

Chapter 1. Introduction

Purpose

The purposes of this manual are to:

1. Describe the process and definitions by which facilities are inventoried on the campuses and reported.
2. Serve as a reference document for users of facilities data.

Why a facilities inventory?

Each campus maintains its own facilities inventory system which provides planning and management data about the existing physical plant. Specifically, the facilities inventory system provides information about: (1) buildings and (2) rooms within buildings. It also serves as the campuses' official record of existing space.

Each year, campuses submit their inventory of facilities to the Office of the President where the data are merged in the Corporate Equipment and Facilities system. This system enables the Office of the President to perform such tasks as development of capital budget proposals, analysis of space needs, and reporting to the State on facilities for the entire University.

Uses of the Facilities Inventory

Outlined below are the major uses of facilities data by campus and UCOP users:

- Campus space assignment and control.
- Construction project planning and management.
- Capital outlay budget development.
- Projections of future space needs.
- Space utilization standards and analysis.
- Development and maintenance of space standards.
- Equipment budgeting standards.
- Operating budget workload measures.
- Scheduling of maintenance, alterations, and janitorial service.
- Insurance and risk management.

- Determination of building use component of the indirect cost rate.
- External reporting, audits, contractual accountability requirements.

Data Reported to the Corporate System

1. The Corporate Equipment and Facilities System is dependent on data from two input files from the campuses: the **building file** and the **room file**.
2. These two files reflect the facilities inventory as of the end of the third week of Fall term classes and are due from the campuses by the tenth working day of December to the Office of the President (Information Systems and Administrative Services).
3. The **building file** should reflect *all* University-owned buildings as well as non-University-owned buildings housing University activities which are available for use by the University as of the end of the third week of the Fall term, irrespective of ownership, structural type¹ or location, and without regard to whether normal assignable area is included. See Appendix C, *Building Area Overview*.²

Exceptions are:

- a. The Regents' assets (such as property holdings used as investments)
 - b. Overseas campuses
 - c. Marine vessels³
 - d. Facilities on wheels (e.g., mobile clinics which are in the equipment inventory)⁴
 - e. Federally owned or operated contract research centers (e.g., Livermore Lab, Los Alamos, Lawrence Berkeley Lab).
4. The **room file** should contain all assignable space for buildings included in the Building file. (See footnotes 2 and 3.)

The data reported to the Office of the President is a subset of that which is collected on the campuses.

¹ Field structures (lath houses, hay sheds, feeding sheds, pole buildings, etc.) are reportable if they are roofed, whether unenclosed or partially enclosed. Shed structures are counted on the basis that support posts for the roof are functionally equivalent to an outside wall or partition, measured from the drip line of the roof. See Appendix C, *Building Area Overview*, for buildings to be included.

² Examples of kinds of buildings normally without assignable area are separate parking structures, free-standing rest room facilities, utilities services structures containing only utilities services equipment. Because various building data are processed on the basis of occupying facilities department and program classification characteristics, it is necessary for all buildings (except separate parking structures) containing gross square feet but no assignable square feet to record the building as having at least one room (using Room Use Code A90) with the actual measured amount of nonassignable square feet reported in the ASF data field as "pseudo-ASF" so that an appropriate facilities department can be associated with the building.

³ Marine vessels, however, are recorded in the building file only when required to account for equipment assigned to them. Such vessels should report an amount of '1' basic gross square foot in the building file; no room level data in the room file are recorded for these vessels.

⁴ "Fixed" mobile facilities, however, are reportable (e.g., relocatable buildings, "mobile homes" on blocks).

Hastings College of the Law is not the property of the Regents but of its own Board of Directors.

superseded

University-Related Foreign Leased Properties

LOCATION	TENANT	UC Entity	PURPOSE	USE	SQ. Ft.	RENT ¹	LEASE TERM	REMAINING OPTIONS
470 Collins St., #5 th Floor Melbourne, Australia	The Regents	OP-EAP	A	Education	Offices	630	Australian \$1,485.26	08/01/2002 07/31/2005 1st 2 yrs 2nd 2 yrs
Delhi, India, #17 New Delhi, India	The Regents	OP-EAP	A	Education	Mixed Use		US\$ 900.00	07/01/2000 06/30/2006 None
Edinburgh Study Center Edinburgh, Scotland	The Regents	OP-EAP	A	Education	Off/Class	689	£ 466.67	07/01/1998 06/30/2008 None – Lease extends unless cancelled
La Lizza 10 Siena, Italy	The Regents	OP-EAP	A	Education	Classrooms (5)		Euro 2,000.00	09/15/2003 09/14/2006 Lease automatically extends but no longer than 9/14/2013
89, rue du faubourg Saint-Antoine Paris, France	The Regents doing business as an Assoc. in a foreign country	OP-EAP	A	Education	Office/ Conference	1,100	Euro 2,000.00	03/01/2003 02/28/2012 None
8 St. James Place ² London, England	The Regents	OP-EAP	A	Education	Office	2,685	£ 7,250	12/25/1998 12/24/2013 None
Universitat Autònoma de Barcelona Bellaterra, Spain	The Regents	OP-EAP	A	Education	Office		Euro 204.00	09/01/2002 08/31/2006 None
Via Montanini 100, #1st Floor Siena, Italy	The Regents	OP-EAP	A	Education	Office	1,440	Euro 2,500.00	10/01/2003 09/30/2009 1st 4 yrs
Crested Towers Building, 5 th Fl. #2 Kampala, Uganda	The Regents	UCSF	A	AIDS Research	Office	936	US\$ 1,150	11/01/2003 10/31/2008 1st 5 yrs

¹ Most of the rent information represents initial rent amounts subject to annual adjustments.

² A subtenant has terminated its agreement, but continues to pay rent per the sublease agreement until 12/31/2005.

University-Related Foreign Owned Properties

Location	Owner	Campus Purpose	Use	Size	Transaction Type	Date Recorded	Book Value	
Atitua Land, Cook Bay Teharaoa, French Polynesia, Tahiti	The Regents	UCB	Research	Field Station	35 acres	Gift	12/7/1981	\$550,000
1 Carmen, Chimalistac Mexico D.F., Mexico	The Regents	OP-EAP	Research and Teaching	Office/ Classroom	1.28 acres	Purchase	9/19/2003	\$4,000,000

X-Sender: jkissler@popserv.ucop.edu
X-Mailer: QUALCOMM Windows Eudora Version 5.2.0.9
Date: Wed, 06 Oct 2004 11:39:52 -0700
To: paul.hancock@ucop.edu
From: Jerry Kissler <jkissler@ucop.edu>
Subject: Fwd: Drafts of the Property Tables

Date: Wed, 06 Oct 2004 10:23:31 -0700
To: Valerie Purnell
From: Jerry Kissler <jkissler@ucop.edu>
Subject: Drafts of the Property Tables

Valerie,

Here are the two tables on property owned or leased outside California. I want to check with UCSF about the Uganda property before you transmit this to Senator Speier's office.

The list of foreign property owned includes only two properties. The Gump gift in Tahiti, which is used as a research station under the direction of the Berkeley campus, and the property in Mexico City, which was acquired to serve as the "California House" for EAP, UC Mexus and other programs.

Most of the leased space is occupied by the University's Education Abroad Program (EAP), which provides opportunities for undergraduates to take classes at a university in another country. The property in Uganda is used by UCSF for the Epidemiology Prevention and Interventions (EPI) Center --- an AIDs research project.

Any comments or suggestions?

Jerry



UC OWNED FACILITIES ABROAD.doc



UC Foreign Leases.rtf

Editing of Data and Error Correction

All data will be edited according to the specifications and code values contained in the individual data element definitions. Campuses should insure that data adhere to published corporate edit values prior to submission to the Office of the President. (See input specifications in Chapter 3, *Building Data Elements* and Chapter 4, *Room Data Elements*.) Campuses will be asked to resubmit their data when errors are detected.

Information Systems and Administrative Services (IS&AS) in the Office of the President is responsible for maintaining the *Corporate Facilities Input Specifications* and for providing updates to the campuses. IS&AS is also responsible for monitoring the receipt of campus data.

The edit reports list data which 1) will not be included in the database after updating or 2) report invalid or inconsistent classifications. The primary functional user in the Office of the President (Resource Administration) determines whether the data omissions or inconsistencies require a resubmittal of the campus file, or whether the file is acceptable and can be processed. After all edits have been approved, the files are used to update the corporate database.

See Chapter 5, *Edit and Standard Output Reports*, for a descriptive list of edit reports.

California Codes
California Government Code
GOVERNMENT CODE SECTION 11000-11019.9

11011.17. (a) The University of California, by July 1, 1988, shall furnish the department, in a uniform format specified by the department, a record of each parcel of real property which it possesses. The University of California shall update its record of real property holdings, reflecting any changes, by July 1 of each year. This record shall include the following information:

(1) The location of the property within the state and the county, the size of the property, including its acreage and any other relevant property data.

(2) The date of acquisition of the real property, if available.

(3) The manner in which the property was acquired and the purchase price, if available.

(4) A description of the current uses of the property and any projected future uses.

(5) A concise description of each major structure on the property.

(6) The estimated value of real property declared surplus by the University of California. Where an actual appraisal is available it may be used, but it is not required.

(b) For property used or possessed by the University of California as a campus, medical center, agricultural experiment station, part of the Natural Reserve System or government owned national laboratory, the record shall only include information required by paragraphs (1), (4), (5), and (6).

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proposed text for a revision
of the Facilities Manual

4.6 FACILITIES INVENTORY

References:

- **Facilities Inventory Guide, University of California, Office of the President, Oakland CA, February 1993**

The Facilities Inventory is an information system that collects planning and management data about the University's existing physical plant. Specifically, the Facilities Inventory provides physical and functional information about buildings and rooms within buildings. The inventory also serves as the Regents' official record of existing space.

Each campus maintains its own inventory. Once each year, campuses submit their inventory files to the Office of the President, where the data is merged into the Corporate Equipment and Facilities System database. This system enables the Office of the President to perform tasks such as long-range planning, capital budgeting, space analysis, utilization monitoring, institutional comparisons, and reporting to the State on University facilities. (The national laboratories and Hastings College also maintain inventory systems, but these systems are not a part of the Corporate Equipment and Facilities System.)

The process and criteria by which campus facilities are inventoried and reported are described in the Facilities Inventory Guide, which is usually kept at the campus office in charge of planning or budgeting. UC inventory standards closely parallel federal guidelines issued by the National Center for Education Statistics.

4.6.1 Uses of the Facilities Inventory

The applications of Facilities Inventory data have expanded in recent years. In the past, data was used mainly in support of capital-outlay programming and space-utilization analysis. The following list indicates the expanding scope of inventory data applications:

- Space assignment and management.
- Construction project planning and management.
- Projections of future space needs.
- Space utilization analysis.
- Development and maintenance of space allocations and utilization standards.
- Equipment budgeting standards (see [3.4](#)).
- Operating budget workload measures (see [3.4](#)).
- Scheduling of maintenance, alterations, and custodial services.
- Insurance and risk management.
- Determination of the building use component of the indirect cost rate.
- External reporting, audits, and contractual accountability requirements (federal, state, and regional).