

# JOB DESCRIPTION

## Portfolio Analyst

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<b>Job title</b>	Portfolio Analyst	<b>Directorate</b>	Development and Commercial Services
<b>Location</b>	Hybrid, with a weekly presence in either our Rushden, Peterborough, Boston or Milton Keynes office	<b>Line manager</b>	Head of Environment and Sustainability

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### Purpose of the job

- > This role leads on monitoring, evaluation, and reporting of Amplius' residential real estate portfolio performance, ensuring the long-term viability of its assets.

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### Key tasks and responsibilities

- > Produce Asset Appraisals by collating data from across our business and identifying opportunities for improvement.
- > Liaise closely with key stakeholders throughout the Asset Appraisal process to ensure we collect qualitative as well as quantitative data.
- > Use the data collected to provide the business with insight into the properties performance and make a recommendation for how to gain best outcome from the property. Training on our data, systems and strategy will be provided.
- > Analyse the performance of our assets and explore opportunities for improvement.
- > Take charge of analysing cost trends per unit and benchmarking to understand their impact on delivery expectations and long-term investment plans.
- > React to changes in our business by updating our tools and parameters as required.
- > Identify and implement process improvements, ensuring better outcomes for stakeholders.
- > Support the Portfolio Manager with the timely production of management information, portfolio performance reports, KPIs, delivery plans, cost monitoring, forecasted spend and volume completions.
- > Ensure the data in our team's system is accurate, timely and up to date.
- > Lead on any systems / data changes required.
- > Support the team with larger Scheme Appraisals, where there is potential to regenerate schemes / neighbourhoods to provide better homes for our customers.
- > Be part of the Project Team delivering scheme feasibility / proof of concept reports.

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## Scope and impact

### Scope:

- > Provides essential analytical support to the asset maximisation team and wider business, ensuring the effective analysis of all voids within the portfolio, to enable a robust, data led decision to be made about retention or disposal of an asset. This role is key to maintaining accurate records, managing documentation, and supporting compliance with regulatory requirements.

### Impact:

- > The Portfolio Analyst ensures smooth delivery of void appraisals through strong administrative support, accurate record-keeping, and compliance. The role supports a pipeline of disposals to the Asset Sales team ensuring the organisations goals are achieved, such as providing warm, safe quality homes for customers as well as realising a financial disposals target.

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## Key relationships

- > Internal teams across the business
- > External stakeholders.
- > Contractors.
- > Legal professionals.

# PERSONAL SPECIFICATION

## Portfolio Analyst

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The values outline the key expectations of all colleagues. Used together, the Person Specification and values will ensure new colleagues will exhibit the competencies required for this role. All our opportunities will be assessed through application to interview.

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### Qualifications

**Essential:**

- > Bachelors degree in Finance, Business or related field.

**Desirable:**

- > Project management, Prince2 Foundation (or equivalent)
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### Experience and knowledge

**Essential:**

- > Experience in portfolio analysis, investment research, asset management or project management role.
- > Proficient user of Microsoft Office systems.
- > Proven experience in portfolio, program, or project analysis.
- > Intermediate Excel skills.

**Desirable:**

- > A qualification, interest, or experience in a property related field.
  - > Possess knowledge of energy efficiency enhancement techniques for buildings.
  - > An awareness of property title documents and Land Registry.
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### Skills and competencies

**Essential:**

- > Detail orientated with a level of accuracy in data analysis and reporting.
- > Analytical thinker, with the ability to analyse complex data and draw out key points.

**Desirable:**

- > Robust communication skills with the ability to convey complex ideas and findings in a clear and concise manner.

## Characteristics

### Essential:

- > Self-starter, with the ability to work on own initiative and prioritise own workload.

### Desirable:

- > Strong problem-solving skills and the ability to think critically and analytically.

## Our values

 <p><b>People come first</b></p>	<p>Everybody matters to us. We care deeply about our colleagues and customers. We have fun and get to know and understand the people we work with. We provide a heartfelt service and treat everyone with dignity and respect.</p>	 <p><b>In it together</b></p>	<p>Our work is all about delivering excellent partnerships and building communities. We collaborate instead of competing. We achieve the best results by working together as one team.</p>
<p>We absolutely own it by doing what we say we'll do and being accountable for our actions. We believe in fairness, equality and inclusivity. We operate with integrity and help those who need it the most.</p>	 <p><b>Do the right thing</b></p>	<p>We're committed to providing better services and building more homes. We're ambitious, proactive and forward thinking. We want to amplify our impact, influence policy and transform the sector.</p>	 <p><b>Driven to do more</b></p>

## Additional duties clause

The above does not constitute an exhaustive list of duties. The post holder may be required to perform any reasonable tasks commensurate with the level of responsibility at the request of their manager.

Duties may vary as and when localised procedures are updated or renewed with varying Local Authorities that the organisation works with. We reserve the right to alter the content of this job description to reflect changes to the organisation or the services it provides.

**To be reviewed as part of the Job Description review process.**