

Job Description:

Wellington Manager - Principal Advisor – Level 4/5

Location:	Rationale – L3 Woodward House, Woodward Street Wellington. Travel to Rationale Arrows town node, and nationwide to client sites
Reports to:	Managing Director, Edward Guy
External relationships:	Communities, government – central/ local, clients, strategic partners, client partner organisations, stakeholders, professional bodies, future clients
Hours:	Fulltime position, averaging 40 hours a week, flexi-time, flexi work environment

Role Purpose:

The purpose of the role is to lead the Wellington team's work to ensure high quality client deliverables, that support the activities of the Market Director, and contribute to the company's commitment to 'better decision making'.

The role is critically aligned to Rationale's 2023 business strategies - to increase market penetration, grow client awareness, improve brand recognition and deliver sustainable business growth.

Role Description:

OVERVIEW: THE FOUR PILLARS

The role is comprised of "Four Pillars" which are interrelated and interdependent and need to work together to achieve the objectives of the role.

The pillars are broken down into the following four components:

- Client work – Better decision making and investment management mastery.
- Skills development/ team mentoring – team satisfaction and optimisation.
- Market Penetration – support revenue generation activities/ new business from new clients and new industries.
- Living the Rationale values - alignment with a Level 4/5 Principal Advisor on our company Skills and Values Matrix (Appendix 1).

Over pinning the pillars is the opportunity to contribute as a member of the management team and influence the business; bringing diversity, experience and maturity to the wider Rationale team.

ROLE DESCRIPTION:

The Wellington Manager Level 4-5 ensures Rationale continues to deliver on our overarching commitment to 'better decision making' in investment management throughout New Zealand.

You will be the pillar that will lead and guide our high-performing Wellington team, demonstrating best practice, mentorship and building wellbeing across the team. The role requires an individual with proven leadership expertise and strong EQ to ensure our people, our greatest asset, are supported and operating at their optimum.

You'll be required to utilise your business case experience and/or technical skillset in infrastructure, having gained a strong foundation in public works, to lead projects of national significance and improve investment decision making throughout New Zealand. The Wellington Manager will support the Market Director's activities to ensure the delivery of high-quality client work across the Wellington team. You will

ensure work is delivered consistently on time and on budget, achieving excellent project outcomes and value for money for our clients and their communities. To execute this function well it is vital that you share Rationale's strategic vision – 'Creating a legacy through trusted relationships and independent advice'.

You will contribute to the wider growth of the business by utilising your industry knowledge and network to support and capitalise on opportunities identified by Rationale's Market Director, ultimately facilitating new pathways for the wider Wellington team.

The Wellington Manager will act as a mentor and leader of work and Rationale culture. The role will have a positive impact on team satisfaction and the attractiveness of Rationale as a place to work while contributing to decision making at the senior leadership level and influencing the overall business.

Familiarity and experience in supporting investment management decision making in New Zealand is essential. Leading business cases, central and local government, financial and economic analysis and modelling experience will be particularly advantageous but not restrictive.

Rationale is an independent advisory company that helps government and business leaders make great investment decisions. Our focus is, and has always been, on improving lives and places for people and helping organisations make evidence-based decisions.

We aim for constant improvement, challenge, and fun – the Wellington Manager is key in this mix.

Role Objectives:

- 1) Ensure your work, and the Wellington team's work, is of excellent quality, solving our communities' and clients' problems and contributing to Rationale's bottom line.
- 2) Provide ongoing leadership and mentoring for the Wellington team, leading and guiding from the front.
- 3) Continuously strive to align with Rationale values & competencies, consistent with a level 4/5 Principal Advisor.
- 4) Bring diversity, experience, and maturity to Rationale's leadership team.
- 5) Work with the Market Direct to support the business' marketing plan, increasing Rationale's workload from new and existing clients and industries.

KPIs/ Measurable Targets:

All employees have specific targets and Key Performance Indicators (KPI) measures which are defined in an individual Professional Development Plan (PDP). These are dealt with at a twice yearly performance review.

A PDP will be agreed with you, including defined KPIs and targets, within the first three months of your employment. Progress will be monitored regularly and performance assessed annually.

This role will have targets set against the following key areas:

- **Chargeable target**
 - To help us remain profitable, team members need to achieve a certain level of chargeability.
 - In this role, we would require 65% of your time (excluding leave) to be chargeable.

- **Client satisfaction**

- At the conclusion of projects that you have delivered, we will contact clients and assess their level of satisfaction with the work that you have delivered (on a scale of 1 to 5, where 1 is the lowest level of satisfaction and 5 is the highest).
 - Our expectation is that, as a minimum, they will rate you at 3 or more.
- **Revenue target**
- Our growth aspirations require us to increase our revenue by penetrating new markets, new clients, and new regions.
 - You will be expected to identify and generate revenue from new activities with existing Clients that support the Business' Marketing Plan.

Capability: What skills do we need?

10+ years relevant sector experience in Specialist Advisory Consultant Role or similar:

- Technical Foundation in three waters, transport, utilities or government – with existing networks
- Business Case and specialist skills in infrastructure decision making
- Understand and advise on executive decision making
- Treasury investment management and budgeting processes
- Awareness working in programmes involving integration of Mātauranga Māori and Te Mana o te Wai
- Strategy & operating model development
- Financial/ economic analysis
- Communication & engagement

Experience relevant to doing this job well

Must have:

10+ years' technical foundation working alongside or within the transport, three waters & utilities sectors applied to an Investment Management supplication

- Excellent stakeholder experience and strong emotional intelligence
- Effective leadership, well-experienced in managing and developing a highly capable and professional team
- Excellent technical knowledge and capabilities with the ability to act decisively
- Management of programmes of work

Nice to have:

Contract management experience

Track record in pitching for and winning bids

Financial and economic acumen

Technical Skill:

Tertiary qualification with evidence of additional learning

Level 4/5 Principal Advisor - Skill Matrix (Appendix 1)

Role Attributes

Innovation

We strive to offer new and creative solutions to challenges. The Wellington Manager will learn fast to understand Rationale products and sell them, identifying product value and transferability to client needs. They lead by example, constantly looking for new and innovative ways to approach how to do business.

Leadership

A natural leader who fosters a collaborative culture to ensure high quality work. Involving, supporting, encouraging, and coaching others. Innovative, engaged, productive.

Human

Empathetic, engaging, and enthusiastic, team members can be open and transparent with the Principal Advisor. Clients, both new and existing, will want to work with the successful candidate. Our people are our biggest asset and ensuring they are fulfilled is of the highest importance.

Innovation

We strive to offer new and creative solutions to challenges. The Principal Advisor learns fast to understand Rationale products and sell them, identifying product value and transferability to client needs. They lead by example, constantly looking for innovative ways to do business and assist our clients.

Decisiveness

Being able to act in an organised and decisive manner is critical to ensuring the Principal Advisor and Rationale can operate successfully. Draw on experience and the best evidence available to make decisions we can stand behind. They demonstrate thinking on the front foot and are willing to be bold.

Technical Knowledge

Significant technical knowledge and expertise adds value to Rationale's business, bringing skills representing our products, including business cases, investment management, infrastructure, asset management, organisational change, programme management, communications, engagement, financial/economic analysis and integrated spatial/master planning to guide the team and our clients.

Self-motivation

Rationale is a team of self-starters and motivated individuals. We work closely as a team but are expected to knuckle down and get the work done without a great deal of supervision. The Principal Advisor is expected to act in the same manner.

Agility

Our business continuously changes and evolves. The very nature of the work we do means we are regularly given challenges by our clients and communities that require us to be agile.

Entrepreneurial

Turns a challenge into an opportunity. Demonstrates commercial nous with an ear to the ground to identify gaps in the business, able to translate performance into tangible and demonstrable outcomes.

Fun

Likes to have fun when there is the chance. The Principal Advisor will play a key role in instigating and supporting events and ensuring the culture at Rationale continues to be one where challenge and fun remain central parts of the way we work.

Values

We are a value-based organisation, this is central to our longevity and enduring success.

Integrity – Fair, professional, impartial, responsible, trustworthy, and authentic. The Wellington Manager is a reputable Leader accountable for the Wellington node, demonstrating Integrity in what they think, say, and do.

Whānau – The Rationale team is like whānau; a family, where people are our biggest asset. We look after our employees, their families and loved ones. We regularly celebrate achievements, both in and out of work. Building strong, enduring, and respectful relationships with our team, iwi, our clients, client organisations, communities. You seize the opportunity to grow our team of advisor/s and analyst/s to deliver the vision of improving decision making for all our communities.

Balance – Ensuring balance is critical. We expect everyone in the Rationale family to have a healthy work-life balance and will seek to make changes if we identify a lack of balance.

Challenge – Challenge is important to us, both personally and professionally – we thrive on doing hard stuff. We know that we are only as good as our last job and take the approach that nothing is too hard. You'll strive to be a change maker in industry. Strategic, well connected and highly motivated.

Success – Strives for and celebrates success and will deliver it for our clients and communities.

Focus Areas

PEOPLE

Leadership: You encourage a collaborative culture to drive high quality work. Involving, supporting, encouraging, and coaching others.

Get the big picture: You learn fast, understanding our business and products. You demonstrate initiative developing skills and capabilities for yourself and others. You grasp Rationale's vision, strategic drivers, goals, and objectives. You know what's coming up, what's going on and who's doing what.

Create a highly desirable workplace: You attract talent to Rationale with fully flexible work arrangements, in an inviting, activity-based workplace. Together we create well places where team, clients and their communities may thrive. You'll be enhancing an environment where people are excited about belonging in the business, happy and proud in our workplace, we look out for each other and enjoy having fun, let's make this one of NZ's best places to work, learn, socialise and innovate.

People are our biggest asset: We target wellbeing with a well workplace. Our terms and conditions of employment, the Code of Conduct and Rationale workplace policies and process support wellbeing so that we may be happy and productive at work, with access to support if not feeling it. You understand and maintain a balance between hard work and fun in a flexible work environment demonstrating compliance with all Health & Safety obligations. You operate in a safe, practical manner, reporting any hazards, risks, or incidents.

Tackle tricky problems: You navigate change to regularly adapt to demands of the country. Demonstrating critical thinking, problem solving and empathy in challenging times. You work at a consistently high professional standard hitting target measures in your performance reviews and add valued critique to individual and team performance. You monitor quality assurance and understand how your actions translate into the bottom line. Turning around challenging situations.

Produce cost recoverable work: There is an expectation that the majority of your time will be chargeable. Your chargeable time target will be set at 70%. All employees have specific targets and Key Performance Indicators (KPI) measures which are defined in an individual Professional Development Plan (PDP) these are dealt with at a twice yearly performance review.

Problem Solving: Rationale are proven problem solvers. You work with the team to help our clients work through tricky problems and create solutions that benefit their communities. Rationale have problem solving processes, which you will use to deliver our work. These processes are regularly modified for improvement purposes and you will be expected to contribute to these changes.

Deliver client ready work Critical thinking, teamwork and problem solving consistently delivers exemplary work and improves our business process. You follow all internal protocols for project delivery, time and document recording with correct use of Workflow Max, Suite files, Rationale brand, project, and document templates. Ensuring every project has an accurate estimate and project plan, with a suitable project approach and sound financial process. We expect attention to detail and quality assurance, with a clear candid communication style, precise written and calculative work.

Be confident as a project tour guide: Meet regularly with stakeholders communicating effectively to update project progress. A key consideration will be project value which is the relationship between project benefits and project costs.

PROJECTS

Pipeline management: Work with clients to keep them informed of what's happening. Curate and manage workload across multiple pieces of work, fit resources with demand, allocate tasks with consideration for capacity, capability, and delivery of high-quality outcomes.

Internal project delivery: Rationale has a number of ongoing internal projects; you ensure your work aligns with the company wide implementation and delivery of these, working in collaboration with the wider Rationale team-.

Provide intelligent business decisions: You take Rationale products and apply them in the client's realm. Evidence based decisions are supported by our business tools. Such as government products, Better Business Case (BBC) framework, Investment Logic Mapping (ILM), stakeholder and community engagement and workshop facilitation. We conduct quality analysis, with the right data, financial figures, and metrics to make intelligent business decisions supporting exemplary investment management. You will use our products adeptly and take them into new industries.

Produce high quality project deliverables: All outputs are of high quality, true to brand, consistent, functional, and well-presented so that things look sharp. You tell the investment management story simply, in a compelling way. Professional, accurate, error free, quality assured work is delivered on time and budget to a client ready standard.

Manage variations: Changes to scope, milestones or constraints are quickly communicated and resolved in a no surprises environment. You identify distressed projects early and mitigate risks, seeking to resolve problems. You can be trusted with high cost, high risk and high-profile engagements.

Continuous learning: We regularly capture lessons learnt and useful takeaways from projects. We like to celebrate professional, project and personal success. Share to grow, grow to share.

About Rationale

In 2024 we will celebrate Rationale's 25th anniversary. Edward Guy, Managing Director has navigated the business through constant change, adapting to demands of the country. A guiding principle that remains unchanged is "nothing is too hard". Evident in the work that Rationale is commissioned to undertake, our

focus is to bring people together to work collaboratively and resolve challenging investment issues - we are firm believers that a problem shared is a problem solved.

	Rationale Strategic Drivers	What does this mean for me?
Mission	Better decision making	I'm making New Zealand a better place
Vision	New Zealand's leading independent advisors in integrated investment management	Our company is trusted, we get great work and people want to work with us
Values	* Integrity * Whanau * Balance *Challenge *Success	Rationale values drive our decisions behaviours and actions at work
Key Result Areas	<ul style="list-style-type: none"> • People: Attracting, <u>retaining</u> and developing high quality teams • Process: Continuous improvement of business processes • Projects: Developing markets, enhancing services, improving communities 	<ul style="list-style-type: none"> • I get the big picture, I have clear goals and a personal development plan • I know how to operate our core business systems, how to do my job, where to get help and how to contribute to process improvements • I get involved with attractive, meaty projects, it's interesting, satisfying work
2022 Business Goals	<ul style="list-style-type: none"> • Creating community and company value • Award worthy work with significant projects • Rated as amongst New Zealand's best workplaces • Winning work as trusted advisors 	<ul style="list-style-type: none"> • I can contribute to and benefit from a growing company • I can be part of award-winning projects • We are rewarded for doing a great job in a productive work environment • Our clients rate us, and the industry sees us as successful
Guiding Principles	<ul style="list-style-type: none"> • Integrity, linking what we think, say and do • Our people are our biggest asset • Create client and community value • Nothing is too hard • We're only as good as our last job • A problem shared is a problem solved 	<ul style="list-style-type: none"> • Integrity is when what we think, <u>say</u> and do line up. I will be respectful and authentic • I change communities by turning problems into successful opportunities • By taking on tricky problems I continually diversify and evolve

RATIONALE CONTINUUM – OUR SERVICES

We are recognised as trusted advisors, helping our communities and clients to navigate through complex and dynamic investment management situations.

We offer a continuum of services – from early evidence gathering and direction setting right through to the delivery of key strategic and statutory documents. All stages in the continuum are about adding more depth and clarity to an investment proposal or strategic objective.

We work differently, collaborating with experts across the investment management spectrum to ensure we can bring the best thinking to bear on any given project.

The process isn't necessarily linear, and often we may have to take a step backward to go forward, but the goal remains the same – help our clients understand the best way forward to deliver the most benefit for their communities.



**INFORMED
DECISION MAKING**



**EFFECTIVE
PLANNING**



**DIRECTION
SETTING**



**LONG TERM
PLANNING**

Intelligence-led, evidence-based analysis – **building the foundation**

- Growth Projections
- Housing Stocktake and Market Viability
- Investment Logic Mapping
- Workshop Facilitation
- Community Engagement
 - Planning
 - Community Surveys and Analysis
 - Workshops
 - Collateral
- Data Analysis
- Population Demographics
- Economic Development
- Infrastructure Valuations
- Rating Models
- Financial and Funding Analysis

Developing the way forward and delivering value for money – **optimised planning**

- Project Establishment
- Outline Strategic Case
- Optioneering
 - Project Investment / Prioritisation
 - Longlist – Shortlist
 - Multi Criteria Analysis (MCA)
- Development Contributions
- Business Case Development
- Funding Applications
 - E.g. TIF, HIF, CIF
- Asset Management Planning
- Geospatial Visualisation
- Visual Storytelling
- Investment Programming

Using evidence to drive your organisation in the right direction – **setting the compass**

- Spatial Planning
- Masterplanning
- Strategic Planning
 - Sustainability
 - Economic Development
 - Housing Capacity and Affordability
- Policy and Strategy Design
- Organisational Review / Structure
- Change Management
- Investment Visualisation
- Graphic Design

We know what you need to do, we plan for it and get on with it – **getting it right for future generations**

- Statutory Documents
- 30 Year Infrastructure Strategy
- Annual Plans
- Long-Term Plans
- Regional / National Land Transport Plans