

Job Description

Post Title: Programme Investment Appraiser

Directorate: Legal & Governance

Reports to: Programme Investment Appraisal Manager

Direct Reports: 0

Key Relationships: Finance and Business Hub, Internal and External Project Delivery Teams and WMCA Decision Makers

Role Purpose

The role leads on the independent appraisal and assessment of Business Cases and Change Requests for all investment projects including Transport, Innovation and Regeneration as directed by the Programme Investment Appraisal Manager. The Project Investment Appraiser's main objective is to support better spending and investment decisions.

The post holder will produce comprehensive Risk and Investment Appraisal Reports which will make a judgement as to the following:

- The proposals alignment to WMCA Strategy, Policy and Objectives;
- The proposals compliance with the Single Assurance Framework (SAF), Government Requirements and HMT's Green Book across the 5 Case Model;
- An assessment of Value for Money (VfM) for the public purse and the need for public sector investment and
- A judgement on affordability, commercial viability and deliverability.

In forming this judgment, the Programme Investment Appraiser will consider the balance of risks (Project and Strategic) with proposed mitigation measures and opportunities associated with the project.

The post holder will work with project delivery teams to provide challenge to project Business Cases and Change Requests. They will also provide WMCA's decision-makers at all delegations including Designated Sign Off, Investment Board and WMCA Board with clear recommendations as to whether a project should be invested in or not. The work completed by this post will drive smarter and more informed decisions at WMCA.

Accountabilities (Deliverables):

- Lead on the continuous improvement and implementation of a process for the independent appraisal and technical assessment of all projects within the WMCA based on the HMT's Green Book and 5 Case Model
- Lead on the appraisal and technical assessment of projects and change requests, securing internal and external expertise as required to provide an independent critique of the investment
- Production of a Risk and Investment Appraisal report with commentary which draws out any risks and issues regarding any aspect of the Business Case and/or the ability of the project owner to deliver a successful project
- Support the presentation of Appraisal recommendations to WMCA's Executive Directors, Designated Sign Off, Investment Panel and at Board level to support decisions on whether to invest in a project
- Fully service all Executive Director, Designated Sign Off, Investment Panel and Board meetings ensuring that Risk and Investment Appraisal reports are reviewed by decision makers in a timely fashion which does not result in undue delay to the development and delivery of investment projects.
- Ensure that any conditions placed on projects at the appraisal or investment decision stage are reflected in the legal agreements for WMCA funding and, if applicable, the Monitoring and Evaluation Plans for those projects
- Work iteratively with Business Areas and internal and external project teams, as required, to provide advice and guidance on the development of robust and compliant Business Cases and Change Requests for WMCA investments, whilst maintaining the ability to independently review completed Business Cases
- Develop close working relationships with key programme stakeholders from each local authority, LEP or delivery partner as well as subject matter specialists and delivery teams across the wider WMCA community
- Seek evidence to validate that all required actions from the project appraisal process have been undertaken
- Highlight any programme risks or potential corporate strategic risks to the project owner and Risk Manager to ensure that the risks are captured on the appropriate risk registers
- Assist in the development of any third party specialist project reviews – writing specifications for external specialists and providing any support as required

Responsibilities (Duties):

- Providing a consistent process to appraise and assess projects with the production of checklists and methodologies which are consistent with the Government's Green Book and Five Business Case model and templates for the recording of appraisal findings.
- Utilising the Project Register and other intelligence regarding the likely timing of project Business Cases, plan workload in order that Business Case appraisals can be undertaken and presented to Investment Panel / Board promptly without any undue delay to the processing of the project and its delivery timetable.

- Support the appraisal and technical assessment of non-delegated projects and, as directed by the Risk Manager, personally lead on the appraisal and assessment of projects.
- Secure as necessary internal and external expertise to provide an independent critique of the Business Case submission e.g. input from the Office for Data Analytics to review the strategic and economic Business Cases. In exceptional cases, this may involve commissioning consultants to provide support.
- Contribute to the writing of a high level summary of each project Business Case with commentary which draws out any concerns and issues regarding any aspect of the Business Case, liaising with the project owner in order to clarify any issues.
- Support the presentation of Business Case summaries, reviews and recommendations to WMCA's Investment Panel and Investment Board to support their decision on whether to invest in the project.
- Attend Investment Panel and Investment Board meetings including recording decisions.
- Liaise with project owners and legal team to ensure that any conditions placed on projects at investment decision stage are reflected in the legal agreements for WMCA funding and, if applicable, the Monitoring and Evaluation Plans for those projects.
- Work iteratively with Business Areas, as required, to provide advice and guidance on the development of robust and compliant Business Cases for WMCA investments, whilst maintaining the ability to independently review completed Business Cases. This may, for example, involve offering advice on very specific Business Case issues, signposting to areas of expertise or evidence/best practice or commenting on Business Case drafts prior to formal submission.
- Highlight to the Programme Investment Appraisal Manager any findings from the appraisal process which may require to be subsequently assessed or reviewed as part of ongoing assurance reviews or health checks.
- Highlight to the Risk Manager any programme/project level risks identified at appraisal stage which may have an impact on WMCA's strategic objectives and so should be included on the Strategic Risk Register.

Person Specification

<i>Please specify (X) whether the experience required is Essential (E) or Desirable (D)</i>			Assessment Method		
Experience	E	D	App*	Int**	Other***
Working within a Project/PMO environment	X				
Exposure to Risk Management		X			
Understanding of the Project Lifecycle from initial stages to implementation		X			
Skills/Knowledge/Abilities	E	D	App	Int	Other
Ability to communicate and support/influence across all levels and roles within WMCA and bring issues to resolution	X				
Excellent verbal and inter-personal skills with an ability to deliver briefings and presentations.	X				
Excellent written and analytical skills with an ability to succinctly summarise complex information.	X				
Customer and results oriented.	X				
Ability to work under pressure whilst maintaining performance.	X				
Self-motivated and able to perform with minimal supervision.	X				
Exhibit a high degree of proactivity and creative thinking when faced with challenges requiring resolution.		X			
Political Awareness and the ability to manage potentially delicate situations		X			
Ability to work as part of a team	X				
Knowledge of project management tools and methodologies		X			
Ability to plan and co-ordinate multiple activities simultaneously, managing time and resource accordingly	X				
Knowledge of HM Treasury Green Book / Five Business Case Model and of appraising public sector projects.		X			
Qualifications/ Professional Memberships	E	D	App	Int	Other
Degree Level in an appropriate subject		X			
PRINCE2 Foundation or Practitioner (Desirable)		X			
P3O Foundation or Practitioner (Desirable)		X			
MSP Foundation or Practitioner		X			

* Application

** Interview

*** Details will be shared at interview stage

Core Expectations

Our culture is underpinned by what we do and how we do it. Our behaviours outline the ways we need to work to deliver success, become truly inclusive, and make the organisation somewhere where everyone can give their best contribution.

Value	Competency	Behaviour
Collaborative	Team Focused	Works as part of team, managing and leading.
	Service Driven	Customer, resident and partner focused.
Driven	Empowered & Accountable	Take ownership and leads when needed.
	Performance Focused	Ambitious and going the extra mile.
Inclusive	'One Organisation' Mindset	Believe in each other's expertise.
	Open & Honest	We do what we say we are going to do.
Innovative	Forward Thinking	Embrace change and open to new possibilities.
	Problem Solving	Go for clear and simple whenever possible.

Health and Safety

All employees have a duty to take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions at work; and co-operate with their employer so far as is necessary to enable it to successfully discharge its own responsibilities in relation to health and safety.

Equality and Diversity

To promote and champion equality and diversity in all aspects of the role

Learning and Development

To participate in and take responsibility of any learning and development required to carry out this role effectively.

Performance Management

To actively engage in the performance management process and take responsibility for managing performance outcomes.

GDPR (General Data Protection Regulation)

To ensure the reasonable and proportionate protection, processing, sharing and storing of WMCA information in accordance with the relevant legislation, corporate policies, and in the best interests of the data subjects (Data Protection/GDPR), the WMCA, our partners, and the West Midlands, in all aspects of the role.

Other

There may be a requirement to work outside normal office hours on occasion to meet work deadlines, give presentations, attend meetings etc., including a requirement to work within stakeholder and partner offices within the WMCA Constituent area on a regular basis