

## SAM – REAL ESTATE SERVICES DIVISION

### PORTFOLIO MANAGEMENT SECTION

1310.2

(Revised 6/2014)

The Portfolio Management Section is the initial point of contact for new RESD projects and serves as a liaison to RESD for state agencies.

Customer Services Managers (CSMs) are assigned by agency and are the central point of contact to RESD. CSMs review incoming CRUISE requests for completeness and direct each request to the appropriate branch for project execution. This unit maintains an understanding of the customers programs, real estate and facility requirements, and assists with collaboration among RESD programs.

Regional Portfolio Managers (RPMs) review all project requests to ensure RESD services are provided from a statewide, strategic asset management perspective and reflect state management, policy and statutory priorities. The RPMs also maintain a profile of the state's real estate portfolio by managing the utilization of space in a state-owned or DGS-controlled office building, assisting agencies with planning short and long term real estate needs, and developing regional plans for future state office requirements.

While managing space assignments in state facilities pursuant to the [State Administrative Manual Management Memo 04-17](#), the following terms and conditions in the [DGS Building Occupancy Policy](#) (Policy) pertain to state agencies (occupant agencies) that hire from the DGS certain premises with the appurtenances situated in various cities within the State of California. Occupant agencies are assigned space subject to the terms contained in the Policy, Building Rules and Regulations, Space Assignment GS 4091, legislative mandates, and any and all applicable State of California statutes, policies, and regulations.