| Job Family | Facilities Development and EHS | Job Summary | Conduction of analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and / or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities. |
| --- | --- | --- | |
| Job Function | Real Estate Management | Category | Professional |
| Job Level | Entry | Intermediate | Experienced | Advanced | Expert |
| Job Title | Real Estate Spec 1 | Real Estate Officer 2 | Real Estate Officer 3 | Real Estate Officer 4 | Real Estate Officer 5 |
| Job Code | S814 | S677 | 0695 | 0238 |
| Tracking Code | A1443 | A1444 | A0753 | A0754 |
| Per. Program | PSS | PSS | PSS | MSP | MSP |
| FLSA | Non-Exempt | Exempt | Exempt | Exempt |
| Generic Scope | Entry-level professional with limited prior experience; learns to use professional concepts to resolve problems of limited scope and complexity; works on assignments that are initially routine in nature, requiring limited judgment and decision making. Employees at this level are expected to acquire the skills and knowledge to perform more advanced work following an agreed upon time in position, through defined training and development planning. | Professional who applies acquired job skills, policies, and procedures to complete substantive assignments / projects / tasks of moderate scope and complexity; exercises judgment within defined guidelines and practices to determine appropriate action. | Experienced professional who knows how to apply theory and put it into practice with in-depth understanding of the professional field; independently performs the full range of responsibilities within the function; possesses broad job knowledge; analyzes problems / issues of diverse scope and determines solutions. | Technical leader with a high degree of knowledge in the overall field and recognized expertise in specific areas; problem-solving frequently requires analysis of unique issues / problems without precedent and / or structure. May manage programs that include formulating strategies and administering policies, processes, and resources; functions with a high degree of autonomy. | Recognized organization-wide expert. Has significant impact and influence on organizational policy and program development. Regularly leads projects of critical importance to the organization; these projects carry substantial consequences of success or failure. Directs programs with organization-wide impact (or may have impact beyond the University) that include formulating strategies and administering policies, processes, and resources. Significant barriers to entry exist at this level. |
| Custom Scope | Provides professional analytical, technical, and research support in meeting overall department goals and objectives for University real property management requirements. Assist with market research, preparing documents, contract proposals, contracts, supporting documents and property financial comparable analysis that support real property transactions. Monitors and makes recommendations for resolution of rent and operating expenses, tenant / landlord relations, lease terminations, property tax exemptions and insurance compliance. Manages and maintains the department real estate database and records | Applies professional knowledge or expertise in one or more specialty areas of real estate and serves as lead person on one or more program(s) within a single discipline. Demonstrates good judgment in selecting methods and techniques for obtaining solutions. Experienced professional who applies needed analysis in support of real estate transactions and decision-making efforts in their Specialty area. Completes financial analyses to evaluate decisions. Completes any required forecasts, budget analyses and reports of activities. Participates in negotiation efforts. | Uses advanced real estate skills to complete needed analysis for real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and / or disposition of real property in compliance with University policy. Manages compliance with agreements and contracts within their specialty. Provides technical expertise in conceptualizing, structuring, and developing proposals for real estate transactions. Leads negotiation efforts. Leads financial analyses to evaluate and recommend lease vs. purchase decisions. Reviews forecasts, budget analyses and reports of activities. Uses | The technical expert in evaluating and negotiating acquisitions, leases and sales of property for the University. Uses expert administration skills in providing leadership and professional services to attain the best use of the University’s real estate assets which is strategic in carrying out the University’s mission. Expert in one or more of the disciplines in analyzing real estate transactions and decision-making and negotiation efforts. May represent the real estate office in a field / discipline at meetings and conferences involving academic compliance committees, campus, system wide, local government, state and federal levels of |
**Job Summary**

Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and / or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

**Job Level**

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- **Entry**: System. Creates complex reports for management and Office of the President. Enforces fiscal compliance for real property contracts. Analyzes and controls reporting of complex revenue producing projects. Manages all financial matters within the department. Researches, analyzes and makes recommendations on a wide variety of complex and confidential existing and new programs. Requires high level of professionalism, independent thinking, problem solving and decision making.

- **Intermediate**: Advanced skills to provide real estate services, analyses, negotiations, legal contracting and management of commercial real estate transactions. Functions independently and is responsible for managing, implementing and permitting uses of University property by non-University entities, and uses of non-University owned properties by University entities, including but not limited to managing and / or implementing Real Property Licensing Programs, Telecommunications Licensing Program, On-Campus Licensing, Off-Campus Licensing Program, Campus Retail Advisory Services, and compliance activities related to the foregoing programs. Manages and implements these functions which involve research, complex financial analysis, complex business and contract negotiations, contract document creation, and site improvement coordination with private, public and governmental agency representatives, business owners, property owners, developers, real estate brokers and attorneys.

- **Experienced**: Authority in matters related to field of expertise. Decision-making is based on established procedures and integration and / or interpretation of relevant laws, regulations and organization policy and professional best practices.

- **Advanced**: Performs the most complex financial and other forms of real estate analysis.

- **Expert**: Performs the most complex financial and other forms of real estate analysis.

**Key Resp 01**

- Responsible for real property contract administration for the University’s real property portfolio (Regents as Tenant) and development and management of fiscal compliance program for the University’s real estate portfolio (Regents as Landlord / Licensor).

- Identifies properties and property information; analyzes income and expense components and develops single year pro forma operating statements.

- Manages all aspects of the Licensing and Retail Lease programs. Develops income projections and discounted cash flow analysis.

- Performs the most complex financial and other forms of real estate analysis.

**Key Resp 02**

- Assist in drafting and preparing proposals, contracts, correspondence.

- Coordinates valuation process, contract appraiser and other consultants as necessary.

- Analyzes submittals from external entities for accuracy and obtains necessary approvals.

- Provides guidance to all UC locations and UCOP staff.
Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and / or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

| Key Resp 03 | Compiles, develops, coordinates and distributes contract and ancillary documents. | Defines and develops complex budgetary, financial and programmatic feasibility and analytic studies with significant economic impacts. Analyzes lease space alternatives. | Analyzes complex data and negotiates license fees. Develops, analyzes, negotiates and drafts complex contracts incorporating financing, leasing and partnership terms. |
| Key Resp 04 | Manages and maintains the department’s real estate database and records system and creates complex reports for management and Office of the President. | Coordinates transaction negotiation and documentation, due diligence and escrow for gifts, leases, purchases and sales of lower valued University related properties. Negotiates complex real estate terms / conditions and contract language. | Values all types of property and independently reaches conclusions based on original work and review of third party appraisals. Plans and directs transactions to fit within the University policy framework while still creatively structuring the transactions to achieve the desired results. |
| Key Resp 05 | Responsible for analyzing, interpreting real estate contracts to determine and verify that insurance requirements, legal requirements and all monetary contractual obligations are in compliance. | Assures that University policies and procedures are followed in connection with real estate transactions consistent with the fiduciary responsibility for such transactions. | Independently leads the negotiating team (local and UCOP staff) for all University real estate related transactions within their specialty and execution of documents (subject to appropriate approval). |
| Key Resp 06 | Independently prepares complex reports summarizing real property contract obligations, compliance, cash-flow, expenses, debt and fund distribution. | Preparing and coordinating Regents forms and Office of the President approval forms. | Recommends and documents policies and procedures. |
| Key Resp 07 | Calculated and prepares invoices for rents and expenses and late notices for fees owed. | Manages annual expense and budget reports. | Prepares and coordinates Regents items and Presidential approval letters for complex transactions and assures that such documents fully and clearly disclose transaction terms and issues. |
| Key Resp 08 | Participates in coordinating the approval process for real property transactions including Regents items and Presidential approval letters. | Provides guidance identifying approaches to transactions that best meet objectives. |
| Key Resp 09 | Assists with the administration of the | Performs site selection review and | |

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<td>Key Resp 03</td>
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<td>and financial analysis for real property transactions.</td>
<td>needed. Reviews outside appraisal and recommends value conclusion.</td>
<td>required preliminary and policy compliance approvals. Evaluates complex title and due diligence issues.</td>
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<td>Key Resp 04</td>
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<td></td>
<td>Uses expert techniques for property valuation, including discounted cash flow and development residual analysis to estimate value.</td>
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<tr>
<td>Key Resp 05</td>
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<td></td>
<td>Leads negotiating teams to achieve optimal results for the University consistent with University Policy and good business practices.</td>
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<td>Key Resp 06</td>
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### Job Summary
Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and / or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

### Job Function
Real Estate Management

### Category
Professional

### Job Level
- Entry
- Intermediate
- Experienced
- Advanced
- Expert

### Key Resp 10
- Oversees the customer service program, ensuring customer service surveys are distributed and tracks / records all results.
- Manages and coordinates tenant improvement process in real estate transactions, assesses client needs, coordinates space planning, reviews and monitors tenant improvement costs, and coordinates required approvals / inspections. Monitors progress of tenant improvement work and cost to ensure that project timelines are met and within budget.

### Key Resp 11
- Responsible for all aspects of the budgetary and financial management program and reporting requirements for the Real Estate department.
- Manages contract compliance with all contract terms.

### Key Resp 12
- Participates in the annual fiscal closing process and responsible for fiscal closing entries for annual activity.
- Protects the legal, financial and contractual interest of the Regents, limiting the potential for liability.

### Key Resp 13
- Oversees the cash handling process and department fiscal transactions.
- Manages and maintains relationships with internal and external entities.

### Key Resp 14
- Provides work direction to administrative staff and supervision of student employees.
- Interprets contract requirements and represents the University in licensor compliance issues and / or disputes.

### Key Resp 15
- Provides back-up support for office administrative duties and assist with special projects.
- Creates annual reports for management and Office of the President. Prepares and oversees the filing of annual possessory interest usage report.

### Education 1
Bachelor's degree in related area and / or equivalent experience / training.

### Education 2
Bachelor's degree in related area and / or equivalent experience / training.

### Education 3
Bachelor's degree in related area and / or equivalent experience / training.

### Education 4
Bachelor's degree in related area and / or equivalent experience / training.

### License 1
Possession and maintenance of a valid Valid California Driver's license

### Last Revised: 24 August 2017
Job Family | Facilities Development and EHS | Job Summary | Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and/or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

Job Function | Real Estate Management | Category | Professional

Job Level | Entry | Intermediate | Experienced | Advanced | Expert
---|---|---|---|---|---
License 2 | California Driver’s license. | Intent to obtain California Real Estate Salesperson’s or Broker’s license within 1 year is preferred. | California Real Estate Salesperson’s or Broker’s license preferred. | California Real Estate Salesperson’s or Broker’s license preferred. | California Real Estate Salesperson’s or Broker’s license preferred.
License 3 | | | | | 
License 4 | | | | | 
Cert 1 | | | | | 
Cert 2 | | | | | 
Cert 3 | | | | | 
Cert 4 | | | | | 
Spec Cond 1 | | | | | 
Spec Cond 2 | | | | | 
Spec Cond 3 | | | | | 
Spec Cond 4 | | | | | 
KSA 01 | Demonstrated working knowledge and experience in real property leasing, property management, real estate terminology, contract writing and interpretation, administrative analysis, and operations research. | Professional experience in commercial real estate practices and lease contract development. | Advanced knowledge of real estate principles and practices, methods and procedures used in competitive real estate transactions, including value analysis, and source selection techniques. Professional experience in commercial real estate practices and lease contract development. | Expert knowledge of real estate principles and practices, methods and procedures used in competitive real estate transactions, including value analysis and sources, selection techniques, applicable rules, regulations, laws, policies, guidelines and practices. 

KSA 02 | Demonstrated analytical ability and skill in problem solving, data gathering, analyzing problems, making recommendations, and implementing solutions. | Demonstrated knowledge and understanding of commercial property management, basic real estate law, and contract interpretation. | Advanced knowledge of real estate law and contract interpretation, the California Public Contract Code and an advanced understanding of University’s Business and Finance Bulletins and other relevant rules, guidelines, policies and practices. | Expert knowledge of real estate law, the California Public Contract Code and an expert in understanding the University’s Business and Finance Bulletins and other relevant rules, guidelines, policies and practices. 

KSA 03 | Demonstrated ability to analyze and interpret written material, financial data, and computer generated information; and prepare concise, professional, well organized reports, | Proven ability and experience in conducting lease negotiations relating to financial and legal contractual terms, contract development, space planning, coordinating tenant improvements | Advanced knowledge and understanding of specific real estate assignments, such as proven ability and experience in conducting lease negotiations relating to financial and | Expert knowledge of and skills in business transactions in a complex legal and policy environment.
**Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and/or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.**

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<td><strong>KSA 04</strong></td>
<td>Demonstrated knowledge of economic and general accounting principles and practices, and ability to perform basic financial analyses.</td>
<td>High level of analytical, mathematical and decision-making skills in order to analyze and interpret financial and legal contractual terms and to draft formal contracts.</td>
<td>High level of analytical, mathematical and decision making skills in order to analyze and interpret financial and legal contractual terms and draft formal contracts.</td>
<td>Expert organizational, presentation and negotiation skills.</td>
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<td><strong>KSA 05</strong></td>
<td>Advanced computer skills, in a PC environment, including word processing, spreadsheet, and database applications for producing complex legal contracts, financial analyses, and database development.</td>
<td>Ability to effectively resolve legal, financial and contractual issues and disputes.</td>
<td>Advanced organizational and negotiation skills. Ability to effectively resolve financial and contractual issues and disputes.</td>
<td>Expert written, verbal and interpersonal communication skills, including expert ability to deal with broad and diverse constituencies with expert customer service orientation and skills.</td>
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<td><strong>KSA 06</strong></td>
<td>Excellent communication and interpersonal skills to effectively present ideas concisely and clearly, in written and oral forms, to a broad variety of university and public professionals, using tact, diplomacy, good judgment, and confidentiality.</td>
<td>Excellent interpersonal skills, including tact, diplomacy and flexibility to interact and maintain working relationships with University departments, University administration, industry representatives, charitable organizations and governmental agencies, including skills to clearly communicate information to a broad variety of people in written form, in person and on the telephone.</td>
<td>Advanced listening, political acumen skills and problem recognition, avoidance and resolution skills. Advanced interpersonal skills, including tact, diplomacy and flexibility to establish, interact and maintain working relationships with University departments, University administration, private industry representatives, charitable organizations and governmental agencies, including advanced written and verbal communications skills to clearly communicate information to broad and diverse constituencies with advanced customer service orientation and skills, in written form, in person and on the telephone.</td>
<td>Expert listening and political acumen skills, and problem recognition, avoidance and resolution skills.</td>
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<td><strong>KSA 07</strong></td>
<td>Experience with and knowledge of financial analysis and summaries.</td>
<td>Projects, finance, and property management.</td>
<td>Legal contractual terms, contract development, space planning, coordinating tenant improvement projects, finance and property management, and superior skills in lease negotiation and drafting of leases and legal documents.</td>
<td>Understanding of risk management, Understanding of risk management,</td>
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Job Family | Facilities Development and EHS | Job Summary | Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and/or disposition of real property and building space in compliance with policy. Participates in development of budgets and resource allocations.

Job Function | Real Estate Management | Job Summary | Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

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<td>financial and budget management principals, general accounting practices, development of budgets, budget reconciliation, and forecasting.</td>
<td>seismic, fire and other life safety and ADA compliance issues.</td>
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<td>KSA 08</td>
<td>Proven experience with automated financial, payroll, purchasing, and other administrative systems.</td>
<td>Strong computer skills, including production of complex legal contracts, as well as analyses including spreadsheets, databases and modeling applications, specifically for financial feasibility analysis, operating budget performance analysis and database development.</td>
<td>Advanced computer skills, including production of complex legal contracts, as well as analyses including spreadsheets, databases and modeling applications, specifically for complex financial feasibility analysis, operating budget performance analysis and database development.</td>
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<td>KSA 09</td>
<td>Demonstrated experience in providing work direction to other staff with the ability to delegate, motivate, and monitor performance.</td>
<td>Demonstrated knowledge of economic and general accounting principles and practices.</td>
<td>Advanced knowledge of economic and general accounting principles and practices.</td>
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<td>KSA 10</td>
<td>Experience with and knowledge of real property lease interpretation in order to verify compliance with financial terms.</td>
<td>Excellent written and oral communication skills, including the ability to compile data and information, and draft formal documents and produce reports. Ability to draft accurate correspondence based upon negotiations and/or conversations, and the ability to keep accurate notes regarding transactions.</td>
<td>Excellent written and oral communication skills, including the ability to compile complex data and information, and draft formal documents and produce comprehensive reports. Ability to draft accurate and complex correspondence based upon negotiations and/or conversations, and the ability to keep accurate notes regarding transactions.</td>
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<td>KSA 11</td>
<td>Excellent organizational skills to prioritize workload and work well independently, including taking initiative, ability to work effectively with frequent interruptions, and to develop timetables and strategies to meet multiple and constantly changing deadlines.</td>
<td>Ability to deal with a multiplicity of demands and projects on an ongoing basis. Ability to work in a fast-paced environment of changing priorities and to maintain accuracy and attention to detail.</td>
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<td>KSA 12</td>
<td>Skills in record management (paper based and electronic).</td>
<td>Ability to prioritize assignments, work independently or as a member of a team, as well as be responsive to</td>
<td>Demonstrated ability to prioritize assignments, work independently or as a member of a team, as well as be</td>
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Page 7 of 8 Last Revised: 24 August 2017
**Job Summary**

Conducts analysis in support of real estate transactions and decision-making efforts. Participates in the selection, evaluation, acquisition, occupation, management and/or disposition of real property and building space in compliance with policy. Manages compliance with lease agreements and contracts; participates in negotiation efforts. Conducts financial analyses to evaluate and recommend lease vs. purchase decisions. Completes any required forecasts, budget analyses and reports of activities.

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<td></td>
<td>supervise.</td>
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<td>responsive to supervision, exercise excellent business judgment and find creative solutions to problems.</td>
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**KSA 13**

Knowledge of basic human resources processes and procedures.

**KSA 14**

Ability to use sound judgment, exercise discretion, and maintain confidentiality.

Demonstrated knowledge and understanding of real property licensing. Knowledge of telecommunications and alternative energy licensing. Demonstrated experience in real property related litigation and legal issues, including evictions, space improvements, land ownership disputes, tenant/landlord disputes, and contract interpretation.

**KSA 15**

Environment

- University settings and various external venues.
- University settings and various external venues.
- University settings and various external venues.
- University settings and various external venues.
- University settings and various external venues.

**Career Path 1**

- Real Estate Officer 3
- Real Estate Officer 4
- Real Estate Officer 5
- Finance > Real Estate > Supervisory and Management

**Career Path 2**

- Manager 1

**Career Path 3**

**Career Path 4**

**Career Path 5**

**Career Path 6**