

Job Description

Directorate:	Growth, Environment, Transport, and Health		
Service:	Economic Development		
Location:	County Hall		
Salary range:	£31,067 - £35,235	Grade:	7
Reports to:	Rosebud Fund Manager	Staff responsible for:	NA

Job purpose and scope

For over 35 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 support the Fund Manager driving new investment opportunities and rigorously assess applications through a robust process leading to loan completions. Once the investment takes place to actively support and monitor the portfolio of investments whilst protecting the position of the service and organisation.

Accountabilities/Responsibilities

Operational Management

- Regularly review and develop processes to ensure that they are fit for purpose.
- Maintain and review all legal and programme documentation to ensure they meet service requirements.
- Manage day to day administration and operational components of the fund including CRM system, mailboxes, and other platforms.
- Create reports for the Fund Manager to support with delivery and management of the fund.
- Maintain accurate and compliant client records and documentation utilising systems.
- Ensure timely receipt of client financial information chasing overdue records as necessary.
- Work with the Fund Manager to review client financial information highlighting any risks and concerns.
- Provide Fund Manager with briefing notes prior to client review meetings to highlight any issues, performance trends and opportunities for further support.
- Maintain regular contact with clients post investment, building rapport and providing exemplar customer service.
- Working with the Fund Manager to ensure clients remain on track to grow and scale their businesses and in turn capturing economic impact measures which can be reported and showcased.
- Gather and analyse trends and outcomes contributing to key performance indicators associated with the successful delivery and management of the fund.
- Working closely with the Council's corporate finance team to efficiently manage the fund. Including but not limited to; arranging monthly payment collections, managing debtors, drawdown of loans, provisions management.
- Acting as client point of contact in the absence of the Fund Manager.

Business Development & Marketing

- Assist in the initial evaluation and processing of incoming enquiries.
- Monitor and track outcomes of all incoming enquiries.
- Where relevant signpost to alternative avenues where business is not suitable to Rosebud
- Conduct personal, corporate credit, and ID verification checks for all applicants following process of diligence.
- Utilise internal and external data platforms to support the assessment of applications with background research.
- Attend internal and external events developing personal profile and visibility of Rosebud.
- Maintain and develop relationships with all key stakeholders and referral partners.
- Involvement with internal and external PR and Comms teams to help showcase Rosebud.
- Organising, attending, and managing events including logistics, resources, publicity and post-event follow up.
- Help source and organise regular client case studies, success stories and testimonials.

Collaboration

- Work closely with the Internal Stakeholders to efficiently manage the fund.
- Provide and encourage cross referrals to Boost/Access to Finance for their business support programme
- Support Fund Manager in collaboration with external funders / introducers to ensure the best outcome for clients and prospects.

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.
- **Safeguarding Commitment**
We are committed to protecting and promoting the welfare of children, young people and vulnerable adults.
- **Skills Pledge**
We are committed to developing the skills of our workforce. All employees will be supported to work towards a level 2 qualification in literacy and numeracy if they do not have one already.

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

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 interview and, in some cases, by using other types of assessment(s).

Qualifications
Relevant degree level or professional equivalent business qualification
Experience
<ul style="list-style-type: none">• Maintaining client relationships, understanding client/stakeholder needs ensuring expectations are exceeded.• Investment enquiry and application management• Basic credit assessment and risk profiling• Demonstrable track record for delivering support to Line Managers• Understanding and experience of business finance products and processes
Essential knowledge, skills & abilities
<p>Knowledge</p> <ul style="list-style-type: none">• Banking and finance sector*• Credit assessment*• Interpreting financial statements*• Portfolio / Relationship Management* <p>Skills</p> <ul style="list-style-type: none">• Excellent verbal, written and presentation skills.• Customer service / relationship management.• Robust planning, organisational, administrative and project management skills.• Well-developed digital skills, including management information systems and CRM. <p>Abilities</p> <ul style="list-style-type: none">• Proactive• Adaptable• High emotional intelligence• Innovative• Problem solving• Customer focussed
Other essential requirements
<ul style="list-style-type: none">• Commitment to equality and diversity.• Commitment to health and safety.

Rosebud Investment Co-ordinator

- Display the LCC values and behaviours at all times and actively promote them in others.
- This is an essential car user post*
You will be required to provide a car for use in connection with the duties of this post and must be insured for business use. In certain circumstances consideration may be given to applicants who, as a consequence of a disability, are unable to drive