

Portfolio Asset Manager

Position Description

Directorate:	Finance and Corporate Services Directorate
Reports to:	Director, Property and Facilities
Direct reports:	None
Location:	Preferred to be Woolloomooloo or Lewisham (but flexible within any of the Society's main metropolitan or regional offices across NSW).
Primary position objective:	Develop and implement a property and asset management plans in accordance with the Property Strategy to deliver a financially sustainable property portfolio which provides operationally effective assets that meet user needs.

The St Vincent de Paul Society is an Equal Employment Opportunity Employer

Directorate overview

This position is in the Finance and Corporate Services directorate. The teams within the directorate and their functions are:

Information and Communications Technology: this team is responsible for state-wide ICT strategy, ICT project management, design and implementation of new ICT systems (e.g. CRM, Business Intelligence), ICT service desk, and cybersecurity.

Finance and Accounting: this team is responsible for state-wide finance policies and procedures; finance shared services (accounts payable, accounts receivable); treasury and investment functions; financial reporting to external stakeholders; financial strategy and special projects.

Group Financial Planning and Analysis: this team is responsible financial budgeting, forecasting and reporting; targeted financial analysis for senior management; strategic and operational advice to senior leadership to improve financial decision-making and business performance; and financial business partnership. The Finance Manager roles embedded in Vinnies Services and Commercial Enterprise, Fundraising and Communications directorates sit with this team

Corporate Services: this team is responsible for state-wide property management; facilities management; procurement; and fleet.

Accountabilities and responsibilities

The Manager, Property Portfolio will:

- **Strategic Business Planning** - Ensure the successful implementation of the Strategic Plan (including the Property Strategy) within the Finance and Corporate Services directorate.
- **Asset Management Planning** - Develop and implement state-wide property and asset management plans to maintain, utilise, improve and maximise the value (delivered to the Society) of the property portfolio in coordination with the Director Property, Manager, Projects, the Property and Facilities Managers across the state. Provide research, analysis and market overviews to various commercial markets.
- **Business Partners** - Act as the business partner for the key internal customers (Vinnies Services and Commercial Enterprises / Retail) to build a consistent strategy for the ongoing and forwarding looking plans for the portfolio and business services. Provide direction for the Property Team on leasing strategies and driving leasing outcomes.
- **Major Projects** - Assist and coordinate with Director Property and Manager Projects on any major projects (in excess \$300,000).
- **Disposal and Acquisition** – assist in the planning, due diligence, negotiation and transaction / financial close for property acquisitions or disposals.
- **Reporting and Governance** - Develop and implement a plan for the management, recording, updating and reporting on the property portfolio as a whole and by segment (i.e. retail, support services and other facilities) with particular emphasis on performance against targets set in accordance with the Property Strategy.
- **Capital Expenditure Management** - Develop and administer the capital expenditure and budget process to acquire, maintain and conduct significant upgrades, and ongoing management and maintenance of properties.
- **Valuations and Property Database** - Develop and maintain a comprehensive database of the property portfolio which includes up to date valuations and other relevant information.
- **Safety and Workplace** - Ensure a safe working environment for members, staff and volunteers by implementing the Society's workplace health and safety practices.
- **Compliance with Policies** - where necessary, ensure that staff and volunteers complete relevant pre-engagement checks (National Criminal History check, and where required Working With Children Check); act in accordance with the organisation's Code of Conduct and Member and Volunteer Charter; and comply with the organisation's Workplace Health and Safety program.
- **Risk Management** - Ensure that effective risk management protocols and procedures are in place to ensure compliance with legal, employment and governance requirements.

Critical Key Performance Indicators (KPIs)

- Timely and accurate reporting on the performance of all properties in the portfolio.
- Project Control Group and Audit & Finance Committee – monthly and/or regular reporting to both of these committees – including obtaining approval of property requests, performance reporting, governance of commitments.
- Asset Business Plans - Development and implementation of a Property and Asset Management Plan (update annually) consistent with the Property Strategy and with our key Business Partners (update annually).
- Target and report on beneficial and measurable outcomes from property portfolio that

increase the efficiency of operations, improved service and financial returns.

- Spending is focused on preventative measures rather than repairs.

Key working relationships

In addition to the Director, Property and Facilities and the Property team, as a senior leadership team, you will foster close working relationships with:

- ED and Directors, of Vinnies Services, of the Retail / Commercial Enterprises; of Finance & Support Services directorates
- Manager, Group Financial Planning and Analysis (Finance and Corporate Services);

Essential criteria

Critical capabilities

There are nine capabilities expected of all leaders across the Society:

- **'People we serve' centric:** (Level 3) Manage the delivery of high-quality services that provide a hand up for the people we serve.
- **Values based leadership:** (Level 3) Manage teams and areas of work to align to the Society's mission, vision, values and lay Catholic heritage.
- **Impact focus:** (Level 3) Manage the delivery of positive impact through informed decision making and efficient and effective use of resources.
- **Collaboration:** (Level 3) Manage collaboration with Conferences, directorates and teams to create opportunities, solve challenges, foster the Society's mission and implement the Strategic Plan.
- **Change leadership:** (Level 3) Manage and mobilise resources to deliver change.
- **Team performance:** (Level 3) Manage and develop individuals and teams to deliver against Society's strategic priorities.
- **Digital engagement:** (Level 3) Manage virtual, dispersed teams and stakeholders using digital tools.
- **Innovation and improvement:** (Level 3) Facilitate an improvement in existing and new services, and ways of working.
- **Financial acumen:** (Level 4) Lead the design and delivery of programs and services that ensures the financial sustainability of the Society.

Role-specific criteria

- Relevant tertiary qualification/s in commerce and/or property management or related fields.
- Demonstrated expertise in property portfolio management, valuation, asset management, acquisition and disposal and reporting.
- Demonstrated ability and expertise in overseeing effective implementation of initiatives.
- Demonstrated ability to review and analyse business data and analytics to enable effective reporting and decision-making on portfolio performance both operational and strategic.
- Excellent written and oral communication skills, including the ability to communicate with key stakeholders from a variety of backgrounds and in providing accurate reports.

- Excellent interpersonal and relationship management skills, with a proven ability to collaborate effectively with internal and external stakeholders.
- High-level understanding of current issues facing the property sector and not for profit industry.

Desirable criteria

- Experience working in a membership-based organisation to support and empower members and volunteers.
- Experience with or exposure to operational issues in the not-for-profit sector.
- Demonstrated understanding of the financial performance levers associated with property assets especially the delivery of both retail and social services.