**BRITISH BUSINESS BANK PLC**

**Role Profile**

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| **JOB TITLE** | **Investment Manager** | | |
| **TEAM** | **British Business Bank Investments Ltd** | | |
| **SALARY** | **£30,000 - £45,000** | | |
| **RESPONSIBLE TO** | **Director** | | |
| **RESPONSIBLE FOR** | **None** | | |
| **OVERALL PURPOSE OF JOB:**  The person appointed will be part of a small team responsible for evaluating, structuring and monitoring, British Business Bank Investments Ltd (BBBIL) debt and equity investments to support lenders whose focus is on providing debt to smaller UK companies.  The role will involve working across the range of activities of BBBIL, working with investment colleagues based in the Sheffield and London offices, and liaising with legal, risk, finance, and external advisors. | | | |
| **MAIN RESPONSIBILITIES**   * New proposal review and assessment including:   + Review of new proposals received including scoring against investment criteria;   + Engaging with applicants, both face to face and via email / telephone, to clarify proposals and obtain further information;   + Preparation and presentation of investment papers summarising analysis of proposals;   + Providing feedback to applicants following decisions to progress or reject proposals;   + Working under the guidance of a Director within the team to:     - Undertake detailed diligence of businesses, management, processes and track record;     - Preparation of reports and analysis for presentation to the BBBIL Investment Committee; and     - Scrutinise and negotiate investment legal documentation alongside specialist legal advisors to ensure consistency with the commercial terms agreed. * Portfolio monitoring, including supporting the lead manager of each investment through:   + Preparing reports, analysis of investee company and / or funds activities and dealing with specific queries and requests for analysis from within the team or outside stakeholders;   + Monitoring the portfolio of investments, including regular review of management information, working with co-investors and taking action where necessary to ensure the best possible outcome of these investments;   + Assisting lead investment managers with compliance activities and customer and advisor relationship management; and   Assisting with the preparation of reporting for the BBBIL Portfolio Monitoring Committee. | | | |
| **RELATIONSHIPS & CONTACTS**   * Reports to the Director, Investment Programme * Liaising with legal and governance, risk and compliance, finance and external advisors. | | | |
| **PERSON SPECIFICATION**  **(Qualifications, skills and competencies required for role)**  **Qualifications**   * A numerate graduate with a good degree in an analytical discipline (e.g. Economics, Accounting, Law, Engineering or Science). * A professional accounting qualification or investment management certificate is desirable.   **Technical Skills**  The role requires that the candidate should have a good commercial understanding of small businesses operations and finances in order to contribute effectively towards the following activities:   * Financial and Investment Analysis * Due Diligence * Negotiation of legal agreements * Financial Modelling * Portfolio monitoring and reporting   **Experience**  This is a small team so the person must have a flexible, team-focused approach and be willing to help out across the Bank when necessary.  The ideal candidate will be able to build strong relationships across a wide range of contacts but to focus this work for the benefit of the team as a whole.  The candidate will also need to be extremely organised and flexible. The team deal with a high volume of transactions and consequently the candidate will need to keep on top of a large portfolio of activity. | | | |
| **Criteria** | | **Essential** | **Desirable** |
| A numerate graduate with a good degree in an analytical discipline (e.g. Economics, Accounting, Law, Engineering or Science). | | X |  |
| Experience of working in a fund management, investment banking, corporate finance or commercial lending environment. | |  | X |
| Knowledge or experience of debt funding and due diligence. | |  | X |
| Understanding of financial accounts and reporting | | X |  |
| Operational knowledge of Microsoft Office software | | X |  |
| Use of email for communication | | X |  |
| Experience of operating within or advising SMEs in a financial capacity. | |  | X |
| Experience of building and maintaining strong relationships with stakeholders and customers and of developing external networks to mutual advantage. | |  | X |
| Demonstrable ability to communicate effectively, both verbally and in writing. | | X |  |
| Ability to work collaboratively and flexibly as part of a team to achieve measurable results. | | X |  |

**Leadership:**

Understands their own role in the organisation and the part they can play to deliver objectives.

**Team Working:**

Works collaboratively with colleagues to deliver own and team tasks, and takes ownership of own actions / tasks

**Relationship Management / Networking:**

Works with contacts in external organisations where appropriate to deliver team and own tasks.

**Making Judgements:**

Uses initiative where appropriate, and recognises when to seek advice.

**Communication:**

Communicates in a courteous and polite manner with colleagues, external clients, ability to receive and record messages accurately to colleagues and clients.