

ROLE DESCRIPTION

Job Title	Investment Analyst
Salary Band	Grades 27-32
Reporting to	Investment Manager
Directorate	Investment & Delivery
Service Area and sub area	Investment Team
Team	Investment Team
Political Restriction	Yes

1. Primary Purpose of the Post
To work on major business growth, innovation and people focused projects and investment 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.
2. Your responsibilities
<p>Development and Financing of Projects</p> <p>To join project teams, supporting the assessment, preparation and funding of projects in the Liverpool City Region, covering the following activities:</p> <ul style="list-style-type: none"> • Supporting in the development and structuring of proposals into deliverable and fundable projects • Supporting market and sector analysis to support funding proposals • Generating financial models and analysis to support the Combined Authority's proposed financing • Drafting (sections or initial drafts of) investment papers and reports • Supporting with due diligence requirements, through a combination of in house and external resources • Supporting assessment of the economic, social, environmental and other impacts of projects under consideration (often led by third party experts or other teams) • Managing documents, reports, key correspondence and other materials related to projects under consideration • Supporting the procurement, selection and contracting of third-party contractors at the project level • Supporting wider data analysis within the team <p>Please note that our typical project teams comprise an accountable senior member, a lead member (Investment Manager), Investment Associate, Investment Analyst (this role) and/or graduate, colleagues from supporting teams (Finance, Legal etc) and external consultants/advisors.</p> <p>Project Monitoring / Portfolio Management</p> <ul style="list-style-type: none"> • To liaise with the Combined Authority's Finance, Legal, Programme Management and other teams on project performance and forecasts



Team Support

- To provide administration of the team's marketing, pipeline and approvals process.
- Supporting the running and administration of key internal boards, panels and meetings as required

3. General Corporate Responsibilities

- To support the implementation of the City Region's Devolution agreement and wider strategic priorities as set out on the CA 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 Analyst

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 delivery or development of business support, innovation or people and skills focused projects	E	A/I
Working effectively in a team	E	A/I
Working under pressure, meeting deadlines and showing resilience	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 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 identify the market position and competitive advantages of a project/company/proposition	E	A/I/E
Ability to synthesise information to generate clear reports and actionable summaries	E	A/I/E
Good communication skills, both written and oral	E	A/I/E
Sensitivity to the political and social impacts of the team's projects and work	E	A/I



Ability to produce straightforward financial models / projections / analyses in Microsoft Excel	D	A/I
Ability to identify project risks and comment on their gravity	D	A/I/T
Willingness to learn and develop key skills and knowledge in relation to the use and deployment of public funding	D	A/I

Personal Attributes	E = Essential D = Desirable	Identified By
Self-starting and highly motivated	E	A/I
Conscientious, with attention to detail	E	A/I/T

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

Key to Assessment Methods:

A - Application	E – Exercise
I – Interview	