

## Executive with finance skills and an interest in impact consultancy

- Full Time
- Fixed term (12 months with potential for renewal)

### Purpose

To support across all Sonnet's practice areas in delivering projects including:

- Advisory support on transactions including mergers, acquisitions, business sales and fundraisings;
- Supporting technical financial analysis including due diligence, feasibility reviews, valuations, and financial model development and reviews (as standalone exercises or as part of broader projects);
- Social/ESG impact analysis, including development of calculations to quantify/evaluate and analyse impacts; and
- Supporting the delivery of strategic review projects, which may include financial options analysis and cost benefit analysis.

### About this role

Sonnet Advisory & Impact is a Community Interest Company providing specialist impact-focused advisory and consultancy to socially-minded clients. About 70% of our clients are charities, social enterprises and public sector organisations - the remainder being corporates who care about the social, economic and environmental impact of what they do.

We are a multi-disciplinary team peopled by experts from all kinds of backgrounds. Sonnet brings together people who've worked in financial and economic advisory, social research, corporate finance, enterprise, and strategic management and development. We believe our strength is in our diversity: blending perspectives and strengths to work on the issues that matter most to us and our clients, thriving on challenge, and responding to multiple viewpoints.

Our work falls into three main areas: Impact Management, Strategy and Governance and Transactions. This Executive role will primarily be focussed on Transactions projects and Impact Management assignments (supporting on Strategy and Governance projects, where required too, particularly where financial analysis is needed).

The Transactions team supports clients seeking to plan and implement strategic change in order to grow or re-focus their activities, so enhancing their ability to meet the needs of their stakeholders. That change may involve acquiring or raising finance to bring in new activities, or the sale of existing activities that are no longer core to their strategy. We often find that clients wish to deliver these changes with a particular focus on ensuring that they enhance impact, delivering positive change for their stakeholders including service users, and we work closely with the Impact and Strategy teams to plan and deliver on this aim.

As an Executive in the team you will be working as part of project teams, and frequently with responsibility for delivering discrete aspects of these. You may be working on two or three projects over the same time period, or focusing on one large project. Your role on projects may include:

- contribute to the design and planning of projects including mergers, acquisitions, business sales and finance raising transactions;
- lead and co-ordinate data/information gathering and analysis of information to draw out meaningful conclusions;
- deliver, with guidance from the project manager, technical financial analysis including business valuations;
- contribute to analysis throughout projects;
- prepare or work as part of a team to prepare written deliverables including reports and Information Memoranda for business sales and finance raising transactions; and
- support the project manager in co-ordinating project delivery with the client, and liaising with the client to ensure smooth delivery of work streams against agreed timetables.

Other duties include compliance and project administration as required; contribution to Sonnet's business development activities; and work on internal initiatives or projects as part of our continual improvement effort.

The Executive reports to Chris Theobald (Director and Transaction Practice Lead).

Find out more about Sonnet - who we are, what we do, and who we work with - on our website: <http://sonnetimpact.co.uk/>

#### Who we are looking for

You have a financial qualification such as ACA, CIMA or CIPFA, and have experience of working with charities and/or social enterprises in roles that involved analysis of and reporting on financial information. You may have gained that experience working within professional practice or in-house at a charity or social enterprise. You might have had some experience of working with organisations through transactions such as acquisitions or mergers, but you are certainly keen to support organisations seeking to grow and deliver strategic changes such as these. You enjoy finding out more about how different organisations and sectors work, the issues they face, their operational models and the ways in which they improve life for service users and society as a whole. Having obtained at least two years' experience post-qualification, you are now seeking the next move to develop your career.

We have no fixed views on your career path to date. What matters more to us is the skills, experience and values you bring to the team. If you think this might be the job for you, we'd be delighted to hear from you.

### Skills and competencies required

#### Essential:

- Genuine and demonstrable desire to help clients achieve positive change.
- Ability to gather, analyse and clearly present information and key messages derived from financial and other data sources.
- Ability to identify trends in and connections between information sources, and ability to structure enquiry to build an understanding of underlying reasons for these.
- Good grasp of risk analysis approaches and ability to apply understanding of risk to data analysis.
- Understanding of financial reporting rules, and ideally an understanding of rules specific to UK charities.
- Able to support clients and others within the team in the presentation of financial and strategic information to internal and external stakeholders.
- Familiarity with basic strategic analysis concepts.
- Ability clearly to present findings either verbally or in writing (excellent written English).
- Excellent Excel skills.
- Strong time management and ability to plan workload to meet deadlines.
- Good people engagement and interpersonal skills.
- Collaborative and supportive working style.

#### Desirable:

- Sector or thematic knowledge of one or more of Sonnet's focus areas.
- Experience of financial model building and/or review and knowledge of good practice standards.
- Familiarity with business valuation techniques.
- Experience in an advisory role in relation to transactions e.g. preparing key deliverables Information Memoranda, financial due diligence reports and similar.
- Experience of social impact analysis and familiarity with key concepts such as Theory of Change
- Familiarity with the field of social impact - main concepts, key terms, etc.
- Curiosity and 'drive' to synthesise data sources to make sense of complex situations.

### Location

Under current conditions we are all working from home, connecting regularly by video conferencing apps, phone and email.

Our office is located in Vauxhall, a few minutes' walk from Vauxhall tube station. We operate a hot-desking working style, with most team members working at least one day per week from home.

### Salary

£45 - £55k , dependent on experience.

Plus benefits and potential for share in profit-related bonus scheme.

### How to Apply

To apply for this role, please email the following information to Tim Gage ([hr@sonnetimpact.co.uk](mailto:hr@sonnetimpact.co.uk)) by Midday on Wednesday 30<sup>th</sup> September 2020.

- a current CV, showing a continuous timeline of what you have been doing
- confirmation that references are available
- an explanation of what you would bring to Sonnet, and why this role is of interest to you

We look forward to hearing from you.