Head of Equity, Joint Ventures, and Partnerships Portfolio Management (Analytics)

Directorate	Investments
Team	Products, Equity and Partnerships
Reports to	Assistant Director, Equity, Joint Ventures and Partnerships Portfolio Management
Direct reports	2

Job purpose

Homes England's equity investments are made to deliver on the Agency's strategic objectives as articulated in its Strategic Plan by securing the financial leverage of the capital that co-invests with us and the operational leverage of working with best-in-class delivery partners. The Agency's equity holdings include bespoke joint ventures, partnerships, institutional investment vehicles, and co-investment platforms. These transactions involve diverse counterparties, a variety of asset classes, differing strategic objectives and investment sizes, requiring a high level of adaptability, strategic insight, and technical acumen.

The role holder will lead the strategic enhancement and implementation of the Agency's Equity analytical and asset management tools, to support the next phase of growth for the investment management platform for the Agency's equity investments. The role holder will oversee the Equity Portfolio management teams' data analytics and optimisation processes, to deliver robust forecasts, risk modelling, financial modelling and drive stakeholder reporting. The role holder will be accountable for the financial modelling requirements of both pre- and post-contract transactions with either internal or external partners as appropriate.

The role will be responsible for data provision to the Agency's central delivery reporting team and will also undertake a senior role on complex transactions providing support to colleagues in the Portfolio management team. This role requires strong analytical and modelling skills with a solid understanding of the financial markets and investment theory.

The post will report directly to the Assistant Director for Equity, Joint Ventures and Partnerships, Portfolio Management. This leadership role is anticipated to oversee a team of 2-3 FTEs.

Key relationships

Works collaboratively, developing mutually constructive relationships internally and externally and focused on the wider mission and objectives.

1. Lead, mentor, and develop a high-performing analytics team – expecting up to 2-3 reports as the portfolio grows.
2. Directly collaborate with portfolio managers, finance and performance teams, and senior leadership to align analytics with organisational goals.

Key accountabilities and responsibilities

1. Lead and have strategic oversight of equity funding forecasts and performance against KPIs, ensuring alignment with the agency's business plan. Collaborate cross-functionally with senior stakeholders to embed forecasting into strategic decision-making and long-term planning.
2. Drive continuous improvement in data quality, analytical processes, and reporting accuracy by setting the vision for data quality, analytical rigour, and reporting excellence.
3. Lead the creation and maintenance of portfolio analytics tools such as Python, R, SQL and Tableau, to enable robust financial analysis and risk management of the equity portfolio and to support investment decision-making
4. Oversee the analysis of portfolio performance, attribution, stress testing and risk metrics to identify trends and opportunities for improvement.
5. Guide the qualitative analysis of the Agency's holdings to inform portfolio and asset decision making.
6. Set the standard for data visualisation and storytelling, ensuring outputs clearly communicate portfolio performance and support strategic engagement with internal and external stakeholders, including HM Treasury and BEIS.
7. Ensure compliance with investment guidelines and regulatory standards across all portfolio activities, embedding a culture of accountability and risk awareness across the team's activities.
8. Act as a strategic advisor to senior leadership, providing forward-looking insights and recommendations to enhance portfolio performance, resilience, and alignment with Homes England's strategy.
9. Stay abreast of industry trends, emerging technologies, and best practices in portfolio management analytics.
10. Lead the ongoing review of policies and procedures relating to portfolio performance and recovery and where appropriate recommendation and implementation of change.

Homes England Employees are expected to be flexible in undertaking duties and responsibilities commensurate with the general character of the role and level of responsibility.

Key skills, knowledge and experience

- Extensive experience in portfolio management, analytics, or a similar role within the real estate or financial services industry.
- At least Degree level or equivalent in a relevant field such as Finance or Economics, Data Scientists, or a relevant equivalent professional qualification or demonstrable relevant experience.
- Proficiency in data analysis and asset management tools and software, such as Power BI, Python, R, SQL, Tableau etc.
- Excellent communication and presentation skills, with the ability to convey complex information to diverse audiences.
- Proven ability to work independently and manage multiple priorities
- Strong leadership and team management skills, with a track record of building and developing high-performing teams.
- Familiarity with machine learning/ AI, Cloud Platforms, Quant Platforms
- Strategic mindset with a focus on innovation and continuous improvement.
- Strong understanding of investment principles, risk management, and regulatory requirements.

Key Competencies

- Exceptional financial, analytical literacy and client reporting and communications skills, with preferred real estate sector experience.

- Strong collaborative skills, building constructive internal and external relationships.

- Inspirational leadership, engaging in a diverse team, navigating organisational workstreams effectively, and confidence in leading through change, adapting communication styles as needed.

- Commitment to the highest standards of compliance, ensuring records are accurate and fit for purpose.

- Skilled in managing stakeholders, including delivering challenging messages to senior forums.

Key performance Measures

1. Achieve equity spending, receipts, and housing delivery targets in line with the business plan and strategic goals.
2. Establish yourself as a recognised expert in portfolio management and process improvements
3. Maintain robust risk management, as reflected in portfolio metrics and audit feedback.
4. Uphold governance standards, operating within the Equity Risk Framework and escalating emerging risks to decision-makers.
5. Develop fit for purpose and impactful analytics, visualisations and management tools to support decision making in the team and for key decision makers.
7. Build senior-level relationships across industry and stakeholder groups to influence policy and drive strategic priorities.
8. Develop a high-performing team with a focus on people development and knowledge sharing, acting as a role model.

Values and key behaviours

Homes England colleagues are expected to be flexible in undertaking duties and responsibilities commensurate with the general character of the role and level of responsibility.

Respectful
As the core principle, this runs through all our values and behaviours

Impactful
We combine our **commercial expertise with social purpose** to deliver value for money and maximise our positive impact

Accountable
We are **empowered to lead by example**, take responsibility for our actions and speak up for what's right

Innovative
We are **bold, creative thinkers** who embrace change, never stop learning and always look for a better way to do things

Inclusive
We recognise and **value everyone as individuals** and draw strength from our differences

Collaborative
We share information, align priorities, and use **our collective knowledge and experience** to achieve great results