**Role Profile**

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| **Job title:** | Health Investment Analysis - Business Partner | **Level:** | | 2.3 / 3.1 |
| **Function:** | Finance | **Reporting to:** | | Estate Strategy Finance – Senior Lead |
| **About The Role** | | | | |
| This finance-based business partner role is part of the Asset Decision Support team, which focuses on financial appraisal and analysis to aid decision-making and maximise value for NHS Property Services (NHSPS). The role involves delivering insightful analysis to inform management decisions, mitigate risks, and unlock value.  The role also involves providing specialist advice and solutions to support transaction owners and decision-makers across the business, while collaborating to enhance financial performance. You will support Health and Office Strategies, from option analysis to business cases, ensuring positive outcomes for the NHS and its customers. Your expertise in real estate, investment, and commercial acumen will be essential in guiding the financial appraisal process and supporting various projects. | | | | |
| **Key Responsibilities** | | | | |
| * Assist the Estate Strategy Finance - Senior Lead by conducting economic and financial analysis to support NHS Business Cases, following HM Treasury Green Book/CIA methodology. * Perform financial modelling, sensitivity analysis, and option analysis to inform decision-making, applying business & commercial acumen to guide real estate strategies. * Collaborate with colleagues to develop and implement efficient real estate strategies across the portfolio. * Proactively engage with colleagues to resolve issues and support customer discussions, producing analysis for board papers and for internal & external stakeholders. * Develop high-quality PowerPoint presentations that effectively communicate complex information to diverse audiences, ensuring clarity and accessibility. Maintain a polished presentation style that engages and resonates with stakeholders. * Communicating financial information effectively & clearly, both verbally and in writing, to   colleagues and customers as required.     * Collect, analyse & research financial and process information to help develop insights into a project, giving confidence to stakeholders. * Actively attend NHS conferences to keep abreast of public sector updates and changes. Create meaningful strategic relationships to add value to the business. * Analyse complex transactions in line with organisational, financial and accounting policies, ensuring adherence to NHSPS standards and due diligence. * Take ownership of tasks, showing initiative in improving financial models and contributing to team development. * Manage multiple tasks and projects, ensuring deadlines are met and maintaining high standards. | | | | |
| **Knowledge, Skills, and Experience** | | | | |
| **Experience** | | | **Capabilities (skills/behaviours)** | |
| * Minimum of 1-2 years of experience in real estate investment analysis / asset management. * Familiarity with real estate valuation principles / development appraisals. * Strong skills in quantitative and analytical real estate modelling (Essential). * Proven ability to perform consistently in a team-oriented, multi-stakeholder environment. * Experience presenting work to various stakeholders and influencing decisions. * Experience of NHS financial language & regulatory environment (Desirable). | | | * Proficient in analysing and questioning financial inputs. * Strong written and verbal communication skills, including the ability to create and deliver presentation decks to stakeholders. * Confident in conducting real estate analysis, providing accurate recommendations to stakeholders. * Effective time management, capable of meeting tight deadlines and juggling multiple projects. * Proactive and capable of independently managing tasks while proactively supporting team needs. * Skilled at networking and building strong relationships, fostering collaboration and trust across teams & external stakeholders. | |
| **Knowledge** | | | **Qualifications** | |
| * Proficient in MS Office, PowerPoint with strong skills in Excel (Essential). * Expertise in financial appraisal and analysis for valuing transactions (e.g., development and options appraisals) (Essential). * Understanding of holistic real estate terminologies (Essential). * Knowledge of accounting principles (Desirable). * Familiarity with NHS real estate background (Desirable). | | | * Degree in Economics, Finance, Real Estate, or equivalent experience in real estate/financial modelling (Essential). * Master’s degree in Finance or Real Estate (Desirable). * Progressing towards or interested in pursuing a financial/real estate professional qualification (e.g., CFA, ACCA, CIMA, MRICS). | |
| **Other information** (travel, hours) | | | | |
| * Confident. * Natural at building relationships. * Team Player, growth mindset. * Emotional intelligence and resilience. * Integrity & Flexibility. * Ability to work at pace. | | | | |