



Dialogue

CAPITAL RESOURCES MANAGEMENT

• BUDGET & CAPITAL RESOURCES

• UC OFFICE OF THE PRESIDENT



Best Value Pilot Program

UCSF has successfully implemented the Pilot Program Best Value (BV) contracting over the last several years. It is one additional tool in an array of delivery methods. To date, BV has been used on approximately 15% of recent contracts ranging in value from \$500k to \$75M on a variety of technically difficult and/or time sensitive jobs.

We are pleased to announce that, on Sept 7th, the legislature approved SB835, a UC-sponsored bill to extend and expand the BV pilot program. This will become effective, after signature by the Governor, on January 1, 2012. Special thanks to Senator Lois Wolk (D-Davis) for carrying this legislation.

The BV Pilot Program will expand to all campuses and medical centers available for all projects in excess of \$1M. The pilot extends until 1/1/2017 with a report on the pilot due on 1/1/2016. Construction industry advocates requested improved owner response on Change Order Requests, and these revisions will be incorporated into the contract General Conditions for BV contracts only. UCOP CRM is developing training, contracts, and documentation for this contracting method. Campus staff must attend training and consult with UCOP before implementing BV. UCOP will review campus-prepared RFP documents prior to solicitation, evaluate all selection processes to insure a transparent and objective process, and facilitate data gathering as needed to report on the success of the BV pilot.

Deborah Wylie

It's Baaaack!

Sometimes history repeats itself and at UCOP we are no strangers to old ways of doing business. A new (really, more like an old) process is back in fashion; the prose-style format for Regent's items! Yes, you heard it here first! No more tables; no more bullets; just the written word will tell your story (i.e. budget approvals, CIP amendments, external financing requests, and design & CEQA approval.) Templates are in the works, but for now, resurrect the circa 2007 items for budget and design approvals as draft templates. It may take a few cycles to get the bugs out, as we perfect this revised new/old format, so let's all be patient! Also, note that the new G&B process has eliminated oral presentations at the Regents meeting; therefore your item must include all supporting documentation for the project. We have seen simple projects get hard questions during the meeting, so items need to be rock solid.

Trish Dolan

Delegated Process Update

The Delegated-Authority Project: Certification Checklist has been developed by a team of UCOP staff and campus representatives. The redesigned checklist is available at <http://www.ucop.edu/capitalprojects/templates.html> and should be used for all delegated-authority project submittals beginning September 19, 2011. As a reminder, all delegated-authority project submittals should be sent to CRM-DelegatedItems@ucop.edu. 43 delegated projects have been approved to date.

Dana Santa Cruz

@ Alicia Jensen

EOC Showcase

Cal State Northridge experienced extensive damage during the 1994 Northridge Earthquake. The disaster assessment lasted for months, and the recovery lasted for years.

All buildings on campus were damaged. As such, the CSUN campus has a critical focus on emergency preparedness. Their dedicated EOC center has some unique features, and they have offered to share this with UC campuses as well. One unique feature is a short-set of drawings for each building, ready for mark-up after an event, with specific instructions to inspectors regarding structure type and specific areas to inspect for damage. This tour is intended for campus architects, emergency responders, campus fire marshals and inspectors. The December 2nd meeting is limited to 40 persons, but we can repeat if there is sufficient interest.

Deborah Wylie



New CEQA Mediation Statute

A new CEQA statute regarding mediation (21167.10) went into effect July 1, 2011. The provisions include: 1) if a person wants to file a CEQA suit he or she may request mediation within 5 business days of the Notice of Determination, 2) the lead agency has 5 days to respond, 3) the request is deemed denied if the lead agency does not respond, 4) the statute of limitations for filing a lawsuit does not run while mediation is underway. Stay tuned as we learn how this will work.

Charlotte Strem

6-7 TOWN GOWN CONFERENCE
- BERKELEY

11  CONTRACT ADMIN
WORKSHOP UCSC

17  EMERGENCY
BUILDING
ASSESSMENT - UCSF

25  QUALITY ASSURANCE
TECHNIQUES - UCD

27  LEED FOR PROJECT
MANAGERS - UCR

Nov

1  DEEP ENERGY
EFFICIENCY
STRATEGIES - UCI

2-3  CEQA FOR PMs
AND UC PLANNERS'
MEETING- UCOP

8 REAL ESTATE SERVICES
GROUP'S NEW CAMPUS
STAFF TRAINING - UCOP

9  QUALITY ASSURANCE
TECHNIQUES - UCI

14-16 **REGENTS
MEETING**
UC SAN FRANCISCO

DEC

2 EOC SHOWCASE AT
CALIFORNIA STATE
UNIVERSITY, NORTHRIDGE

"Working Together in Tough Times"

is the theme for the 5th annual Town Gown conference, **October 6-7**, in Berkeley. Keynote speakers include: Gavin Newsom (Lt. Gov.), Robert Reich (UCB professor of Public Policy), Paul Saffo (Managing Director of Discern Analytics), and Mark Hertsgaard (author of 'HOT: Living through the next 50 years on Earth'). Sessions include: Disaster Preparedness, Recovery and Resilience; Economic Resilience; Strengthening the Local Economy; and Climate Action and Sustainability Strategies. More information: <http://towngownca.com/> *Charlotte Strem*

Designated Campus Fire Marshal Appointments

According to the Memorandum of Understanding between the Office of the State Fire Marshal and UC (January 2011), the Office of the State Fire Marshal (OSFM) determines whether a proposed Designated Campus Fire Marshal (DCFM) is qualified to be appointed to the position. Per the MOU, UCOP sends a letter to the OSFM requesting review and evaluation of a candidate. The request will include the "candidate's name, qualifications, resume, recent applicable experience, and training record with certificates, diplomas, and other appropriate documentation. The OSFM will review the submitted documentation, determine the acceptability of a particular candidate's qualifications and will notify UCOP of its determination concerning the candidate's designation." Please note that until the OSFM provides that determination, newly hired or proposed DCFMs should be termed 'Acting'.

Catherine Kniazewycz

Real Estate Gifts

The Regents receives an average of 35 real estate gifts annually (including bequests), taking title to about 10 and overseeing sale of some 25 others without taking title. Of those properties to which The Regents take title, most support the University's endowment and are sold; however, about 25% are given to the University to occupy and use in carrying out its mission. In addition to title and environmental review, properties to be retained and used require thorough facilities, operating, site, and CEQA investigations (e.g., seismic safety). Ideally, gifts for University-related use result from a collaborative process between campus and donor focusing on 1) donor conditions for property retention and use, and 2) funding for capital and operating requirements (perhaps with donor contributions). These issues were discussed at the recent Endowment Real Estate roundtable--contact the Real Estate Services Group (RESG) for program materials.

Allen Meacham

CEQA Training and UC Planner's Workshop (Nov 2-3)

The agenda for the CEQA Training and UC Planner's Workshop targets two slightly different audiences, for attendance on one or both days. The first half-day is designed for project managers and physical and environmental planners. The agenda will focus on aspects of CEQA important for project managers to understand as they develop capital projects for approval and implementation. Topics include CEQA overview, mitigation monitoring for 3rd party development, Delegated Process for design approval, stormwater regulation impacts and highlights from recent CEQA litigation. Thursday is a full day session, designed for UC physical and environmental planners to discuss CEQA practice in greater detail. Agenda topics include CEQA GHG analysis in relation to campus Climate Action Plans, adequacy of Findings, Categorical Exemptions, Historic Resources, funding demands for public services, and details of recent UC and CEQA court cases.

Charlotte Strem

Sustainable Practices Policy Update

The Sustainable Practices Policy (8/26/11) incorporates updates in the areas of green building design, climate protection practices, sustainable operations, environmentally preferable purchasing, and sustainable foodservice practices. Updates also remove past deadlines and clarify requirements, in addition the policy has been reformatted per the new UCOP template. The Sustainable Practices Policy has been reviewed and approved by campus sustainability officers, working groups comprised of subject matter experts from all campuses, staff within Budget and Capital Resources, and the Sustainability Steering Committee. The new Policy will be posted here shortly: <http://www.universityofcalifornia.edu/sustainability/policy.html>

Andy Coghlan

For questions regarding a particular topic, please contact the author of the article directly: <http://www.universityofcalifornia.edu/directories/ucopsearch.php>

For corrections, updates or future contributions please contact: MICHAEL.LINDER@UCOP.EDU