

## ROLE DESCRIPTION

<b>Role title</b>	Lead Surveyor - Estates, Strategy & Development		
<b>Directorate</b>	Property		
<b>Reporting to</b>	Head of Property		
<b>Grade</b>	7		
<b>Evaluation ref</b>	RP191	<b>Job Family Ref</b>	NA
<b>Role purpose</b>			
<p>As a member of the Property departmental management team, the Lead Estates Strategy and Development 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 Estates Strategy and Development is responsible for the strategic development of Somerset Council's portfolio of surplus property as well as regeneration land and property assets and also takes a lead role in managing the acquisition and disposal of real estate. This includes ensuring the council's operational and non-investment estate holdings support service and strategic objectives effectively, acting as the council's lead client in relation to developer contributions to support the provision of education places, and optimising the council's land and property portfolio to minimise cost and deliver capital receipts. As the council's strategic lead in this specialist area, the postholder takes a lead role (working with external strategic partners, the Head of Property, other Directors, senior managers and Executive Members) in developing and implementing real estate strategies for strategic sites and asset portfolios to achieve strategic and financial objectives.</p> <p>As a senior professional within the Property department, the Lead Estates Strategy and Development is responsible for ensuring the council is kept abreast of changes in relevant legislation, regulations, professional practice and technological innovation. The role will also have a key function in championing professional development, learning and innovation within the department, through coaching, mentoring and professional leadership.</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>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 Strategy and Development 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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	<p>Undertake representational and communication duties on behalf of the Council to promote and protect the Council's interests in matters concerning their specialist areas.</p> <p>Value the diversity of Somerset's communities ensuring equality of access and treatment in service delivery and employment.</p> <p>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 Property departmental teams.</p> <p>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.</p> <p>Support the delivery of the Council's key strategic aims and objectives ensuring understanding and commitment from staff from across the Property department.</p> <p>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.</p> <p>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.</p> <p>Support 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.</p> <p>Ensure flexibility in reacting to the needs of the Council, its' customers and partners supporting a culture of continuous improvement.</p> <p>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.</p> <p>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</p>
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	<p>compliance of the team with all relevant health and safety legislation and Somerset Council H&amp;S policies.</p>
<p>Asset Management, portfolio development &amp; innovation</p>	<p>Leads the delivery of the Council's Asset Management Plan objectives in relation to the area of estate strategy and development.</p> <p>Oversees the Council's property rationalisation programme, and the Council's leadership of the Somerset One Public Estate partnership.</p> <p>Leads the development of strategies for the Council's land and buildings assets at portfolio level to achieve financial and strategic objectives (for example, land use strategies to mitigate against climate change or biodiversity loss, strategies to support urban regeneration and economic development, strategies to support the provision of social and affordable housing or care accommodation).</p> <p>Champions a commercial, creative and innovative approach to the use of the council's estate.</p>
<p>Estate Development, acquisitions and disposal.</p>	<p>Leads the development of strategies and plans for the council's most significant development sites. Works with the council's planning, housing enablement and regeneration functions to facilitate and deliver development.</p> <p>Acquires and manages sites for education development to ensure the Council is able to meet its statutory obligations to provide sufficient education places. Negotiates the provision and transfer of education sites under development agreements.</p> <p>Leads the Council's most significant and complex site acquisitions and disposals, negotiating to drive long term overall value for the Council.</p>
<p>Operational delivery</p>	<p>Line management, supervision and oversight of estate strategy and development team, allocation and monitoring of casework to senior professionals.</p> <p>Oversees the Council's programme for the disposal of surplus assets, ensuring best value is obtained and driving the achievement of targets for capital receipts to support the Council's financial plans and capital investment strategies. Ensures that opportunities to develop or maintain social value are considered, alongside the views of local communities and representatives.</p> <p>Oversees the management of covenants and the negotiation of covenant releases.</p>
<p>Planning advice and developer contributions</p>	<p>Oversees the internal town planning consultancy / advisory service within the Property service. Sets objectives and strategies to deliver planning gain value, or to secure planning consents to achieve non-financial strategic objectives.</p>

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	Oversees the negotiation of S106 and CIL contributions to support the provision of education places.
Corporate Governance and Asset Management Policy framework	<p>Supporting or working with senior internal stakeholders to design and operate effective governance arrangements and a policy framework to ensure that property acquisitions and disposals are effectively controlled.</p> <p>Acts as lead professional advisor to the Council's Executive and Scrutiny functions in relation to estate strategy and development.</p>
Asset Management System & Asset Records	<p>Accountable for ensuring that the Estate Strategy and Development asset records are effectively maintained.</p> <p>Works with the relevant Property departmental leads and teams to ensure that the prime records are stored securely, and that the council's corporate Asset Management System is updated and maintained accurately.</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>
Business Partnering	<p>Represents the Property service as the subject matter expert while providing advice and guidance to a number of client service functions (e.g. Education, Housing, Social care commissioning functions); 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 asset management strategy and decision making.</p>
Performance frameworks & staff development.	<p>Accountable for a productive and timely throughput of casework, ensuring that the council does not hold surplus sites for any longer than necessary by monitoring the progression of development and sales.</p> <p>Manages and reports on the performance of the Estates Strategy and Development team; holds direct reports accountable for achievement of targets 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	Oversees the income and revenue / capital expenditure budgets relating to the portfolio of surplus and development land, ensuring value for money.

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	Responsible for the timely achievement of agreed capital receipts targets through the oversight of a pipeline of asset disposals.
Corporate Strategy, Capital Investment Strategy and Asset Management Strategy	<p>Considers future risks and opportunities in the macro-economic environment, translating them into breakthrough strategies within area of responsibility. Effectively integrates long-term opportunities and challenges with day-to-day activities.</p> <p>Jointly responsible with other Heads of Service for ensuring the council is kept abreast of changes in relevant legislation, regulations, professional practice and technological innovation.</p> <p>Applies knowledge of real estate marketplace to advance the Council's goals. Shares industry developments with wider team and key internal stakeholders.</p> <p>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.</p>
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>
<b>Qualification/Knowledge/Experience/Skills</b>	
<p><b>Qualifications</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Be a registered valuer.</li> <li>• Evidence of work related continuing professional development.</li> </ul> <p><b>Skills</b></p> <ul style="list-style-type: none"> <li>• Well-developed commercial acumen, strategy development and negotiation skills are essential.</li> <li>• Applies expertise to act as the Council's ambassador for developing appropriate plans or performing necessary actions based on recommendations and requirements.</li> <li>• Uses expertise to act as the lead on planning, organising, prioritising, and overseeing activities to efficiently meet business objectives.</li> <li>• As part of the Property leadership team leads on analysing data trends for use in reports to guide decision making.</li> </ul>	

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- 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 planning, real estate development and asset management strategy in a local authority context including detailed understanding of specialist / affordable and social housing development, education site acquisition and developer contributions, and rural land use strategies.
- Knowledge of corporate governance of asset disposals and acquisitions in a local authority context.
- Evidence of working with and influencing stakeholders.
- Evidence of leading and developing teams, skills in motivating staff.

### Experience

- Experience level enables post holder to provide leadership to others regarding work related systems, processes, and challenges.
- Experience of Leading Property Teams
- Experienced in strategic management and leadership across company functions directing substantial resources over long-time frames.
- Experienced in dealing with political / community leadership stakeholders; experience of estate management in a local authority context.

### Dimensions of role

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 6 employees.

### Notes

#### Working conditions:

Regular travelling and able to travel countywide, including travel outside standard work hours and to areas that are not currently serviced by public transport.

This role involves working within a dynamic and supportive local authority environment. Candidates should be prepared for the following conditions:

- **Work Hours:** Standard working hours are 37, with occasional requirements for evening or weekend work to meet project deadlines or attend community events.

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	<ul style="list-style-type: none"> <li>• <b>Location:</b> The primary work location is County Hall, with opportunities for remote work as per organisational policies.</li> <li>• <b>Travel:</b> Some travel within the local area may be required for meetings, site visits, and community engagement activities.</li> <li>• <b>Work Environment:</b> The role involves working both independently and as part of a team, with access to modern office facilities and resources.</li> <li>• <b>Health and Safety:</b> Adherence to all health and safety regulations is mandatory, ensuring a safe working environment for all employees.</li> </ul>
Corporate Responsibilities	<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 workforce including the motivation and development of employees within the service teams.</li> <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</li> </ul>



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	<p>efficiency, modernising services, and achieving better outcomes and opportunities for service users and customers.</p> <ul style="list-style-type: none"><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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