

# Post Specification

## Post Specification - Key Information

- **Post Title:** Planning Obligations Officer
- **Date:** January 2025
- **Post Group Number:** 8661
- **Job Family:** Regulation and Technical
- **Job Family Role Profile:** RT9
- **Final Grade:** 9

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

## Service Area Description

The Technical Services team provides vital administrative and technical support across the Council's Planning and Building Control functions. The team is responsible for the registration and validation of planning and building control applications, consultation processes, document management, and the maintenance of key records including those for street naming and numbering, land charges, and planning obligations. It also supports the monitoring and administration of Section 106 agreements and the Community Infrastructure Levy (CIL). By ensuring the accuracy and efficiency of systems, data, and statutory procedures, the team plays a critical role in enabling timely decision-making, maintaining transparency, and supporting high-quality service delivery.

## Purpose of this Post

The Planning Obligations Officer is responsible for the calculation, invoicing, and collection of the Community Infrastructure Levy (CIL) from applicable developments. The role supports planning officers in concluding S106 agreements and monitors payments due under these agreements, ensuring that funds are allocated and spent in accordance with legal obligations. The Planning Obligations Officer also ensures accurate records are maintained to support the collation of the annual Infrastructure Funding Statement (IFS). Reporting to the Team Leader for Technical Services, this role is critical in ensuring compliance and transparency in the management of planning obligations and infrastructure funding.

## Key Job Specific Accountabilities

1. **Community Infrastructure Levy (CIL) Management:**
  - Calculate CIL liability for applicable developments, ensuring accurate assessments in line with national legislation and local charging schedules.
  - Issue CIL liability and demand notices, monitor payments, and manage the invoicing process to ensure timely collection of funds.
  - Maintain accurate records of CIL income and expenditures, ensuring compliance with statutory requirements and internal policies.
  - Oversee the administration of the CIL allocation process to appropriate projects
2. **S106 Agreements & Planning Obligations:**
  - Support planning officers in negotiating and finalising S106 agreements, ensuring that developer contributions align with council policies and infrastructure priorities using persuasion to achieve to required outcomes for communities and the area.

- Monitor financial and non-financial obligations within S106 agreements, ensuring payments and deliverables are tracked and enforced.
- Liaise with developers, solicitors, and internal stakeholders to resolve issues related to S106 agreements and payments.

### 3. **Monitoring & Reporting:**

- Oversee the ongoing monitoring of CIL and S106 contributions, ensuring that payments are received and allocated in accordance with agreements and council priorities.
- Ensure the spending of funds complies with S106 agreements and is allocated to appropriate infrastructure projects.
- Maintain detailed records of all planning obligations, providing data to inform the annual Infrastructure Funding Statement (IFS) and other reporting requirements.

### 4. **Stakeholder Engagement & Collaboration:**

- Work closely with internal teams, including Finance, Legal, and Planning Policy, to ensure effective management of CIL and S106 processes.
- Liaise with developers, planning officers, and external partners to address queries related to planning obligations, ensuring clarity and compliance.
- Support community engagement regarding infrastructure funding, contributing to public consultations and stakeholder discussions as required.

### 5. **Policy Compliance & Process Improvement:**

- Ensure all planning obligations activities comply with relevant national legislation, local policies, and best practices.
- Contribute to the review and improvement of processes related to CIL and S106 management, identifying opportunities for greater efficiency and transparency.
- Stay updated on changes in legislation and best practices related to planning obligations, advising the team and adapting processes accordingly.

### 6. **Record Keeping & Financial Management:**

- Maintain accurate and up-to-date records of all planning obligations, including payment schedules, expenditures, and project allocations.
- Assist in reconciling financial records with the Finance team, ensuring transparency and accountability in the management of funds.
- Prepare detailed records and reports to support audits and performance monitoring.

### 7. **Infrastructure Funding Statement (IFS):**

- Compile and provide accurate data for the annual Infrastructure Funding Statement (IFS), ensuring compliance with reporting requirements.
- Work with internal departments to gather information on CIL and S106 income, expenditures, and project outcomes.
- Ensure the IFS reflects the council's achievements and priorities in managing planning obligations and infrastructure funding.

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

## **Key Facts and Figures of the Post**

- **Budget Responsibilities:** None.
- **Staff Management Responsibilities:** None.
- **Other:** None.

## **Essential Criteria**

**Experience:**

- Relevant experience in planning, finance, or a regulatory environment, with a focus on CIL, S106 agreements, or infrastructure funding.
- Experience managing financial processes, including invoicing, payment tracking, and reconciling accounts.

**Qualifications:**

- Degree in Town Planning, Geography, Public Administration, or a related field, or equivalent professional experience.

**Knowledge:**

- Understanding of the Community Infrastructure Levy (CIL), S106 agreements, and associated legislation and policies.

**Expertise:**

- Competent in using planning management systems, financial software, and Microsoft Office, particularly Excel.

**Disclosure and Barring Service (DBS) Checks**

- This post does not require a DBS check.

**Job Working Circumstances**

- **Emotional Demands:** Minimum exposure
- **Physical Demands:** Minimum exposure
- **Working Conditions:** No additional demands

**Other Factors:**

- Ability to travel throughout Westmorland & Furness and occasionally beyond.
- To model and display the corporate standards of behaviour.