

Associate Facilities Analyst

JOB FAMILY DEFINITION

This classification falls within the Facilities Analysis Job Family encompassing a range of work in which incumbents are responsible for providing analytical and advanced technical support to facilities functions including capital and facilities planning, construction, and associated funding; real estate acquisition, disposition, leasing, and licensing; and operational analysis such as safety and health. This class specification represents the type and level of work performed recognizing that specific work assignments may differ from one unit to another and from one incumbent to another.

CLASS SUMMARY

Incumbents, as assigned, are responsible for providing paraprofessional analytical duties in support of planning and program management activities related to facility and workspace design, real estate, environmental assessment, workplace health and safety, general facility operational program administration, and lease portfolio coordination which includes tracking and processing payables and receivables; forecasting lease revenues and expenses; preparing/reviewing year-end lease statements; coordinating maintenance and repair vendors; ensuring landlord and tenant compliance with lease terms; administering license terms and conditions; coordinating the resolution of tenant issues; reviewing lease, licensing and/or real estate documents for accuracy; maintaining records associated with leases; and compiling and reporting statewide property metrics.

DISTINGUISHING CHARACTERISTICS

The Associate Facilities Analyst may be involved in providing basic fiscal analysis, landlord-tenant relations, and coordination of leasing and/or licensing for an assigned real estate portfolio. Incumbents may also perform paraprofessional level analysis in environmental health and safety functions and space planning.

The Associate Facilities Analyst is distinguished from the Facilities Analyst in that incumbents assigned to the Facilities Analyst classification perform one of several different functions including environmental, health, and safety analysis; risk and quality compliance; facility space planning and project management; or owned-real property acquisition and disposition.

EXAMPLES OF ESSENTIAL DUTIES *(The duties listed are illustrative only and represent the core areas of responsibilities; specific position assignments will vary depending on business needs.)*

- Administers and processes leases and license documents including, but not limited to, initial leases, amendments, lease close-out (expiration and terminations), and Estoppel Certificates; drafts proposed lease language; and performs research related to leases.
- Maintains spreadsheets and databases with lease and real estate contract information; updates appropriate facilities management system; formats and prepares documents and reports, including but not limited to, leases, contracts, and Excel spreadsheets; extracts data and reports from facilities management systems.
- Compiles and prepares financial and other reporting metrics for assigned portfolios.
- Supports project management activities; works with higher level analysts as part of a team.

- Assists with the development, review, modification, and implementation of forms, policies, and procedures.
- Maintains lease records and associated documentation.
- Processes and issues invoices, as assigned.
- Serves as a primary contact for and liaison with landlords, tenants, contractors and licensees.
- Provides orientation and guidance to new staff.
- Provides training to internal and/or external clients in assigned area.
- Performs other duties of a similar nature and level as assigned.

EXAMPLES OF POSITION SPECIFIC RESPONSIBILITIES *(Illustrative Only)*

Positions assigned to real estate may be responsible for:

- Performing basic analysis for real estate leases, licenses, and owned-property contracts; forecasts incoming revenues and outgoing expenses; processes rent payables, including initial account set up, monthly transmittal of rental rolls to the Finance Office, and year-end review of landlord's operating expense statement.
- Reviewing and verifying accuracy of data for items including, but not limited to, transfer agreements, purchase and sale agreements, memoranda of understanding, project agreements, joint occupancy agreements, deeds, property tax documents and records, closing statements, escrow instructions, title reports and maps; reviewing or summarizing contract or lease provisions and/or abstracts prepared by outside legal counsel; and ensuring that data entered into the facilities management system is accurate.
- Participating in Request for Proposal processes for title, appraisal, and land survey professional services, as assigned.
- Assisting in compiling data and performing limited scope analysis related to revenue enhancement and cost containment studies.

Positions assigned to capital and facilities planning and policy may be responsible for:

- Providing basic analytical support to project teams for items including, but not limited to, project feasibility reports and capital funding and change requests, review and selection of architects and planning consultants, monitoring of consultant work, review of documents regarding facility programming and planning.
- Participating in and providing basic analytical support to the facility modification and maintenance program.
- Assisting higher level analysts and providing support with planning short and long term system and infrastructure renewal projects.
- Assisting in planning space use for leased, renovated, and expanded facilities.

Positions assigned to risk and quality compliance may be responsible for:

- Assisting in the research and compilation of data for the establishment of health and safety requirements applicable to building occupancy, renovations, new construction, facilities maintenance, and property disposition pursuant to the Judicial Council Injury and Illness Prevention Program (IIPP)
- Assisting higher level analysts in designing, developing, and delivering health and safety programs, as assigned.
- Assisting in the research and development of policies and procedures pertaining to hazardous materials, incident investigations, and trial and appellate court requests for health and safety services.

- Providing basic analytical assistance on investigations related to indoor air quality, industrial hygiene, job hazards, workplace safety, safety incidents, and employee accidents, as assigned.

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

Bachelor's degree, preferably in real estate, engineering, environmental science, building/construction/inspection, or a directly related field that would provide the knowledge and skills necessary for the assigned area. *An additional four years of professional experience as noted above may substitute for the bachelor's degree. Or, additional directly related experience and/or education may be substituted on a year-for-year basis.*

OR

Two years as a Facilities Specialist with the Judicial Council of California or two years of experience performing the duties of a class comparable in the level of responsibility to that of a Facilities Specialist in a California Superior Court or California state-level government entity.

LICENSING AND CERTIFICATIONS

- None

KNOWLEDGE OF

- Applicable federal, state, and local laws, codes, regulations, and/or ordinances;
- Basic principles and practices of budget and contract management;
- Knowledge of commercial real estate principles, practices, and terminology;
- Knowledge of commercial lease administration and licensing methods;
- Basic principles and applications of critical thinking and analysis;
- Principles and methods of data collection and analysis;
- Business mathematics;
- Customer service principles;
- Applicable work rules and policies; and
- Applicable business equipment and desktop applications.

SKILL IN

- Understanding leases and contracts, and legal advice regarding leases and contract interpretation;
- Compiling, sorting, and articulating issues and recommendations;
- Interpreting, monitoring, and reporting financial information and statistics;
- Exercising confidentiality;
- Organizing tasks, meeting deadlines, and prioritizing competing demands within assigned projects;
- Maintaining and updating documentation;
- Preparing reports;
- Providing contract administration;
- Providing attention to detail;
- Providing customer service;
- Utilizing a computer, relevant software applications, and/or other equipment as assigned;
- Effectively communicating; and

- Maintaining effective working relationships with colleagues, customers, and the public.

WORKING CONDITIONS, ADA AND OTHER REQUIREMENTS

The Judicial Council is an equal opportunity employer. The Judicial Council will comply with its obligations under the law to provide equal employment opportunities to qualified individuals with disabilities.

Positions in this class typically require: sitting, stooping, kneeling, crouching, reaching, standing, walking, pushing, pulling, lifting, fingering, grasping, talking, hearing, seeing, and repetitive motions.

Sedentary Work: Exerting up to 10 pounds of force occasionally, and/or a negligible amount of force frequently or constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.

Incumbents generally work in a typical office environment with adequate light and temperature. The Judicial Council will make all reasonable efforts to minimize the need for employees to travel by taking advantage of virtual conferencing tools as much as possible. However, positions in this class may require local and statewide travel to site locations and work to be performed in outdoor environments with varying light and temperature, as necessary.

Please Note: *The Judicial Council classifies work based on organizational need. The distinguishing characteristics, essential duties and minimum qualifications described in this specification relate to the body of work required and not to the attributes of an incumbent assigned to perform the work.*