



BIG SOCIETY CAPITAL

Working with us to improve the lives of people in the UK

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Introduction

Thank you for considering Big Society Capital. We are delighted to be recruiting a talented and ambitious Interim Data and Portfolio Manager during our exciting 10 year anniversary year to lead our work on managing portfolio and impact data effectively.

We believe this is a fantastic opportunity for anyone who is passionate about our mission to improve lives across the UK and who can bring enthusiasm and commitment to the role they will play in delivering that mission.

We have put together this job pack to give you some insight about us and what it is like to work here, as well as some understanding about the role we have on offer and the skills and experience we are looking for.

Who we are

As the UK's leading social impact investor, our role is uniting capital, expertise and ideas to create better lives.

Working with expert partners, we seek to understand people's needs first. Then, using our knowledge and capital, we collaborate and invest with fund managers who also want to create a better, sustainable future.

They, and the social enterprises and charities they invest in, create the impact. Our role is to bring the most relevant experts from our network to the table, generating ideas and connecting capital to where it's most needed.

We want to give more people and communities the chance to have an impact on the issues they care about - from housing and access to affordable financial products and services, to health and wellbeing, and community resilience. In this way, we create opportunities for investors and enterprises to generate systemic social change, not just for today but for generations to come.

What we do

Our work at Big Society Capital starts with building an understanding of the social issue and the sustainable enterprise solutions that can bring about change. We then design or improve investment routes that can bring together the needs of enterprises and investors. We seed and test new solutions across a wide range of social issues and asset classes and scale up those that work by bringing in more capital alongside us. We believe sustainable solutions can attract the greatest capital and ultimately grow to have the biggest impact on people's lives. You can learn more about our social impact [here](#).

As a wholesale social impact investor, we invest into fund managers who in turn provide capital to enterprises that can bring about social change. So far, in collaboration with other investors, we have committed £2.4 billion* of investment. We also engage with investors, fund managers, charities and social enterprises to make it easier to use social investment.

We focus on building four key investment systems where there is greatest potential for scale of impact and where we believe we can make the biggest difference. Alongside this we run our innovation work to find the new big ideas for five years' time. You can read more about our approach [here](#). The four investment systems are: Social and Affordable Housing, Impact Venture, Social Lending and Social Outcomes Contracts.

* as at end June 2021

Our team

Our staff and Board bring together diverse experiences from the social, finance, government and business sectors to deliver our work to improve the lives of people in the UK through social investment. A full list and profiles of our staff and Board are available [here](#).

CHAIR

SIR HARVEY MCGRATH

Harvey has been our Chair since 2014. He has a long and distinguished career in the international financial services industry, including chairing both Prudential plc and Man Group plc. He currently is the Chair of West London Zone, Funding London, and the Advisory Council of the Impact Investment Institute; Co-Chair of the Cambridge University Campaign Board; a Member of the Guild of Cambridge Benefactors; a trustee of New Philanthropy Capital and a member of the Advisory Board of the Sutton Trust. ([To be succeeded by Robin Hindle Fisher](#))



EXECUTIVE TEAM:

ANNA SHIEL

HEAD OF ORIGATION

Anna joined us in 2012 and is responsible for our overall origination approach, looking at how social investment can be used to support business models that address social issues. She was previously a Director in Merrill Lynch's Financial Institutions Group. She is a Board member of Charity Bank.

JAMES WESTHEAD

HEAD OF ENGAGEMENT

James joined us in 2019 and is responsible for our engagement with investors, and charities and social enterprises. He was previously Executive Director of External Relations at Teach First and prior to that, an Education & Social Policy Correspondent at the BBC. He is a trustee of Literacy Pirates, which provides after school programmes to improve children's literacy and confidence.

CHRISTINE CHANG

DEPUTY CHIEF INVESTMENT OFFICER

Christine joined us in 2012 and is responsible for the delivery of our investment process. She has international finance experience including at Enclude and Goldman Sachs, and was recently on secondment to run Esmée Fairbairn Foundation's social investments. Christine is passionate about the delivery of social impact by charities and social enterprises, and sits on the boards of Thera Trust and Pact Futures CIC.

JEREMY ROGERS

CHIEF INVESTMENT OFFICER

Jeremy joined us in 2013 and is responsible for investing and managing our portfolio. He has twenty years of experience across the financial and social sectors including as a Managing Director at JP Morgan, Big Issue Invest and Ashoka. Jeremy has held multiple voluntary and non-executive roles at charities and social enterprises including the Princes Trust, Ashoka, Big Issue Invest and Pilotlight. He is also a Senior Advisor to the Rockefeller Foundation.

DAVID BURNDRED

CHIEF FINANCIAL OFFICER

David joined us in 2017 and leads our finance, legal, compliance, people and operations teams. He has held a number of senior leadership roles, most recently as CFO at Lewis Silkin LLP, and spent nine years at CDC Group as an Investment Manager. He advises a number of charitable organisations on financial management and strategy matters and is a Trustee of a community sports organisation.

STEPHEN MUERS

CEO

Stephen joined us in 2016 and prior to being CEO, he was Head of Strategy and Market Development, responsible for our Early Action focus area, strategy and relationship with government. He was previously Director, Criminal Justice Policy at the Ministry of Justice, and has held senior roles across many government departments. He is Chair of the Friends Provident Foundation and his book "Culture and Values at the Heart of Policy Making" was published in 2020.

Working here

Purpose

As a member of the team, you have an opportunity to shape our work and the impact we can have to improve people's lives across the UK through social investment.

Benefits

We provide a salary and benefit package that is very competitive within the UK social and public sector (please see page 6).

Values

Our organisational culture shapes all our work. Our values articulate the culture we seek to create and encapsulate a number of behaviours and attitudes we feel are necessary to live up to our purpose.

Purposeful: We are passionate and energetic in our work to bring about our long-term vision of a thriving social investment market that enables positive social impact.

Pioneering Spirit: We give our team the autonomy and flexibility to be entrepreneurial and creative. We have the courage to push boundaries and a restless drive for change.

Openness: We listen, learn, experiment and collaborate. And we are adaptive and flexible in responding to what we learn.

Rigorous: We take a rigorous approach in all we do. We expect the highest standards and continually strive for excellence.

Respectful: We are genuine in both our approach and aspiration. We value each member of our team and our partners for what they bring.



Equality, Diversity and Inclusion (EDI)

Big Society Capital is committed to being a diverse organisation that is truly representative of the communities we serve. We are an equal opportunities employer with an inclusive environment where all employees can contribute to their fullest potential. We want every colleague to be able to deliver their work with dignity, equality, comfort and independence.

Our office is fully accessible with step-free access and an open-plan set up. We are open to accommodation requests regarding assistive technologies, accessibility tools, flexible working or any other reasonable adjustments that will make working or visiting here more accessible for you.

If you have a disability or other access needs and require any support to assist you through the recruitment process, please get in touch with Ruth Davidson (People and Talent Manager) at rdavidson@bigsocietycapital.com.

You can find more information about our approach to EDI [here](#).

Benefits and perks

Health and wellbeing

We want to support the wellness of our team as much as possible which is why we not only offer a generous pension, medical, vision and life cover but also 24/7 access to online, phone or face-to-face counselling. Our enhanced family leave package and flexible working approach encourages Big Society Capital employees to achieve a healthy balance between work and personal goals, as we continue to adapt to the changing needs of our diverse workforce.

Community

While we enjoy the benefit of regularly working from home, there is a strong sense of community at Big Society Capital and we like to find opportunities to come together as a team. We hold regular company-wide socials and events, potluck lunches, family sports days and team breakfasts. There are several colleague-led social groups on offer, celebrating diversity and covering a wide range of interests, from running to book clubs to TED Talks!

Learning and development

We are proud of our open learning culture with opportunities for formal and informal training – you will be given the support and autonomy needed to tailor your own development journey, taking into account your long-term ambitions and short to medium term needs within the role in a way that is engaging and stretching. Our twice-yearly induction is hosted by Big Society Capital but with speakers from across the sector, offering a comprehensive introduction to social investment for all new joiners. We have an open library with a wide range of fiction and non-fiction books for you to borrow (and add to!).

Holidays

It's crucial that everyone has a chance to genuinely switch off, refresh and recharge, which is why we go beyond our annual holiday entitlement, offering additional closure days and increased time off the longer you work here.

Make an impact

Our whole team has the opportunity to contribute to improving people's lives across the UK through social investment with regular opportunities to hear from frontline charities and social enterprises. Employees are encouraged and supported to become a social sector trustee and given time off to volunteer for causes they are passionate about – we love to hear how colleagues spend their volunteering days!

Travel

While you will not be required to come into the office every day, it is in a convenient location for when you do! We are based in Central London, close to a number of public transport links and for anyone who prefers to cycle in, we offer a cycle to work scheme and bike storage on site.



Interim Data and Portfolio Manager

Location:	London EC4A (hybrid office and homeworking)
Accountable to:	Senior Director, Data & Portfolio
Contract type:	12-18 month, fixed-term (open to flexible working options)
Salary:	£52,750 - £63,250 (depending on experience)

Overall purpose of the role:

As we celebrate 10 years since Big Society Capital's (BSC's) launch and implement our brand new 2025 strategy to scale social impact investment and improve peoples' lives in the UK, it is an exciting year to join the organisation as Data and Portfolio Manager, while a team member is taking maternity leave.

Working within the Data and Portfolio Operations Team (DPO Team), you will ensure that Big Society Capital manages portfolio data, impact data and systems effectively to produce accurate, timely, and strategic management information. The data will be used both internally, with the board and externally on our website. The data will be in respect of BSC's own Portfolio, and the SBSI Trust portfolio. In an emerging market this data is a crucial driver of Big Society Capital and our partners' learning, decision-making and strategic planning.

Responsibilities:

Portfolio Data & Management Information:

- Assisting the Senior Director, Data and Portfolio and DPO Team to meet BSC's data requirements, including establishing priorities, planning systems and process changes, and efficiently implementing these changes
- Assisting with Data points within the BSC Annual Report and Review
- Ensuring that information and data stored on Salesforce, presented through Dashboards, visualised through Tableau & published on BSC's website is up-to-date and accurate
- Creation of reports and presentations that are engaging, user-friendly & insightful - incorporating best practices in data visualisation and storytelling
- Working collaboratively with Market System, Engagement, Finance, Legal, Communications, SBSI and Impact Teams on cross functional projects and initiatives
- Presenting the "Data Dives" session at bi-annual induction for sector peers on data use at Big Society Capital

Impact Data and Systems Change

- Support redesign of BSC's Annual Impact Performance Committee meeting format and approach
- o Lead on delivery of BSC's Performance Committee (PerCo), including a) design of relevant templates, b) support to the team to complete required materials and c) compilation of all materials submitted to committee members
- o The work will be delivered, under guidance of the Head of Impact and in close collaboration with an Impact Director and Market System Leads

Market System Performance Review Workshops

- Support preparation of data insights and materials (system change, enterprise, impact, and broader market data) for respective workshops in consultation with Market System Leads and Head of Impact.

Lead on continuing design and execution of BSC's enterprise level data collection, management, and analysis

- o Work with relevant teams and individuals across the organisation to design data collection and management processes for the various enterprise level data streams (standing data, resilience and impact growth data, business model data, Equality Diversity & Inclusion (EDI) data)
- o Lead on engagement with fund managers, as it relates to the collection of enterprise data. This includes provision of guidance and support materials to facilitate implementation of new processes.
- o Lead on data analysis and provide inputs to MS teams and Annual Performance Review Workshop.

Market System change dashboards

o Lead on design & delivery of Market System Change dashboards, in close collaboration with Market System Leads, Market System Impact Leads, and Head of Impact

SBSI Trust Impact Support

- o In parallel with BSC Portfolio Impact data plans ensure that SBSI impact data is up to date and feeds into key internal and external impact management processes
- o Support external impact communication tools through data provision: website, interactive impact map, annual impact report & annual report

External Market Data

- Managing the annual end-to-end process for both the Market Sizing estimate & Enterprise Level Data release.
- Using Tableau to visualise data – enabling insight into Social Investment in the UK
- Expanding the volume and improving the quality of data on social investment activity and performance

Systems Management

We use Salesforce as our single-source-truth for portfolio data and Tableau as a visualization tool.

- Maintaining & developing the back-end architecture of Salesforce alongside the Salesforce Administrator

Person Profile

Essential Experience

- A background relevant to Big Society Capital objectives (such as government, social enterprise, finance, or investment)
- A passion for and demonstrable commitment to Big Society Capital's social mission and the UK social sector
- Experience and confidence in using Microsoft Excel and PowerPoint
- Experience in data management
- Proven project management skills

Desirable Experience

- Experience and confidence in using Salesforce & Tableau
- Experience leading on (impact) data management process design and execution
- Experience in supporting design and execution of impact management processes within impact investing organisations

Skills and Abilities

- Structured thinker able to synthesize, simplify and reframe complex problems
- A collaborative team player, able to establish excellent working relationships
- Attention to detail with an ability to prioritize ideas and initiatives
- Comfortable with ambiguity, and the ability to work towards a bigger vision, which may be a moving target
- Ability to balance quantitative with qualitative, leading to pragmatic creativity

Applications

- Please apply via Applied by midday Tuesday 5 July 2022 at [this link](https://app.beapplied.com/apply/56hon90e9v): <https://app.beapplied.com/apply/56hon90e9v>
- Applied is a platform designed to minimise unconscious bias in recruitment. You will be asked some work-based questions which are reviewed anonymously by the hiring panel. Please note, while you will upload your CV, it will not be viewed by panel members at this stage, so we ask that you give full consideration to each answer.
- As a Disability Confident employer, we guarantee an interview for all candidates with disabilities who meet the minimum criteria for the job. We are defining a disability in accordance with the Equality Act 2010, as a person who has a physical or mental impairment, and the impairment has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities. You will be asked in your Applied application whether this applies to you.

Please note...

- We are a UK-based business with an office in the Chancery Lane area of London, accessible to a number of public transport links. Our current approach allows colleagues to spend 40% - 60% of their working hours in the office, and the remainder from home. We hope that this working pattern encourages Big Society Capital employees to achieve a healthy balance between work and personal goals, as we continue to adapt to the changing needs of our diverse workforce.
- Right to work: for candidates who do not have the right to work in the UK, Big Society Capital may consider visa sponsorship
- Equality, Diversity and Inclusion: Big Society Capital is committed to being a diverse organisation that is truly representative of the communities we serve. We are an equal opportunities employer with an inclusive environment where all employees can contribute to their fullest potential. We want every colleague to be able to deliver their work with dignity, equality, comfort and independence. Our office is fully accessible with step-free access and an open-plan set up. We are open to accommodation requests regarding assistive technologies, accessibility tools, flexible working or any other reasonable adjustments that will make working or visiting here more accessible for you. If you have a disability or other access needs and require any support to assist you through the recruitment process, please get in touch with Ruth Davidson (People and Talent Manager) at rdavidson@bigsocietycapital.com