ORC: ODD Ready 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.

We help asset managers strengthen governance, operating models, controls and oversight so they are better prepared for institutional operational due diligence. Our approach is practical, senior-led and informed by extensive experience assessing managers across asset classes, strategies and geographies.

Our Team of Experts

Our ODD Ready 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 Offering: *Preparing Managers for Institutional Due Diligence*



Nigel Morriss
CEO

"Asset managers face significant scrutiny during ODD, particularly where governance, controls, or documentation have not evolved at the same pace as the business. Our ODD Ready approach identifies gaps, tests how the operating model stands up to allocator assessment and provides a practical roadmap to institutionalization."

Flexible Support, Built Around the Manager

ORC's ODD Ready solution can be delivered as a single programme or in selected stages.

Document Review	Mock ODD Exercise	Implementation Support

The scope can be tailored to the manager's maturity, strategy, investor base, and immediate fundraising priorities.

Why ODD Readiness Matters for Asset Managers

Mitigating Gaps Early
Address weaknesses before they are raised by prospective investors.

Strengthening Institutional Credibility
Demonstrate that governance, controls and oversight are appropriate for the business.

Supporting Fundraising
Improve ability to respond clearly and confidently during allocator diligence.

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 Ready Solutions

Our Approach: *From Diagnostic Review to Sustainable Improvement*

Designed Around the Manager's Operating Model

ORC's ODD Ready solution is tailored to the manager's current business, strategy, growth plans and investor expectations.

We assess how the operating model works in practice, not only how it is described in policies or marketing materials. The review can cover governance, personnel, authorities, processes, controls, service providers, technology, continuity and oversight, with the exact scope able to be adjusted to focus on a specific upcoming diligence exercise or support a broader institutionalisation programme over time.

Detailed Discovery and Assessment

ORC builds a detailed understanding of the manager's current operating model and tests how it is likely to stand up to institutional ODD scrutiny, by detailed desktop and onsite discovery covering:

Current Operating Model	Policies and Processes	Mock ODD Exercise	Gap Analysis and Risk Status
Governance, people, controls and authorities	Documentation, procedures, oversight and evidence	In-depth meetings, discussion and process walkthrough	Strengths, weaknesses and priority areas of focus

Enhancement Recommendations and Implementation Support

ORC translates assessment findings into a practical, prioritized roadmap and supports the design of enhancements needed to strengthen institutional readiness.

Prioritized Recommendations	Operating Model Design	Documentation Enhancement	Implementation Support
Immediate actions, near-term enhancements and longer-term improvements	Governance, responsibilities, processes and control frameworks	Sharpen key risk messages or framing before Investment Committee or internal governance review.	Project planning, stakeholder coordination and progress tracking

Ongoing Readiness Support

Institutional expectations, investor requirements and operating models continue to evolve after the initial assessment. ORC provides ongoing support to help managers maintain momentum, implement agreed improvements and remain prepared for future ODD reviews as the business grows.

Maintain ODD Readiness	Keep documentation, controls and governance arrangements current and review-ready
Respond to Change	Reassess readiness following growth, team changes or operating model developments.
Provide Continuity	Retain access to senior support that already understands the manager's business.

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