

Department of Administration (DOA)
Division of Facilities Management (DFM)
Bureau of Real Estate Management (BREM)

Position Number: 027186

State Job Classification: Administration Program Management Supervisor
Working Title: Real Estate Portfolio Manager

Position Summary:

This is an advanced position responsible for managing the Leasing Section staff to implement DFM's plans for the States owned and leased real estate. This includes developing and implementing a statewide acquisition and allocation plan for space used by State agencies in leased facilities or State office buildings in a manner that maintains a low total cost of occupancy in leased facilities and a low vacancy rate in DOA State owned buildings. This position includes training and managing staff to ensure leasing and other real estate work is completed in a timely manner and in compliance with statutes, administrative rules, policies and procedures. This position is located in the Division's Bureau of Real Estate Management and is supervised by the Bureau Director of BREM.

A significant portion of the individual's time will be spent overseeing the leasing of space in privately owned facilities by State government agencies, which includes over 500 leases and 3.5 million square feet. The leasing Section Chief and staff also work closely with the Space Management Section to manage occupancy of DOA State owned office buildings totaling more than 3.5 million square feet. In addition the position is responsible for managing lease and State office building rent billing, contracting for appraisals, reviewing easements, tracking waste fraud and abuse and assisting the Division of Facilities Development as needed.

The Leasing Section Chief directly supervises 2 FTE authorized permanent positions and 2 LTE employees. Among other tasks, supervision includes hiring, training, providing expectations, setting clear measurable goals, assigning work, monitoring progress, taking corrective action as necessary, evaluating results and providing ongoing informal and annual formal performance evaluations to employees.

The leasing Section Chief is required to have knowledge and experience in effectively managing staff to achieve DOA goals including a good understanding of financial and real estate principals, in depth strategic planning, analysis, process management and lease negotiations. Basic knowledge of facility planning, real estate legal terminology, and project management practices are also required.

Goals and Worker Activities

30% A. Manage portfolio of DOA operated State Office Buildings and Leased Space

A.1. As requested, develop and update long term statewide real estate portfolio plans covering the acquisition and allocation of space used by state agencies in leased facilities or state office buildings (SOB) and for the occupancy of SOB space.

A.2. Provide assistance and input to staff in the Bureau of Facilities Management regarding developing a long range SOB facility maintenance plan consistent with any acquisition and/or sale of asset plan.

A.3. Implement DOA's goals and objectives for providing office space to all state agencies. Assist in the development of short and intermediate range plans and actions to meet state office space needs utilizing all

state office buildings and leased facilities. Ensure that state owned space is fully utilized and achieve other strategic space management goals.

A.4. Review all state agency space requests for changes in space assignments and recommend action based upon DOA policies and established real estate portfolio goals and objectives. Work with Agencies to justify the business case for space needs and occupancy costs.

A.5. Develop alternative scenarios for meeting space needs including the acquisition, disposition, renewal, and termination or assignment of existing space. Complete life cycle and other economic analysis of facility acquisition options. Provide analysis, identify options and develop recommendations for all proposed leases, lease extensions and amendments to ensure compliance with state laws, protect state interests and achieve strategic space management goals. Direct the preparation of summaries of analysis and recommendation for department and division managers.

A.6. Manage the development and use of information system Archibus for the leasing program. This would include lease accounting, monthly invoicing and billing to state agencies. Develop and maintain reporting systems to keep management informed of progress of leasing transactions in general and strategic leases in particular.

35% B. Manage the Leasing Section, Bureau of Real Estate Management and Occupancy, DFM

B.1. In consultation with the Bureau Director, assess human resource needs and complete the required administrative paperwork to request to fill an open permanent position(s) or limited term positions. Once approved by the Administrator and HR, work jointly with the Bureau Director to develop job posting, and participate in the selection of qualified candidates, and recommend hire of candidates.

B.2. Recommend the promotion, transfer, discipline or discharge of employees to the Bureau Director.

B.3. Assign new employees to an appropriate mentor that will be responsible for his or her training in the documents, processes and practices utilized by Leasing Section. Monitor progress and provide guidance on what more may be needed.

B.4. Identify all training needs including negotiation; conflict resolution and customer service that new employees require or experienced staff could benefit from a refresher.

B.5. Assign workload to all employees creating a balanced workload of RFPs, new leases, renewals and other transactions. Track status of leases and be able to provide information for reporting.

B.6. Meet regularly with staff on work plans, accomplishments and problem resolving strategies. If an issue arises, address it immediately so corrective action is immediate and similar issues do not arise in the future. Provide clear expectations to new employees (and current employees) so all employees understand the measures of their goals, particularly if outcomes are expected to increase over time.

B.7. Monitor and informally evaluate employee performance on an ongoing basis to ensure all projects are moving forward as needed. Provide support as needed and/or reassign work if necessary. A formal evaluation must be completed on an annual basis that accurately assesses current performance and identifies where performance must improve in the following period. Serve as first contact in the employee grievance procedure.

10% C. Develop and administer reports and real estate performance metrics.

C.1. Develop and create standard reports. Report benchmarking and performance metrics to Division and other senior management. Reports should include information on real estate transactions and customer satisfaction.

C.2. Develop and create biweekly status reports on leasing activities, particularly projects of concern.

C.3. Work with Bureau Director to develop and provide performance metrics on a quarterly basis to Administrator and leasing staff. Reports should include measures that will identify the need for process improvements and useful for strategic planning.

C.4. Develop evaluation criteria and data elements to compile measurements. Collect data from a variety of data systems for analysis and review. Identify and address missing data elements and reporting needs.

10% D. Identify and implement leasing process improvements

D.1. In conjunction with Bureau Director and leasing team, develop and document policies and procedures for all activities carried out by leasing staff including defining space requirements, soliciting lease proposals, identifying lease options, negotiating terms and state compliance requirements.

D.2. On a periodic but regular basis , in conjunction with Leasing Section staff and legal team, formally analyze current leasing program policies, practices and documents, consider issues that have arisen, research best practices and recommend a need for improvement. Recommend updates to standards and policies to Bureau Director.

D.3. Work jointly with the Bureau Director to secure senior manager approvals for modifications to current practices and implementation of new policies and practices. Update policy and procedure manual and workflow charts so updated policies and practices are documented.

D.4. Train leasing employees on new policies and practices and ensure they are implemented as planned.

D.5. Recommend administrative code and statutory revisions/new legislation that would improve the leasing section's performance and customer service. As required work with legal staff to draft changes in statutory language and administrative code related to state leasing and facilities planning.

10% E. Manage Customer Relations

E.1. Communicate with agency representatives to keep them informed of the status of their leases, changes in state leasing policies and procedures. Coordinate meetings among agency representatives to better communicate with them and identify common issues.

E.2. If requested or needed, assist agencies in completing their space request submissions. Provide expertise to support probable agency forecasting of future space needs.

E.3. Oversee the actions of leasing officers regarding tenant lease issues. Ensure leasing officers resolve

conflicts among agency desires, state budget, lessors, and space policies and real estate market conditions. Also ensure leasing officers resolve safety and environmental concerns and citations in leased space. Work with DFD technical experts to identify options and solutions if necessary.

E.4. Negotiate resolution of complex issues between building owners, state agency tenants and/or leasing officer. Explain major policy issues to state agencies.

E.5. Function as liaison to the State Budget Office regarding space issues. Provide advice on budget items and fiscal estimates. Assist the DFM and DFD Building Commission representative(s) in the preparation of requests to the Wisconsin State Building Commission.

E.6. Respond to a variety of inquiries by phone, email or in writing from agencies requesting information or clarification on leasing and real estate issues.

5% F. Other duties as required

F.1. This position will play a role in the revised state process for identifying and selling surplus property. Specific tasks are not yet defined but at a minimum, could include participating in meetings devoted to assessing real estate and contracting for appraisals.

F.2. This position also may be assigned duties associated with acquiring or constructing new state buildings.

F.3. Coordinate and facilitate agencies' identification of their long-range space needs plans and incorporate their needs into the development of long range statewide real estate portfolio plan.

Knowledge and Skills:

1. Organizational skills and abilities, including the ability to manage multiple projects and establish workload priorities and timelines
2. Skill in supervisory techniques, including leadership and team building skills
3. Ability to work as a team member as well as independently.
4. Budget management skills.
5. Research and problem solving capability
6. Knowledge and skill in use of computer software (Microsoft word, excel) and lease management software (Archibus).
7. Ability to negotiate with honesty and integrity.
8. Excellent verbal and written communication skills.
9. Knowledge of techniques to develop and maintain effective working relationships in order to accomplish job goals and objectives
10. Ability to work effectively with a diverse group of people.

Additional Requirements:

Graduation from a 4 year college or university with a degree in business, real estate or finance is preferred. Well qualified candidates will have several years of leasing and supervision experience, lease management software experience, and be a Licensed Commercial broker. A commercial broker's license is preferred.

As this position may require occasional travel between sites, a valid driver's license or ability to provide one's own transportation will be required.