Dialogue

CAPITAL RESOURCES MANAGEMENT ♦ BUDGET AND CAPITAL RESOURCES ♦ UC OFFICE OF THE PRESIDENT

New Real Estate Services Group Hire

Jonathan Stern has recently joined the Real Estate Services Group (RESG) as a new Senior Real Estate Officer. Jonathan comes from the Port of San Francisco where he directed its development group and negotiated public/private development agreements and ground leases on San Francisco's piers and the adjacent waterfront. His projects included rehabilitation of historic Pier 15 for the Exploratorium, and planning efforts for San Francisco's southern waterfront. The Port's projects are similar to UC's complex real estate partnerships... with more salt water.

Before joining the Port, Jonathan was a Principal at Bay Area Economics – an economic planning and real estate development consulting firm in Emeryville– evaluating demographics, markets and real estate. At BAE he advised Bay Area cities on housing, commercial and industrial real estate and markets and participated in regional planning,including ABAG's sustainable blueprint project and analysis for campus LRDPs and other university related projects. Jonathan is a member of the Urban Land Institute and serves as a ULI mentor.

Jonathan came to the Bay Area over 25 years ago to attend Stanford (don't hold it against him). He resides in Berkeley with his wife and three children (8, 11, & 13). Away from work he sits on the board of Tehiyah Day School and swims, runs and skis to keep up with his kids.

Gordon Schanck

Informal Bidding Implementation - A New Contract type

Construction Services has a new contract, the **Informal Form** (a.k.a the "IF form") for informal bidding and awarding projects with construction value of less than $640,000 following provisions in Public Contract Code 10504.5.

The IF set of documents includes the Base Qualification Questionnaire, a core document that must be completed by all bidding general contractors and MEP contractors (if using) for projects with construction value between $300K and $640K. This fulfills the qualification requirement of the statue and enables UC to bid to a selected group of qualified contractors to work on our projects. IF documents meet the requirements of PCC 10504.5 and aim to relieve the some administrative burden when bidding projects less than $640,000 in construction value.

In addition to the new contract family, Construction Services raised the threshold for using the Mini Form contract documents for informal bidding for projects with construction value of less than $200,000. Construction Services broadcast a webinar in December to discuss these changes but if you missed it and/or need more direction or advice, feel free to call us.

Vini Bhargava

Private Activity Questionnaires

On November 19, 2014, CRM opened the on-line interface for Private Activity Questionnaires (PAQs) to allow campuses to either update existing PAQs or enter new information regarding private use in projects funded from State General Obligation (GO) bonds. Concurrently, Capital Markets Finance released its PAQ on-line interface to the campus for non-state funded projects.

Since the initial implementation of the on-line questionnaires in 2012, several system interface improvements have been made. The most significant improvement is a "renew" function that allows campuses - for projects that have experienced no changes - to simply renew the previously submitted PAQ from the archives. The renew function streamlines the entry process considerably by pre-populating a current form, allowing the campus to confirm the data. Detailed instructions were included in the November email to campus staff responsible for reporting private use, but please contact Michael Linder or the capital planner for your campus if you have any questions.

Colleen Connor

iCamp Introduction

UC is in the initial implementation phase of the Integrated Capital Asset Management Program (ICAMP). The project has been in development for some time. UCOP Risk Services has provided funding for the start-up portion of this project. ICAMP is a combined enterprise software solution and facilities assessment to establish better data on the condition of UC facilities and infrastructure assets to prioritize improvement projects and help reduce risk.

The age and condition of UC facilities and infrastructure assets create a need for sound, data-driven capital renewal decisions based upon accurate and detailed information that can identify, prioritize, and quantify facility renewal needs and their associated risk. ICAMP plans to perform phased real-time condition assessments on UC owned facilities and infrastructure assets and will include an assessment of major costs of deferred maintenance deficiencies.

The UCOP ICAMP team has met with more than 70 campus constituencies and is currently working with a small team of campus stakeholders to evaluate proposals to provide software for this project.   *Paul Reynolds*

System-Wide Construction Insurance Update

Effective January 1, 2015, Willis Insurance Services of California, Inc. (Willis) is the new broker and administrator for all construction insurance programs. Willis replaces services that Aon had been providing to the University.
This does not change any insurance coverage. However, as a result of this change, the University may no longer use the forms created by Aon. OP Risk Services has new online forms for application, extension and termination of Builder's Risk Insurance and UCIP. Any information submitted on Aon forms will be returned back to you and you will need to re-fill the information on the new forms. The new forms, tips on using these forms and additional useful information can be found at: http://www.ucop.edu/risk-services/risk-financing-claims/content/construction-liability-insurance-resources.html. Willis and OP Risk Services are eager to create a fresh dialogue and provide effective services, and have organized a "listening tour" traveling to each campus meeting with interested parties.   *Vini Bhargava*

CODE CORNER

Gender-Inclusive Facilities

Former UC President Mark Yudof established the UC LGBT Task Force in 2012 to advance recommendations made by the LGBT Working Group to the President's Advisory Council on Campus Climate, Culture, and Inclusion. The Task Force identified the need for "provision of safe and accessible restroom facilities on campus and in all UC-owned buildings for transgender and gender non-conforming members" for the UC community.

President Napolitano charged Capital Resources Management to convene a group to develop guidelines for campuses to provide gender-inclusive restroom and changing room facilities in new construction and major renovations. CRM has gathered a core working group with architectural, project management, capital planning, and code interpretation and enforcement experience, together with members of the LGBT Task Force, to draft the guidelines.

An initial draft of these guidelines will be transmitted to the Chancellors for review and feedback before the guidelines are finalized. Campus reviewers should include at a minimum: capital planning, capital projects, facilities management, housing and dining, police, athletics and recreation, medical centers capital/facilities organizations, and any other important stakeholders the campus may identify.

This will be the last "Code Corner" for some time. Many readers may know that Catherine Kniazewycz, CRM Director of Architecture, is retiring this month after more than 25 years with the University. She has taken the position of Director of Design and Construction at Cal State Northridge to be nearer to family. While she is looking forward to new challenges, and to living near her new grandson, she will miss her many friends and valued colleagues at UC, and intends to maintain those relationships in the future. You can take the girl out of UC, but you can't take UC out of the girl!   *Catherine Kniazewycz*