

## **ROLE DESCRIPTION**

<b>Job Title</b>	Investment Associate
<b>Salary Band</b>	Grades 37-40
<b>Reporting to</b>	Senior Investment Manager or Investment Manager
<b>Directorate</b>	Investment & Delivery
<b>Service Area and sub area</b>	Investment Team
<b>Team</b>	Investment Team
<b>Political Restriction</b>	Yes

<b>1. Primary Purpose of the Post</b>
To lead on major Business Growth, Innovation and people focused projects and investments that will generate economic growth, wellbeing dividends and financial returns in the Liverpool City Region Combined Authority's Investment Team. To make a difference at work.
<b>2. Your responsibilities</b>
<p><b>Development and Financing of Projects</b></p> <p>Supporting the identification, development and assembly of projects in the Liverpool City Region, in support of the Combined Authority objectives. Projects are typically focused on Business, Innovation &amp; Skills. The core elements of the role of the Investment Associate include the following activities:</p> <ul style="list-style-type: none"> <li>• Engaging with businesses, public authorities, third sector organisations, investors, stakeholder/membership groups and colleagues to identify new project opportunities.</li> <li>• Managing project opportunities from conceptualisation to delivery by agreeing ownership, funding, operational, legal and other key elements (supported by CA internal departments and external consultants as necessary)</li> <li>• Support in the development and structuring of proposals into deliverable and fundable projects</li> <li>• Providing market and sector analysis to support funding proposals</li> <li>• Generating financial models and analysis to support the Combined Authority's proposed financing</li> <li>• Drafting investment papers and reports and supporting presenting those papers to various investment panels and other fora</li> <li>• Supporting with due diligence requirements, through a combination of in house and external resources</li> <li>• Supporting assessment of the economic, social, environmental and other impacts of projects under consideration (mostly led by third party experts)</li> <li>• Managing documents, reports, key correspondence and other materials related to projects under consideration</li> <li>• Supporting in the structuring and negotiation of legal funding agreements with third party sponsors</li> </ul>

- Supporting the procurement, selection and contracting of third-party contractors at the project level
- With active support from senior team members, to manage projects and relationships with third parties
- To provide advice on projects' deliverability, risks and critical success factors

Please note that our typical project teams comprise an accountable senior member, a lead member (Investment Manager), Investment Associate (this role), Investment Analyst and/or graduate, colleagues from supporting teams (Finance, Legal etc) and external consultants/ advisors.

#### **Project Monitoring / Portfolio Management**

- To liaise with the Combined Authority's Finance, Legal, Programme Management and other teams on project performance and forecasts

### **3. General Corporate Responsibilities**

- To support the implementation of the City Region's Devolution agreement and wider strategic priorities as set out in the Corporate Plan.
- To participate in all aspects of training and development as directed and to use all relevant learning opportunities to improve personal skills so as to improve effectiveness and efficiency of service delivery
- To support the Investment Team in contributing to the corporate management of the strategic risks facing the LCRCA
- To support the achievement of corporate efficiency targets and initiatives
- To ensure the Combined Authority's commitment to equal opportunities is demonstrated through promoting non-discriminatory practices in all aspects of work undertaken

It must be understood that every employee has a responsibility to ensure that their work complies with all statutory requirements and with Standing Orders and Financial Regulations of the Combined Authority, and to ensure that all work functions are undertaken in accordance with health and safety legislation, codes of practice, and the Combined Authority's safety plan.

This job description is not intended to be prescriptive or exhaustive; it is issued as a framework to outline the main areas of responsibility at the time of writing.

### **4. Recruitment Plan**

Competency Based Interview  
Assessment

## PERSON SPECIFICATION

**Job Title:** Investment Associate

Criteria		
Qualifications and Training	E = Essential D = Desirable	Identified By
Relevant undergraduate degree or equivalent experience	E	A

Experience and knowledge	E = Essential D = Desirable	Identified By
Substantial relevant professional experience, in a business support, innovation or people & skills focused environment	E	A/I
Working effectively in a team	E	A/I
Working under pressure, meeting deadlines and showing resilience	E	A/I
Substantial experience of engaging with diverse project stakeholders in the context of delivering publicly funded Business Growth, Innovation & Skills projects	E	A/I

Skills and abilities	E = Essential D = Desirable	Identified By
Strong analytical skills to be able to analyse and interpret economic / financial information to understand the financial standing of a project/company/proposition	E	A/I
Ability to handle complex data and communicate findings to stakeholders, recommending solutions, with a focus on simplifying the information and tailoring communication to suit your audience	E	A/I
Ability to manage internal/external stakeholder relationships whilst communicating complex data	E	A/I
Ability to collect, organise and analyse data to provide actionable insight for business decisions	E	A/I/E
Ability to identify trends, patterns and opportunities for improvement	E	A/I
Ability to write clearly and succinctly and to communicate effectively	E	A/I/E



Sensitivity to the political and social impacts of the team's projects and work	<b>E</b>	<b>A/I</b>
Experience of business/innovation/skills investment appraisals	<b>D</b>	<b>A/I</b>
Sector expertise in an area of relevance for the Investment Team	<b>D</b>	<b>A/I</b>
Ability to identify the market position and competitive advantages of a project/company/proposition	<b>D</b>	<b>A/I/E</b>
Ability to produce straightforward financial models / projections / analyses in Microsoft Excel	<b>D</b>	<b>A/I</b>
Ability to understand and commission economic impact assessment	<b>D</b>	<b>A/I</b>
Ability to identify project risks and comment on their gravity	<b>D</b>	<b>A/I/E</b>

<b>Personal Attributes</b>	<b>E = Essential D = Desirable</b>	<b>Identified By</b>
High personal motivation with a willingness to go the extra mile	<b>E</b>	<b>A/I</b>
Conscientious, with attention to detail	<b>E</b>	<b>A/I/E</b>
Dedication to making a difference at work, supporting the vision and aims of Liverpool City Region Combined Authority	<b>E</b>	<b>A/I</b>

<b>Core Behavioural Competencies</b>	<b>E = Essential D = Desirable</b>	<b>Identified By</b>
Dedication to making a difference at work, supporting the vision and aims of Liverpool City Region Combined Authority	<b>E</b>	<b>A/I</b>
Commitment to equal opportunities	<b>E</b>	<b>A/I</b>

### Key to Assessment Methods:

A - Application	E – Exercise
I – Interview	