

<b>Post title</b>	<b>Portfolio Planner</b>
<b>Division / Section</b>	<b>Strategic Asset Planning</b>
<b>Department</b>	<b>Sustainable Development, Place</b>
<b>Responsible To</b>	<b>Strategic Asset Partnership Manager</b>
<b>Number of post holders</b>	<b>4</b>
<b>Acting up/ Secondment</b>	<b>No</b>

### **Purpose of Job**

A technical expert taking the leading role in creating innovative and creative solutions to maximise the optimisation of the Council's estate. Responding to service demand strategies from Heads of Service within the Council and partner agencies such as the Integrated Joint Board and Edinburgh Leisure.

Undertake a range of projects/areas of work to support the optimisation of the Council's estate. This will include:

- Contributing to the development of the Corporate Property Strategy and plan
- Improving the efficiency and utilisation of the Council's Operational Estate through identifying projects.
- Be responsible for the preparation of business cases for approval for investment in the operational estate.
- Ensure that all resources are utilised effectively whilst working towards the delivery of projects.

### **MAJOR TASKS/JOB ACTIVITIES**

Undertake a leading role in range of complex projects/areas of work ensuring outcomes are delivered on time and to a high standard, ensuring they are inline with Council priority outcomes and the Corporate Property strategy.

Support the Strategic Asset Partnership Manager with the development of a Strategic Framework Plan to support all estate optimisation initiatives throughout the Council.

Develop and agree with Strategic Asset Partnership Manager a methodology for identifying and selecting opportunities for development into business cases; this includes agreeing a prioritisation method.

Provide professional advice on complex technical issues to inform the strategy and approach to improving the efficiency and utilisation of the Council's operational estate including identifying surplus assets and developing and managing business cases for approval by Senior Management.

Develop initiatives through proactive participation in extensive stakeholder engagement and relevant governance frameworks to drive demand strategies from primary users of the estate.

Represent the Strategic Asset Partnership Team within the Localities Leadership Teams; develop, monitor and update the Estate strategy within the Locality Improvement Plans.

Each planner will be responsible for a different locality with matrix management of similar projects. Each will also have to develop a relationship with one of the following:

- Education & Children's Service
- Edinburgh Health & Social Care Partnership / IJB
- Place
- Corporate Offices and Support (touching on each Department's office requirements and supporting Resources, CE team, Strategy and Economy)

Explore, define and agree co-location, ways of working and space sharing opportunities to develop further initiatives by engaging with internal stakeholders, partner agencies and third-party organisations.

Demonstrate and support effective planning and decision making, identifying opportunities to introduce change and continuous improvement, responding to the Council's dynamically changing operating model.

Manage ad-hoc demands from Services (outside the demands from Heads of Services) and challenge them where required (e.g. new build proposals on the lifecycle costs and the provision from other departments for running costs and resources).

Identify, develop and prioritise a set of business cases that contribute to the delivery of an estate portfolio in line with the operational estate strategy, tailored to each asset type, and considering the full property lifecycle.

Develop full business cases for approval including robust financial cases and benefits assessments, based on the agreed template, preparing initial budgets for opportunities from other Property & Facilities Management functions and from Finance.

Develop the approved rationalisation business case into detailed plans, essentially in terms of ways of working and how the services will be delivered.

Define and agree with the services "Change Managers" the alterations to the service delivery and map the different components including IT, Security, modification of FM services delivery.

Develop high level implementation plans and programmes and coordinate at high level with the services affected.

Review and update the business case budget and highlight specific risks to the implementation.

Monitor the progress, evolution and implementation of initiatives and business cases with the relevant stakeholders (e.g. Sustainable Construction Delivery team in the case of new build), including budget requirements.

Liaise with and manage external consultants and contractors.

Research best practice, processes, methodologies and approaches to Estate optimisation.

Provide professional advice on complex technical issues to inform the strategy and approach overseen by the Strategic Asset Partnership Manager. Support the Strategic Asset Partnership Manager with the preparation and content of reports, strategic plans, other documents, briefings, presentations and FOIs for Council meetings, external agencies, senior officers, including the Council Management Team and the relevant committees as well as business and stakeholder groups

Ensure effective and efficient reporting to support the Council's democratic process, including Executive committees and Neighbourhood Partnerships, meetings of the Council and Elected Members etc.

Commission PBM for new build delivery

### **Supervision and Management of People (Numbers and type of staff)**

Expected to work under the general direction of the appropriate Management Team/Head of Service, but will necessarily have decision making freedom on a day-to-day basis. They will be required to develop their own work programmes, set their own targets, monitor performance and manage the conflicting priorities and deadlines that such a role entails.

Lead a number of multi-disciplinary teams working to deliver specific project(s) as determined by the appropriate Head of Service. The staffing compliment of these teams will vary according to the work programme, but is likely to be between 5 to 10 employees, comprising design, ICT, building and communications specialists, and service change managers.

Establish and communicate clear standards and expectations and must delegate effectively to make the best use of the skills and resources available.

Be visible, approachable and capable of building the trust necessary to secure the commitment of manager staff to change.

### **Creativity and Innovation**

The post will develop and implement proposals relating to the policy, procedures and strategic development and implementation of a specialist operational service covering a range of professional disciplines. This will involve developing totally new approaches and key policy initiatives in a wide range of subject areas impacting across the Council and/or the entire city, responding to the new Council operating model.

Creative analysis required of the Council's new operating model to develop innovative solutions to complex problems and service challenges where there may be no precedent or relevant policy at a time of operational change.

The post holder's environment is one of varying, and often conflicting, political and other vested interests. The large number of Managers and key Council employees using the services of the section require that there will be a high level of competing priorities and demands, which must be dealt with effectively and diplomatically.

Must demonstrate a creative and constructive approach to problem solving and develop a positive environment that encourages staff and reporting managers to continuously develop and improve services on an incremental as well as transformational basis.

An ability to interpret a range of complex information and to home in on key issues, principles and inter-dependent factors is essential in order to ensure that decisions are properly informed by technical, political and presentational expertise. Must demonstrate confidence in their own judgement whilst encouraging feedback and responding constructively to alternative ideas and proposals.

### **Contacts and Relationships**

Maintain positive and professional relationships with a wide variety of stakeholders within and outwith the Council, negotiating effectively on behalf of the Council.

Develop and maintain effective professional relationships with a diverse range of internal and external colleagues, individuals, external bodies, stakeholders and interest groups.

Effectively manage contacts to ensure required outcomes are successfully delivered, representing the Council with confidence and conviction.

Required to communicate complex, and politically contentious issues which requires a degree of support, persuasion and advocacy.

The post holder would be required to manage projects at the same time delivering differing work environments for differing customers – for example a project to create a new customer hub to serve public face-to-face contact with Council services, and a project to create a new call centre environment, that needs to provide an internal council service with a high-tech response. Differing clients will put differing demands and priorities on each project.

### **Decisions (Discretion)**

The post will provide advice, recommendations and proposals to the senior team members on Strategic Asset Planning service covering the city. The post holder will be responsible for designing change proposals taking full account of services' transformational requirements.

The post will contribute substantially to the final decision on all advice, recommendations and proposals presented to Chief Officials, Elected Members and committees relating to policy, service practice and provision for a specialist operational service across the Council and/or the entire city.

Required to assist in developing and introducing a set of operating processes and procedures in line with the new operating model for Sustainable Delivery and be proactively involved in the continuing need to develop these so they remain fit for purpose.

### **Decisions (Consequences)**

The decisions made in the course of the job will impact on the management and quality of the Council's Strategic Asset Planning service covering the entire city. They will have a direct impact on the council's ability to collaborate and implement its transformation agenda. The postholder will design scenarios to support Council service delivery to maximise outcomes (i.e. co-location of the right services in the right environment), and scope new investment up to the magnitude of 325m, with lifecycle implications of five times that amount.

This is a high profile and complex service area, with significant impact on the Council's reputation (eg closing libraries). The post holder will be responsible for developing proposals with significant risks to the Council and will use professional judgement to assess the situation and advise on a course of action.

### **Resources**

The post holder is responsible for ensuring the optimal use of the operational estate, with a book value of £1.8 billion, identifying efficiencies wherever possible.

The post holder will oversee the delivery of projects up to £1million and develop business cases for projects worth £25million.

### **Environment – Work Demands**

Required to operate effectively in a dynamic environment. The demands of best value, partnership working and local governance arrangements will impact on the complexity of this post.

Manage often opposing views and priorities to ensure a balanced and commercial approach is taken while meeting the regulatory obligations and the strategic aims of the Council.

### **Environment – Physical**

Although the post may be exposed to some adverse working conditions these will be predominantly within the range of normal office based activities. The post will include onsite activities to construction sites.

### **Environment – Working conditions**

Although the post will have some requirement to take care in relation to the working environment, work activities and dealing with people this will not be more than the normal required of a Council employee

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### **Knowledge and Skills**

A degree or an equivalent professional qualification in a relevant discipline is essential with extensive knowledge and skills in a range of related professional disciplines. An appropriate postgraduate or equivalent professional qualification is also expected but relevant experience and demonstrated competence will also be taken into account.

The post holder will have extensive practical experience in the provision of project management preferably with knowledge of using Prince 2 methodology.

Experience in an environment where strategic change and continuous improvement has been required.

### **Health and Safety**

The Council must abide by relevant health & safety and employment law, as well as the common law duty of care. All members of staff are required take care for their personal health and safety and that of others who may be affected by their actions or inactions. You are therefore required to carry out your duties in a safe manner in accordance with instructions and in compliance with safety rules/procedures, regulations and codes of practice. You are required to advise your line manager if you become aware of any unsafe practice or condition or if you have any other safety concerns and should comply with accident and near-miss reporting procedures.

If you supervise, manage or lead other staff, you are also responsible for ensuring that the Council's operations are carried out in such a way that ensures, so far as is reasonably practicable, the health, safety and welfare of those staff and that of any others who may be affected. You will therefore conduct relevant risk assessments and assign duties with appropriate instructions, in compliance with safety rules/procedures, regulations and codes of practice. You will address and/or escalate any issues of any unsafe practice, condition or any other safety concerns you identify or that are brought to your attention, taking appropriate advice as necessary and will ensure that accident and near-miss reporting procedures are understood and complied with.