

**PORTFOLIO MANAGEMENT, LONG RANGE PLANNING, AND POLICY AND STANDARDS SECTION****1310.3**

(Revised 03/06)

Portfolio Management Unit. Regional Portfolio Managers in this unit have expert knowledge of local commercial real estate markets. They are responsible for managing the state-owned and leased assets, initial review of proposed projects, implementation of the regional facilities plan, preparation of the rent rolls for DGS owned office buildings, and identification of unused or underutilized state assets. Four portfolio managers are assigned to the major metropolitan planning areas and the fifth portfolio manager has responsibility for the balance of the state. This unit also provides services related to the following policy that is strengthened and codified in Government Code Section 14682:

1. Existing state-owned or state-controlled space must be utilized before the leasing of additional space can be considered. Special requirements such as conference, hearing, and training rooms will be provided if suitable alternate facilities are not conveniently located or it is not economical to rent such facilities periodically.
2. When tenant agencies located in existing state-owned space vacate their premises, they are obligated to continue paying rent for this space until a new tenant can be assigned or until RESD can negotiate a mutual termination of the lease. If DGS generated the tenant's relinquishment they are not so obligated. Early notification to the RESD's CAM about the possible need to vacate space is encouraged to avoid unnecessary rental payments.

Long Range Planning Unit. Responsible for collecting information and projecting future state office space needs, developing regional plans and implementation strategies to meet the state's identified needs, preparing long-term forecasts of capital requirements for state facilities and preparing economic analysis for new projects. The regional facilities plans are updated annually for the major metropolitan areas and on a rotating schedule for the balance of the state. The Long Range Planning Unit also prepares individual facility plans, master plans and other planning documents at the request of individual client state agencies, the administration and the Legislature. These plans may include alternative office opportunities, transportation and parking issues, land use strategies, site planning, and facility massing alternatives.

Policy and Standards Unit. Identifies, reviews and consolidates the real estate and facility related policies and standards for the RESD. It works with all branches within the division, and its customers, to ensure a clear understanding of policies and standards. This unit works closely with the division's executive committee, assists in the development of new policies, and suggests appropriate revisions to existing policies and standards.