

Job Family	Investment Management	Job Summary	Involves the professional management of the Real Estate asset class in order to meet specified investment goals for the benefit of the Institute. Provides oversight and management of the Real Estate class by creating and monitoring relationships with existing managers, evaluating and selecting new external managers, and creating risk and investment guidelines for internal and external managers.
Job Function	Real Estate Investments		
Category	Management		

Job Level	Manager 1	Manager 2	Manager 3	Manager 4
Job Title			Real Estate Investment Manager 3 – OP ONLY	
Job Code			0234	
Tracking Code			A0869	
Per. Program	MSP	MSP	MSP	MSP
FLSA	Exempt	Exempt	Exempt	Exempt
Generic Scope	Spends the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives, functions with autonomy. Manages the accountability and stewardship of human, financial, and often physical resources in compliance with departmental and organizational goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls. Manages systems and procedures to protect departmental assets.	Oversees through subordinate managers a large department or multiple smaller units, OR manages a highly specialized technical function / team. Has significant responsibility to achieve broadly stated goals through subordinate managers. Determines objectives, directs programs, develops strategies and policies, manages human, financial, and physical resources, and functions with a high degree of autonomy. Proactively assesses risk to establish systems and procedures to protect organizational assets. Determines strategies for a program with organization-wide impact.	Oversees through subordinate managers one or more large, complex departments or business units with multiple functional disciplines / occupations, OR manages a program, regardless of size, that has critical impact upon the organization as a whole, such as most or all of a campus, medical center, UCOP or the UC System. Has significant responsibility for formulating and administering policies and programs, manages significant human, financial, and physical resources, and functions with a very high degree of autonomy. Oversees through subordinate managers the accountability and stewardship of department resources and the development of systems and procedures to protect organizational assets.	Directs through subordinate managers multiple large and complex critical programs impacting broad constituencies across major portions of the organization. Identifies objectives, manages very significant human, financial, and physical resources, and functions with an extremely high degree of autonomy. Accountable for formulating and administering policies and programs for major functions. Operational or program results can affect overall organization-wide performance and reputation. Directs through subordinate managers the development of strategic goals and objectives to achieve accountability and stewardship of university resources in a manner consistent with system-wide objectives and initiatives.
Custom Scope			Oversee all Real Estate investment activities with overall responsibility for achieving Real Estate investment performance targets. Participates with the Chief Investment Officer and the Regents to establish strategic plans and objectives. Manages the activities of the investment staff. Reviews and approves recommendations for investment strategies. Monitors performance for adherence to approved objectives. Erroneous decisions have a serious impact on the overall success of the performance of investments. In consultation with the CIO, select and oversee external Real Estate investment managers.	
Key Resp 01			Manages, prepares, administers, and directs the investment activities for Real Estate investments.	

Job Family	Investment Management	Job Summary	Involves the professional management of the Real Estate asset class in order to meet specified investment goals for the benefit of the Institute. Provides oversight and management of the Real Estate class by creating and monitoring relationships with existing managers, evaluating and selecting new external managers, and creating risk and investment guidelines for internal and external managers.
Job Function	Real Estate Investments		
Category	Management		

Job Level	Manager 1	Manager 2	Manager 3	Manager 4
Key Resp 02			Participates with other higher-level managers to establish strategic plans and objectives.	
Key Resp 03			Plans, designs, influences and implements Real Estate investment strategies.	
Key Resp 04			In consultation with the management team, provides oversight and management of the Real Estate investment strategies by creating and monitoring relationships with existing managers, evaluating and selecting new external managers, and creating risk and investment guidelines for internal and external managers.	
Key Resp 05			Works with other managers to approve the selection of real estate managers; monitors and manages relationships with existing managers; determines acceptable risk and strategy guidelines for external managers; trains and directs the organization's portfolio managers.	
Key Resp 06			Negotiates, influences and persuades other senior level managers.	
Key Resp 07			Assist the CIO and the SMG with communications with the public, Legislature and Board of Regents and focus on internal communications to promote teamwork, good morale, and collaboration.	
Key Resp 08				
Key Resp 09				
Key Resp 10				
Key Resp 11				
Key Resp 12				
Key Resp 13				
Key Resp 14				
Key Resp 15				
Education 1			MBA / CFA or an equivalent combination of education and experience and more than 10 years investment experience within a specific asset class.	
Education 2				

Job Family	Investment Management	Job Summary	Involves the professional management of the Real Estate asset class in order to meet specified investment goals for the benefit of the Institute. Provides oversight and management of the Real Estate class by creating and monitoring relationships with existing managers, evaluating and selecting new external managers, and creating risk and investment guidelines for internal and external managers.
Job Function	Real Estate Investments		
Category	Management		

Job Level	Manager 1	Manager 2	Manager 3	Manager 4
Education 3				
Education 4				
License 1				
License 2				
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			Advanced degree and / or professional designation.	
KSA 02			Advanced experience with computer modeling.	
KSA 03			Demonstrated sensitivity and ability to identify critical information.	
KSA 04			Ability to quickly research and collect pertinent information.	
KSA 05			Ability to integrate essential information, and use that information to define and test options and alternatives.	
KSA 06			Demonstrated ability to develop recommendations and justification for the most productive course of action.	
KSA 07			Ability to be insightful and use creative skill in reasoning and logic, and in quantitative analysis.	
KSA 08			Excellent interpersonal skills as demonstrated by the ability to interact with others in a consistently positive manner, exercise discretion and tact, and gain consensus in an environment where others may have strongly conflicting ideas and goals.	

Job Family	Investment Management	Job Summary	Involves the professional management of the Real Estate asset class in order to meet specified investment goals for the benefit of the Institute. Provides oversight and management of the Real Estate class by creating and monitoring relationships with existing managers, evaluating and selecting new external managers, and creating risk and investment guidelines for internal and external managers.
Job Function	Real Estate Investments		
Category	Management		

Job Level	Manager 1	Manager 2	Manager 3	Manager 4
KSA 09			Excellent verbal and written communication and presentation skills.	
KSA 10			Demonstrated ability to articulate ideas and issues clearly concisely, and persuasively to a variety of audiences.	
KSA 11			Demonstrated ability to prepare and / or edit complex reports involving logical and quantitative analysis, so that it is clearly understandable by both technical and lay readers and effectively advances and justifies a specific proposal or set of recommendations.	
KSA 12				
KSA 13				
KSA 14				
KSA 15				
Environment			Office settings and various external venues	
Career Path 1			Career Path open	
Career Path 2				
Career Path 3				
Career Path 4				
Career Path 5				
Career Path 6				