

# Job Description

## Senior Investment Strategist, Responsible Investment

**Business Unit:** Responsible Investment, Investments

**Reports to:** Head of Responsible Investment





## Team Purpose:

The Guardians of New Zealand Superannuation is committed to sustainable finance and Responsible Investment (RI) leadership. We believe environmental, social and governance (ESG) considerations, including climate change, are fundamental to long term risk and return. RI is central to the New Zealand Superannuation Fund's Mandate and investment beliefs. The RI team develops and maintains the Guardians' RI policies, standards and procedures to ensure that RI considerations are integrated into all investment decisions. The RI team is a central resource for thought leadership, research and analysis on RI, sustainable finance and ESG<sup>1</sup> issues, and provides expert input into other investment teams through consultation, collaboration, ESG due diligence and education. The RI team also provides support to the organisation on RI communications, stakeholder relations and reporting.

## Core responsibilities:

1. Lead and develop the Guardians' goals and guidelines for ESG best practice, including sustainable finance, and support incorporation into investment activities.
2. Manage the Fund's Carbon Footprinting and support the Climate Change Investment Strategy.
3. Lead internal RI capability building, education and guidance.
4. Lead RI portfolio monitoring, engagement, voting and exclusion activities including engaging with company directors and making exclusion recommendations.
5. Lead the Crown Financial Institutions (CFIs) RI resource agreement and collaborate to meet Government CFI RI requirements.
6. Lead or support RI-related communications, including identifying ESG-related reputational risks, reporting, presenting, managing stakeholders and supporting senior executives.
7. Contribute to internal and external governance groups and project teams.
8. Contribute to required portfolio reporting with other Senior Investment Strategists to ensure a whole of portfolio view and to inform Investment Committee and Board discussions.
9. Lead and/or contribute to cross-Investments Team strategic projects
10. Actively engage with peers, industry/government stakeholders and potential partners, to build strategic relationships and insights.
11. Provide timely, expert support to the investments team when implementing investment decisions.
12. Demonstrate appropriate knowledge and use of all Guardians' systems and processes, including those relating to risk management and compliance practices.
13. Understand and comply with all Guardians' policies and procedures, including the Statement of Investment Policies, Standards and Procedures (SIPSP) .
14. Champion the Guardians' vision, values and constructive culture at all times.

## Key tasks:

1. Develop and maintain RI standards, guidelines, procedures and tools and support their integration with the investment framework.
2. Lead and/or support ESG integration into risk allocation, manager ratings, opportunity assessments, asset management and investment due diligence and manage resources accordingly.
3. Remain up-to-date and build institutional knowledge of global RI practice and research, including use of ESG metrics in investment analysis.
4. Support change management and training in other teams, and knowledge sharing with external managers and companies.

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<sup>1</sup> ESG issues includes environmental, climate change, human rights, health & safety, employment, cultural, community relations and business ethics and corporate governance.



5. Conduct ESG assessments and site visits, and provide input into risk assessments, due diligence and post-investment management.
6. Manage the engagement programme, engage with company Boards or executives regarding breaches of ESG standards, and collaborate with the CFIs or other investors.
7. Implement voting policies including analysing recommendations and engaging with investment managers and company directors.
8. Lead or support communications on ESG issues and advise on potential reputational risks.
9. Participate in, and present to, internal and external committees and forums as required.
10. Lead alongside the Head of RI the development of the Sustainable Finance Strategy.
11. Manage relationships with suppliers, peers, membership organisations and other relevant external parties or stakeholders.
12. Support other Guardians' activities as required.

**Person requirements:**

1. Substantial experience in Responsible Investment, sustainability or ESG management.
2. Thorough understanding of a combination of finance, responsible investment, sustainability, and social impact concepts, issues, and performance measures.
3. Capable and confident in managing stakeholder relationships and perspectives
4. Sound commercial judgement and ability to combine financial and ESG goals.
5. Strong technical and analytical skills.
6. Ability to operate both autonomously and collaboratively across diverse groups.
7. Strong written and verbal communication skills.
8. Collegial, constructive approach, including the ability to foster both internal and external relationships.