

## Chelan PUD REAL ESTATE SPECIALIST Level Guide

Category	Real Estate Specialist I	Real Estate Specialist II	Real Estate Specialist Senior
<b>Overarching Purpose</b>	Coordinate, evaluate, acquire and manage timely property rights necessary for the acquisition, disposition, construction, and management of District facilities and properties essential to District operations and ensure internal and external customers receive accurate and timely information regarding District projects.		
<b>Advancement/ Career Path</b>	<p>This is the entry level in the job family.</p> <p>Employees hired into the Level I role are generally expected to develop the knowledge, skills and abilities to advance to Level II.</p> <p>To advance to Level II, incumbents must be able to perform all the essential functions of the higher level position, at a basic level. Advancement is subject to approval of the business need, and salary budget availability.</p> <p>The typical timeline for advancement is 2 (two)years.</p>	<p>This is the second level in the job family.</p> <p>To advance to the next level, incumbents must be able to perform all the essential functions of the higher level position, at a basic level.</p> <p>Advancement is subject to approval of the business need, and salary budget availability. It may also be subject to availability of an open position and a competitive recruitment process.</p> <p>The typical timeline for advancement is three (3) years.</p>	<p>This is the career level position in the job family.</p> <p>This position develops many skills necessary to move into supervisor positions.</p> <p>Advancement to any open position outside of this job family is generally subject to a competitive recruiting/selection process.</p>
<b>Core Functions</b>	<ul style="list-style-type: none"> <li>Customer Relations - 35%: Research, analyze, and respond daily to internal and external customer inquiries pertaining to land/land rights, ownership, and right of way information. Consult with various public and private agencies in response to customers' inquiries regarding rights-of-way, utility locations, permits, surveys and related matters.</li> </ul>	<ul style="list-style-type: none"> <li>Public/Customer Relations - 15%: Participate with the organization and analysis of public meetings held to obtain public input regarding District-related projects. Represent department in pre-construction conferences to assist system owners with anticipated right of way needs for their projects. Consult with various public and private agencies in response to customers' inquiries as well as processes and policies for routine and moderately complex</li> </ul>	<ul style="list-style-type: none"> <li>Public/Customer Relations -10%: Participate with the organization and analysis of public meetings held to obtain public input regarding District-related projects. Evaluate the results of public response and report. Play a major role in creating a solution amenable to all. Consult with various public and private agencies in response to customers' inquiries as well as processes and policies for non-routine and complex projects regarding rights-of-way, utility</li> </ul>

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	<ul style="list-style-type: none"> <li>• Encroachment - 5%: Participate in public awareness and monitoring encroachment matters associated with District land and land rights. Identified encroachments referred to higher level Real Estate Specialists.</li> <li>• Real Estate Support - 35%: Perform title searches, create Arc GIS exhibit mapping and sketches, perform field investigations, prepare correspondence, support of opinions and other documents, applications and reports in direct response to District needs for acquisition of, or information regarding, land or land rights. Process, track and respond to Agency Comment Requests in cooperation with other departments. Process easement release and road vacation requests by external customers to ensure District rights are reflective of present and future needs. Perform notary duties as required by law as a service to internal and external staff and department needs.</li> <li>• IT Activities - 10%: Routinely prepare, maintain data systems, and other information systems pertinent to District property to ensure information is current. Prepares basic ArcGIS exhibit maps and sketches.</li> <li>• Legal Document Preparation - 15%: Generally using approved templates, prepare and process legal documents</li> </ul>	<p>projects regarding rights-of-way, utility locations, permits, surveys and related matters. Research, analyze, and respond to internal and external customer inquiries pertaining to land/land rights, ownership, and right of way information.</p> <ul style="list-style-type: none"> <li>• Encroachment - 5%: Participate in public awareness, monitoring and resolving encroachment matters associated with District land and land rights.</li> <li>• Real Estate Support - 15%: Perform title searches, create Arc GIS exhibit mapping and sketches, perform field investigations, prepare correspondence, support of opinions and other documents, applications and reports. Process, track and respond to Agency Comment Requests in cooperation with other departments. Process easement release and road vacation requests by external customers to ensure District rights are reflective of present and future needs. Perform notary duties as required by law as a service to internal and external staff and department needs.</li> <li>• IT Activities - 5%: Prepare ArcGIS mapping for presentations and display. Participate in identifying data needs and in implementing resolutions. Prepare, analyze and</li> </ul>	<p>locations, permits, surveys and related matters.</p> <ul style="list-style-type: none"> <li>• Encroachment - 5%: Responsible to ensure monitoring processes are conducted and completed timely each year, including public awareness, monitoring and resolving encroachment matters associated with District land and land rights.</li> <li>• Real Estate Support - 5%: Participate in the development and maintenance of technical standards and operating procedures for the Real Estate and Permitting Department. Perform title searches, create Arc GIS exhibit mapping and sketches, perform field investigations, prepare correspondence, support of opinions and other documents, applications and reports. Perform notary duties as required by law as a service to internal and external staff and department needs.</li> <li>• IT Activities - 5%: Identify data needs, make recommendations for resolution and participate in implementation. Prepare moderately complex Arc GIS mapping for presentations and display.</li> <li>• Legal Document Preparation - 30%: Prepare standard and complex legal contracts and documents for the acquisition, management, or</li> </ul>
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	<p>of a limited nature relating to District real estate interests (i.e., non-negotiated or “friendly” easements requested by customers and/or permits, requiring minimal or no negotiations).</p>	<p>update project related data systems, and other information systems pertinent to District real property management and ensure information is current.</p> <ul style="list-style-type: none"> <li>• EF 5 % Encroachment: Participate in public awareness, monitoring and resolving encroachment matters associated with District land and land rights</li> <li>• Legal Document Preparation - 25%: Prepare standard legal contracts and documents, generally using approved templates, with minimal assistance for the acquisition, management, or relinquishment of District land and land rights.</li> <li>• Negotiations Support - 30%: Participate in the development of original and alternate plans for complex negotiations with property owners for the acquisition of land and/or land rights. Conduct complex title searches and review title reports. Identify issues with title or title reports.</li> <li>• Other - 5%: Mentor and train Real Estate Specialist I; perform all duties of a Real Estate Specialist I as workload requires.</li> </ul>	<p>disposition of District land and land rights. Organize the aspects of purchase or sale of District land/land rights according to statutory requirements and the direction of management. Work closely with legal team to ensure the District’s interests are represented in legal documents.</p> <ul style="list-style-type: none"> <li>• Negotiations -40%: Develop plan(s) for complex negotiations with property owners for the acquisition of land rights for distribution, transmission, water, wastewater, fiber, hydro, and parks. Rights include easements for all utilities, substation/switchyard sites, water/wastewater sites and others. Conduct complex title searches and review title reports. Identify issues with title or title reports. Review, analyze and present action recommendations regarding complex appraisal reports and cost effectiveness of purchasing or leasing real property and/or facilities. Identify and communicate alternative solutions to complex acquisition projects.</li> <li>• Other - 5%: Provide technical guidance to Real Estate Specialists I and II; perform all duties of a Real Estate Specialist I and II as workload requires.</li> </ul>
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<b>Education &amp; Certifications</b>	<ul style="list-style-type: none"> <li>Requires a minimum of two (2) years college level or equivalent real estate related courses such as Real Estate Law, Land Titles, Easement Valuation, Standards of Practice for the Right of Way Professional, or Real Estate Appraisal or the equivalent combination of education, experience and training that provides the required knowledge, skills and abilities.</li> <li>Must possess, or obtain within 90 days of employment, a Washington State Certified Notary Public certification.</li> <li>Desire membership in the International Right of Way Association (IRWA).</li> </ul>	<ul style="list-style-type: none"> <li>Requires a minimum of two (2) years college level or equivalent real estate related courses, such as Real Estate Law, Land Titles, Easement Valuation, Standards of Practice for the Right of Way Professional, or Real Estate Appraisal or the equivalent combination of education, experience and training that provides the required knowledge, skills and abilities.</li> <li>Must possess, or obtain within 90 days of employment, a Washington State Certified Notary Public certification.</li> <li>Desire membership in the in the International Right of Way Association (IRWA).</li> </ul>	<ul style="list-style-type: none"> <li>Requires a minimum of four (4) years college level or equivalent real estate related courses, such as Real Estate Law, Land Titles, Easement Valuation, Standards of Practice for the Right of Way Professional, or Real Estate Appraisal or the equivalent combination of education, experience and training that provides the required knowledge, skills and abilities.</li> <li>Must possess, or obtain within 90 days of employment, a Washington State Certified Notary Public certification.</li> <li>Desire International Right of Way Association (IRWA) Specialist Certification.</li> </ul>
<b>Required Minimum Experience</b>	<ul style="list-style-type: none"> <li>Two (2) year of real estate-related experience, such as land and real estate property rights, land titles, legal descriptions/documents or real estate appraisal including experience in public/customer relations.</li> </ul>	<ul style="list-style-type: none"> <li>Four (4) years of real estate experience in at least one of the following: land planning, right of way acquisition, and/or real estate appraisal including experience in public/customer relations.</li> </ul>	<ul style="list-style-type: none"> <li>Five (5) years of real estate experience in at least one of the following: land planning, right of way acquisition, and/or real estate fee appraisal including experience in public/customer relations.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>Basic knowledge of laws relating to land and land rights, land use and real estate acquisition.</li> </ul>	<ul style="list-style-type: none"> <li>Working knowledge of laws relating to real estate acquisition, real property management, and real property valuation.</li> <li>Working Knowledge of land use planning regulations and procedures.</li> <li>Working knowledge of real estate legal documents, reading legal descriptions and real estate title.</li> </ul>	<ul style="list-style-type: none"> <li>In depth knowledge of laws relating to real estate acquisition, real property management, and real property valuation, as well as land use planning.</li> <li>In depth knowledge of land use planning regulations and procedures.</li> <li>In depth knowledge of legal document preparation, reading and writing legal descriptions and real estate title.</li> </ul>
<b>Skills &amp; Abilities</b>	<ul style="list-style-type: none"> <li>Communication and interpersonal skills, both verbal and written...</li> </ul>	<ul style="list-style-type: none"> <li>Communication and interpersonal skills, both verbal and written.</li> </ul>	

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	<ul style="list-style-type: none"> <li>• Ability to work well with internal and external customers.</li> <li>• Strong organizational skills.</li> <li>• Very Good Microsoft Office computer applications skills required.</li> <li>• Basic skills with ArcGIS mapping.</li> <li>• Mathematical skills including the ability to apply concepts such as fractions, percentages, ratios and proportions to practical situations.</li> <li>• Ability to work well under pressure and perform multiple tasks in a timely manner.</li> <li>• Ability to work well in a diverse environment.</li> <li>• Ability to take direction and be self-directed within the parameters of job.</li> <li>• Team Player.</li> <li>• Ability to participate in problem solving exercises and think through alternative solutions.</li> <li>• Ability to identify problems and communicate them to the Real Estate Specialists and the Manager.</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to work well with internal and external customers.</li> <li>• Strong organizational skills.</li> <li>• Very Good Microsoft Office computer applications skills required. Familiarity with PeopleSoft, Maximo, FileNet and other software preferred.</li> <li>• Basic ArcGIS mapping</li> <li>• Mathematical skills including understanding basic ideas of statistical analysis, geometry and trigonometry as well as the ability to apply concepts such as fractions, percentages, ratios and proportions to practical situations.</li> <li>• Basic legal document writing skills.</li> <li>• Negotiation skills.</li> <li>• Ability to work well under pressure and perform multiple tasks in a timely manner.</li> <li>• Ability to work well with teammates of varying levels and positions.</li> <li>• Ability to take direction and be self-directed within the parameters of job.</li> <li>• Team building skills.</li> <li>• Ability to follow complex lines of thinking and problem solving including alternative solutions.</li> <li>• Ability to define problems, collect data, establish facts and draw valid conclusions.</li> <li>• Ability to build consensus both internally and externally.</li> <li>• Ability to think creatively.</li> <li>• Ability to interpret a moderate level of technical instructions in mathematical</li> </ul>	<ul style="list-style-type: none"> <li>• Excellent communication and interpersonal skills, both verbal and written.</li> <li>• Ability to work well with internal and external customers.</li> <li>• Strong organizational skills.</li> <li>• Excellent Microsoft Office computer applications skills required. Familiarity with PeopleSoft, Maximo, FileNet and other software preferred.</li> <li>• Basic ArcGIS mapping.</li> <li>• Advanced mathematical skills including understanding and applying probability and statistical inference and fundamentals of plane and solid geometry and trigonometry as well as a thorough understanding of the use of ideas such as fractions, percentages, ratios and proportions to practical situations.</li> <li>• Advanced legal document writing skills for complex real estate transactions.</li> <li>• Excellent negotiation skills.</li> <li>• Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures and/or governmental regulations.</li> <li>• Team building skills</li> <li>• Advanced report writing</li> <li>• Ability to work well under pressure and perform multiple tasks in a timely manner.</li> <li>• Ability to work well with teammates of varying levels and positions.</li> </ul>
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		<p>or diagram form and identify the variables.</p>	<ul style="list-style-type: none"> <li>• Ability to take direction and be self-directed within the parameters of job.</li> <li>• Team Player.</li> <li>• Ability to follow complex lines of thinking and problem solving including alternative solutions.</li> <li>• Ability to define problems, collect data, establish facts and draw valid conclusions.</li> <li>• Ability to build consensus both internally and externally.</li> <li>• Ability to think creatively</li> <li>• Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.</li> <li>• Ability to analyze the legal terms of land related documents.</li> <li>• Ability to communicate effectively with all levels of management.</li> <li>• Ability to communicate with customers on politically sensitive real property issues.</li> </ul>
<b>Decision making</b>	<p>Follows established procedures. Establishes daily work priorities. May train lower level employees. Escalates problems or issues to supervisor and provides recommended solutions.</p>	<p>Works under general supervision. Free to determine most appropriate work methods. Acts as a resource for colleagues with less experience. Escalates unusual or complex issues to supervisor.</p>	<p>Works independently, under limited supervision. Acts as a resource for colleagues with less experience. Trains and mentors others. May act as a team leader. Advises management on best work methods, processes and/or application of policy. Receives guidance in complex situations.</p>
<b>Complexity</b>	<p>Performs mostly routine work. Ability to complete tasks repeatedly with minimal</p>	<p>Prioritizes and performs a broad range of moderately complex technical or</p>	<p>Manages and performs an extensive range and variety of complex technical or</p>

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	<p>variation. Applies knowledge of the organization and developed technical knowledge in the functional area to identify and recommend solutions to problems. This position will provide assistance to existing staff in generally routine title research and document preparation.</p>	<p>professional work. Solves day to day problems using established policies, regulations, or work rules. Many duties will require analysis and evaluation, with assistance of manager or Senior Real Estate Specialist, of interests and issues and the creation of several possible solutions amenable to all parties' in the resolution of moderately complex real estate assignments.</p>	<p>professional work activities, some without precedent. Takes a broad perspective to identify solutions. Most duties will require analysis and evaluation, with minimal assistance, of interests and issues and the creation of several possible solutions amenable to all parties in the resolution of complex real estate assignments.</p>
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