

## **Job Description**

**Job Title: Start Up Broker**

**Reports to: Contract Manager NEA**

**Salary: £26,000.00-£28,000.00**

**Location: Home Based**

### **Purpose**

- To mentor and be responsible for providing unemployed customers with advice and guidance to assist them to successfully set up and commence trading
- To set up and attend events and actively recruit, assess (screen) and engage with unemployed customers as part of the New Enterprise Allowance (NEA) programme
- To support and mentor customers' transition to self-employment and their new business start-ups (and go on to maintain their own sustainable SME business) e.g., suitable Business Plans and cashflow plans etc.
- To manage a smooth hand over of customers to a Sustainment Broker, once the new business has commenced trading
- To achieve own monthly volume of events, suitable clients screened for progression onto NEA, revenue and contracted outcome KPI targets that contribute to budgets across the division (and any approved re-forecasts) and Group
- Build strong relationships with Jobcentre Plus colleagues and other key stakeholders
- To assist the Contract Manager (and other areas of the Group) as needed to make the contract a success each month and the Group as a whole

### **Main Duties and Responsibilities**

- Set up events, screen and select the most appropriate customers for the programme by leading Link Up: Sign Up sessions and conducting Initial Assessments so as to be held accountable for the right volume and quality of customers referred to the NEA programme from the Jobcentre Plus each month
- Where the customer has a potentially viable concept, enrol them onto the programme and provide suitable advice and guidance to support the production of a good quality business plan
- Work closely with the Shaw Trust PRaP team regarding referrals to maximise diary time for the Start-Up Broker each week
- To support, attend and run seminars and other events as needed/directed by the contract manager to support customers
- Support the customer through their voluntary Business Development Phase if required
- Support and track customers' progression in developing a viable business plan and business, ensuring all activity is always recorded accurately on eEmploy/PICs/CRM
- Ensure the Business Plan is received in a timely manner to obtain approval (within 12 weeks of IA date) and where this is not possible, an extension approval email has been received from JCP and uploaded to eEmploy/PICs
- Tutor the customer in the legal set up of their business and provide effective information, advice and guidance to ensure they have the best opportunity start trading
- Develop support for customers through existing links, networking events and seminars
- Build and maintain relationships with Jobcentre Plus staff within an assigned geographic area to ensure the correct quantity and quality of referrals is being received
- Produce with the customer an agreed SSMART action plan, setting clear objectives to achieve contractual milestones

- Record customers' journey using the eEmploy/PICs/CRM systems and work in co-operation with the administration support team(s) to manage the recording of customers' progression accurately and effectively
- At regular intervals, check that the customers, and where appropriate mentors, are satisfied with progress, the quality of Shaw Trust Group services, record feedback and other relevant information gathered on databases
- Introduce customers to any other service which may become relevant to them, and personally account manage customers' progress using these services to the point of Start-Up, tutoring any corrective action necessary
- Help the customer access external funding if required, by signposting to suitable loans or grants
- Develop good internal working relationships within the team by exchanging information, 'best practice' ideas and experiences. Work closely with other teams to ensure effective co-ordination and collaboration
- Carry out any other reasonable duties commensurate to the role as requested by the Contract Manager or appropriate Senior Manager/Director
- Ensure internal audit and compliance criteria are met and that all activity conforms to Shaw Trust Group systems, policies and procedures at all times. This includes the timely and accurate data entry on customer management system for changes and updates to customer details

## **KEY PERFORMANCE INDICATORS (actual targets/measurement in bold):**

- Deliver regular Link-Up: Start-Up (LUSU) sessions as required based on volumes of referrals from Jobcentre Plus
- Drive referrals to LUSU by carrying out regular engagement activities with JCP staff – these may be, but are not limited to, delivering LUSU-lites, attending weekly Work Coach meetings, conducting floorwalking exercises, etc. **(Achieve monthly Starts target)**
- Responsible for the volume and quality of clients passing their Initial Assessment by ensuring the LUSU is used effectively to stop poor quality customers being referred to IA **(MPL2 target of 85% of all referrals to IA must start on programme - NB: MPL2 not applicable during CV04 period)**
- Ensure suitable amount of appointments are available for Initial Assessments to be booked within contractual timeframe **(MPL1 – IA must take place within 10 working days of PRaP referral – NB: 15 days during CV04 period)**
- Submit completed Initial Assessment paperwork and correctly filled out ESF1420 to FCA within 24 hours of appointment **(MPL1 – IA outcome must be submitted to PRaP with 15 days of Referral - NB: 20 days during CV04 period)**
- Mentor the customer as required by the contract to commence trading with a viable business plan **(all customers must have three meetings in addition to the IA prior to the BP being approved, the first of which must be face to face unless by exception)**
- Achieve Business Plan Approval and Commence Trading monthly and Rolling 3 Month targets set **(Start to BP target of 80% and Start to CT target of 70%)**
- Ensure quality of Pre-Trading delivery meets required Customer Service Standards **(Management Checks >95% each month/Zero Fails attributable in monthly CSS return to DWP)**
- Ensure Pre-Trading delivery is compliant in line with DWP PCO criteria and internal Quality expectations **(Management Checks >95% each month)**

### Other

1. To undertake any further training as identified in the Shaw Trust review procedures.
2. Ensure that safe working practices are followed in respect of COSHH and other Risk Assessment control measures.
3. Employees must comply with the provisions of 'The Health and Safety at Work Act 1974' and must take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts of omissions whilst at work. Employees are also required to co-operate with their employer to enable them to perform or comply with any statutory provisions. The Trust's efforts to promote a safe and healthy working environment can only succeed with the full co-operation of its employees.
4. To understand, comply with and promote Shaw Trust's safeguarding policy and procedures. It is the responsibility of all employees to make the working environment safe and secure for all. Everyone must adhere to the 5 Rs in relation to possible abuse: Recognition, Response, Reporting, Recording and Referral. The Trust can only ensure its dedication to the protection of vulnerable people with the full cooperation of its employees.
5. The Trust has a Diversity and Inclusion Policy and it is the responsibility of all staff to comply with this. The key responsibilities for staff under this Policy are set out in the Trust Code of Conduct.
6. To maintain the confidentiality about clients, staff and other Trust business. The work is of a confidential nature and information gained must not be communicated to other persons except in the recognised course of duty. The post holder must meet the requirements of the Data Protection Act at all times.
7. To maintain awareness of risk and to take personal responsibility for ensuring that the Trust is not unnecessarily exposed to risk. To report any issues or concerns relating to risk and the effectiveness of the Trust's risk management arrangements.
8. Be aware of, promote and implement Shaw Trust's Risk, Quality and Information Security Management Systems.
9. To report to line manager, or other appropriate person, in the event of awareness of bad practice.
10. Recycle and manage energy within your environment in line with Shaw Trust's Strategic aim to adopt green approaches and become carbon neutral.

This job description is intended to provide a broad outline of the main duties and responsibilities only. The post holder will need to be flexible in developing the role in conjunction with the line manager. The post holder may be asked to carry out any other delegated duty or task that is in line with their post.

<p align="center"><b>Person Specification</b></p> <p align="center"><b>Job Title:</b></p> <p align="center">(E=Essential D=Desirable)</p>
<p><b>SKILLS AND CORE COMPETENCIES</b></p>
<p><b>Technical competency (qualifications and training)</b></p> <ul style="list-style-type: none"> <li>• SFEDI award for Business Support (Desirable)</li> <li>• Experience of establishing a 'start up' business</li> <li>• Experience of Business Mentoring</li> <li>• Understanding of commercial business and Business Start-Ups</li> <li>• Basic IT literacy</li> <li>• Must have a clean current driving licence and a car available for business use</li> <li>• MUST NOT HAVE their own business that will conflict with the weekly workings of Shaw Trust pay rolled staff.</li> </ul>
<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>• Experience in achievement of personal targets each month, as per contracted requirements</li> <li>• Knowledge and understanding of business processes and strategy, market analysis, pricing, including Sales and Marketing, HR Management, Finance, Production (where applicable), ICT and Project Management, SME business culture and the motivations and aspirations of the owner-managers/directors</li> <li>• Able to tutor clients to find their own answers and ways of starting and growing their business</li> <li>• Sound understanding of management accounts and their impact on a business</li> <li>• Working with mentors and support agencies.</li> <li>• Project management, including setting and working to priorities and time planning accustomed to achieving targets</li> <li>• Experience of effectively managing client relationships</li> </ul>
<p><b>Skills and Attributes</b></p> <ul style="list-style-type: none"> <li>• Strong communicator and training or tutoring of business skills</li> <li>• Ability to manage priorities and work with a high caseload</li> <li>• Ability to deliver excellent customer service</li> <li>• Well-developed tutoring, leadership, coaching, mentoring and motivation skills</li> <li>• Strong interpersonal and negotiating skills.</li> <li>• Strong client and third-party management skills and able to manage a range of mentors to support a broad range of clients</li> <li>• Strong project and client portfolio management skills</li> <li>• Analysing client financial data and key performance ratios</li> <li>• Good facilitation and presentation skills</li> <li>• Personal gravitas in the eyes of the client</li> <li>• Self-starter and remote team player</li> <li>• Ability to communicate effectively, both verbally and in writing</li> </ul>

## **Personal qualities, communicating and relating to others**

### Core Competencies

All Shaw Trust employees are required to demonstrate a number of core competencies:

- Self-management – manage workload effectively
- Relationship management – develop and maintain productive relationships with your team, management, clients, partners, subcontractors and all key stakeholders
- Customer and Employer focused – committed to understanding client aspirations, supporting their needs.

### Attitudes & Behaviours

- Represent Shaw Trust in a professional manner on all occasions.
- Strive to improve practice to be creative and innovative and work towards continuous improvement
- To adopt a co-operative approach to delivery by maintaining and promoting effective communications, sharing good practice across the organisation and externally

## **Safeguarding**

Shaw Trust is committed to safeguarding and promoting the welfare of all learners/customers and expects staff to share this commitment.

All Roles will require a basic DBS Disclosure check due to the nature of the work to be undertaken.

### Other

- Have an understanding of and be able to demonstrate a commitment to Equal Opportunities and Diversity. (E)