

# Job Description

## For Qualified Financial Positions

This form is used to provide a complete description of the specific job (or role) and defines the skills, knowledge and abilities required to undertake the specific and generic role profile.

### Section A: Specific Role Profile

The specific role profile provides key information relating to the salary and working conditions e.g. location of a job, along with the current focus of the job role and a brief description of the main duties.

#### Role Details

Job Title:	Investment Analyst	JEID	FQ006
Salary Grade:	Grade O		
Team:	Pensions and Investments		
Service Area:	Resources, Finance		
Primary Location:	Shire Hall, Warwick (remote working available)		
Political Restriction	This position is not politically restricted.		
Responsible to:	Lead Commissioner Pensions and Investment		
Responsible for:	N/a		

#### Role Purpose

To provide support to the Pension Fund Investment Sub-Committee and officers around the management and governance of the Fund's investment portfolio.

#### Role Responsibilities

Draft and keep updated the Fund's UK Stewardship Code submission  
Prepare the Fund for TCFD reporting and manage the reporting requirement going forwards  
Monitor and update the Fund's Responsible Investment and Climate Risk policies  
Run contract procurements on investment-related contracts  
Draft monitoring reports and assist in identifying any investment monitoring and performance issues  
Be aware of the wider LGPS space and developments in the Fund's pool, Border to Coast Pensions Partnership  
Liaising with the Fund's pool and partner funds  
Attend and write notes on manager meetings  
Help write papers for the quarterly Investment Sub-Committee and Local Pensions Board meetings  
Have regard to the Fund's liabilities when helping with strategic investment decisions  
Any other responsibilities relating to the governance and management of the Fund and providing assistance to other senior officers.

## Section B: Generic Role Profile

The generic role profile provides a list of the main tasks that cover the broad range of duties and responsibilities performed at this level for the job role. An employee may not be undertaking all of these at any one time, but they could be expected to do so under their contract of employment.

### Generic Role Details

Job Role:	Finance Professional - Qualified Level 6
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### Main Tasks

- Manage a Specialist Unit (reporting directly to a Third or Fourth Tier Officer) or be responsible for a specific technical area of work.
- Produce a Business Plan and be responsible for the delivery of its activities.
- Provide strategic (financial) advice to senior managers and elected members.
- Be responsible for final accounts closure for the service area.
- Be responsible for financial and statistical returns.
- Prepare reports to Committee and Senior Managers.
- Undertake reviews and identify improvements to existing procedures and / or systems.
- Undertake the monitoring of the specialist area activity at directorate / corporate level.

## Section B: Person Specification

The person specification provides a list of essential and desirable criteria (skills and competencies) that a candidate should have in order to perform the job.

Each of the criteria listed below will be measured through; the application form (A), a test / exercise (T), an interview (I), a presentation (P) or documentation (D).

### Essential Criteria

Assessed By:

Substantial post professional experience including experience of managing a significant area of service within a Finance environment	I
The ability to demonstrate a high degree of complex problem solving skills	A
The ability to communicate complicated and contentious information with varied audiences in person and/or writing, including the ability to convince others to adopt a course of action which is not necessarily their preferred approach	A
The ability to work within a broad policy framework using managerial discretion over a very broad area of activity	I
The ability to work under a very high degree of pressure including meeting unpredictable deadlines and dealing with conflicting demands	A
Experience of managing others within a Finance environment	I
Experience of developing significant policies/ practices which impact across a broad area of the organisation	I

The ability to pull together plans/develop solutions through the introduction of new/original thinking	I
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## Desirable Criteria

Assessed By:

Awareness of Responsible Investment	I
Willingness to work towards CFA qualification, or similar	A
Approximately 3-5 years (or more) of investment experience	A
Is an effective team player with strong emotional intelligence	I

## Section C: Working Conditions

The working conditions relate to those non-contractual elements of the job that may impact on the holder of the position, as well as those workplace-based responsibilities that are part of this job. These are not contractual but provide a guide to the working conditions and the potential hazards and risks that may be faced.

### Health & Safety at Work

To take responsibility for your own health, safety and wellbeing, and undertake health and safety duties and responsibilities for your role as specified within Warwickshire County Councils Health and Safety Policy, and all other relevant health and safety policies, arrangements, procedures, systems of work as specified for the post/ role.

### Potential Hazards & Risks

The potential significant hazard(s) and risk(s) for this job are identified below (those ticked). The purpose of recording this information on the job description is so that the health status of the potential and actual post-holders can be assessed with regard to the significant hazards and risks. These hazards and risks should be based on the appropriate activity, process and/or operation risk assessment whereby all of the significant risks are identified, recorded and appropriately controlled. The list below is therefore not an exhaustive list because it is the risk assessment that details all significant risks that could arise out of or in connection with the work activity, but any others will be identified in the 'other' section.

<input type="checkbox"/> Provision of personal care on a regular basis	<input type="checkbox"/> Driving HGV or LGV for work
<input type="checkbox"/> Regular manual handling (which includes assisting, manoeuvring, pushing and pulling) of people (including pupils) or objects	<input type="checkbox"/> Any other frequent driving or prolonged driving at work activities (e.g. long journeys driving own private vehicle or WCC vehicle for work purposes)
<input type="checkbox"/> Working at height/ using ladders on a regular/ repetitive basis	<input type="checkbox"/> Restricted postural change – prolonged sitting
<input type="checkbox"/> Lone working on a regular basis	<input type="checkbox"/> Restricted postural change – prolonged standing
<input type="checkbox"/> Night work	<input type="checkbox"/> Regular/repetitive bending/ squatting/ kneeling/crouching
<input type="checkbox"/> Rotating shift work	<input type="checkbox"/> Manual cleaning/ domestic duties

<input type="checkbox"/> Working on/ or near a road	<input type="checkbox"/> Regular work outdoors
<input checked="" type="checkbox"/> Significant use of computers (display screen equipment)	<input type="checkbox"/> Work with vulnerable children or vulnerable adults
<input type="checkbox"/> Undertaking repetitive tasks	<input type="checkbox"/> Working with challenging behaviours
<input type="checkbox"/> Continual telephone use (call centres)	<input type="checkbox"/> Regular work with skin irritants/ allergens
<input type="checkbox"/> Work requiring hearing protection (exposure to noise above action levels)	<input type="checkbox"/> Regular work with respiratory irritants/ allergens (exposure to dust, fumes, chemicals, fibres)
<input type="checkbox"/> Work requiring respirators or masks	<input type="checkbox"/> Work with vibrating tools/ machinery
<input type="checkbox"/> Work involving food handling	<input type="checkbox"/> Work with waste, refuse
<input type="checkbox"/> Potential exposure to blood or bodily fluids	<input type="checkbox"/> Face-to-face contact with members of the public
<input type="checkbox"/> Other (please specify):	