

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-

11877-PMDB

EFFECTIVE DATE:

7/15/2016

DGS OFFICE OR CLIENT AGENCY Project Management & Development Branch	POSITION NUMBER (Agency - Unit - Class - Serial) 719-503-9595-048
UNIT NAME AND CITY LOCATED Real Estate Leasing and Planning – West Sacramento	CLASS TITLE Associate Real Estate Officer
WORKING DAYS AND WORKING HOURS Monday through Friday 8:00 a.m. to 5:00 p.m.	SPECIFIC LOCATION ASSIGNED TO 707 3 rd Street, West Sacramento, CA 95605
PROPOSED INCUMBENT (If known)	CURRENT POSITION NUMBER (Agency - Unit - Class - Serial) 719-503-9595-048

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 supervision of the Senior Real Estate Officer, Supervisory, and/or Supervising Real Estate Officer the incumbent will independently perform complex and difficult duties in order to provide service requested by internal and external customers:

% of time performing duties	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)
30%	<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 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>ESSENTIAL FUNCTIONS</p> <p>In order to provide suitable office and warehouse facilities for customers which includes assessing customers' program needs, administering complex lease terms, evaluating and selecting appropriate facilities for client agencies in accordance with the, Cruise Request, Form 9 Space Action Request, lease terms and conditions and accepted industry practices and the RESD Leasing Manual, RESD's Regional Facility Plans, and the guidelines outlined in the MOU between DGS and DOF:</p>

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

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE

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.

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE

DUTY STATEMENT

GS 907T (REV. 03/05)

RPA- 11877 -PMDB

% of time performing duties	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>
	<ul style="list-style-type: none"> • Meets with customers to assess their program needs by analyzing their needs for office, warehouse, and other types of facilities to be leased for state occupancy. • Determines that their needs are consistent with RESD Regional Facility Plans by comparing their needs with approved Regional Facility Plans. • Personally inspects facilities and determines if they meet the state's requirements by onsite inspections that might include walking irregular terrains. • Assists customers in securing approval of the Department of Finance (DOF) as necessary, by providing support and consultation in the Form 10 completion and submission. • Gathers and evaluates data regarding real estate market conditions to determine appropriate rental rates using relevant market comparable data (i.e. advertising, current leases, internet). • Assist customer with facility issues by interpreting and clarifying lease terms and conditions. • Formats documents legally sufficient for execution on behalf of the state in order to effect the successful completion of nondisturbance and attornment agreements, estoppel certificates, and change of ownership documentation.
20%	<p>Negotiates complex lease terms and conditions with Lessor, Lessor's agent or representative in order to ensure lease compliance, secure appropriate leased facilities that satisfy various state programmatic needs at current market rates or better by collecting and analyzing market data, and using sound real estate and business principles and practices, various types of communication (i.e. using face to face meetings and telephone calls) in accordance with the Cruise Request, Form 9 Space Action Request, lease terms and conditions, RESD Leasing Manual, the State Administrative Manual and various State and Federal codes and regulations.</p>
20%	<p>In order to execute documents that secure leased facilities, maintain tenantable quarters, and protect the State's interest in accordance with the Cruise Request, Form 9 Space Action Request, lease terms and conditions, RESD Leasing Manual, the State Administrative Manual and various State and Federal codes and regulations</p> <ul style="list-style-type: none"> • Prepares written lease contracts, leases amendments, and other related real estate documents, including notices to the Joint Legislative Budget Committee using document templates and boiler plate language and PC software such as Word and Excel, and using sound real estate principles and practices. • Drafts original lease language for unique situations that is reviewed and approved by DGS Legal and immediate supervisor using principals of real estate contract law.
10%	<p>Prepares status reports on projects and meets with customer agencies to provide updates on the progress of projects, resolve problems, and to facilitate a successful project delivery and better service to customers using Excel and Access software in accordance with RESD's customer service principles and project management policies.</p>

DUTY STATEMENT

GS 907T (REV. 03/05)

RPA- 11877 -PMDB

<p>% of time performing duties</p>	<p>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>
<p>10%</p>	<p>Informs and educates industry professionals (i.e. real estate brokers, building owners, building managers, etc.) regarding the State's leasing process and in order to ensure a successful project delivery and provide better service to customers in accordance with RESD policy and the office goals and objective of improving State client leasing programs in accordance with the Leasing Manual. This is accomplished by meeting with building owners, brokers, developers, and other industry professionals to explain the state's facilities requirements and specific customer needs using the state's standard lease policies and documents and the customer's program data that is consistent with the Cruise Request, Form 9 Space Action Request and accepted industry practices, and the RESD Leasing Manual.</p> <p>In order to improve the State's Leasing Program, provide better customer service, and protect the State's interest in accordance with the RESD Leasing Manual, RESD policy, State Administrative Manual and various State/Federal codes and regulations, and the office goals:</p> <ul style="list-style-type: none"> • Provides advice, assistance and training to other Real Estate Officers by using training tools such as the RESD Leasing Manual, organized training classes for real estate officers (i.e. special classes, all staff meetings, etc.) • Provides advice, assistance and training to Client Agencies by using training tools such the Facilities Development Overview (FDO) training class and manual for client agencies • Assists in the preparation and delivery of specific training programs on leasing policies and procedures to in house staff and to customers by using Power Point Presentations, one on one and/or group meetings • Interprets and applies policies and procedures relating to lease negotiations and space planning, i.e. seismic safety, ADA, sustainability, asbestos, etc. by making on site inspections to visually determine if proposed leased facilities are in compliance and/or proposed remedies will bring them into compliance • Evaluates pending legislation that may affect the state's leasing operations by comparing the contents and weighing the benefits against potential problems. • Makes recommendations for improvements to leasing policies and practices by using sound judgment, real estate business principles and practices.
<p>10%</p>	<p>Marginal Functions</p> <p>Participates in matrix teams or small work groups assigned special projects for the purpose of solving problems and/or developing new procedures or products in order to improve customer service between RESD Branches by actively representing PSB using effective communication and cooperation with other team members, in accordance with effective teamwork principles and RESD's policies for matrix teams.</p> <p>KNOWLEDGE AND ABILITIES</p> <p><i>Knowledge of:</i> 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>

DUTY STATEMENT

GS 907T (REV. 03/05)

RPA- 11877 -PMDB

% of time performing duties	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><i>Ability to:</i> 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>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"> • Interest in and aptitude for commercial lease negotiation work. • Excellent problem solving skills. • Excellent communication, analytical, and negotiation skills. • Understanding of the State Legislative process. • Leadership ability, creative ability, tact, and patience. • Willingness to work at odd hours and to travel throughout the State. • Effectively use electronic project management systems with the ability to prepare spreadsheets and communicate on the Internet and LAN systems. • Possession of a Valid California driver's license, Class C. • Ability to exercise a high degree of diplomacy, initiative, independence and originality.