# ROLE PROFILE

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| **Job Title:** | Investment Planning Manager | **Reporting to:** | Head of Investment Planning |
| **Directorate:****Team:** | Customer ServicesInvestment Services  | **Location:** | Any location across the business |
| **Purpose of the role:** |
| Support the effective and efficient management of the portfolio so that the optimum investment in properties can be achieved. Develop comprehensive and robust 5-year and 30-year investment plans, utilising data and information from multiple sources to achieve a better outcome for Thirteen and its customers. |
| **Key accountabilities and job content:**  |
| * To fulfil the requirements as set out within the Tier 4 profile
* Lead on the successful development of investment plans ensuring accurate planning and design
* Lead on the development of the 5-year and 30-year portfolio investment planning activities incorporating financial planning and design
* Ensure the data in the property management system is relevant, up-to-date and of good quality
* Liaise / consult with stakeholders to ensure, where possible, that asset management strategies and programmes are properly co-ordinated with other projects being pursued by partners and local authorities
* Ensure understanding of portfolio performance and to take forward opportunities in relation to improving categorisation and future returns on investment to feed into portfolio optimisation.
* Develop investment models which underpin the corporate strategy to achieve high quality, sustainable, carbon reduced and desirable homes for customers
* Produce reports that inform on performance, highlight initiative and track progress
* Work in conjunction with other senior managers with property appraisals, disposals and acquisitions where investment planning inputs are required
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| **Qualifications:** |
| * Relevant professional qualification to a minimum of HNC level in Building Surveying, Construction or Housing Management or Degree in Building Surveying, Construction, Housing Management or equivalent
* Ideally a member of a professional body such as the RICS / CIOB or CIH
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| **Knowledge, skills and experience:**  |
| * Demonstrable knowledge of relevant property legislation, systems, procedures and requirements
* Knowledge of good practice in portfolio management planning with regard to long term maintenance strategies and business planning
* Ability to interpret large volumes of data, identifying property trends and business solutions through a technical knowledge of property
* A good understanding of value for money principles with commercial appreciation and acumen
* A good understanding of financial management, having the ability to make sound financial decisions
* Experience of working in a multi discipline and cross-organisational groups
* Ability to analyse and solve complex problems
* Able to prioritise to achieve realistic targets, costs and time deadlines
* Relevant experience of leading a team with a holistic approach to service delivery and continuous improvement
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| **Role requirements and demands:**  |
| **Solving problems:** | Problem solving that is of a specialist / technical nature, with greater complexity and requires an understanding of the organisational context.  |
| **Making decisions:** | Operational decision making relating to organisational objectives and outcomes that have been defined by others. |
| **Communicating:** | Provides information on complicated matters. Uses tailored communication skills in relation to specialist/technical issues where required. Strong verbal communication skills with ability to present to a wider audience |
| **Financial responsibility:** | Delegated budget holder.  |
| **People management responsibility:** | Yes  |

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| *For Reward Team use only* |
| Version 1 | Sept 24 |