director (Business Services) | | | | |

Note: This job description is not exhaustive and is not a comprehensive list of all the tasks that may be required of the post holder. It is illustrative of the general nature and level of responsibility of the work to be undertaken. The post holder is also expected to carry out other duties which are broadly consistent with the role as identified below. This job description will be subject to periodic review, and it may be amended to meet the changing needs of the business. The post-holder will be expected to participate in this process, and we would aim to reach agreement on any changes.

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