



Research Director

Cape Town, South Africa

CREO is a New York-headquartered not-for-profit with a mission to mobilize and catalyze high-impact capital to drive the necessary transition to a low-carbon, sustainable, and prosperous future for all.

To achieve our mission, CREO works with a large ecosystem of global stakeholders, including Members (wealth owners, family offices, and family enterprises), Affiliate Members (select institutional and corporate investors), and Partners (aligned investors such as pension funds, university endowments, or private equity; government; not-for-profit organizations; and academia).

We facilitate investment in sustainability by helping large asset owners and our membership community to build knowledge and confidence via shared insights, research, and programming that focuses on the question of 'how' to invest in the decarbonization transition.

CREO seeks a mission-driven person for the role of **Research Director** to oversee CREO's core delivery of research, climate, and climate investing knowledge.

Operating at the leading edge of climate finance, the research team is the central knowledge hub for climate and sustainability solutions within CREO. We deliver creative insights and ideas that convey a well-informed viewpoint through papers, presentations, and consultations. In practice, our audience is investors and our information sources are varied. Any given day will find the team engaged in personal research, substantive conversations with family offices, aligned investors, philanthropists and subject matter experts. CREO differentiates its research through strong narratives that tie together judgement, experience, and data with a clear understanding of the capital markets. The expertise the research team delivers establishes and maintains the credibility upon which CREO builds its other activities.

The Research Director is a new role charged to oversee CREO's research production, ensuring the vitality of our research as the organization expands. As a leader and mentor, the Director will own the entire lifecycle of research projects from ideation to execution to distribution and presentation. This will include directly managing several direct reports on the research team. It also includes leading internal collaboration across the organization on behalf of the research team, as well as sourcing and maintaining external research collaborations. On a day-to-day basis, the Director acts as a content editor, an expert at interpreting data, and a hub of information to all stakeholders. Finally, the Research Director will lead efforts to integrate AI data analysis and content tools into CREO's research workflow.

This role will work closely with CREO's advisory, investment, development, operations, and programs teams. The Research Director will report to the California-based Global Head of Research.



Primary Objectives

The key long-term outcomes of success are sustaining the quality and differentiation of CREO's research, while growing the audience and impact of the research program.

1. Lead the Research Lifecycle
 - Lead the Research Lifecycle by example, personally working on core research projects and delivering 3-4 seminal papers a year whilst establishing the quality standard required and overseeing the work of 4-6 colleagues.
 - Manage 6-10 simultaneous ongoing research projects at any given time, working with authors on content, thesis, scope, timelines, and budgets. Allocate time efficiently across the research team to ensure a steady cadence of organizational research outputs.
 - Oversee delivery of 20-30 research products per year. Develop a holistic view so that CREO's research broadly covers a wide range of climate solutions and climate investing trends.
 - Keep all CREO stakeholders informed of new research.
2. Ensure the Quality of Content
 - Act as editor of papers and presentations, helping authors communicate their ideas effectively and impactfully.
 - Help authors think creatively about climate solutions and investment theses as they develop content ideas.
 - Maintain a view of the marketplace for research on climate investing and how it is changing (e.g. with growth of LLMs). Regularly develop recommendations for CREO to respond and differentiate its research outputs.
 - Be an analytical thought partner for authors, pushing them when necessary to deepen their analysis or develop stronger viewpoints. Draw information and resources from across the organization to support authors when needed.
 - Maintain CREO's reputation for high-quality deliverables.
3. Manage Team and Collaborators
 - Directly supervise a team of 4-6 reports, including performance management.
 - Develop relationships with external collaborators and potential consultants.
 - Spearhead the research team's collaboration with other internal teams, putting in place processes and behaviors that ensure smooth, efficient interactions within a culture of continuous improvement. Working closely with the operations, programs, and investment teams will be essential.
 - Serve as a trusted partner to senior leadership, enabling strategic initiatives through strong execution.
4. Use and Expand Data Tools
 - Champion the use of CREO's own data platform for research processes, becoming a super-user and disseminating CREO data through our research products
 - Integrate emerging AI tools into data analysis and visualization, e.g. utilizing AI coding tools for analysis, or LLMs to establish a consistent tone and voice across authors.
 - Communicate and coordinate the research team's needs for new features in the data platform
 - Together with the team, source and aggregate a library of data and external research publications for the benefit of CREO data platform users.
 - Develop a catalogue of external data sources to support analysis on specific climate topics. Selectively recommend data for analysts and authors from the research, investment, and



advisory teams.

5. Support CREO Members

- Collaborate with the Member Engagement team to match CREO's internal experts to program needs and to requests from CREO members for direct consultations.
- Understand the limits of CREO's internal knowledge and expertise and use judgement and diplomacy to refer members onward when appropriate.

Desired Qualifications

- At least a Masters degree, and ideally a PhD, in climate related research. Exposure to capital markets related research is preferred, along with associated academic qualifications like CFA designation.
- At least 10 years of progressive work experience in applied research, financial analysis, project management, trend analysis, and/or strategic consulting.
- Training or experience in an area relevant to climate solutions (e.g. science, technology, policy, etc.). Comfort reading sources ranging from bank research to technoeconomic reviews.
- Strong judgement and narrative development skills.
- Natural curiosity and a willingness to investigate new ideas, even if unconventional
- Advanced writing skills. Experience editing professional papers that include technical and/or financial analysis preferred. Experience with research on climate solutions would be a benefit.
- Knowledge of financial markets and investment decision making.
- Proven ability to write clearly and synthesize complicated concepts.
- Demonstrated ability to meet multiple deadlines in a fast-paced work environment with minimal guidance.
- Flexibility and willingness to collaborate across time-zones, which will require occasional evening commitments
- Comfort working and managing remote reports in a multi-time-zone setting that leverages cloud-based platforms for work activities and communications, including Outlook, Slack, and Salesforce.
- Demonstration of the ability to handle confidential information with integrity and discretion
- Fluency in English and authorization to work in South Africa are required.

Compensation & Benefits

This role will be paid a base salary between ZAR1.2 and ZAR 1.5 million commensurate with experience. Additionally, this role will be eligible for an annual performance bonus of up to 15% of the base salary.

CREO relies on Multiplier, Inc. as our employer of record. Medical, dental, and vision insurance plans are available through Multiplier for the team member plus their spouse, children, or whole family; CREO contributes a monthly flat fee toward premiums of the actual cost incurred up to a maximum of ZAR4,000 per month for an individual or ZAR8,000 per month for a family.



CREO offers a generous time off package, including PTO and sick leave, week-long org-wide breaks in August and December, and observation of statutory South African holidays.

CREO is an equal opportunity employer committed to an in-person, collaborative, team-based culture. Successful applicants will be expected to work on-site in the Cape Town office (at a location yet to be determined).

To apply, please send your resume and a note expressing your interest to hire@creosyndicate.org.



More about CREO

We lead with the intensity of an investment bank and the heart of a foundation. All team members are partners in further engaging, supporting, and activating CREO's growing membership across two Global Hubs – the Americas and EMEA – and 25+ countries to advance CREO's goal of helping members deploy \$100B of high-impact capital into the decarbonization transition by 2025 and catalyze \$900B of institutional capital by 2027.

CREO is not, and does not provide services as an investment advisor, investment analyst, broker, dealer, market-maker, investment banker, or underwriter.

CREO strives to be a diverse, equitable, and inclusive workplace. As an Equal Opportunity Employer, we are committed to providing employees with a work environment free of discrimination and harassment. All employment decisions are based on business needs and job requirements. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.