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**NHS PROPERTY SERVICES LTD****Job Description**

<b>Job title:</b>	Senior Portfolio Optimisation Manager
<b>Level:</b>	3
<b>Type of role:</b>	Permanent
<b>Base:</b>	Midland Hub (Birmingham, Mansfield, Cambridge)
<b>Travel requirements:</b>	Regular travel across defined region
<b>Responsible to:</b>	Principal Portfolio Optimisation Manager
<b>Directorate:</b>	Asset Management
<b>Job reference:</b>	SPOM

Established in 2013, NHS Property Services is a property owner, service provider and advisor, helping to shape the estate of the NHS for the future. We have one goal: to ensure the NHS makes the right property choices that enable excellent patient care.

Our portfolio is one of the largest in the UK, comprising more than 3,000 properties with 7,000 tenants across England. At a total value of more than £3bn, this represents about 10% of the total NHS estate.

Our properties range from listed buildings through to award-winning, state-of-the-art integrated health campuses.

**Main purpose**

We have an exciting opportunity for an experienced commercial property consultant/surveyor to develop property strategies that encourage more effective delivery of NHS services.

You will support the short and longer-term development of our own property portfolio strategy by engaging with our customers, tenants, occupiers and other stakeholders, at a senior level to drive the efficient and effective use of our part of the NHS estate.

The Portfolio Optimisation team will seek to understand National and Local healthcare policy and priorities, to support assessment of options around NHS Property Services' property portfolio to ensure that the estate is occupied on an optimal basis, correctly specified to support customer needs, delivers best value and is fit for purpose to support patient and clinician needs.

Their recommendations will drive decision making and gain commitment from stakeholders around positioning of the properties, unlocking future development or disposal opportunities for

surplus sites, the right length of lease commitments for service needs, or establishing where and what form new Primary or Community Care schemes may take.

The role requires strong property, business, political and financial acumen to provide pragmatic solutions to deliver savings and portfolio optimisation, whilst balancing effectively the interests of NHS Property Services and the needs of the wider health and social care system.

## **Scope of Roles / Main focus:**

You will need to develop an excellent understanding of the potential of the NHS Property Services portfolio in your geographic/functional area, and to help drive efficiencies to optimise the portfolio, through property consolidation, enabling disposals, driving value from lease events and where relevant the “right-sizing” of new developments.

The main focus of the Senior Portfolio Optimisation Manager is:

- To manage the formulation and delivery, review and implementation of portfolio strategies on a geographic or customer driven or similar basis.
- Work with our customers, tenants, occupiers and the Investment Management team to develop and deliver a strategy for a pipeline of disposals opportunities
- Work with our customers and the Development Team to generate new property development opportunities and the Town Planning Team to optimise the potential use of existing or surplus health care properties.
- Work closely with the national Strategic Estates Planning (SEP) team to interface with STP and CCG estates groups, to understand STP and CCG level estates plans and how their priorities may be reflected in the property strategy for NHS Property Services assets
- Undertake options assessments to develop location, or site-specific strategies to drive planning for lease events, the use of vacant and sessional space policies and to work closely with the Property Management Team
- Working on the national office programme, to ensure consistent occupational metrics are applied, enable consolidation/disposals, and value to be extracted from lease events across a large programme with significant financial opportunity over the next five years
- Working with occupiers to help them obtain relevant business case approvals to commit to carry through the implementation of those schemes aligning with NHS Property Services portfolio strategy
- Responsible for identifying and delivering opportunities for rationalisation, investment and disinvestment in our portfolio to rationalise our properties to meet our 3 year strategic business plan
- To develop and deliver a programme, working in collaboration with AM and Operational functions to deliver Asset Plans for PS sites
- Successful implementation of agreed strategies
- Representing NHS Property Services in any shared property initiatives in an area, where PS owned properties are impacted, to include One Public Estate forums
- Collaborate with all the functional teams across Asset Management to deliver successful estate rationalisation programmes, with the Portfolio Optimisation team being responsible

for feeding a pipeline of work to all other Asset Management teams having assessed the options available and agreed a way forward prior to handover.

- Portfolio Optimisation team will be responsible for developing projects up until the point of agreed business cases (customer) and Initiative Approval Process (IAP) (Internal), at which point the projects will be handed over to other NHS Property Services teams either within Asset Management or Construction, dependent upon the project

### **Key Responsibilities**

- Utilise a consistent, staged process for scoping and evaluating projects to ensure stakeholder alignment throughout the process, seeking to identify at an early stage financial viability and deliverability of schemes, to prevent unnecessary work to PS and the healthcare system
- Analyse, assess and where relevant, challenge, all proposed property opportunities, on the basis of sound financial, and qualitative, evidence based analysis, working in conjunction with the PS Evaluation and Analysis team and the NHS Property Appraisal Unit, or other approving bodies, to progress through the approval processes
- Be responsible for project specific budgets where external consultants input is required, act as informed client and manage consultants, ensuring they are appropriately procured, they have an appropriate brief and are well managed to ensure their outputs are both suitable for the purpose and value for money
- Help support development of best practice in relation to Portfolio Optimisation and where required share across regional teams in the wider organisation
- Analyse complex information in order to make appropriate recommendations and support portfolio decisions
- Work as ambassadors for the NHS PS vacant space policy, supporting commissioners in the preparation/maintenance of realisation lists and identification of properties that may become surplus and eligible for entry into the vacant space scheme.
- Supporting the identification of space suitable for sessional use to be incorporated into the sessional space portfolio, and work with the Investment Management team to engage with customers around this
- Customer relationship management for key customers as identified as suitable in the Top 100 Customers, ensuring that the customer can access the organisation easily and any issues or concerns quickly resolved by the Portfolio Optimisation team taking ownership for resolution and building trust.
- Acting as an Ambassador for NHS Property Services through professionalism, knowledge and a proven track record of delivery of asset projects, including cost savings and disposals against an agreed target.
- Update and maintain a detailed record of on-going work, within a central tracker, to record progress and added value to P

## Person Specification

	Essential	Desirable
<b>Qualifications</b>	<p>Educated to Degree Level in estate management or a related discipline with 5 years plus relevant professional experience</p> <p>Member of a professional Estates body e.g. RICS, RTPI, RIBA</p>	<p>A relevant post-graduate qualification or additional professional qualification</p>
<b>Knowledge</b>	<p>Excellent knowledge of property strategies and strategic asset management across a broad portfolio of diverse properties.</p> <p>Including options analysis, and assessment of disposal, lease restructure and development opportunities</p> <p>Good knowledge of providing and procuring professional services in support of portfolio optimisation.</p> <p>Some general knowledge of commercial property management, including Landlord &amp; Tenant Law and some transactional experience.</p> <p>Good understanding of corporate drivers for real estate decisions</p> <p>Well-developed political, business and financial acumen.</p>	<p>Good knowledge of NHS organisation and other public sector structures.</p> <p>Understanding of Primary Care Policy in NHS</p> <p>Some knowledge of town planning and / or development processes and policy in England.</p>
	<p>Must have experience of working in strategic asset management, preferably in a large or complex organisation.</p> <p>Understanding of negotiating headleases and subleases, and undertaking property transactions.</p> <p>Good experience in leading the preparation of property</p>	<p>Working with a variety of organisations on shared property initiatives.</p> <p>Leading the preparation of business cases to inform asset management decisions.</p> <p>Some experience of managing staff and multi-disciplinary external consultant teams</p>

<b>Experience</b>	<p>strategies.</p> <p>Preparation of feasibility studies and providing input to the development of business cases to inform asset management decisions.</p> <p>Experience of managing contractors and consultants.</p> <p>Good experience of communicating with a wide range of stakeholders at a senior level.</p> <p>Customer relationship management skills and understanding of its importance</p> <p>Track record of delivery of successful asset management</p>	<p>Knowledge of MHT Five Case Model</p> <p>Working with public-private partnership arrangements for project delivery</p> <p>Working with private sector developers and investors</p>
<b>Skills</b>	<p>Strong commercial acumen and be able to work with the key stakeholders to ensure robust financial, legal and risk management to solve the issues</p> <p>Sound understanding of cash flow analysis for options assessment and ability to interpret and explain to non-financially literate stakeholders</p> <p>Good organisation skills and ability to meet deadlines.</p> <p>Excellent interpersonal skills and team working, - ability to communicate and negotiate with individuals and organisations plus influence decision making.</p> <p>Ability to communicate specialist information to non-specialists.</p> <p>Negotiation skills when dealing with contractors and suppliers.</p> <p>Ability to lead project teams to</p>	

	<p>secure successful outcomes.</p> <p>Identifying opportunities for estate rationalisation.</p> <p>Project management.</p> <p>Tact and diplomacy in a political environment.</p> <p>Identify commercial opportunities.</p> <p>Report writing.</p> <p>Analysis of complex estates data to inform decision making.</p>	
<b>Personal Qualities/Abilities</b>	<p>Self-motivating, ability to work independently where required drawing on the experience of colleagues where necessary</p> <p>Flexible and willing to take on new roles and develop new skills as the job requires.</p> <p>Innovative, flexible thinking and willing to challenge established ideas</p>	
<b>Other Requirements as applicable</b>	<p>Flexible and adaptable with a willingness to travel to sites across a region and to occasionally work from different bases within a region.</p> <p>Must maintain CPD and other requirements to ensure ongoing membership of professional institute.</p>	