



## POSITION DESCRIPTION

### Position details

|                   |   |
|-------------------|---|
| Position Title    | Investor Relationship Manager   |
| Team/Branch/Group | Skills and Investment / Settlement, Protection and Attraction / Immigration New Zealand |
| Location          | Wellington  |
| Date              | July 2017   |

### Our purpose

Our purpose is to grow the New Zealand economy to provide a better standard of living for all New Zealanders. To achieve this, we need a strong, high performing economy, where for example, people (workers, consumers and investors) are protected and aware of their rights and obligations; and the integrity of the environment is maintained.

As one of New Zealand's largest government agencies, the work we do impacts the lives of all New Zealanders. We work to increase household incomes by helping businesses to be more productive and internationally competitive, increasing opportunities for all New Zealanders to participate in the economy through improved job opportunities, and by ensuring quality housing is more affordable.

This is all echoed in our Māori identity – Hikina Whakatutuki – which broadly means “lifting to make successful”.

### How we work

Our aspiration is that MBIE is a great place to work where great work gets done.

We believe in harnessing the potential of our people and the diverse skills and life experiences they bring to MBIE.

Our targets are challenging and require us to work with others, and across the Ministry (making the most of our size and scope).

Our people will need to adopt a generous disposition and actively seek out opportunities to be purposely collaborative across MBIE. This means asking ‘why not?’ instead of ‘why?’, and leveraging off the collective that is MBIE in the pursuit of goals that stretch right across teams, branches and groups.

We work across government, and New Zealand, in a way that enables us to expand and deepen our understanding of businesses and markets. We use our extensive presence across New Zealand and around the world to make and leverage domestic and global connections.

With our Crown entity partners we work collaboratively with other government agencies; local government; businesses; industry, sector, union and employer groups; consumer groups; Māori leaders; and scientists to develop and deliver fit-for-purpose policy, services, advice and regulation that support people, businesses, communities and regions to be successful.

As the lead agency for providing government services for business, we are focussed on making it easier for business to interact with government.

### Our character

**Shape** We shape the agenda by challenging the status quo, and by generating and adopting new

ideas, to bring those ideas to life.

**Collaborate** We support each other, engage early and proactively partner in pursuit of shared goals.

**Deliver** We have a can do attitude, take ownership, act with purpose, urgency and discipline, take calculated risks, celebrate success and learn as we go.

### **Our structure**

The Ministry comprises around 3,200 staff operating in New Zealand with a further 400 staff in overseas locations.

The Ministry has seven business groups: Building, Resources and Markets; Corporate, Governance and Information; Finance and Performance; Immigration New Zealand; Labour, Science and Enterprise; Market Services; and the Office of the Chief Executive.

The Investment Relationship Manager position reports into the Manager Investment Programme in the Immigration New Zealand group.

The branches in this group are:

- Business Strategy & Governance
- Compliance, Risk & Intelligence
- Service Design & Performance
- Settlement, Protection & Attraction
- Visa Services

### **Position purpose**

To support and drive the delivery of the Investor Migrant programme, provide investor migrant prospects and investor migrants with the highest quality, professional level of government support and service. To be a point of contact for investor migrants and prospects both offshore and in New Zealand. In doing so build positive and transparent relationships with investor migrants, NZ Inc., private sector partners, regional economic development agencies, and all relevant stakeholders to maximise the value of investor migrant capital committed to New Zealand and support the productive investment of that capital.

#### **Specifically:**

To provide quality, day-to-day tailored support to Migrant Investor Category (MIC) applicants and prospects, to support the effective delivery of client services, build and maintain a wide range of mutually beneficial relationships with appropriate stakeholders, both on and offshore, including:

- Clients – be a key onshore point of contact for MIC applicants and prospects. Understand their requirements and to provide them with the appropriate connections and channels to support productive investment and settlement in New Zealand.
- Visa Services, particularly the Business Migration Branch (BMB) - understand and be able to clearly and regularly articulate and communicate the current and future operational situation within BMB and work with BMB and other relevant Visa Services staff and managers to put in place systems and processes needed to ensure the smooth delivery of the overall investor programme;
- NZ Inc. – maintain positive working relationship with key contacts within NZTE, MFAT, MBIE and other appropriate government agencies to support the delivery of the strategy;
- Capital Markets – banks, investment firms and appropriate companies at all levels, as well as key industry bodies such as the NZX;
- Early stage investment – although part of the Capital Markets, maintain a wide range of relationships with incubators and organisations that support early stage investment, such as the Angel Association New Zealand and NZVCA. ;
- Licensed Immigration Advisers and lawyers – maintain appropriate working relationships, in accordance with INZ's guidelines, to provide high quality service to MIC applicants and prospects;
- Any other relevant and appropriate individual, firm, agency or body that may assist in the delivery of the strategy and achieve targets.
- To engage in other related activities, particularly across other business policies (e.g. Entrepreneur) to support government outcomes.

## Team Level

To provide quality day to day support to the Manager Investment Programmes and the Investment Team to support delivery of the strategy and achieve targets, including:

- Provide input and insight into the development of the investor programme and its strategy to deliver our targets;
- Client Relationship Management (CRM) – Maintain current and future investor attraction data and understand CRM analytics to support delivery of the strategy, deliver governance and reporting requirements, business planning, and improve conversion rates. Manage research projects as and when required. Maintain an in-depth understanding of the investor pipeline and the conversion process. Maintain a good level of understanding of national and international wealth and investor migration trends and data.
- Support effective policy development – support the Manager Investment Programme to actively engage with policy colleagues and play a central role in driving policy development based on client and market knowledge and data. Facilitate an ongoing connection between the investor migrant market and MBIE policy.
- Manage and communicate the investor ‘story’ – working with the investor team to support the continual development of the appropriate internal (INZ and MBIE teams and senior management) and external communication (Attraction Taskforce, private sector and regional stakeholders, and Ministers) of the investor story. The aim should be to communicate (i) the ‘types’ of investors that INZ is engaging with and (ii) their value to New Zealand. Practically this means building and maintaining a bank of investor migrant information to support the internal and external promotion of the initiative and its value to the economic development of New Zealand.
- Project management – professionally and accurately project manage specific initiatives as required.

## Key relationships

- Key staff across relevant NZ Inc. agencies, particularly MBIE, MFAT and NZTE
- Appropriate private sector firms, particularly those involved in the Capital and Financial Markets, and facilitators of investor migration such as lawyers and LIAs
- Regional bodies, particularly Economic Development Agencies
- Appropriate external stakeholders as and when required
- Investor migrant applicants and prospect
- Staff in Minister’s office
- Members of the Settlement Protection and Attraction Leadership team and their staff
- Visa Services management and other appropriate staff, particularly with the Business Migration Branch
- All managers and staff in MBIE and INZ

## Key accountabilities and deliverables

Responsibilities of this position are expected to change over time as the Ministry responds to changing needs. The incumbent will need the flexibility to adapt and develop as the environment evolves. This includes performing any other reasonable duties as required.

| Key accountability or deliverable  | Indicators of success  |
|--|--|
| <p><b>Critical areas of success</b></p> <p><i>Delivers quality results which contribute to the Ministry’s outcomes</i></p> | <p>The Investor Relationship Manager will be required to deliver results in the following areas:</p> <ul style="list-style-type: none"> <li>• Supporting and working alongside the Manager Investment Programme to develop, drive and deliver the Investor Migrant Attraction strategy;</li> <li>• Taking a collaborative approach across NZ Inc. and with appropriate private sector stakeholders, drive and be part of (innovative) strategies and initiatives that deliver measurable outcomes for New Zealand;</li> <li>• While protecting the integrity of New Zealand’s immigration system, provide HNW investor migrants with a high quality level of service that</li> </ul> |

| Key accountability or deliverable  | Indicators of success  |
|--|--|
|  | <p>appropriately manages their investment and migration expectations, while leveraging their capital, commercial skills and international networks for the benefit of New Zealand;</p> <ul style="list-style-type: none"> <li>• Maintain a constant balance between promotion (investor attraction) and the key importance of service delivery and the need to match demand with available departmental resources;</li> <li>• Maintain open and mutually supportive relationships with key departmental and cross government stakeholders, particularly MBIE/INZ policy, Visa Services and NZ Inc. agencies, primarily but not exclusively MFAT and NZTE;</li> <li>• Play a role in the delivery of the department's NZ Inc. commitments;</li> <li>• Have the flexibility to provide actionable solutions to complex problems in short time frames and in a professional manner;</li> <li>• To participate in relevant NZ Inc. market attraction strategies;</li> <li>• Provide frank, open advice on ideas, strategies, opportunities and risks to team colleagues;</li> <li>• Support the delivery of relevant reporting requirements including briefing notes, Cabinet papers and responses to Parliamentary Questions, OIA and Privacy Act requests, Attraction Taskforce papers;</li> </ul> |
| <p><b>Personal Leadership</b></p> <p><i>Provide leadership that engages and motivates others to succeed and develop, and proactively share experience, knowledge and ideas</i></p>                                       | <ul style="list-style-type: none"> <li>• Models positive behaviours</li> <li>• Models the desired values and culture of the organisation across the team</li> <li>• Contributes to an open, collaborative environment that encourages quality, innovation, ongoing learning and knowledge sharing within the team</li> </ul>   |
| <p><b>Team Leadership</b></p> <p><i>Contribute to building and maintaining a high-performing team that is capable of delivering innovative advice, products and services to support MBIE's strategic direction</i></p>   | <ul style="list-style-type: none"> <li>• Working as part of the Attraction team, actively ensure the maintenance of an inclusive, supportive and results focused culture. A culture that supports continual improvement – for New Zealand, the department, the team and individuals - based on positive, inclusive relationships, accountability and a collective desire to deliver on expectations.</li> <li>• To be able to display a high degree of professionalism and sound judgement. To be able to objectively navigate and quickly help resolve any personal or team issues.</li> </ul>  |
| <p><b>Relationship Management</b></p> <p><i>Manage constructive working relationships with work colleagues and external stakeholders to enhance understanding and co-operation needed to achieve desired results</i></p> | <ul style="list-style-type: none"> <li>• Track record of quality relationship management, at a client and stakeholder level. To be able to proactively and where appropriate, innovatively, leverage relationships to support the delivery of strategies and for high value day-to-day outcomes</li> <li>• Participate as an active team member and contribute knowledge and expertise needed to achieve MBIE's outcomes</li> <li>• Develop effective working relationships with other MBIE managers and staff in order to transfer knowledge and learning from the team to the wider organisation</li> <li>• Build and maintain effective relationships and partnerships with internal and external stakeholders, as necessary, in order to identify and share best</li> </ul>  |

| Key accountability or deliverable   | Indicators of success  |
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|   | <p>practice information and to promote the Ministry, its products and services</p> <ul style="list-style-type: none"> <li>• Represent whole-of-Ministry views and protect its reputation in any external interactions</li> </ul>   |
| <p><b>Safety and wellbeing</b><br/><i>Manages own personal health and safety, and takes appropriate action to deal with workplace hazards, accidents, incidents and near misses</i></p> | <ul style="list-style-type: none"> <li>• Manages own personal health and safety, and takes appropriate action to deal with workplace hazards, accidents and incidents.</li> <li>• Ensures own and others' safety at all times.</li> <li>• Complies with relevant safety legislation, policies, procedures, safe systems of work and event reporting.</li> <li>• Reports all incidents/accidents, including near misses in a timely fashion.</li> </ul> |

| Competencies                        |   |
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| <p><b>Cultivates Innovation</b></p> | <p><b>Shape the agenda</b>, creating new and better ways for the organisation to be successful, by</p> <ul style="list-style-type: none"> <li>• Coming up with useful ideas that are new, better or unique</li> <li>• <b>Challenging the status quo</b></li> <li>• Introducing new ways of looking at problems</li> <li>• <b>Generating and adopting new and creative ideas</b>, and putting them into practice</li> <li>• Encouraging diverse thinking to promote and nurture innovation</li> </ul>  |
| <p><b>Nimble Learning</b></p>       | <p>Actively learn through experimentation when tackling new problems, using both successes and failures as learning fodder, by</p> <ul style="list-style-type: none"> <li>• <b>Learning as we go</b>, when facing new situations</li> <li>• Experimenting to find new solutions</li> <li>• Taking on the challenge of unfamiliar tasks</li> <li>• Extracting lessons learned from failures and mistakes</li> <li>• Being flexible and responsive to changes in requirements</li> <li>• Identifying personal learning opportunities</li> <li>• Finding own solutions where possible</li> </ul>   |
| <p><b>Collaborates</b></p>          | <p><b>Support others</b>, building partnerships and working collaboratively with others to meet shared objectives, by</p> <ul style="list-style-type: none"> <li>• Working co-operatively with others across MBIE, the public sector and external stakeholder groups to achieve shared objectives</li> <li>• Balancing competing interests and priorities appropriately and in line with MBIE's priorities</li> <li>• Identifying, <b>engaging early</b> and partnering with relevant stakeholders to get work done</li> <li>• Crediting others for their contributions and accomplishments</li> <li>• Gaining trust and support of others.</li> <li>• Addressing behaviours that do not align with our culture</li> <li>• Seeking and respecting the views and opinions of others</li> <li>• Providing timely and helpful information to others across the organisation</li> </ul> |
| <p><b>Customer Focus</b></p>        | <p>Build strong customer relationships and delivering customer-centric solutions, by</p> <ul style="list-style-type: none"> <li>• Gaining insights into customer needs</li> <li>• Delivering quality, accurate, timely service and customer focussed solutions</li> <li>• Identifying opportunities that benefit the customer and will improve service delivery</li> <li>• Building and delivering solutions that meet customer expectations</li> <li>• Establishing and maintaining effective customer relationships</li> <li>• <b>Pro-actively partnering in pursuit of shared goals.</b></li> <li>• Actively seeking and responding to customer feedback</li> </ul>  |
| <p><b>Action Oriented</b></p>       | <p>Take on new opportunities and tough challenges with <b>purpose, urgency and discipline</b>, by</p> <ul style="list-style-type: none"> <li>• Readily <b>taking ownership</b> and action on challenges, without unnecessary planning, and being accountable for the results</li> <li>• Identifying and seizing new opportunities</li> </ul>  |

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|   | <ul style="list-style-type: none"> <li>• Displaying a <b>can-do attitude</b> in good and bad times, and <b>celebrating success</b></li> <li>• Stepping up to manage tough situations and encouraging my colleagues to do the same</li> </ul>  |
| <b>Decision Quality</b>                             | <p>Make good and timely decisions that keep the organisation moving forward, by</p> <ul style="list-style-type: none"> <li>• Making sound decisions, even in the absence of complete information</li> <li>• Relying on an appropriate mix of analysis, wisdom, experience and judgement to make valid and reliable decisions</li> <li>• Considering all relevant factors and using appropriate decision-making criteria and principles, <b>taking calculated risks</b> where required</li> <li>• Recognising when a quick 80% solution will suffice, and when it will not</li> <li>• Analysing information to make effective decisions in order to improve performance</li> </ul>         |
| <b>Organisational commitment and public service</b> | <p>Role models the standards of Integrity and Conduct for the State Services Contributes to the development of, and helps promote and builds commitment to MBIE's vision, mission, values and services, by</p> <ul style="list-style-type: none"> <li>• Willingly undertaking any duty required within the context of the position</li> <li>• Managing own personal health and safety, and takes appropriate action to deal with workplace hazards, accidents and incidents</li> <li>• Understanding Equal Employment Opportunities (EEO) principles and the application of these to MBIE</li> <li>• Complying with all legislative requirements and good employer obligations</li> </ul> |

## Personal specifications

### Skills and Experience

A proven track record of experience and achievement in:

- Proven ability to build a wide range of in-depth, tailored and productive relationships with investors from across the world. To be able to tailor a service according to varying needs of high value – and often demanding – investor clients.
- Demonstrable knowledge of the New Zealand investment environment and capital markets, current and emerging investment propositions, and to be able to 'own' a wide range of active relationships – to senior level - across government and business.
- Someone who 'owns' their work and can professionally and proactively develop, manage and drive specific initiatives and projects that support the investor programme.
- A track record of successful collaboration, working with government and private sector partners; someone who understands the risks and opportunities inherent in public/private collaboration and who can mitigate risks and drive results.
- A practical and in-depth knowledge of INZ operating systems, policies and processes, particularly the business stream(s). A proven ability to navigate these and where appropriate to be able to influence key people and processes in order to find practical, actionable solutions to complex 'square peg, round hole' problems.
- Acute awareness of the role of risk and the ability to effectively identify and manage risks proactively.
- Well-developed professional written and verbal communication abilities and strong presentation skills to a wide range of senior audiences
- Understanding of Government decision-making and operating procedure
- Ability to assess and resolve potentially complex problems quickly and effectively
- Ability to engage in clear sighted planning with experience engaging in process improvement activities

### Qualifications

- Degree level qualification in relevant subject, or similar is desirable though not mandatory

### Other

- The ability to gain and maintain a national security clearance as required
- Must be a NZ citizen or hold a residence class visa (if the role is located in New Zealand)
- Must have the legal right to live and work in the country in which this position resides (if the role is located outside of New Zealand)