

Post Specification

Post Specification - Key Information

- **Post Title: Estates and Investment Assistant**
- **Date: July 2026**
- **Post Group Number: PG 7155**
- **Job Family: Organisational Support**
- **Job Family Role Profile: OS12**
- **Final Grade: Grade 12**

To be read in conjunction with the job family role profile.

Service Area Description

This is a new post within the Estates Team, which forms part of the wider Corporate Assets Service. The Estates team is responsible for the estates / asset management of the Council's diverse portfolio of approximately 1,500 operational and non-operations properties across Westmorland and Furness.

The team, through its professional estates and asset management activities, supports a diverse range of front-line services and back-office functions including children's services, health and care services, highways, corporate buildings, and community infrastructure. The Estates team is responsible for delivering major financial programmes including sales, acquisitions, savings and income generation propositions and statutory capital accounting / asset valuations.

Purpose of this Post

To assist with the management of the Council's property portfolio to help ensure assets are fit for purpose in the context of the Council's Vision, Priorities and Asset Management Strategy.

To support the Estates team in estates and valuation matters relating across Westmorland and Furness and to provide relevant information to the Council, partners and stakeholders as directed.

To support the acceleration of actions arising from the Council's Asset Management Strategy.

To contribute to the Council's locality-based property optimisation projects and major financial delivery plans including sales, acquisitions, savings and income generation propositions and statutory asset valuation programmes.

Key Job Specific Accountabilities

1. Supporting the team with the day-to-day management of the Council's estate including liaising with tenants, responding to enquiries, repairs and carrying out property viewings. Assisting with sales and disposals including viewings.
2. Carrying out and documenting unoccupied and surplus property inspections.
3. Supporting the Estates team to ensure case monitoring records are kept up to date.
4. Uploading, monitoring, and evaluating data onto the Council's property database (Concerto) such as lease details, ownership details, etc.
5. Providing property data to the Estates and other Council teams / departments.

6. Supporting the team with the identification and correct charging of service charges, business rates, rent and other payments.

Resolving enquiries regarding the Council's property portfolio and resolving complex issues with the assistance of other members of the team.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

- **Budget Responsibilities:**
 - Responsible for managing a varied caseload of estates management and asset valuation work with a varying value up to £2.5m.
 - Responsible for consultancy commissions up to a value of £5k.
- **Staff Management Responsibilities:**
 - No direct line management responsibilities
 - To instruct other colleagues i.e. grounds maintenance, building surveyors regarding minor works, etc.
 - Assist facilities management and finance colleagues.
 - Takes a supporting role in estates and asset management matters, not restricted to locality.
- **Other:**
 - Ability to deliver positive and challenging changes within a diverse and extensive property portfolio is essential.

Essential Criteria

- **Qualifications:**
 - Willingness to learn and progress within the property profession possibly working towards a qualification such as becoming a Member of the Royal Institution of Chartered Surveyors (RICS) in due course.
- **Knowledge:**
 - Basic knowledge of estates and asset management processes with a willingness and enthusiasm to develop this knowledge.
- **Experience:**
 - Experience of working in partnership across public, private or third sector
 - Experience of or willingness to engage in dialogue and negotiations with colleagues / stakeholders / members of the public in relation to property issues.
 - Experience of researching and presenting data, report writing and production of presentation material.
 - Experience of working with databases, Microsoft Word, Excel and Powerpoint.
- **Expertise:**
 - Ability to work systematically with good forward planning to meet deadlines.
 - Tactful, resilient, and assertive in dealing with challenging situations.
 - Strong commitment to delivery of value for money public services.
 - Positive approach to team working and new challenges.
 - Positive approach towards problem solving.
 - Valid driving licence.

Disclosure and Barring Service (DBS) Checks

- This post does not require a DBS check.

Job Working Circumstances

- **Emotional Demands:** Minimum exposure
- **Physical Demands:** Modest effort required
- **Working Conditions:** Hybrid agile working. Travel across Westmorland and Furness, occasional travel outside the authority area.
- **Other Factors:** Ability to work flexibly.

Other Factors:

- *requirement to travel*