

DUTY STATEMENT

GS 907T (REV. 04/02)

SHADED AREA FOR HUMAN RESOURCES ONLY

INSTRUCTIONS: Refer to the Payroll and Personnel Procedures Manual (PPPM) for Duty Statement Instructions.

RPA-

11779- PMDB

EFFECTIVE DATE:

1. DGS OFFICE OR CLIENT AGENCY Asset Management Branch	POSITION NUMBER (Agency - Unit - Class - Serial) 719-505-9602-013
2. UNIT NAME AND CITY LOCATED Real Property Services Section	3. CLASS TITLE Senior Real Estate Officer (Specialist)
4. WORKING HOURS/SCHEDULE TO BE WORKED 8:00 a.m. to 5:00 p.m.	5. SPECIFIC LOCATION ASSIGNED TO 707 3 rd Street, West Sacramento, CA
6. PROPOSED INCUMBENT (If known)	7. CURRENT POSITION NUMBER (Agency - Unit - Class - Serial) 719-505-9602-013

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.

8. **BRIEFLY (1 - 3 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS**

Under the general direction of the Supervising Real Estate Officer, Real Property Services Section, the incumbent performs the following highly specialized duties:

9. Percentage of time performing duties	10. 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. (Use additional sheet if necessary)
	<p>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.</p> <p>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.</p> <p>The Senior Real Estate Officer (Spec) performs independent analysis, prepares appraisals, reviews appraisals and acquisitions, performs due diligence, acquires, sells and leases real property for the Department of General Services and other state agencies except Caltrans and the University of California, upon receiving requests of an internal or external client, in accordance with the Real Estate Services Section Policy and Procedures Manual, State Administrative Manual, and various state and federal codes and regulations as guidelines.</p> <p>The work is initiated by both external and internal requests such as those from the Department of Finance, client agencies, local agencies, private sector, and special legislation.</p>

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

SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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12. **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 to balance the workload.

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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DUTY STATEMENT**RPA- 11779-PMDB**

GS 907T (REV. 1/98)

9. Percentage of time performing duties	10. 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>
35%	<p>ESSENTIAL FUNCTIONS</p> <p><u>Appraisal Review</u> Performs desk and field reviews of the most complex high-value and politically sensitive real property appraisal reports, valuing fee or any lesser property interest, with a high degree of independence in order to approve, reject or arrive at an alternative value based on information provided in the appraisal by preparing written reports based on opinions formed as to the completeness of the report, the adequacy and relevance of the comparable data, the propriety of adjustments to the data, the appropriateness of the appraisal methods and techniques, and the appropriateness and reasonableness of the analyses, opinions, and conclusions in accordance with established guidelines and procedures (Uniform Standards of Professional Appraisal Practice).</p>
30%	<p><u>Appraisal</u> Performs site inspections and prepares real property appraisals of the most complex high-value and politically sensitive real properties in order to determine the fair market value, in fee or any lesser interest, for the purpose of acquiring or disposing of real property and the leasing of state-owned property, by conducting independent data research, field work, and analyses of data e.g., comparable sales and other economic information regarding the local market in accordance with established guidelines and policies. Many of these properties are valued in excess of \$1 million and some in excess of \$10 million.</p>
15%	<p>Develops a separate written opinion of value, upon rejection of the appraisal under review, that was originally submitted in the appraisal report in order to arrive at a market value estimate approved by the Department of General Services by conducting independent data research, field work, and analyses of data e.g., comparable sales and other economic information regarding the local market in accordance with established guidelines and policies as required by the Government Code and the State Administrative Manual and in accordance with U.S.P.A.P. guidelines.</p>
10%	<p>In order to ensure that the state acquires property under appropriate terms and conditions in accordance with state law and policy:</p> <ul style="list-style-type: none"> • Prepares or reviews complete acquisition packages on most difficult and complex requests for proposed site submittals by analyzing the deeds, contracts, summaries, etc. • Arranges for appraisal of site through a service request or personal services contract. • Arranges for the review of the appraisal and insures that the appraisal and review is sufficient to move the project to site selection by coordinating with the review unit and becoming fully knowledgeable with the appraisal and the appraisal report. • Resolves zoning problems by working with property owner and local government agencies. • Prepares and analyzes or reviews all necessary advertisements for property to be used for state facilities by placing the ad or reviewing the ad in the local newspaper nearest the property. • Analyzes actual proposals and recommends site selection based on pertinent information received from newspaper ads and any other information gathered. • Prepares and or reviews market study to determine probable purchase price by analyzing local economic conditions. • Meets with high level state and local agency representatives such as Facility Chiefs and the Deputy Director by traveling to the facility or at the various off-site locations. • Appears at the State Public Works Board meeting to explain acquisitions process and support or justify the site selection recommendation as required.

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10%	<p>With the assistance of legal counsel, develops creative and complex language by applying real estate expertise, various code, statute, and regulation references and by interpreting various manuals such as the Real Estate Policy and Procedure Manual, the State Administrative Manual to be used in documents such as sales and purchase agreements or MOU's between state agencies in order to successfully accomplish the goals of General Services, the client agency, the purchaser or property owner, and the local jurisdiction while ensuring compliance all applicable policies, regulations and laws. The work is initiated by both external and internal requests.</p> <p>MARGINAL FUNCTIONS</p> <p>Conducts research and makes recommendations, through briefings and written analysis, to upper management, clients, and control agencies regarding the appraisal and acquisition of real property.</p> <p>Acts as a mentor to subordinate staff by providing advice and assistance on complex appraisal and acquisition problems in order to assist in the training and development of Real Estate Officers in accordance with U.S.P.A.P., the Real Estate Services Section Policy and Procedures Manual, the State Administrative Manual and various state and federal codes providing direction and guidelines.</p> <p>Attends management and project meetings to help keep the project on task, to keep customers and management informed by communicating project status and issue information and to resolve issues by either teleconferencing or meeting with clients face-to-face as requested by management.</p> <p>KNOWLEDGE AND ABILITIES</p> <p>Knowledge of: Factors involved in appraising property; principles, methods, and techniques used in the acquisition or disposition of real property and in negotiating commercial leases; legal procedures and documents involved in real property transactions; real property law concerned with acquisition, eminent domain, leasing, and sale of real property; rural and urban property values and the effect of economic trends upon value, price, and construction cost of improvements; portfolio management; due diligence; negotiation for and asset enhancement of leased commercial space; facility planning; asset enhancement of real property; and common methods of legally describing real property.</p> <p>Principles, practices, and trends of public and business administration, including management analysis, planning, and program evaluation; formal and informal aspects of the legislative process, budget process, and the administration and Department's goals and policies; principles and practices of real estate asset management such as real estate acquisition, development, leasing, sales, planning (long-range and tactical), including the concept of real estate evaluation and building operational costs, cost/benefit analysis and economics; factors and considerations in appraising real property and real property rights; development and asset enhancement of real property EDP systems; legal descriptions, procedures, and documents involved in real property transactions; principles, methods, and techniques used in the acquisition, disposition, or leasing of real property; financial analysis principles and concepts as it relates to real estate asset management such as real estate acquisition, development, leasing, sales, and planning; rural and urban property values and their effect on economic trends upon value, price, and construction cost of improvements; computer software (i.e., databases, spreadsheets, project management software, Outlook, etc); negotiation techniques and strategies; project management concepts and principles; and leadership skills, techniques, and methods.</p>

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9. Percentage of time performing duties	10. 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>
	<p>Ability to: Understand and apply the laws, policies, rules, and regulations relating to the appraisal, acquisition, and leasing of real property for public use purposes; negotiate effectively; appraise real property accurately; read and interpret maps, plans, and data relating to property locations; write clear and concise reports; analyze situations and data accurately and adopt an effective course of action; establish and maintain cooperative relations with those contacted in the course of the work; and communicate effectively.</p> <p>The ability to effectively lead and direct the work of other Real Estate Officers.</p> <p>Interpret and apply laws, rules, regulations, and policies as related to real estate asset management such as real estate acquisition, appraisal, development, leasing, sales, and planning; analyze situations accurately, make recommendations, and/or take effective action as it relates to real estate asset management such as real estate acquisition, appraisal, development, leasing, sales, and planning; establish and maintain cooperative relations with departmental employees, personnel from other State agencies, staff from Federal and/or local agencies, stakeholders, vendors, consultants, and/or the public regarding technical and program matters; effectively negotiate and apply methods, techniques, and strategies used in the negotiation of leases, acquisition, disposition, and management of real property; interpret complex data used to legally describe real property; perform accurate financial analysis and evaluation as it applies to real estate appraisal, management, acquisition, development, leasing, and sales; prepare technical reports, documents, memoranda, and materials relating to a variety of real property transactions; take action and/or make commitments in a variety of situations; coordinate several competing projects or activities; operate computer software (i.e., databases, spreadsheets, project management software, Outlook, etc); represent the department and the division and make effective public presentations to large audiences; perform and understand mathematical functions and processes sufficient to analyze real estate value, finance and economic trends, and specific real estate deal points for acquisition, sale, or leasing of real property; and work effectively in a matrix team environment.</p> <p>SPECIAL REQUIREMENTS Interest in and aptitude for real property appraisal, acquisition and commercial lease negotiation work; demonstrated creative ability; tact, patience, willingness to work at odd hours, willingness to multi-task in a stressful environment, to think creatively, and problem solve in a variety of situations, to continually learn and assimilate new information, to lift office supplies, books and manuals weighing up to ten pounds, and to walk over a variety of different terrains; and to travel independently throughout the State.</p> <p>DESIRABLE QUALIFICATIONS</p> <ul style="list-style-type: none"> • Excellent leadership skills. • Excellent problem solving skills. • Experience in public speaking and making oral presentations to high level audiences. • Experience planning and implementing change in a Matrix-based organization. • Excellent computer utilization skills including the use of the internet, electronic mail, Word, Outlook, spreadsheets, and databases. • Administrative experience with policy formulation in real estate with emphasis on acquisition, leasing, surplus sales, lease/purchase and appraisal. • Experience with public real estate acquisitions, sales and/or appraisals involving multi-million dollar transactions. • Knowledge of real estate law, practices, and terminology as applied to public sector transactions. • Excellent communication, analytical, and negotiation skills. • Ability to work independently, as a team leader, and a team member. • Understanding of the State Legislative process. • Understanding of the importance of the acquisition process in a matrix organization. • Knowledge of real estate law, practices, and terminology as applied to public sector transactions with emphasis on the Uniform Standards of Professional Appraisals Practices. • Possession of a current State of California Certified General appraisal license.

WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES

Work Environment:

- Professional office environment and protocol.

Physical Abilities:

- Use a telephone to obtain and impart information.
- Requires physical mobility to walk over a variety of different terrains in order to inspect the real property.
- Travel independently and/or with others (by vehicle or airplane) to sites in remote locations throughout the state.
- Visit worksites in inclement weather conditions.
- Daily use of PC and related applicable software at a work station.
- Lift office supplies, plans, books and manuals weighing up to 10 pounds.
- Work extended hours.

Mental Abilities

- Work under pressure, effectively handle stress and deadlines.
- Ability to multi-task.