ROLE DESCRIPTION

Job Title	Investment Associate (Place)
Salary Band	37-40
Reporting to	Investment Manager
Directorate	Investment and Delivery
Service Area	Investment
Political Restriction	None

1. Primary Purpose of the Post

To work on major place and economic infrastructure projects and investments that will generate financial returns, economic growth, and well being dividends across the Liverpool City Region.

2. Your responsibilities

Development and Financing of Projects

Supporting the identification, development and assembly of projects in the Liverpool City Region, in support of the Combined Authority's objectives. Projects are typically focused on land/property interventions but may take a range of forms, whether physical, financial, operational or any combination of these. The core elements of the role of the Investment Associate include:

- Engaging with businesses, public authorities, third sector organisations, investors,
- stakeholder/membership groups and colleagues to identify new project opportunities
- Managing project opportunities from conceptualisation to delivery by agreeing ownership, funding, operational, legal and other key elements of due diligence (supported by CA internal departments and external consultants as necessary)
- Supporting assessment of the economic, social and environmental impacts of projects under consideration in line with Green Book guidance.
- With support from senior team members, to manage projects and relationships.
- To provide advice to decision-makers on projects' deliverability, risks and critical success
- factors including through briefings and investment reports.

The responsibilities of the Investment Team and the post are wide-ranging, and also include:

- Identifying themes and trends across the Liverpool City Region that could lead to new project opportunities
- Identifying opportunities to replicate, adapt and apply successful development approaches in other places to the Liverpool City Region
- Overseeing market and sector analysis to support funding proposals

- Generating financial projections and analysis to support the Combined Authority's proposed financing
- Managing documents, reports, key correspondence and other materials related to projects under consideration
- Other tasks identified by the project leader in managing the proposed transaction
- Supporting the procurement, selection and contracting of third-party contractors at the project level

Project Monitoring / Portfolio Management

• To liaise with the Combined Authority's finance, legal, portfolio 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, in accordance with the Investment Strategy
- 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 under 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 ensure the Combined Authority's commitment to equal opportunities and 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 exercise

LIVERPOOL CITY REGION COMBINED AUTHORITY

METRO MAYOR LIVERPOOL CITY REGION

PERSON SPECIFICATION

Job Title: Investment Associate (Place)

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**
Relevant professional experience, preferably in a surveying, planning or regeneration-related environment	E	A
Experience of contributing to a high-performance culture	E	A
Experience of engaging with diverse project stakeholders in the context of delivering publicly funded regeneration projects	E	I

Skills and abilities	**E = Essential D = Desirable**	**Identified By**
Strong communication skills , including the ability to: • Relay the Combined Authority's strategy, priorities and capacity • Create a shared vision around project opportunities • Persuade stakeholders to commit to project opportunities • Overcome obstacles with constructive dialogue	E	E
Clear and succinct written communication for a range of audiences and purposes.	E	E
An ability to identify project opportunities in a changing market, across sectors	E	E
Understanding of the UK planning and development environment in respect of land and property projects	E	E
Experience of property development and/or property investment appraisals	E	E
Project management skills to assist project assembly and passage through approval thresholds	E	I
Ability to produce straightforward financial models / projections / analyses in Microsoft Excel	D	I
Ability to identify project risks, comment on their	D	E

Gravity, and consider potential mitigations		
Sensitivity to the political and social impacts of the team's projects and work	E	I

Personal Attributes	**E = Essential D = Desirable**	**Identified By**
Ability to work effectively in a team (E)	E	I
Ability to work under pressure, meeting deadlines and showing resilience	E	I
High personal motivation with a willingness to go the extra mile (E)	E	I
Strong emotional intelligence, including the ability to understand people's professional and personal motivation (E)	E	I
A commitment to the LCR and an understanding of its stakeholders (E)	E	I
An ability to demonstrate our core values, including a commitment to Equality, Diversity, and Inclusion (E)	E	I

Key to Assessment Methods:

KO – Knockout question	A - Application	P – Presentation	T - Test
FQ – Filter Question	I – Interview	E – Exercise	AC – Assessment