



## ROLE DESCRIPTION

<b>Role title</b>	Lead Surveyor – Estates Operations		
<b>Directorate</b>	Strategic Asset Management		
<b>Reporting to</b>	Service Director – Strategic Asset Management		
<b>Grade</b>	7		
<b>Evaluation ref</b>	RP190	<b>Job Family Ref</b>	
<b>Role Purpose</b>			
<p>Lead the Estates Operations section within the Property Services department and to be responsible for providing estates management, valuation, acquisition, disposal and property development in respect of the Council's property portfolio and to ensure the Council maintains accurate property records in accordance with regulatory and statutory requirements. As a member of the Property DMT, the Lead Surveyor – Estates Operations works with other senior managers to shape the council's asset management strategy and decision-making, and to improve, co-ordinate and lead the work of the department.</p> <p>The Lead Surveyor – Estates Operations is responsible for the effective management of Somerset Council's portfolio of leased land and property assets, and also oversees the Council's statutory asset valuation, property records and estate management functions. This includes ensuring the council's leased estate supports financial and strategic objectives effectively, ensuring the council fulfils its legal obligations as landlord, landowner or tenant, and maintaining effective control of tenancies, income collection and asset management. As the council's strategic lead in this specialist area, the postholder takes a lead role (working with the Head of Property) in developing and implementing asset management strategies for leased portfolios to achieve strategic and financial objectives. The postholder leads on the council's Corporate Landlord policy.</p>			
<b>Key results area</b>	<b>Accountability</b>		
Corporate Responsibilities	<p>Support in the delivery of the Council's strategic priorities and Council's Asset Management Plan, as a member of the Directorate's Senior Leadership Team supporting strategy and performance and championing the delivery of the Council's vision with all stakeholders.</p> <p>To deputise for the Head of Property as required.</p> <p>Ensure that relevant and best professional advice, guidance and information is available in an intelligible and timely fashion to the Cabinet, Scrutiny, all elected Members, as well as to other stakeholders. Update and advise Elected Members in respect of operational and policy issues in relation to the Strategic Asset Management department.</p> <p>Lead the Estates Operations team with a clear identity in terms of flexible and responsive ways of working, inclusive and diverse culture, and high level of employee engagement and wellbeing.</p>		

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Undertake representational and communication duties on behalf of the Council to promote and protect the Council's interests in matters concerning their specialist areas.

Value the diversity of Somerset's communities ensuring equality of access and treatment in service delivery and employment.

Function as a role model for Somerset's vision and values. Promotes a culture of continuous improvement that encourages creativity and innovation to ensure services are efficient and develop the potential and flexibility across the Council and its workforce including the motivation and development of employees within the wider Property departmental teams.

Ensure that all services place a high value on customer responsiveness by demonstrating a commitment to meeting and involving the broadest range of direct and indirect service users, citizens, customer, and communities.

Support the delivery of the Council's key strategic aims and objectives ensuring understanding and commitment from staff from across the Property department.

Keep abreast of specific statutory or regulatory duties contained within the role to ensure any challenges and opportunities in the delivery of services are responsive, compliant, and well communicated to customers, communities, and business as appropriate.

Jointly with other DMT members participates in the development of corporate strategy and the Council's asset management strategy, applying functional expertise to test the viability of the strategy. Contributes creative ideas and insights to support the strategy formation process.

Support, and lead where appropriate, Corporate and Directorate specific transformational change programmes with the aim of maximising efficiency, modernising services, and achieving better outcomes and opportunities for service users and customers.

Ensure flexibility in reacting to the needs of the Council, its' customers and partners supporting a culture of continuous improvement.

Ensure compliance with all relevant legislation, the Council's standards of conduct, organisational policy, and professional codes of conduct to uphold standards of best practice.

Support the Head of Property to ensure that the Council's statutory obligations relating to property and related assets are met, and be accountable for compliance of the team with all relevant health and safety legislation and Somerset Council H&S policies.

## ROLE DESCRIPTION

<p>Asset Management &amp; Innovation</p>	<p>The post holder will be accountable for the following service areas:</p> <ul style="list-style-type: none"> <li>• Valuation (including Statutory and Annual Asset Valuations)</li> <li>• Estate Management</li> <li>• Disposals and Acquisitions – professional advice and negotiations</li> <li>• Commercial property portfolio management</li> <li>• Any professional property matter</li> <li>• Estate Operations elements of the Asset Management Plan</li> <li>• Adherence to corporate landlord policies where they apply to the Estate Operations Function</li> </ul> <p>Leads the development of strategies for the Council's leased estate at portfolio level to achieve financial and strategic objectives (for example, strategies to support the joint community use of assets, strategies to achieve the commercial objectives of operational services through tenancy and lease arrangements).</p> <p>Champions a commercial, creative and innovative approach to the use of the council's estate.</p>
<p>Landlord and tenant management</p>	<p>Oversees the council's landlord and tenant management function.</p> <p>Responsible for designing and implementing an effective internal control framework to ensure that operational financial, legal and reputational risks relating to the Council's non-investment leased property holdings are managed effectively.</p>
<p>Operational delivery &amp; estate management.</p>	<p>Line management, supervision and oversight of Estate Operations team, allocation and monitoring of casework to professional estates surveyors.</p> <p>Oversees the management of the council's legal responsibilities as landlord or tenant under a wide range of tenancy agreements and as Corporate Landlord for the council's directly occupied operational portfolio. This includes lead responsibility for landlord compliance matters across the council's non-operational, leased estate.</p> <p>Oversees the granting of wayleaves, easements, licences and other minor interests; sets standards and control mechanisms in this area of responsibility to drive and maintain value and mitigate against risk.</p> <p>Where applicable under the Council's Corporate Landlord policy, commissions enforcement action as landlord against unauthorised encampments, occupation of or encroachment on the council's property. Oversees the management of boundary issues and effective resolution of disputes.</p>

## ROLE DESCRIPTION

	<p>Develops and oversees effective public information, customer / client engagement and enquiry handling to ensure landlord / tenant / public enquiries are dealt with effectively and efficiently.</p>
Asset Valuations & insurance	<p>Oversees the annual valuation of the Council's real estate assets as required for the Statutory Statement of Accounts.</p> <p>Working with the council's insurance and risk management departments, is jointly responsible for ensuring that the council's real estate assets are adequately and properly insured and that financial risks are well managed.</p>
Asset Management System, Asset Records	<p>Accountable for ensuring that the Estate Operations asset records are effectively maintained.</p> <p>As a senior client for the Asset Management System, takes responsibility for setting objectives and allocating resources to maintain, develop and improve the system.</p> <p>Oversees the Council's Property and Asset Valuation records functions. Accountable for the maintenance of effective internal control of Property Records and prime documentation, reconciliation between the Council's financial, asset management and GIS systems, and the Council's dealings with the Land Registry.</p>
Business Partnering	<p>Represents the Property service as the subject matter expert while providing advice and guidance to our internal client service functions (e.g. Leisure / Culture services, Waste / Highways operations); develops strong working relationships and understanding of the strategic environment in which that function operates. Provides signposting and initial advice on a range of Asset Management matters outside of specialism.</p> <p>Feeds service function perspective into wider property strategy and decision making.</p>
Performance frameworks, innovation & development.	<p>Accountable for timely collection of rental income, ensuring accurate and timely collection of rent and dividend payments within area of functional responsibility. Accountable for minimising void periods and the effective mitigation of liabilities and risk.</p> <p>Manages and reports on the performance of the Estates Operations team; holds direct reports accountable for achievement of commercial targets / strategic outcomes and takes corrective action where necessary to ensure the achievement of business objectives.</p> <p>Jointly accountable with other Heads of Service for championing professional development, learning and innovation within the department, through coaching, mentoring and professional leadership.</p>
Budget Management	<p>Oversees the income and expenditure budgets relating to the leased property portfolio, as well as relevant reserves, ensuring value for money.</p>

# ROLE DESCRIPTION



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Stakeholder Engagement	<p>Works closely with the Property DMT in developing asset management and commercial strategies for the council's tenanted portfolio.</p> <p>Develops and maintains effective working relationships with Executive and Service Directors to lead market analysis to support business cases / financial assurance for the Council.</p> <p>Builds strong customer relationships and delivers customer-centric solutions.</p>

## Qualification/Knowledge/Experience/Skills

### Qualifications

- Be a full member of the Royal Institute of Chartered Surveyors (RICS) with at least 5 years post qualification experience of working in complex organisations.
- Be a registered valuer.
- Evidence of work related continuing professional development.

### Skills

- Commercial acumen, commercial risk management and negotiation skills, and stakeholder management skills are essential.
- Applies expertise to act as the Council's lead for developing appropriate plans or performing necessary actions based on recommendations and requirements.
- Uses expertise to act as the lead on planning, organising, prioritising, and overseeing activities to efficiently meet business objectives.
- As part of the Property leadership team leads on analysing data trends for use in reports to guide decision making.
- As part of the Property leadership team leads on developing, monitoring, interpreting, and understanding policies and procedures, making sure they match council strategies and objectives.
- As part of the Property leadership team leads on interpreting and applying knowledge of laws, regulations, and policies.
- Within area of responsibility, acts as the organisational authority on managing projects and/or programmes within desired cost, time, and quality parameters.
- Within area of responsibility, acts as the organisational authority on identifying, assessing, and managing risks.
- Has extensive knowledge of asset management, landlord and tenant management and local authority real estate including detailed understanding of local / sector markets and macro-economic strategic context.
- Knowledge and experience of the corporate landlord model of asset management in a local authority context, and of best practice frameworks for local authority estate management.
- Evidence of working with and influencing stakeholders.
- Evidence of leading and developing teams, skills in motivating staff.

## ROLE DESCRIPTION



<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>• Experience level enables post holder to provide leadership to others regarding work related systems, processes, and challenges.</li> <li>• Experience of leading property teams</li> <li>• Experienced in strategic management and leadership across company functions directing substantial resources over long-time frames.</li> <li>• Experienced in dealing with political / community leadership stakeholders; experience of estate management in a local authority context.</li> </ul>	
<p><b>Dimensions of role</b></p> <p>Book value of leased property portfolio c. £300m. Annual valuation of land and property portfolio valued at c £800m.          Responsible for annual income from leased estate investments ranging from c.£6m-£8m.          Oversees estate management and accountable for legal responsibilities across c. 1,300 sites and buildings, further c. 4,000 minor landholding interests.          Direct leadership and management of 7 employees.</p>	
<p><b>Notes</b></p>	
<p>Competencies / attributes</p>	<p>Somerset Council has developed an attributes framework which will be a key component of the role; this can be found on the Council's website.</p>
<p>Working conditions:</p>	<p>Role involves occasional travel to sites around Somerset, some of which may not be accessible by public transport.</p>
<p>Working arrangements:</p>	<p>N/A</p>
<p>Corporate Responsibilities</p>	<ul style="list-style-type: none"> <li>• Provide clear leadership to deliver the Council's strategic priorities and meet the Council's financial targets, as a member of the Directorates Senior Leadership Team.</li> <li>• Update and advise Elected Members in respect of operational and policy issues in relation to the Services team or teams.</li> <li>• Lead teams with a clear identity in terms of flexible and responsive ways of working, inclusive and diverse culture, and high level of employee engagement and wellbeing.</li> <li>• Undertake representational and communication duties on behalf of the Council to promote and protect the Council's interests in matters concerning their specialist areas.</li> <li>• Create, monitor, and review frameworks of performance measures and quality standards to be applied in the delivery of services.</li> <li>• Function as an ambassador for the Council promoting, both internally and externally, the Council's vision, strategic aims, and values.</li> <li>• Value the diversity of Somerset's communities ensuring equality of access and treatment in service delivery and employment.</li> <li>• Function as a role model for Somerset's vision and values. Promotes a culture of continuous improvement that encourages creativity and innovation to ensure services are efficient and develop the potential and flexibility across the Council and its</li> </ul>

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	<p>workforce including the motivation and development of employees within the service teams.</p> <ul style="list-style-type: none"><li>• Ensure that the service places a high value on customer responsiveness by demonstrating a commitment to meeting and involving the broadest range of direct and indirect service users, citizens, customers, communities, and businesses.</li><li>• Support the delivery of the Councils' key strategic aims and objectives ensuring understanding and commitment from staff from across the service.</li><li>• Support Corporate and Directorate and service specific transformational change programmes with the aim of maximising efficiency, modernising services, and achieving better outcomes and opportunities for service users and customers.</li><li>• Ensure flexibility in reacting to the needs of the Council, its' customers and partners supporting a culture of continuous improvement.</li><li>• Ensure compliance with all relevant legislation, the Council's standards of conduct, organisational policy, and professional codes of conduct to uphold standards of best practise.</li><li>• Accountable for compliance with all relevant health and safety legislation and Somerset Council H&amp;S policies.</li></ul>
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