

THE NATIONAL INSTITUTIONS OF THE CHURCH OF ENGLAND

MANAGING EMPLOYER: PENSIONS BOARD

INVESTMENT DEPARTMENT

JOB PROFILE

- JOB TITLE:** Investment Analyst – Pensions Board
- GRADE:** Band 4
- LOCATION:** Church House, Great Smith Street, London SW1P 3AZ
- ACCOUNTABLE TO:** Investment Officer - Pensions Board
- KEY RELATIONSHIPS:** The Chief Investment Officer and other members of the Church of England Pensions Board's (the Pensions Board) Investment Department, senior staff in the Pensions Board, members of the Pensions Board's Investment Committee, members of the Ethical Investment Advisory Group and Engagement team, the Pensions Board's investment consultant, external fund managers, custodian and other external advisers.
- BACKGROUND:** A new post that is being created specifically to provide further support to the Pensions Board in the oversight of its asset allocation and investment management arrangements.
- JOB SUMMARY:** Assisting the Pensions Board's Investment Officer in organising and administering the work of the Pensions Board's Investment Committee and with other tasks associated with the investment of the Board's pension scheme assets and charitable funds.
- MAIN DUTIES AND RESPONSIBILITIES:**
1. Assisting the Investment Officer in the production of Committee reports and managing and monitoring the Pensions Board's fund managers.
 2. Assisting in the preparation of reports for presentation at quarterly Investment Committee meetings.
 3. Preparation of other *ad hoc* reports for the Investment Committee as required.

4. Attending meetings with the Board's fund managers, researching the key issues beforehand and keeping a record of those meetings.
5. Establishing and maintaining a system for the reconciliation of the custodian's records with those of the fund managers.
6. Monitoring fund managers' KPI's, compliance and regulatory reports and ensuring the Board's managers are adhering to key points in IMAs and investment guidelines.
7. Sympathetic to the Board's ambitions in Ethical Investment, liaising with colleagues in the Ethics and Engagement Team, specifically in relation to manager ESG ratings.
8. Deputising for the Investment Officer when appropriate.
9. Minuting Investment Committee meetings.

The main duties and responsibilities of your post are outlined in your job description. This list is not exhaustive and is intended to reflect your main tasks and areas of work. Changes may occur over time and you will be expected to agree any reasonable changes to your job description that are commensurate with your banding and in line with the general nature of your post. You will be consulted about any changes to your job description before these are implemented.

PERSON SPECIFICATION:

Essential

Skills/Aptitudes:

- Excellent written and oral communication skills.
- Highly numerate.
- Good administrative and organisational skills.
- Able to work under pressure and meet tight deadlines.
- High degree of accuracy and attention to detail.
- Excellent IT skills.

Knowledge/Experience:

- 2 years of relevant work experience within an endowment, pension fund or fund manager.
- Thorough understanding of how investment markets operate.
- Experience of research and report writing.
- Experience of organising meetings and of minute taking.
- Experience in office administration

Personal Attributes:

- Flexible in order to meet the demands of the post.
- Excellent interpersonal and liaison skills.
- An excellent team player, able to work with a wide range of people at all levels in a variety of situations.
- Able to represent the National Church Institutions with confidence at internal and external meetings.

Education:

- Ideally educated to degree level or equivalent work experience.
- Investment Management Certificate or equivalent.

Desirable

Education:

- Degree in a financial discipline.

- CFA or willingness to study for it.

GENERAL INFORMATION:

Who we are and our values

We in the National Church Institutions support the mission and ministries of the Church locally and throughout England. We work together in our teams, with those who serve in Parishes, Dioceses, Schools and other ministries and with our partners at a national and international level.

We have developed our NCI ‘people’ values which are below, and we work with these regardless of whether we are of Christian faith, another faith or no faith;

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| Excellence:
we take pride in doing a good job | <ul style="list-style-type: none"> • Understand the needs and expectations of those we serve and support • Take personal responsibility for solving problems and learn from what we do • Support what works but be open to and welcome change where it's needed • Work with others to get the best Result for those we serve and support |
| Respect:
we treat everyone with dignity | <ul style="list-style-type: none"> • Value people for who they are and embrace our differences • Listen and learn from each other, regardless of who or what we are • Set clear, realistic and fair expectations • Recognise achievement and support each other |
| Integrity: we are trustworthy | <ul style="list-style-type: none"> • Do what we have said we will do • Take accountability for what we do • Be open and straightforward with ourselves and others • Celebrate behaviours that support our values and challenge those that don't |

Our training, policies, procedures and practices are all intended to support behaviours in line with our values and we expect all staff to uphold these.

Diversity

We understand the benefits of employing individuals from a range of backgrounds, with diverse cultures and talents. We aim to create a workforce that:

- values difference in others and respects the dignity and worth of each individual
- reflects the diversity of the nation that the Church of England exists to serve
- fosters a climate of creativity, tolerance and diversity that will help all staff to develop to their full potential.

We are committed to being an equal opportunities employer and ensuring that all employees, job applicants, customers and other persons with whom we deal are treated fairly and are not subjected to discrimination. We want to ensure that we not only observe the relevant legislation but also do whatever is necessary to provide genuine equality of opportunity. We expect all of our employees to be treated and to treat others with respect. Our aim is to provide a working environment free from harassment, intimidation, or discrimination in any form which may affect the dignity of the individual.

Standards of Behaviour and Conduct

Staff are expected to act at all times with due consideration for others and in a manner befitting their position as employees of the Church and as professionals, whatever their job.

Health and Safety Responsibilities

The NCIs take Health and Safety at work very seriously and require their staff to familiarise themselves with, and follow, their policy.

Confidentiality

Staff must not pass on to unauthorised persons, any information obtained in the course of their duties without the permission of their Head of Department.

TERMS OF EMPLOYMENT:

Starting Salary: Salary starts at the probationary point of £36,781 per annum. On satisfactory completion of the probationary period the salary will rise to the standard point for the band £40,250 per annum. (pro rata to if part-time)]

Pension Contributions: Non-clergy staff will be automatically enrolled in the Church Administrators Pension Fund (CAPF, DC Section) unless they choose to opt out. Clergy already in the Church of England Funded Pensions Scheme (CEFPS) will have the option of either remaining in this scheme or joining the CAPF scheme.

The National Church Institutions have an income protection insurance arrangement. To be eligible for cover under this policy an employee must be a member of the CAPF DC section. Please note that insurance cover is not necessarily automatic and that underwriting may be required by the schemes in some instances. Cover will be subject to any terms and conditions laid down by the insurance company.

Hours of Duty: Normal hours of work are 35 per week, Monday to Friday with an hour's unpaid break for lunch.

Annual Leave: 25 days paid leave per leave year. This is exclusive of public holidays and additional holidays approved by your employer.

Season Ticket Loan: Staff are eligible to apply for an interest-free travel season ticket loan for their journey to and from work.

Contract: The post is offered on an open-ended contract, subject to a six-month probationary period.