

PORTFOLIO ADMINISTRATION ANALYST

DEFINITION

Under direction, demonstrates responsibility for lease and service contract administration, conducts portfolio-wide real property analyses related to occupancy costs and capacity utilization; supports portfolio optimization and expense reduction strategies; performs related work as assigned.

CLASS CHARACTERISTICS

Incumbents are competent to conduct real estate portfolio analysis, administration and reporting. Incumbents will have a supportive role in the negotiation and management of agreements for brokerage, appraisal, title or other related services.

EXAMPLES OF DUTIES (*illustrative only*)

- Reviews and performs analysis of real estate occupancy expenses and revenues including rent, operating expenses, and capital improvements.
- Performs analysis of portfolio capacity utilization and validates demand forecasts.
- Assists in implementation of strategies for portfolio optimization and occupancy expense reduction.
- Performs benchmarking against public and private sector data and best practices.
- Assists unit supervisor in tracking and forecasting real estate transactional requirements and staff and consultant resource allocation.
- Participates in negotiation of portfolio-wide contracts for title, brokerage, appraisal, expense auditing and other related services; administers resulting contracts, including monitoring provider compliance with terms, managing performance, and tracking costs.
- Prepares bids, secures all necessary approvals, and ensures that standard procedures are followed.
- Manages contracts to ensure that the terms and conditions are being fulfilled and that there is proper performance.
- Audits Common Area Maintenance (CAM) reconciliation and rent statements to insure compliance with lease terms, referring complex or intractable disputes to contracted lease management consultants.
- Serves as primary contact for and liaison with landlords, tenants, and licensees.
- Analyzes data and documentation submitted by counties under the County Facility Payments (CFP) requirement; tracks CFP submittals and collection of payments.
- Develops and revises lease abstract forms; abstracts leases.
- Designs portfolio and ad-hoc reports with assistance from the CAFM Application Analyst.

- Monitors critical lease and other contract dates and coordinates with Senior Real Estate Analysts on corresponding decision requirements.

WORKING CONDITIONS

- Work occasional evening and weekend hours.
- Required to travel statewide occasionally as necessary.
- May be required to travel out-of-state on a very limited basis.

QUALIFICATIONS

Knowledge of:

- Real estate principles and practices.
- Real estate lease and general contract administration and compliance.
- Real estate terminology.
- Negotiation techniques.
- Practices of commercial lease formation and management.

Ability to:

- Explain, interpret, analyze, and summarize complex real estate leases and service contracts.
- Research, compile, analyze, and summarize information and data pertaining to real estate.
- Plan, manage, and deliver multiple projects.
- Organize, prioritize, and coordinate multiple work activities and meet critical deadlines.
- Operate personal computers and use specified computer applications such as word processing, spreadsheet, project management, and report writer software.
- Communicate effectively in English, orally, and in writing.
- Prepare a variety of effective written materials.
- Establish and maintain effective working relationships with those contacted in the course of the work.
- Use tact and discretion in dealing with those contacted in the course of the work.

Licenses and Certificates:

None.

Education and Experience

Equivalent to possession of a bachelor's degree from an accredited college is required. Three years of professional experience tracking, analyzing, evaluating, abstracting and reporting on real estate portfolio data is required.

Additional directly related experience may be substituted for education on a year-for-year basis.

One year of postgraduate education in a field related to the work may be substituted for one year of required experience.