

JOB DESCRIPTION

JOB TITLE:	Investment Governance Officer
MANAGED BY:	Senior Investment Manager
GRADE:	8

ROLE OVERVIEW

The Investment Officer provides operational and analytical support to the Investment Management team, ensuring investments are administered, monitored and reported effectively in line with the West of England Mayoral Combined Authority's (the MCA) Investment Strategy and the West of England Local Growth Assurance & Monitoring and Evaluation Frameworks

Working under the direction of a Senior Investment Manager, the role supports investment performance monitoring, governance processes, systems administration and reporting, helping ensure investments deliver value for money and comply with internal and statutory requirements.

This role is a first development position within the investment management career pathway.

KEY RESPONSIBILITIES

Contract Management Support

- Support investment managers & analysts in the day-to-day management of investments, including performance monitoring, issue tracking and partner engagement.
- Maintain accurate and up-to-date investment records, approvals and documentation within MCA systems and SharePoint.
- Support the preparation of investment management plans, performance reports, dashboards and governance papers.
- Coordinate investment contract variations, approvals and compensation events in line with agreed processes and service standards.

Data, Systems and Reporting

- Manage investment data within the MCA's commercial and grant systems, ensuring completeness, accuracy and audit readiness.
- Produce routine and ad-hoc reports on investment performance, spend, risk and compliance.
- Support continuous improvement in investment data quality and reporting capability.

Governance and Compliance

- Support adherence to Financial Conduct Authority and all applicable investment regulatory controls.
- Assist with audit activity, information requests (including FOI) and governance reviews, escalating issues where appropriate.
- Identify risks or issues within investment data or processes and escalate to the Senior Investment Manager.

Team and Capability Development

- Contribute to the consistent application of investment management tools, templates and processes.
- Support knowledge sharing and best practice within the Investment Management team.
- Act in accordance with MCA's values, maintaining effective working relationships with colleagues and investors / investees.

PERSON SPECIFICATION

ESSENTIAL

Qualifications and Knowledge

- Educated to A-level standard or equivalent, or demonstrable relevant experience in an investment, finance or commercial support role.
- Understanding of investment management principles and the investment lifecycle.

Experience

- Experience supporting investment or commercial activity within a complex organisation.
- Experience handling data, reporting and governance documentation.
- Experience working with multiple stakeholders in a regulated environment.
- Strong IT skills, including Microsoft 365 and document management systems.

Skills and Competencies

- Highly organised with strong attention to detail.
- Analytical and comfortable working with data and reporting tools.
- Clear written and verbal communication skills.
- Ability to manage competing priorities and meet deadlines.
- Professional, collaborative and customer-focused approach.

DESIRABLE

- Willingness to work towards, a relevant professional qualification (e.g. CFA, CISI, CII or equivalent).
- Experience within local government or the wider public sector.
- Awareness of social value and sustainability considerations.