**JOB DESCRIPTION**

**Job Title:** Investment and Sustainability Officer

**Department:** Senior Bursar’s Office (Bursary)

**Reports to:** Senior Bursar

**Responsible for:** Part-time administrative assistant

**Purpose of role:** Develop endowment wide analysis to support decision making, support the Senior Bursar in managing the securities portfolio (representing £800m of a £1.8bn endowment), and drive the endowment-wide sustainability agenda. More broadly, the purpose of this role is to support the Senior Bursar in meeting the endowment’s financial and environmental goals, and maximising the long-term resilience and ability of the endowment to provide financial support to the College’s mission and activities. These are long-term goals, which is reflected in the permanent nature of this role.

**KEY ACCOUNTABILITIES:**

1. Building and executing on the sustainability strategy of the whole endowment (£1.8bn), in the context of the endowment’s commitment to net zero by 2050 and the desire for Trinity to have a significant, lasting and positive impact on the environment.

   This includes:
   - managing sustainability consultants
   - coordinating external managers in both property and securities to deliver on sustainability goals
   - Secretary to the Sub-Committee for Sustainable Investment
   - liaising with the internal stakeholders such as the Climate Change Working Group and student bodies convened events to amplify Trinity’s impact.

   A significant part of this role will be project management of initiatives to improve the environmental impact of the endowment and working with others to develop best in class reporting metrics. In this role, it will be critical to ensure that the financial implications of our investments are aligned with our portfolio objectives and environmental goals. This also includes driving sustainability engagement efforts for Trinity as a shareholder, client and landowner. In this aspect of the role, it will be important to work closely with the Property Investment Manager.

2. Informing the strategy of the securities portfolio (£800m) with analysis, helping build the strategy and executing on it.

   A key aspect of the role will be enabling the plan to enhance and increase the endowment’s allocation to private equity/venture capital over the medium term. This process is expected to take several years to build. This includes maximising Trinity’s edge in private markets through our alumni network, Fellowship, university links and reputation.

   Key tasks will involve:
   - developing the Endowment’s requirements
   - tendering
   - constantly reviewing our counterparties
   - managing costs and containing complexity

   This involves aiming to enhance the resilience of the endowment in the long term for the College.
3. Supporting the Senior Bursar in developing endowment-wide analysis including both property and securities by working closely with external managers and advisors.

This includes:
- undertaking scenario analysis
- income estimates
- asset allocation analysis
- risk analysis
- performance and cost attribution
- holdings reports.

A key part of this role will be analysing and providing recommendations on managing the costs of the endowment to ensure that the College is receiving value for money. This includes identifying and coordinating the best external advisors to support Trinity.

4. Day-to-day management of third parties supporting the securities portfolio (including consultant relationships, custodianship, funds), maximising the value of the relationships for the College (including driving tender processes), and coordinating with them.

5. Overseeing the operations of the securities portfolio (£800m) by working closely with the finance team and the endowment accountant (e.g., on large transactions). This involves overseeing the streamlining of key financial and reporting processes for the College.

6. Across all responsibilities, this role will need to report on activities, and progress against goals in the endowment, including for key milestones (e.g. Investment Committee, Subcommittee on Sustainable Investment), and will need to coordinate a variety of stakeholders.
PERSON SPECIFICATION

Experience and Knowledge

• Experience in securities including public and private equity
• Experience in sustainable investment
• Project management
• Investments
• Intermediate knowledge of sustainability
• Experience of building excel models in a linked and organised manner
• Experience in coordination, analysis, report writing.

Skills and Personal Attributes

• Advanced interpersonal skills
• Teamwork
• Advanced excel
• Intermediate power point
• Advanced writing and communication skills

Qualifications

Degree level
EMPLOYMENT DETAILS

Salary: Competitive

Holiday: 25 working days plus 8 public holidays.

Probationary period: 6 months.

Meals: Free lunch provided for staff who are on site and whose duties cover this period.

Pension scheme: A pension scheme, which complies with the requirements of the Occupational and Personal Pension Schemes Regulations for auto-enrolment, will be available after three month’s service. All staff will become members unless they choose to opt out.

5% staff contribution and 10% College contribution. Contributions can increase up to 8% with 16% College contribution.

Private Health Care: The College provides private health and dental insurance for self and family. Staff are able to join the schemes after successful completion of their probationary period, subject to certain limitations. This is a taxable benefit.

Gym: Membership of the College gym is available for a modest fee.

Sports & Social Club: The Trinity College Staff Sports and Social Club, run by a committee of staff, offers regular outings to places of interest, and organises functions including a Christmas event.

Cycle to work Scheme: A tax-free benefit allowing you to spread the cost of a new bike, including either a pedal bike or an e-bike, and equipment for it, over 12 months, up to a maximum value of £2,000.

Employee Assistance Programme: To support staff emotional and physical wellness, we provide free access to an employee assistance scheme, available 24/7.

Childcare: Access to a workplace nursery, subject to places being available.