

ROLE PROFILE

Role Title:	Investment Manager
Department:	Asset Management
Role Purpose:	To manage the Asset Management budget including financial control of the Asset Management contract payments, analysis of financial claims and cost analysis and providing budgetary information.
Reporting to:	Head of Commercial and Investment
Responsible for:	Valuation Surveyor Valuation Assistant
Disclosure level:	n/a
Role Level:	<u>Frontline Manager</u>

Key Role Responsibilities	<p>To be responsible to the Head of Commercial and Investment for delivering a financial and budgetary control service ensuring that all work completed by Midland Heart and its contractors are within budget and within contract terms.</p> <p>To ensure that the purpose of the repairs service is achieved: 'the right work at the right time'.</p> <p>Manage the cost monitoring service identifying any trends and changes to and agreeing performance improvement measures.</p> <p>Take responsibility and working with other managers in the Commercial and Investment and Compliance teams for all financial issues</p> <p>Provide weekly and monthly reports on the number and outcomes of accruals and completions to the relevant Contract Managers and work together to resolve any issues identified as part of the contract management process.</p> <p>Work closely with key internal colleagues and external partners to ensure they contribute to enabling Midland Heart to fulfil all of its statutory obligations.</p> <p>Work openly and honestly with staff delivering the work, to 'check' and 'redesign' the service by knowing what the actual customer experience of the service is.</p>
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<p> </p>	<p>Ability to work effectively with contractors, understand their commercial operations and how their business can be effectively integrated with Midland Heart to achieve mutually beneficial returns financially and in performance</p> <p>Provide support to the Head of Commercial and Investment.</p> <p>Provide a positive contribution to the overall corporate goals of Midland Heart.</p> <p>Accountability for the delivery of these objectives and key performance indicators, as agreed with the Head of Commercial and Investment, via operational plans and targets.</p> <p>Assist the Director of Asset Management with financial planning, budget setting, and budget optimisation for the External repairs and maintenance contracts</p> <p>Develop a highly competent team which can deliver a broad range of services. Maximise the contribution of this team and others through effective leadership.</p> <p>Build and manage relationships with the Procurement consortia, consultants and contractors through which we deliver services.</p> <p>To be accountable for the delivery of Value for Money (VFM) in the statutory compliance stem of the business as agreed with the Director of Asset Management via Operational plans.</p> <p>Manage and coordinate periodic financial verification audits on works, service areas or budget headings, as required including coordinating the recovery of any overpayment or the settlement of claims made.</p> <p>To undertake any other duties commensurate with this post, as directed by the Head of Commercial and Investment.</p> <p>Policy Review</p> <p>Ensure meaningful consultation is undertaken with development, asset management and repairs and maintenance teams.</p> <p>Collate information in relation to circulars, statutory instruments, legislative and other changes and ensure policies are reviewed as appropriate and relevant staff are advised of</p>
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	<p>any implications.</p> <p>Continually review procedures across the Assets Directorate to achieve continuous improvement in the way that services are delivered.</p> <p>Investigate new/alternative forms of building contracts, specifications and building techniques.</p> <p>Innovation and Best Practice</p> <p>Promote Midland Heart's innovative activities and policies within the social housing sector and seek recognition of the Association's achievements.</p> <p>Accountable for establishing a high performance culture that maximises productivity, improves service and delivers 'best practice' property management in pursuance of establishing a 'centre of excellence' for professional contract management.</p> <p>Ensure all contractors delivering work for the Group comply with standing orders, legislative requirements and Midland Heart hold current details within the respective database.</p> <p>Provide all necessary information to customers, staff and contractors to satisfy and/or exceed our duty of care.</p> <p>Develop necessary training schedule for all staff within the repairs system. Work with organisational Development and contractors to deliver annually. Ensure training logs are systematically kept for all involved.</p> <p>Individual Contract and Framework Administration</p> <p>Review the arrangements and effectiveness of building and repairs contracts and associated tender procedures, including specifications, bills of quantities, and schedules of work for all Midland Hearts statutory compliance works.</p> <p>Working in partnership with the Procurement Business Partners, accountable for the development and agreement of the annual procurement activity schedule, ensure that the association's contract arrangements are EU procurement regulations compliant.</p> <p>Ensure that the services operate economically, efficiently and effectively.</p> <p>Work with the Head of Commercial and Investment to develop standard contract documentation and specifications for use by the teams.</p> <p>Ensure that tender and call off procedures are implemented</p>
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	<p>and documentation is in full compliance with Standing Orders and the Association's other requirements.</p> <p>Ensure all relevant insurances are in place and maintained throughout each contract</p> <p>Ensure that the Contract Documents, Bonds and Collateral Warranties are prepared for building contracts and that they are signed and sealed and correctly stored for future reference.</p> <p>Ensure that all statutory and other relevant development control approvals are obtained for the projects.</p> <p>Monitor and co-ordinate reports on the performance of contractors and consultants on the various frameworks.</p> <p>Financial Control and Value for Money</p> <p>Be responsible for budgetary control of all of the responsive, void and planned budgets being delivered across the team.</p> <p>Identify variances to the Director and Finance, adverse or positive, within agreed timescales with proposals for possible actions to mitigate effects against budget.</p> <p>Ensure invoices are managed appropriately and paid promptly and within financial year and minimise accruals monthly and ensure all outstanding work is identified and is being addressed within system and not on hold.</p> <p>Work with the Director to control overhead's expenditure and salary budgets.</p> <p>Human Resources & Staff Management</p> <p>Ensure all new staff members are correctly recruited and inducted.</p> <p>Ensure Operations Managers work with staff within their daily work to identify what work is being delivered and work with staff to improve efficiency.</p> <p>Manage staff's performance and training needs within the Group's performance framework and ensure effective deployment of staffing resources to maximise performance.</p> <p>Be responsible for disciplinary action.</p> <p>Customer involvement</p> <p>Provide customers the opportunity to be involved within all areas of the repairs and voids service as defined with the Involvement strategy.</p> <p>Ensure service standards are challenged and tested by</p>
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	<p>customers at regular intervals and feedback is obtained for all new build schemes.</p> <p>General</p> <p>Represent Midland Heart internally and externally, positively and professionally.</p> <p>Provide support to Director of Asset Management and act as deputy in their absence.</p> <p>Provide a positive contribution to the overall corporate goals of Midland Heart.</p> <p>Apply, promote and implement the Groups Equalities & Diversity Policies and Code of Conduct.</p> <p>Undertake any other duties commensurate with this post, as directed by the Director of Asset Management</p>
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Education, Qualifications and Training	<p>Degree or equivalent in a related discipline.</p> <p>Membership or study to become a member of a relevant professional body such as RICS or CIOB.</p>
Knowledge and Experience	<p>Experience of managing external contractors and consultants.</p> <p>Experience of interpreting data and identifying areas of concern</p> <p>Experience of Budget Setting and Forecasting</p> <p>Experience of driving performance in a changing environment</p> <p>Thorough knowledge and understanding of project management and financial controls including trend analysis and forecasting.</p> <p>Knowledge of early warning signs from financial data and options</p> <p>Thorough understanding of Building Regulations.</p> <p>Thorough understanding of construction contract law.</p> <p>Understanding of JCT and other standard forms of contract</p> <p>Good Working knowledge of Health and Safety legislation and statutory compliance obligations of registered</p>

Role Specific Skills & Behaviours	<p>Ability to motivate and lead teams of technical and administrative staff.</p> <p>Excellent numeracy and IT skills</p> <p>Ability to write coherent and concise reports.</p> <p>Ability to formulate effective and appropriate responses on the basis of sound technical knowledge</p> <p>Ability to write coherent and concise reports</p> <p>Ability to formulate effective and appropriate responses on the basis of sound technical knowledge</p> <p>Ability to implement change and drive service improvement</p> <p>A Positive, can do attitude with strong leadership qualities.</p> <p>Strong leader and motivator of people</p> <p>High level of initiative</p> <p>Advocate of continuous improvement</p>
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