

## Job Description - Portfolio Manager



### Background and context:

Social Tech Trust is at an exciting stage. With a clear purpose to transform lives with tech, the dedication of our expert team, a supportive Board, and a strong portfolio of social tech start-ups, we're ready to scale our impact.

In pursuit of our vision of a world where social transformation is the driving force behind tech, we've already invested more than £30 million in over 750 socially motivated initiatives. Following a strategic review, we are further developing our investment function to provide ventures with the longer-term support they need to scale and expanding our grant programmes to inspire tech innovation.

We're drawing on a decade of experience as a leading tech focused charity and challenging tech to do more for us - placing social need first, so tech has a transformative impact on the lives of people across the UK.

We're looking for a purposeful, talented and highly motivated individual who shares our vision. The successful candidate will be a confident and proactive team player, with an analytical mind, a talent for relationship building, and the ability to manage multiple priorities.

The Portfolio Manager will report to the CEO. They will develop and nurture relationships with partner organisations and manage and deliver initiatives in furtherance of our vision. They will work closely alongside our Investment Managers to build our investment function, including generating a pipeline of ventures and managing the portfolio to deliver targeted financial and social returns.

This is a fantastic opportunity for somebody with investment experience to use their previous skills and experience to make the world a better place.

**Location:** London or Oxfordshire

**Role type:** Permanent, full-time

**Reporting line:** CEO

### Role:

Work in partnership with internal and external stakeholders to develop, manage and deliver innovative programmes that align with the Trust's vision. Support the investment team and CEO to build our investment function including establishing an investment fund and sourcing and managing a diverse portfolio of ventures.

### Responsibilities:

- Proactively build the pipeline of new investment opportunities (including through establishing and running investment and grant programmes).
- Build and develop strategic partnerships with external organisations to collaboratively deliver programmes and initiatives.

- Develop and deliver programme management approaches to ensure the successful delivery of partnerships.
- Support the development of the Trust's investment function to further the Trust's vision of "A world where social transformation is the driving force behind tech".
- Support the fundraising strategy, including preparing materials and attending investor meetings.
- Build and manage a portfolio of ventures, including making presentations to the Investment Committee and fulfilling monitoring and performance requirements as set out by the Trust, fund administrator and investors. This may involve taking up board roles with individual ventures.
- Work closely with the Investment Managers to analyse financial information to determine how an organisation is positioned to deliver for investors, including company results, profit and loss, balance sheet and cash flow statements.
- Work with the Trust's Operations Manager, Investment Managers and key advisors to inform the development and management of operational processes to support the Trust's investment activities.
- Raise awareness of the Trust and advocate its vision through engaging with key stakeholders and targeted networks, including writing blogs, inputting to PR activities and promoting the Trust's work at events.
- Any other duties as required by the Trust.

### **Person specification**

The ideal candidate will be motivated by the potential for social transformation to drive tech. They will have previous portfolio management experience; a track record of working with early stage ventures to support their development and growth; and a desire to apply this to develop a sector leading investment function. They will be a confident and proactive team player, with an analytical mind, a talent for relationship building, and the ability to manage multiple priorities.

### **Essential**

- A shared belief in Social Tech Trust's vision of a world where social transformation is the driving force behind tech
- A track record of successfully supporting ventures to achieve social and financial goals
- Proven experience of building partnerships and networks in support of organisational objectives
- Excellent programme management skills
- Excellent research, analytical and numerical skills
- Strong understanding of the importance of governance
- Strong written and verbal communication skills; able to articulate complex ideas and put across recommendations with confidence to a variety of audiences.
- Proven ability to work collaboratively as part of a small team
- Action-oriented work ethic
- High attention to detail with a drive for excellence

### **Desirable**

- Relevant degree or equivalent professional experience
- Demonstrable experience of making equity investments in ventures through working in either venture capital, private equity, social investment or a related field

- Experience of investing in tech
- Experience of portfolio construction
- Experience of conducting due diligence on potential investments
- Background in finance, tech, entrepreneurship or the social sector
- Professional qualifications in finance or other relevant fields

### **How to apply**

To apply for the role of Portfolio Manager, please forward your CV, together with a covering letter (maximum two sides of A4). Please ensure that your application fully addresses how you meet the requirements of the role as defined in the person specification.

Please provide the names, positions, organisations and telephone contact numbers of two referees relevant to this role. References will only be taken with your permission, once your application has progressed to offer stage.

Applications should be submitted to **Kathy Marcham at [hello@socialtechtrust.org](mailto:hello@socialtechtrust.org)**.

The closing date for applications is **Friday 22<sup>nd</sup> February**. Interviews will take place **week commencing 4<sup>th</sup> March**.

If you have queries about any aspect of the appointment process or would like additional information, please contact **Kathy Marcham at [hello@socialtechtrust.org](mailto:hello@socialtechtrust.org)**