



Executing and delivering value through Investment and Development Management



## Introducing our speakers





Adrian Powel
Director of Investment and
Development Management



Dan Hotson
Transaction Management
Partner



Emma Hau Healthcare Planner



Hanna Hardy
Transaction Management
Partner



Conor Doyle
Property Development
Partner



Howard Williams
Transaction Management
Partner



Victoria Shaw
Property Development
Partner



Junior Moka
Property Development
Partner

# Agenda



Role of Investment and Development Management in the NHS



How we've partnered with customers to deliver change through:



Healthcare Planning



**Development Management** 



**Investment Management** 



Q&A







# Introduction to Investment & Development Management

#### Who are we?





National team of 30 NHS professionals



**Deep Understanding** of both the NHS and external markets



**Skill range** includes Chartered Surveyors, Healthcare Designers and Town Planners



**Deliver end to end** customer project and programme solutions



600+ years of combined experience



**Integrated** with other specialist skilled teams in NHSPS and external supplier frameworks



250+ years working in the NHS

#### What do we do?





Raised £586m for reinvestment



Managed **transformative** customer projects and programmes, including acquisitions



Disposed of **647 surplus** NHSPS properties (plus NHSE, DHSC and Trust sites)



Managed **land transactions** to enable CDC developments



Saved £100's m in vacant property costs and backlog maintenance



Supporting New Hospital Programme



Enabled the release of land for almost **9,000 new homes** 



Deliver quality **new health developments** 





# **Healthcare Planning**



**Contributions from:** 

• Emma Hau, Healthcare Planner

# What is Healthcare Planning and why it matters?





Healthcare Planning is a **strategic process** for designing healthcare environments that meet **current and future needs** 



Balances clinical functionality, accessibility, and flexibility



Improves patient experience and staff efficiency



Ensures spaces adapt to evolving models of care and emerging technology



**Builds resilience and sustainability** into your healthcare estate delivery

# Our values and principles



- Patient Centred Design: Prioritising the needs, dignity and experience of patients in every space
- Sustainability and Adaptability: Creating flexible spaces that can evolve with changing care models and technologies
- Collaboration: Engaging stakeholders across disciplines and communities in the planning process
- Alignment and Unlocking Value: Helps identify practical needs and hidden challenges. Aligns spaces with workflows and community needs
- Building Trust: Fosters ownership and creates transparency in the development process







#### Benefits and outcomes



- Right sized spaces to match service demand and avoid over/underutilisation
- Identify surplus areas and opportunities for growth and repurposing
- Improve occupation efficiency and space utilisation
- Enabling early leasing agreements through clear space planning
- Lower construction costs by avoiding latestage design changes



# It's not just about space – it's about strategy



- Supports estate optimisation through data driven space planning
- Aligns space use with service models and workforce needs
- Improves financial forecasting and capital planning
- Reduces risk of overbuilding or underutilisations
- Strengthens business cases for funding and approvals







# **Development Management**



**Contributions from:** 

• Conor Doyle, Property Development Partner



#### **Chiswick Health Centre**





Optimisation with the redevelopment for new **2,348sqm health centre** in line with the ICB's requirement



Disposing of 60% of site with planning consent for 55 affordable homes nominated to NHS key workers



Decant to maintain continuation of clinical services at NHSPS owned property during construction and disposal



Joint Development Partnership with London Borough of Hounslow



Benefits include increased clinical provision, eliminate backlog maintenance, estate rationalisation, improved health outcomes





#### Northwood and Pinner





Refurbished a 1,400sqm locally listed building into a new Health Centre, with partial demolition and extension, whilst releasing surplus land for 70 residential homes



Key drivers include **conserving heritage**, **protecting ecology** whilst **maximising residential** development



Shift to neighbourhood environment - alignment with NHS Long Term Plan



Funding and timing of deal structure were key to success













# Investment Management - Disposals



**Contributions from:** 

• Dan Hotson, Transaction Management Partner

#### Achievements to date





**647 surplus sites sold nationally** since April 2013 – **raising £586m** 



Wider benefits – CO2 and backlog savings, estate efficiency



Whole sites, part-disposals, development-led transactions



Largest sale – £43m, secured planning consent for 300 homes



















## Chiswick disposal





Disposal and Joint Development Agreement with LB Hounslow



**Year end timing challenge** – development cashflow, cash and CDEL targets



Freehold retained, 250-year lease granted on 60%, MV premium with ground rent



**Key worker nomination rights** (60 years)





## Stamford Brook disposal





Year end timing challenge... again!



Short term leaseback to NHSPS (with occupiers as temporary subtenants)



Multiple town planning options – PD consent, change of use, pre-apps



Unconditional sale, completed Jan 2024











# Northwood & Pinner disposal





Part disposal – with full residential planning consent



**Leaseback structure,** vacant possession on relocation to new health centre

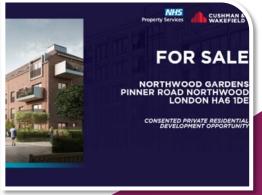


Phased payment deal structure



Transact by end of Q3...?











# Investment Management - Acquisitions



**Contributions from:** 

Hanna Hardy, Transaction Management Partner

### Overview





**Importance** to NHS in Acquiring Estate



**Partnering** with the System, GPs, ICBs &Trusts



**Key Principles** 



















#### Catterick





**Not your average health centre!** High profile joint health care facility between Ministry of Defence (MOD) and NHS at Peronne Lines.



Full planning granted on 4<sup>th</sup> October 2022 - MOD/NHS full FBC approval in 2023



Tilby Douglas appointed under P22 Contract. Construction phase due for completion spring/summer 26



**11,594 sqm** (2,993 Healthcare space) **fully integrated care facility** with MOD/ NHS Occupiers (GPs, Trusts, Dental)



# Catterick – How we supported delivery





**Bespoke advice** around key issues



Transactional **arrangements** 



Relationship / stakeholder management

#### Read more:

https://humberandnorthyorkshire.org.uk/locations/northyorkshire/our-work/catterick-integrated-care-centre-cicc/









# Summary – What makes us different









# **Customer Mandates**



#### **Contributions from:**

- Howard Williams, Transaction Management Partner
- Benita Mehra, Director of Estates and Facilities (Tavistock and Portman NHS Foundation Trust)
- Adrian Powell, Director of Investment and Development Management

# Howard Williams, Transaction Management Partner



- Joined NHSPS in February 2025
- Work with NHS Trusts and ICBs on the acquisition and disposal of NHS estate



#### Personal track record:

- 22 years in private practice as a Development Surveyor/Valuer and Land Agent
- Worked with over 25 NHS Trusts across England.
- Delivered over £15-30m worth of land sales in any given year
- Best year was £80m worth of capital receipts/ overage income
- First land agent to acquire land for the New Hospitals Programme

#### Lessons learnt





NHS estate is diverse and nuanced



Overage and clawback - is it worth the effort?



Clinical **interdependencies and separation** of operational and surplus estate



**Extracting value** through town planning



Maximising value can come in various guises



Technical due diligence



**Understanding** the clinical strategy and its alignment with estate strategy



**Agency role** – market conditions and pitching the opportunity

# Current commissions West London NHS Trust





#### **Background**

- Disposal of the former
   Broadmoor Hospital site in
   Crowthorne Berkshire
- 60 acres of land; 100,000 sq. ft Grade II Listed Buildings & Historic Park and Garden



#### Challenge

- Ecological constraints
- Engagement with key stakeholders
- Overcoming stigma and challenging market conditions



#### **Next Steps**

- Under offer to a consortium of developers
- Exchange the subject to planning sale contract
- Work with the developers and Trust to deliver the planning permission
- Trigger the sale and capital receipt



# **Current commissions Lewisham and Greenwich NHS Trust**





#### **Background**

- Disposal of community estate
- 3 x clinics in southeast London
- Working with NHS Open
   Space to identify
   rationalisation/ consolidation
   within some of the properties



#### Challenge

 Consider how the assets can be disposed of with tenants in situ



#### **Next Steps**

 Agree heads of terms with tenants to ensure we have a market facing and attractive investment



# Current commissions Tavistock and Portman NHS Foundation Trust





#### **Background**

- Disposal of Gloucester House, Belsize Park
- 0.44 acres with a 6,000 sq.ft. locally listed pr building



#### Challenge

- Building is in a high value area of north London currently used as a school
- Selection of the right agent is crucial given the micro market of the location of the property



#### **Next Steps**

- Helping the Trust to prepare the property to the market with appointed agents
- Town planning output and helped draft the business case for disposal



# **Current commissions Tavistock and Portman NHS Foundation Trust**







It's in the **relationships** - in effect nurturing and developing our relationships to develop trust and a common aim.



#### **Benita Mehra**

Director of Estates and Facilities
Tavistock and Portman NHS Foundation Trust

# Scenarios where we can help





Getting project started



Key worker housing



Revenue producing assets



Greenbelt land



LA needing land for housing



**Estate** underutilised



Preparing site for sale

# Multiple Site Programmes





#### **Approach**

- Robust programme governance to manage interdependencies
- Rigorous due diligence for the management of expectations around timelines and funding approvals
- Clear sequencing and phasing of site activities to avoid resource conflicts both from a design team and occupational mobilisation perspective
- Stakeholder management and engagement across locations
- Standardisation of team leading to project efficiencies



# Multiple Site Programmes





#### **SARC**, South of England

- Customer: NHSE Health and Justice
- Overview: Delivery of 6 Sexual Assault Referral Centers
- Objective: Project delivery to meet Forensic Guidance and achieve UKAS accreditation
- Role: DM and programme coordination role.
   Leasehold acquisitions, multiple licences to alter, deeds of variation, lease negotiations, financial control and contractor procurements
- Outcome: 3 sites delivered and 1 with a start on site date in Q4 25/26



#### **Primary Care, Kings Lynn & Rackheath**

- Customer: Norfolk and Waveney ICB
- Overview: Delivery of 2 primary care projects
- Objective: Deliver projects within NHS time bound funding constraints
- Role: DM and programme coordination role, site acquisitions, planning approvals, S.278 negotiations
- Outcome: Projects delivered on budget, funding timeline extended to meet project complexities specifically power connections

# Norfolk and Waveney ICB – Kings Lynn











# Norfolk and Waveney ICB – Kings Lynn





The experience NHSPS brought in delivering services end-to-end was incredibly helpful. Their holistic approach meant **cohesive and efficient planning** throughout the process and led to the successful completion of this project.

The NHSPS Planning Team worked closely with us throughout the planning process for the new build Health Hub. The issues which arose during the course of securing planning consent were complex and NHSPS have been professional throughout in their approach. The team provided **much needed clarity for us in challenging and time-bound situations**, and responded promptly and helpfully to queries we raised, ensuring that we felt assured throughout. They were also proactive and helpful in engaging and involving wider stakeholders such as local Councillors.



#### **Catherine McWalter**

Senior Lead Primary Care Estates Manager NHS Norfolk and Waveney ICB

## Whitechapel





#### Challenge

- To sell 5 vacant sites and derelict buildings in Whitechapel covering 2.55 ha owned by DHSC
- Management of existing building and occupiers
- Led by in-house Development Management and Investment Management skills and resources
- Challenging planning policy framework
- Gained planning approval for 81,000 m2 to deliver a world class life sciences hub
- Unconditional sale to Queen Mary University of London



#### **Outcome**







Summary



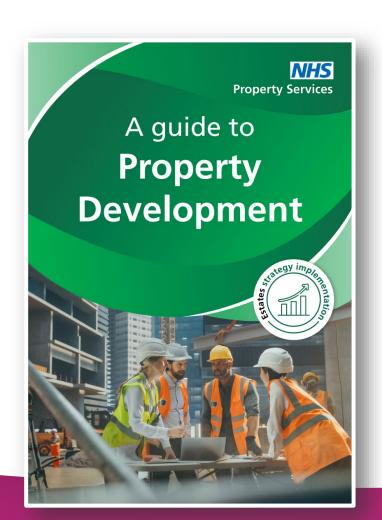


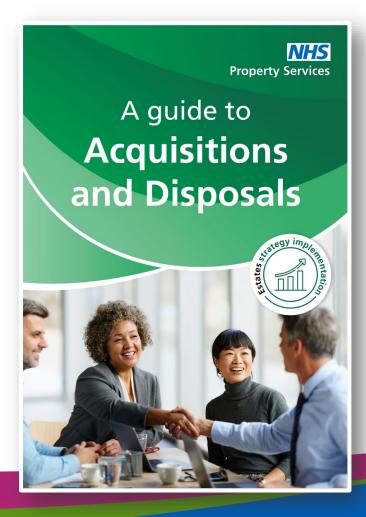
Q&A

# You might also be interested in...









#### Get in touch with the team



By email

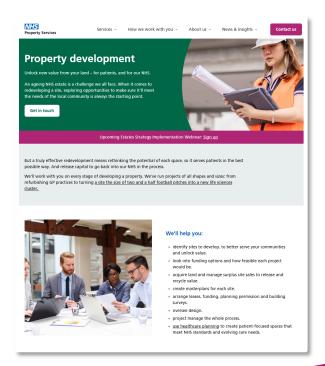


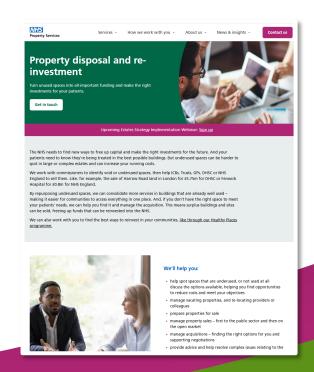
property.development@property.nhs.uk



disposalsenquiries@property.nhs.uk

#### By visiting our website





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## Our simplified service offer



We work hand in hand with you to deliver the services you value most – in a way that keeps you compliant, is delivered sustainably and is backed by data insights. So that you can better assess, adapt and maintain your estate at any or every stage of its life – and keep on delivering for your communities.





#### Estate strategy development

Strategic estate planning

- ICB business case development
- Options appraisals and funding solutions Net zero strategy



#### Estate strategy implementation

- Estate optimisation and space utilisation Lease advisory
- Town planning
- Property development

- Property disposal and re-investment
- Capital project management



#### Estates management services

- Hard facilities management
- Soft facilities management
- Property management
- PFI management

- Statutory building compliance
- · Carbon reduction and energy management



# Thank you







