A. IDENTIFICATION

Position Title: Real Estate Analyst
Department: Facilities Services
Position Reports To (Title): Manager, Real Estate Services
Description Prepared by:
Date: December 24, 2015

B. POSITION SUMMARY

Briefly describe the primary function and purpose of the position in one or two sentences.

Reporting to the Manager, Real Estate Services, the Real Estate Analyst conducts research; analyzes, and synthesizes data; and prepares reports on all property and real estate transactions in Facilities Services to support planning. The Real Estate Analyst reviews documentation on contracts, leases, and agreements and ensures real estate information stored in databases is accurate and complete. The incumbent responds to internal and external requests for information while administering property and antenna licenses and leases and revenues. The Real Estate Analyst liaises with internal and external Real Estate stakeholders and legal representatives as required.

C. DUTIES AND RESPONSIBILITIES

Starting with those you consider the most important, list and describe the main duties and responsibilities of the position. For each item start with an action verb and briefly describe WHAT is done, HOW it is done and WHY it is done.

Information Management: Data Analysis & Synthesis

- Researches, compiles, analyzes, and prepares reports on all property and real estate transactions for review by stakeholders (SFU Surrey, AVP Research, Innovation Office, etc.) as well as Facilities Services staff to inform and in support of planning.

- Monitors and ensures real estate information stored in databases (AMT & Docushare) is accurate and complete. Makes recommendations for improvements in document management (i.e., filing methodology).

- Actively examines information to identify where gaps exist and liaises with internal and external stakeholders to obtain missing information.

- Monitors information in databases on an ongoing basis to locate items that require further action. Prioritizes items discovered based on urgency and importance; responds as required. Ensures ongoing maintenance of information from licensees/lessees in regards to their equipment, chemicals, etc., and follows-up and notifies licensee/lessees of their contractual obligations.

- Proactively contacts licensees to obtain required information in accordance with license/lease agreement terms (i.e., updated lists of chemicals in use; changes in common usage; and hours of operations, etc.).

- Monitors compliance with procedures and identifies when licensees have not adhered to the terms of their agreements (i.e., when providing notice to the university of intended access). Determines whether tenants/licensees have adhered to procedures and enforces SFU standards (i.e., whether safety procedures, escort procedures, etc., have been followed).
Administrative/Professional Position #118399

- Provides training and assistance to others (external consultants and departmental staff) in the access and use of Facilities Services’ databases and record systems.

- Creates reports to summarize relevant information in the real estate database by consulting with stakeholders to understand their needs.

- Generates and distributes real estate related reports to relevant stakeholders.

- Ensures all real estate and property related and contact information is updated accurately and in a timely manner in Facilities Services’ databases and record systems.

- Creates exception reporting for databases in order to proactively identify circumstances that require action by the university prior to the date that the incident comes due. Troubleshoots and resolves problems.

- Attends strata meetings as required to gather information regarding SFU’s real estate holdings.

- Researches, compiles, and analyzes real estate industry data and best practices, and prepares reports on a variety of real estate subjects.

Contract Administration

- Reviews license/lease abstracts, rent roll summaries, deal summary sheets, rent collection reports, and license/lease expiry reports, etc., for accuracy.

- Ensures accurate reconciliation of license/lease fees against anticipated collection amounts. Reviews license/lease agreements to determine the appropriate license fee and invoices licensees/lessees when necessary. Tracks payments and actively follows up with licensees/lessees when payments become overdue.

C. DECISION MAKING

i) Give some typical examples of the most important decisions the incumbent is expected to make in carrying out the duties and responsibilities of the position. To what extent can the incumbent rely on established policies or advice from others in making these decisions?

Makes decisions when:

Compiling, analyzing, and preparing reports on all property and real estate transactions for review by stakeholders.

Monitoring information in databases on an ongoing basis to identify missing information or to locate items that require further action.

Liaising with internal and external stakeholders to obtain missing information.

Reviewing all documentation relating to SFU’s real estate and antenna related agreements, ensuring all necessary inspections, assessments, and appraisals have been conducted as required.

ii) Give some examples of the types of decisions the incumbent would refer to his/her supervisor.

Refers decisions regarding:

Final approval on decisions that have significant financial impact.

Final approval for areas where implications or consequences to internal and external stakeholders are significant.

Critical issues or serious problems with legal agreements.
E. SUPERVISION EXERCISED

*Indicate the number of employees for whom the position is responsible.*

Number of employees reporting directly to the position. 0*

Total number of employees for whom the position has direct responsibility. 0

*Occasionally oversees the work of temporary staff and/or Co-op students.

F. SUPERVISION RECEIVED

*Describe the extent to which the supervisor determines the day to day work load of the position and assists in the completion of duties. Explain the nature of guidance received and how often work is checked or reviewed.*

The Real Estate Analyst performs duties with a high degree of independence, working under general direction from the Manager, Real Estate Services to complete assignments accurately, professionally, and on a timely basis. The Analyst is normally self-directed and expected to independently prioritize work.

G. UNUSUAL WORKING CONDITIONS

*Required to work on multiple projects concurrently and to occasionally work additional or flexible hours. Required to attend strata meetings outside of regular working hours.*

H. ENTRANCE QUALIFICATIONS

*What combination of experience, training and/or formal education do you believe is the minimum required to perform the duties of this position?*

Undergraduate degree in business administration, or a related discipline, with one year of related experience, including experience in data analysis and reporting, or an equivalent combination of education, training, and experience.

Good knowledge of research methodology, data analysis, and reporting.

Good knowledge of real estate related transactions (e.g., contracts, leases, licenses, etc.).

Good knowledge of legal terminology relating to real estate transactions and documentation.

Excellent research, data analysis, report writing, and presentation skills.

Excellent interpersonal and communication skills (oral, and written).

Ability to exercise tact and diplomacy and to perform duties in a professional manner.

Ability to exercise sound judgment and discretion when responding to requests for data and information.

Proficient in the use of word processing, database, desktop publishing, and spreadsheet applications (including pivot tables).
I. ORGANIZATIONAL RELATIONSHIPS

J. APPROVALS

Incumbent's
Signature: ___________________________ Date: ___________________________

Supervisor's
Signature: ___________________________ Date: ___________________________

Signature of Next
Administrative Level ___________________________ Date: ___________________________