



FAQs

DIVERSITY PROJECT

P>THW>Y

**Developing the Female
Portfolio Managers
of the Future**

Frequently Asked Questions

Does the participant have to be UK-based?

Yes (for 2024). However, we are exploring the opportunity to expand the programme in future years together with the Diversity Project North America and DP Europe.

Should each of the participants from the same company share one sponsor, or should each of them have their own sponsor?

Each participant should have her unique sponsor. Each participant is unique and would benefit from the focused attention of her sponsor, who will by nature of the role, be her champion within the firm, as well as an adviser and sounding board.

When we select someone for the 1-year programme, are we guaranteeing that they will be a fund manager at the end of the year?

No, this is not within the Diversity Project's power. In addition, some participants may be at an early stage of their careers and e.g. still working towards their CFA qualification. However, each participant should be on a good path, closer and better equipped to become a portfolio manager after the programme.

For the participants to get on-the-job training, will they need to transfer into an investment function (e.g. if someone in middle office is selected to participate), do they need to move to a front office function effective Jan 2024?

Not necessarily. However, the participant must shadow someone in an investment function before the programme even begins (or before the selection is finalised). It is important for the participant to have a true understanding of what the job entails and for the firm to be fully supportive to a future change of role to an investment team.

Frequently Asked Questions

Who are the trainers and speakers?

Trainers for the programme are a mixture of high-profile investment professionals, Diversity Project leaders and Ambassadors, current and former portfolio managers and executive coaches. We have a strong emphasis on practitioners, past and present, who have direct experience of working in the investment industry.

Will there be training for line managers?

No. Part of the sponsor's role is to work with the line manager. We will however be bringing sponsors together and providing them with coaching and support so they can fulfil their role well.

Will sessions be recorded?

Yes. Most sessions are recorded in case someone missed one and to allow for catch-up.

Do you already have the calendar of sessions and events for 2024?

No. We intend to offer a very similar structure to the 2023 programme but some of the sessions and specific dates haven't been confirmed for 2024. We may change a couple of the Zoom sessions into in-person format (for example, the Career Development Plan session).

Rather than creating a new portfolio management position to ensure the participant progresses, can firms create co-portfolio management roles to satisfy condition?

Absolutely. Creating co-fund management roles creates new opportunities for progression, adds gender diversity and makes teams more diverse.

Frequently Asked Questions

Can the sponsors be external?

No. Sponsors/mentors should come from the participant's own firm. We want to avoid the risk of companies "poaching" talent from other companies. The sponsor should ensure that the participant has opportunities to progress at the firm once programme has finished.

If you have further questions, please get in contact via info@diversityproject.com