ORC: ODD Advisory Partner Solutions

ORC

An Overview of ORC

We are a Specialist Consultancy

ORC is a specialist due diligence and advisory consultancy, supporting sovereign entities, DFIs, institutional investors and asset managers. ORC has supported clients with combined assets under management exceeding US$ 2trn. ORC helps allocators assess manager risk, strengthen governance and make better-informed decisions through bespoke advisory solutions. ORC's approach is practical, senior-led and tailored to the client's internal process, investment strategy and governance requirements.

Our Team of Experts

Our ODD Advisory solutions are led by a senior team of industry leaders and practitioners.



Nigel Morriss | CEO
Authority in investment operations and operational risk; delivering institutional-grade ODD.



Maria Long | Partner & Head of ODD
Senior ODD specialist; practical experience across asset managers, funds, and service providers.



Steven Bishop | Operations Specialist
Seasoned COO and CCO; extensive ODD experience.



Scott Palmer | ODD Specialist
Former Head of ODD at USS Investment Management; deep, multi-asset experience, including direct investments.



Joseph Haire | Consultant
260+ ODDs completed in the past five years.

Supported by additional Partners; with our team's total combined industry experience exceeding 205 years.

More than Due Diligence Providers

We offer a range of solutions supporting clients across the investment and asset servicing lifecycle.

Advisory	Investment Governance & Due Diligence	Custody & Fund Administration	ESG Advisory

Our ODD Advisory Partner: *Extension of Your In-House Team*



Nigel Morriss
CEO

"Lean ODD teams shouldn't have to choose between retaining ownership and accessing senior challenge. ORC provides experienced, partner-level ODD support at the points where judgment matters most, helping clients validate conclusions, identify blind spots and strengthen decision-making without outsourcing their process."

A Snapshot of Our ODD Experience

185	ODDs completed since 2023
1000+	ODDs completed by our Senior Team

Our Solution; Designed for Lean ODD Teams

Many institutional investors want to retain ownership of their ODD function, including their process, manager relationships, reporting and investment recommendations.

We provide experienced, partner-level support exactly when it is needed, without requiring the client to recruit additional headcount or outsource the ODD function.

The client remains in control. ORC provides senior judgment, independent challenge and additional capacity when required.

Flexible Access to Senior ODD Expertise

ORC's ODD Advisory Partner solution can be structured around the client's preferred working model.

Retainer Model	Advisory Time Bank	One-Off/ Specific Exercise Support

We offer pilot arrangements as a **low-commitment way for clients to experience our solution support** before deciding whether to move to an ongoing arrangement.

We Are ODD Thought Leaders

Read our thought pieces and insights into what we observe in ODD.

Thought Pieces Follow Our Linkedin

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ORC: ODD Advisory Partner Solutions

Our Advisory Approach: *Senior Support, Slotting in to Clients' Existing ODD Approach and Team*

Advisory Designed Around the Client's Existing ODD Process

ORC's ODD Advisory Partner solution is designed to integrate with the client's existing ODD framework, not replace it.

ORC can align to the client's methodology, rating framework, report format, committee process and investment timetable. The scope of support can be adjusted by manager, strategy, risk profile or internal resource need.

Use Cases for Our ODD Advisory Solutions

Manager Meetings	**Attend as an additional pair of experienced eyes and help challenge key operations issues and observations through targeted questioning.**
Report Review	**Review draft ODD report before Investment (or similar) committee submission, validating whether conclusions are supported by evidence and challenging risk ratings/scores.**
Blind Spot Check	**Identify gaps, inconsistencies or overlooked risk areas in the ODD assessment.**
Remediation Planning	**Act as a sounding board on recommendations provided to underlying managers, risk remediation planning, and manager responses.**
Peak Workload Support	**Provide temporary capacity to lean ODD teams facing compressed review timelines or periods of heightened ODD workload.**
Specialist Topic Advice	**Offering insight and challenge across specialist areas of assessment, including cyber, operational resilience, outsourcing, AI governance and complex operating models.**

How Our Solution Strengthens Allocators' ODD Processes and Teams

ORC provides focused challenge at the points where internal ODD teams need additional confidence before decisions are made.

Consistency Across Reviews

Challenge risk ratings, conclusions and remediation expectations. Ensure consistent application across managers.

Evidence-Based Challenge

Confirm findings are supported by appropriate evidence, meeting discussion and manager responses.

Governance-Ready Input

Sharpen key risk messages or framing before Investment Committee or internal governance review.

Practical Escalation Support

Distinguish between issues that can be monitored and issues requiring escalation, further diligence or remediation.

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