

## Making a difference throughout Scotland

Since 1996, Foundation Scotland has distributed significant funding to charities and community groups across the country, creating happier, fairer, and more sustainable communities.

We support philanthropists to help their personal giving make the most difference. We work with donors to invest in community action that enables people and places to flourish. We work alongside communities to ensure that local funds are distributed by communities themselves. We offer social investment opportunities to enable social enterprises, community organisations and charities to grow and deliver positive social impact. For a quick introduction to how we make a difference, [watch our animation](#).

## The Social Investment Team

Foundation Scotland's Social Investment Team designs, delivers and manages a portfolio of loan and grant investments to social enterprises. The team also integrates new repayable finance opportunities across other teams in the Foundation.

There is a low level of knowledge about social investment, and the team strives to grow understanding of the opportunity in the wider community, charity and social enterprise sectors. As the grant funding environment becomes more challenging, many organisations have the potential to take on loan finance, and our growing portfolio of investees bears this out.

However, these organisations require a social investment product and a supportive approach that matches their requirements, grows confidence and enables them to flourish. The team provides the following services:

- Credit assessment
- Financial modelling
- Report writing
- Relationship management
- Social impact monitoring
- New fund development
- Training and support to all colleagues in connection with the above

## Role Purposes

The description for this role reflects two levels of skills and contribution, linked to two different grades: Social Investment Executive Grade E and Senior Social Investment Executive Grade F. Postholders in Grade E can be supported through a learning and development pathway towards achieving Grade F.

The Senior Social Investment Executive role in Grade F will have deep knowledge that spans credit assessment, social enterprise, and the grantmaking/funding context, the capability and credibility to undertake the most complex social investment assessments, lead on delegated areas of development, and undertake a mentoring and capacity building role internally.

Reporting to the Head of Social Investment, the postholder will:

- Process applications from social enterprises, undertake loan assessments, prepare detailed financial reports for decision making panels as required.
- Manage an investment portfolio and ensure regular reports are created for relevant panels. Deliver the main contact point for financial draw down and financial reporting queries from investees.
- Process tasks required for the loan book including delinquency and provision management, contribute to the creation and implementation of assessment and management processes for investments.
- Deliver effective support for the Social Investment Committee and maintain systems which monitor, document and review the work for this Committee.
- Contribute to the design of investment and support programmes, working in partnership with relevant stakeholders. Activities include: planning, research, design and implementation of suitable approaches to financial monitoring and evaluation.

#### **Senior Social Investment Executive – Additional Purposes**

- Lead on assigned complex assessments, including where there is a requirement to capacity build the investee.
- Lead on delegated areas of development across social investment, including tools and templates to support investment, guidance for potential investees.
- Act as an in-house expert, providing capacity building, coaching and mentoring support to colleagues on social investment.

Working with:

- Colleagues
- Applicants
- Investees
- Committee Members
- Stakeholders in the sector, such as community and social enterprise infrastructure bodies

## Core Responsibilities

### 1. Pre-application support and advice

- Provide support and advice to applicants on potential projects.
- Consider solutions and opportunities for applicants to apply for investment.

#### **Senior Social Investment Executive – Additional Responsibilities**

- Step in or take the lead on the more complex advice and support needs with applicants, including those where a significant capacity building or business improvement requirement exists before investment is likely or where the opportunity is potentially high profile or reputationally sensitive.

### 2. Investment assessment

- Financial modelling, considering the affordability of investments for applicants and implications for their business and the suitability for an investment.
- Write and present assessment reports for consideration by the team and Social Investment Committee.

#### **Senior Social Investment Executive – Additional Responsibilities**

- Develop deep knowledge of particular social investment approaches, combining credit analysis expertise with understanding of social enterprise, governance, and community benefits.
- Refine and develop guidance, training and tools to support a proactive approach to social investment assessment, that includes identification of capacity building needs of investees and signposting or direct support.
- Work in partnership with the Impact, Learning and Knowledge Manager to develop evaluation and impact assessment frameworks to evidence the community contribution of social investments in line with Foundation Scotland vision and ambitions.

### 3. Portfolio management

- Relationship management with a diverse portfolio of investees.
- Processing and agreeing drawdown with applicants including assessment of security and legal requirements.
- Processing payment holidays and loan restructures.
- Problem solving, support and practical advice for investees.

#### **Senior Social Investment Executive – Additional Responsibilities**

- The senior adviser will be responsible for relationship management of a portfolio of the more complex investees. This may be in relation to the complexity of the project to be delivered, or the unusual nature of the opportunity, or the capacity and relationship needs of the investee.
- Provide coach-mentoring or peer support to colleagues in relation to portfolio management.

#### 4. Raise the profile of social investment within Foundation Scotland and across Scotland

- Provide input and advice on potential social investment opportunities across the wider Foundation.
- Represent the Social Investment Team at relevant forums and sector events.

#### **Senior Social Investment Executive – Additional Responsibilities**

- Act as an in-house expert, providing capacity building, coaching and mentoring support to colleagues on social investment, and exploring partnership opportunities with other Foundation Scotland teams relating to community funds, donor development and philanthropy.
- Using deep knowledge of social investment, act as an ambassador and champion for social investment, including public speaking in financial and funding forums and with potential investors and donors.

#### 5. Supporting communications activities

- Contribute and shape case studies to show good practice in the sector.
- Provide performance reports on portfolio activity.
- Liaise with the Communications Team for public relations activity and media management.

## Shared Responsibilities

### **Planning: Team**

- Contribute to a range of team activities, including establishing team plans, monitoring progress against targets, creating a range of reports for internal purposes and for external donors, and providing feedback on the team and business plan.

### **Evaluation, Impact and Learning**

- Contribute to the design and implementation of monitoring and evaluation processes, analysis of data, gathering learning from practice and from policy/sector reviews, the creation of a range of impact and learning reports and the application of learning for different funds and programmes and Foundation operations.

### **Professional Development**

- Engage in opportunities to develop skills, experience, and knowledge, focused on the individual role profile and responsibilities, and agreed with the line manager. Engage in any Foundation review of training and professional development.

### **Profile**

- Where appropriate, raise the profile of the Foundation through the delivery of presentations to relevant audiences, attendance at relevant forums and by engagement in relevant networks and with agreed partners.

## Scope and Accountability

Responsible for own professional practice and due diligence in the delivery of the role, including collaborative working with colleagues within the Social Investment Team and other teams at Foundation Scotland. The postholder is expected to plan and manage their own workload and deliver to expected timescales and deadlines, including financial and business planning, budgetary, evaluation and reporting deadlines.

### **Senior Social Investment Executive**

In addition, the Senior Social Investment Executive will be expected to develop and maintain deep knowledge within assigned areas, such as specialist areas of investment, financial projections, emerging business models within the social enterprise sector, governance, and business sustainability.

The Senior Social Investment Executive will lead on delegated areas of development and improvement across the social investment team, acting as an adviser to the social investment committee, and contributing to cross-cutting initiatives working in partnership with other foundation Scotland departments or external organisations.

The Senior Adviser will share their deep knowledge and expertise back into the organisation through coaching, mentoring, peer support and/or delivery of training modules. They will evidence the credibility to represent Foundation Scotland with more complex investment relationships or in external forums as an ambassador for social investment.

## Person Specification

### Education, experience and specialist expertise

- A minimum of three years' experience of managing, assessing, and providing investment.
- May have a degree level qualification in a relevant field, or equivalent level of analytical thinking, research and communication skills gained through experience and short courses.
- Strong analytical skills in assessment of investment proposals / applications.
- Strong knowledge of preparing financial assessments and reports.
- Ability to understand and report on complex financial information.

### Senior Social Investment Executive

- Ideally membership of a relevant sector professional body.
- Knowledge of social investment.
- Knowledge of social enterprise, and new and emerging non-profit and community benefit business models.
- Understanding of governance and regulatory requirements pertaining to social enterprise and other non-profit and community benefit projects and organisations.
- Knowledge of Subsidy Control Regulations.

### Communications and relationship skills

- Strong written skills, applied particularly in report formats and short research projects.
- Excellent interpersonal skills in building relationships with investees, third and community sector bodies and representatives.
- Good communicator with an ability to build relationships across the Foundation.

### Senior Social Investment Executive

- Expertise and presentational skills at a level to be a persuasive and credible ambassador and advocate for social investment internally and externally.
- Expertise and credibility to capacity build with potential and actual investees at all levels, and act as an internal coach-mentor.

### General and transferable skills

- Capable in the use of standard Microsoft Office applications.
- Ability to work independently, to take initiative and adopt a problem-solving approach.
- Strong organisational skills with excellent attention to detail.
- Flexible with a can-do attitude.
- Strong organisational and prioritisation skills.
- Ability to work under pressure, to tight deadlines with a positive and constructive attitude.
- Proactive with a commitment to customer service.
- A demonstrable commitment to ongoing learning, development, and adaptability.
- Eligibility to work in the UK.
- Ideally UK driving licence.

## The benefits of working for us

In addition to a sense of fulfillment and an opportunity to meet a wide range of people, Foundation Scotland offers the following benefits.

- A progressive pay system with benchmarked annual increases
- Life Assurance at 3 times annual salary
- Defined contribution scheme with 6% Employers contribution
- MS Office license to use on a personal device whilst employed by Foundation Scotland
- 35 days annual leave [all public holidays need to be taken from this allowance]
- Training and development opportunities
- Working pattern flexibility and homeworking
- Employee Assistance Plan
- Equivalent 2 days paid to undertake volunteering opportunities

The description for this role reflects two levels of skills and contribution, linked to two different grades: Adviser Grade E and Senior Adviser Grade F (of 10 grades).