

## Job Description

### Senior Project Officer - Rosebud Investment Fund

<b>Service:</b>	Economic Development	<b>Team:</b>	Business Growth
<b>Location:</b>	Lancashire – Office Base Preston		
<b>Salary range:</b>	£43,421 - £48,474	<b>Grade:</b>	10
<b>Reports to:</b>	Head of Service / Business Finance & Scaleup Lead	<b>Staff responsible for:</b>	n/a

#### Job Purpose

Over nearly 40 years, Rosebud has been a fundamental foundation of Lancashire County Council's Economic Development portfolio. It exists principally to provide debt and equity investment to aspirational high growth companies across Lancashire; and, to support, educate and facilitate connectivity for these businesses to achieve their full potential.

This unique service is provided by Lancashire County Developments Ltd (LCDL), which is a wholly owned subsidiary of the Council covering 12 local authority areas: Burnley; Chorley; Fylde; Hyndburn; Lancaster; Pendle; Preston; Ribble Valley; Rossendale; South Ribble; West Lancashire; Wyre. Businesses should be based in the Lancashire County Council administrative area or relocating here.

#### Purpose:

- To enable Lancashire's most ambitious businesses to grow.

#### Vision:

- To see Lancashire businesses and people fulfil their potential, driving the growth of our economy.

#### Mission:

- Develop a responsible approach to investment for further growth.
- Empower our businesses to create value through innovation.
- Target our investments to enable new jobs, skills, and opportunities.

#### Values:

- Aspirational - provide valuable investment support using a pragmatic and innovative approach.
- Responsive - listen to and understand the needs of our businesses and provide timely responses.
- Collaborative - build effective partnerships and together harness our collective strengths.

The primary purpose of this role is to:

- Responsibly support businesses seeking investment.
- Provide access to investment funds both through Rosebud and alternative finance providers.
- Manage an existing portfolio of investments.
- Develop relationships with internal and external stakeholders.
- Be a dynamic ambassador for the brand.

#### Accountabilities/Responsibilities

#### Strategic

- Develop and deliver key outcomes and impact measures to showcase achievements.
- Help shape the future of Rosebud to enable Lancashire's most ambitious businesses to grow.

- Full responsibility for managing the fund including reporting, review and presentation to stakeholders.

#### Operational & Technical

- Maintain effective and compliant client records.
- Ensure effective processes and documentation are developed, maintained, and regularly reviewed.
- Have a deep and knowledgeable level of financial literacy.
- Provide excellent risk management for potential and existing businesses across the portfolio.
- Develop productive working relationships with both credit underwriting and loan panel functions.
- Where necessary identify the need for external specialists to support operational activity.
- Ensure all policies and regulatory guidance are current and adhered to.

#### Business Development

- Manage the relationships with the existing portfolio of investment clients and fund stakeholders.
- Deliver new investment targets through the development of qualified pipeline.
- Develop new relationships, maximising referrals to drive lending and investment within Lancashire.
- Support businesses to better understand financial instruments and funding options.
- Work collaboratively with co-investment partners.

#### Marketing & Communications

- Develop and deliver a robust communication strategy for all key stakeholders, including our members (County Councillors).
- Managing all marketing and PR activity including that by internal and external partners.
- Be active within Lancashire networks to raise both personal and service profile.
- Actively showcase success stories.
- Access, review and communicate relevant insights from external reports and research.

#### Collaborative

- Liaise with the Access to Finance service, supporting businesses seeking investment.
- Work closely with the Council's Corporate Finance team to efficiently manage the fund.
- Collaborate with the Economic Development team at the Council to deliver wider business support.

#### **Other**

- **Equal Opportunities**

We are committed to achieving equal opportunities in the way we deliver services to the community and in our employment arrangements. We expect all employees to understand and promote this policy in their work.

- **Health and safety**

All employees have a responsibility for their own health and safety and that of others when carrying out their duties and must help us to apply our general statement of health and safety policy.

- **Customer Focused**

We put our customers' needs and expectations at the heart of all that we do. We expect our employees to have a full understanding of those needs and expectations so that we can provide high quality, appropriate services at all times.

#### **Our Values**

**We expect all our employees to demonstrate and promote our values:**

- **Supportive**

We are supportive of our customers and colleagues, recognising their contributions and making the best of their strengths to enable our communities to flourish.

- **Innovative**

We deliver the best services we possibly can, always looking for creative ways to do things better, putting the customer at the heart of our thinking, and being ambitious and focused on how we can deliver the best services now and in the future.

- **Respectful**

We treat colleagues, customers and partners with respect, listening to their views, empathising and valuing their diverse needs and perspectives, to be fair, open and honest in all that we do.

- **Collaborative**

We listen to, engage with, learn from and work with colleagues, partners and customers to help achieve the best outcomes for everyone.

## Person Specification

### *Senior Project Officer - Rosebud Investment Fund*

All the following requirements are essential unless otherwise indicated by \*

Your ability to meet the job requirements will initially be assessed by the information provided on your application, but further assessment will be undertaken at the interview and, in some cases, by using other types of assessment(s).

<b>Qualifications</b>
<ul style="list-style-type: none"> <li>• Relevant degree level or professional equivalent business qualification.</li> </ul>
<b>Experience</b>
<ul style="list-style-type: none"> <li>• Managing investment portfolios and loan books in the SME market.</li> <li>• Seeking and building new investment propositions through a robust lending process.</li> <li>• Investment enquiry and application management.</li> <li>• Credit assessment and risk profiling.</li> <li>• Demonstrable track record for delivering investment support and education to businesses.</li> <li>• Understanding and experience of business finance products and processes.</li> <li>• Professional approach to business evaluation and investment returns.</li> </ul>
<b>Essential knowledge, skills &amp; abilities</b>
<p><u>Knowledge</u> Deep technical knowledge of the following:</p> <ul style="list-style-type: none"> <li>• Banking and finance sector – particularly the alternative finance market</li> <li>• Credit assessments</li> <li>• Investment readiness and business plan appraisal</li> <li>• Interpreting financial statements</li> <li>• Lending applications</li> <li>• Managing investment portfolios</li> </ul> <p><u>Skills</u></p> <ul style="list-style-type: none"> <li>• Credit assessment decision making.</li> <li>• Excellent verbal, written and presentation skills.</li> <li>• Stakeholder and relationship management.</li> <li>• Robust planning, organisational, administrative and project management skills.</li> <li>• Well-developed digital skills, including management information systems and CRM.</li> </ul> <p><u>Abilities</u></p> <ul style="list-style-type: none"> <li>• Results driven</li> <li>• Proactive</li> <li>• Adaptable</li> <li>• High emotional intelligence</li> <li>• Innovative</li> <li>• Problem solving</li> <li>• Customer focussed</li> </ul>

### Other essential requirements

- Commitment to equality and diversity.
- Commitment to health and safety.
- Display the LCC values and behaviours at all times and actively promote them in others.
- Car for use in connection with the duties of this post and must be insured for business use