

**DUTY STATEMENT**

GS 907T (REV. 08/01)

**SHADED AREA TO REFLECT RECLASS POSITION NUMBER ONLY****INSTRUCTIONS:** Refer to the Essential Functions Duty Statement Manual for instructions on how to complete the Duty Statement.

RPA-

**11714-AMB**

EFFECTIVE DATE:

<b>DGS OFFICE OR CLIENT AGENCY</b> Asset Management Branch	<b>POSITION NUMBER (Agency - Unit - Class - Serial)</b> 719-103-5393-XXX
<b>UNIT NAME AND CITY LOCATED</b> Customer Services Management – West Sacramento	<b>CLASS TITLE</b> Associate Governmental Program Analyst
<b>WORKING DAYS AND WORKING HOURS</b> Monday through Friday 8:00 a.m. to 5:00 p.m.	<b>SPECIFIC LOCATION ASSIGNED TO</b> 707 Third St., 5 <sup>th</sup> Floor, West Sacramento, CA 95605
<b>PROPOSED INCUMBENT (If known)</b>	<b>CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)</b> 719-101-5157-001

YOU ARE A VALUED MEMBER OF THE DEPARTMENT'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO ENABLE THE DEPARTMENT TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.

**BRIEFLY (1 or 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS**

Under the general direction of the Assistant Branch Chief, the AGPA will be the initial point of contact for state agencies requesting services from the Real Estate Services Division (RESD) and will evaluate and determine incoming project requests for assignment to the appropriate project management section. The AGPA will serve as the liaison between the Customer Services Managers (CSM), RESD service providers and customer agencies.

<b>% of time performing duties</b>	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>
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The Department of General Services' (DGS) Core Values and Employee Expectations are key to the success of the Department's Mission. That mission is to "Deliver results by providing timely, cost-effective services and products that support our customers." DGS employees are to adhere to the Core Values and Employee Expectations, and to perform their duties in a way that exhibits and promotes those values and expectations.

**This position is designated under the Conflict of Interest Code. The position is responsible for making, or participating in the making, of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Form 700 within 30 days of appointment. Failure to comply with the Conflict of Interest Code requirements may void the appointment.**

In accordance with the Regional Facilities Plan, Statewide 5 Year Plan, Executive Orders S-10-04, D-46-01, and W-18-91, and other statutory and policy directives regarding asset management, the incumbent will evaluate requests for RESD services for completeness and accuracy; coordinating with the CSM and Regional Portfolio Managers (RPM). The incumbent will seek input for clarification or additional details from the requesting agency, the CSM and the RPM as appropriate. Client agency project requests are initiated electronically via Global CRUISE (Customer Requests: Upgraded Information Sharing Environment).

**SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE**

<b>SUPERVISOR'S NAME (Print)</b> Angela Verbaere	<b>SUPERVISOR'S SIGNATURE</b>	<b>DATE</b>
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**EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT**

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.

<b>EMPLOYEE'S NAME (Print)</b>	<b>EMPLOYEE'S SIGNATURE</b>	<b>DATE</b>
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30%	<p>The Customer Requests Upgraded Information Sharing Environment (CRUISE) system is the automated system that all departments and agencies statewide utilize to initiate requests for any services provided by RESD. The Customer Services Management Unit is the unit within AMB that receives all requests for RESD services and is responsible for managing the CRUISE system, setting up and approving users, analyzing requests including ensuring that all program data necessary to process a request is included, and working closely with requesting departments and RESD service providers to ensure that projects requests are routed to the appropriate service provider and processed timely.</p> <p><b>ESSENTIAL FUNCTIONS</b></p> <p>In order to assign customer service requests to the appropriate project management unit, the incumbent:</p> <ul style="list-style-type: none"> <li>• Gathers project scope data, analyzes information and develops a comprehensive description of the services requested including any ancillary requests describing program use, a project schedule for completing the requested project noting any special requests that would need special handling (such as a request for work as part of a reasonable accommodation) and ensuring funding is sufficiently planned.</li> <li>• Identifies problems with the project scope and develops recommendations to solve those problems. Types of problems are, but not limited to, funding not available, incorrect real estate descriptions, and insufficient time lines.</li> <li>• Meets with CSM, RPM, FMD, and or RESD service providers to discuss any unresolved issues, specialty projects, and or workload problems.</li> <li>• Determines if the project scope contains information technology work that requires Department of Technology approval and obtains said approval if necessary.</li> <li>• Coordinates with the Office of Fiscal Services to develop third party customer account setups.</li> <li>• Responds to CRUISE generated e-mails and phone calls that initiate requests for new CRUISE accounts and password resets. When new accounts are requested the AGPA will initiate contact with appropriate customer supervisor for authorization of new accounts. All requests for new accounts must be vetted with the appropriate level customer supervisor for approval.</li> <li>• Assigns the request to the appropriate RESD unit for project development. Types of projects include requests for new leased space in a privately owned building or a state owned facility, relinquishment of space, acquisition or acquisition package reviews, appraisal and appraisal reviews, architectural or engineering services, feasibility studies, construction or requests for delegation for a variety of real estate transactions.</li> <li>• Meets, confers, and speaks with high level management from requesting departments for data gathering, problem resolution, follow up and or status updates.</li> <li>• Responds to customer inquiries and concerns by researching inquiries, routing customers to the correct RESD resource or service provider or providing comprehensive solutions.</li> </ul>
25%	<p>In order to resolve customer billing errors and set up new Customer Account Numbers, the incumbent:</p> <ul style="list-style-type: none"> <li>• Identifies where the error originated, recommend a course of action to correct the errors and presents solutions to customer, AMB management, and/or FMD and RESD management.</li> <li>• Develops new Customer Account Numbers and ensures that the funding sources are identified and available for use.</li> <li>• Develops and prepares issue memos to address high level errors and/or problems by gathering relevant data and information in support of recommended solutions.</li> </ul>

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25%	<p>In order to avoid delayed projects, the incumbent:</p> <ul style="list-style-type: none"> <li>• Develops and prepares quarterly status reports and presents to customers and internal project management staff.</li> <li>• Develops a system to track all pending requests that are on hold and reconciles to the quarterly status reports.</li> <li>• Meets with assigned RMP and/or RESD, and FMD project manager to gather most recent information to develop solutions to remove on hold projects for assignment or cancellation.</li> </ul>
15%	<p>In order to remain efficient, affordable, and project focused, the incumbent:</p> <ul style="list-style-type: none"> <li>• Analyzes proposed real estate related legislation to determine if there is any significant impact on the way AMB services are provided.</li> <li>• Identifies and develops process improvement plans.</li> <li>• Recommends and develops real estate service policies and procedures.</li> <li>• Develops ad hoc reports as requested by management.</li> </ul>
5%	<p><b>MARGINAL FUNCTIONS</b></p> <ul style="list-style-type: none"> <li>• Develop and maintain customer contact lists.</li> <li>• Draft and distribute various communications to customer agencies.</li> <li>• Update the CSM Manual to ensure that all information is current. Advise the CSMs of any changes that will affect current processes.</li> <li>• Update the RESD Brochure.</li> <li>• Other duties as may be assigned.</li> </ul>
<p><b>KNOWLEDGE, SKILLS AND ABILITIES</b></p>	
<p><b>Knowledge of:</b> Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; governmental functions and organization.</p>	
<p><b>Ability to:</b> Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work.</p>	
<p><b>DESIRABLE QUALIFICATIONS</b></p>	
<ul style="list-style-type: none"> <li>• Extensive knowledge of Microsoft Outlook, Excel, Word, PowerPoint and Access.</li> <li>• Knowledge of Oracle applications, particularly ABMS and PAL.</li> <li>• Knowledge of the Matrix Team concepts and charter team process.</li> <li>• Knowledge of the DGS administrative policies and procedures.</li> <li>• Demonstrated reliability in attendance, project completion, and organization.</li> <li>• Demonstrated ability to exercise a high degree of initiative, independence and originality in performing assigned tasks.</li> <li>• Excellent customer service skills: listen with attention to cues such as content, context, tone, gestures and facial expression; express ideas and facts clearly; interact with others in ways that are friendly, courteous, and tactful and that demonstrate respect for individual and cultural differences and for the attitudes and feelings of others.</li> <li>• Understand and use written information that may be presented in a variety of formats; select reading strategies appropriate to the purpose, such as skimming for highlights, reading for detail, reading for meaning and critical analysis.</li> <li>• Express ideas and information in written form clearly, succinctly, and accurately, and in an organized manner.</li> <li>• Demonstrated skills in organization of work tasks, anticipation of obstacles, and setting priorities.</li> <li>• Demonstrated ability to work independently doing research, and gathering and evaluating information.</li> </ul>	

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	<p><b>SPECIAL PERSONAL REQUIREMENTS</b></p> <ul style="list-style-type: none"><li>• Demonstrated ability to act independently, open-mindedness, flexibility and tact.</li><li>• Present self professionally</li></ul> <p><b>INTERPERSONAL SKILLS</b></p> <ul style="list-style-type: none"><li>• Strong verbal and written communication skills, excellent telephone skills, and desired to be courteous and helpful.</li><li>• Act independently and work will as a team member.</li></ul>