

Context statement

To accompany job description and person specification when required

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Job title – Commercial Portfolio Manager

Directorate - Place

Service - Assets & Property

Team – Estate Management

Job description ref. - Senior Technical Officer Level 4 - ES603

Grade – 12

Organisation Structure

Reporting to: Service Manager Estate Management

Responsibility for: n/a

Context of Work

Assets & Property

Assets & Property is part of the Place Directorate and is responsible for a range of asset and property related activity including estate management, building safety and compliance, asset strategy, facilities management, repairs and maintenance, and capital construction projects.

As part of the Place Directorate, we contribute to the directorate's goal to create outstanding places and services and play our part in delivering the Place Plan which is a roadmap for the future operations of the Place Directorate up to 2030. Placemaking is at the core of the Place Directorate. We are dedicated to working with our communities to create places where people can live and work comfortably. Places that improve people's wellbeing and maximise life opportunities.

The Council's Strategic Asset Management Plan (SAMP) 2024-2030 as agreed by Cabinet in October 2024 outlines the council's approach to managing its assets. It aims to transform how the council uses its land and property - moving the Council away from being traditional property owners in seeking opportunistic savings and one-off sales, to a more proactive approach as 'place-makers' that considers property as a platform for the delivery of the Council's wider corporate priorities.

The SAMP aims to ensure our assets and property service acts as an enabler for more effective and efficient delivery of council services, and our policies deliver an estate that adapts and responds to this change - one that is leaner and more agile and innovative in the way it supports the delivery of services. Be this through the provision of operational assets to support service delivery, or the management of commercial / investment assets maximising yields and receipts to fund council services.

Our Assets & Property functions are designed to facilitate the delivery of the SAMP 2024-2030 and aligns with the council's strategic ambitions. This includes a strong focus on strategic asset management and a business partnering approach, creating a clear link between asset strategy and assets service delivery.

Colleagues in Assets & Property teams will need to bring expertise and innovation to their role and will work on local, regional and collaborative projects, often as part of a multi-disciplinary cross functional team.

Estate Management



The core purpose of the estate management team is the effective management of the council's assets and investments to deliver income for the council.

The function is responsible for delivery of the estate management element of asset class strategies, including being responsible for Landlord/Tenant relationships and negotiate, manage and review all leasehold arrangements for community, commercial and operational assets.

The team are responsible for managing and implementing programmes of work related to lease renewals, rent reviews and asset valuations.

Key Responsibilities

- Contribute to the delivery of the council's Strategic Asset Management Plan.
- Provide day to day professional advice on estate management matters
- Lead on outsourcing of estate management function in relation to certain classes of assets in line with the council's procurement procedures and regulations, ensuring compliant and cost-effective procurement.
- Contract manage outsourced estate management of certain classes of assets, including ensuring delivery to the appropriate service levels, quality standards, on time and on budget.
- Routinely evaluate the performance of outsourced managing agent contracts.
- To provide expert advice and act as the Council's expert, where required, in the functional areas in which the post holder operates.
- To manage case load effectively, work at pace and deliver high quality customer service.
- Oversee and ensure managing agents undertake inspections to ensure that all properties leased, licensed or covered by any other occupational agreements relating to operational tenants, the third sector and other parties are compliant with HSE legislation and kept in a fit condition in accordance with the lease terms.
- Oversee and ensure managing agents respond to tenant enquiries in a timely manner
- Received and resolve escalated tenant enquires, not resolved by the managing agent.
- Oversee the managing agent's delivery of the client role, including being accountable for specific commercial portfolios, including ensuring the accurate billing and calculation of rent and service charges for tenants.
- Budget management (including monitoring and forecasting) of managing agent contracts, including income budgets and overseeing debt recovery in relation to portfolio.
- Where required undertake estate management of your portfolio of assets
- Where necessary to oversee and undertake operational property transactions including occupational agreements, lease/contract tenancy arrangements, negotiating and managing rent reviews and service charges, landlord consents, income and debt management, property insurance, repairs, dilapidations, breach of covenants, commercial surveying and asset valuations.
- Where necessary develop heads of terms and instruct legal with regard to transfers and leases.
- To undertake asset acquisitions and lettings of the council's property assets.
- Manage and update property data in relation to your portfolio of assets

- Provide key performance indicator data and contribute to production of reports as required.
- Contribute to Estate team programme and project management activity as required.
- Continually work to raise standards, support excellent service delivery and ensure compliance with all council policies, procedures and legislation.
- If required, to oversee, undertake and/or commission and, where appropriately qualified, to sign off Asset Valuations undertaken in accordance with the principles set down in the RICS Valuation – Global Standards (Red Book) 2017. To have a good working knowledge of the requirements of CIPFA (and any other relevant accounting body) to enable the timely and effective production of the Capital Accounting asset valuations for both DC accounts and external bodies.

NB: The duties and responsibilities of this post are not restrictive and the post holder may be required on occasion to undertake other duties. This will not substantially change the nature of the post.

Essential & Desirable Criteria

Applicants will be shortlisted on the basis of demonstrating that they fulfil the following criteria in their application form and should include clear examples of how they meet these criteria. You will be assessed in some or all of the specific areas over the course of the selection process.

Qualifications/ training/registrations	
Educated to degree level, or equivalent experience in a relevant field	Essential
Professional membership as a Chartered Surveyor in a relevant discipline to the role	Desirable
Experience	
Proven experience of service and stakeholder engagement, and relationship management	Essential
Demonstrable experience of estate management	Essential
Proven experience of managing outsourced managing agent provision	Essential
Comprehensive understanding and use of digital property management systems	Desirable
Experience of programme and project management	Desirable
Skills, abilities & knowledge	
Ability to analyse and understand complex datasets, including experience of needs analysis work	Desirable
Excellent communicator in both verbal and written format, able to facilitate clear, concise and timely communication amongst others	Essential
A self-starter, highly motivated, enthusiastic, dedicated and driven to achieve high standards and results	Essential
An excellent team player who works collaboratively, understands when to seek help if needed and has an ability to support others	Essential
Professional and courteous manner in doing business and dealing with all contacts inside and outside the organisation	Essential
A completer/finisher with a desire to see things through to their conclusion	Essential
Advanced problem solving and analytical skills with the capacity to devise and implement innovative solutions for strategic change	Essential
Able to interpret property market trends	Desirable
Able to work at pace and under pressure	Essential

Behaviours
Respect
Accountability
Togetherness
Openness
Curiosity

Travel Requirement

This position has a significant travel requirement. This means that there is a requirement for a vehicle (or transport deemed to be suitable by the Council) to be available on most working days in order to carry out normal duties. Employees in positions with a significant travel requirement are required to provide a replacement vehicle if their usual vehicle is not available over an extended period.

Context statement prepared by:			
Manager	Jessica Maskrey, Head of Assets & Property	Date	February 2025