

Chapter 1310 - ASSET PLANNING AND ENHANCEMENT BRANCH

1310 PROGRAM SUMMARY, RESOURCES, AND CONTACTS

(Revised 06/05)

The Asset Planning and Enhancement Branch (APEB) ensures the optimum use of the state's real estate assets to meet program needs and to derive the maximum value from the state's surplus property. APEB also provides regional and facility planning services which present strategies for most effectively meeting the state's office space needs.

The RESD's CAMB is the initial point of entry for requesting new services. Clients wishing to engage the services of the APEB should contact their RESD CAM or they may call the CAMB at (916) 376-1800 or CALNET 480-1800. For more information about CAMB, see SAM Section 1305.

Additional information on APEB's services and operations may be accessed from our home page located at <http://www.resd.dgs.ca.gov/ape>. Our mailing address and telephone numbers are:

Asset Planning and Enhancement Branch
Real Estate Services Division
707 Third Street, 6th Floor
West Sacramento, CA 95605
(IMS Code Z-1)

Telephone: (916) 376-1829 or CALNET 480-1829
FAX: (916) 376-1833 or CALNET 480-1833

1310.1 TERMS AND DEFINITIONS

(Revised 06/05)

Capitol Area Plan. This plan is the official master plan, approved in statute, for development of state-owned property proximate to the State Capitol Complex and Capitol Park. Progress reports are submitted to the Legislature annually.

Major Metropolitan Regional Planning Areas. (1) Sacramento/East Yolo Counties (2) Los Angeles County (excluding Long Beach)/ (3) San Francisco Bay Area (4) San Diego County.

Other Regional Planning Areas. (1) San Joaquin Valley (2) Upper Sacramento Valley (3) South Central Coast (4) North Coast (5) Orange County (6) San Bernardino/Riverside Counties (7) Santa Clara/Contra Costa/East Alameda Counties (8) Long Beach.

1310.2 ORGANIZATIONAL STRUCTURE

(Revised 06/005)

The APEB is organized in two sections: (1) Portfolio Management, Long Range Planning, Policy and Standards Section, and (2) Asset Enhancement Section.

1310.3 PORTFOLIO MANAGEMENT, LONG RANGE PLANNING, AND POLICY AND STANDARDS SECTION

(Revised 03/06)

Portfolio Management Unit. Regional Portfolio Managers in this unit have expert knowledge of local commercial real estate markets. They are responsible for managing the state-owned and leased assets, initial review of proposed projects, implementation of the regional facilities plan, preparation of the rent rolls for DGS owned office buildings, and identification of unused or underutilized state assets. Four portfolio managers are assigned to the major metropolitan planning areas and the fifth portfolio manager has responsibility for the balance of the state. This unit also provides services related to the following policy that is strengthened and codified in Government Code Section 14682:

1. Existing state-owned or state-controlled space must be utilized before the leasing of additional space can be considered. Special requirements such as conference, hearing, and training rooms will be provided if suitable alternate facilities are not conveniently located or it is not economical to rent such facilities periodically.
2. When tenant agencies located in existing state-owned space vacate their premises, they are obligated to continue paying rent for this space unless and until a new tenant can be assigned or until RESD can negotiate a mutual termination of the lease. If DGS generated the tenant's relinquishment they are not so obligated. Early notification to the RESD's CAM about the possible need to vacate space is encouraged to avoid unnecessary rental payments.

Long Range Planning Unit. Responsible for collecting information and projecting future state office space needs, developing regional plans and implementation strategies to meet the state's identified needs, preparing long-term forecasts of capital requirements for state facilities and preparing economic analysis for new projects. The regional facilities plans are updated annually for the major metropolitan areas and on a rotating schedule for the balance of the state. The Long Range Planning Unit also prepares individual facility plans, master plans and other planning documents at the request of individual client state agencies, the administration and the Legislature. These plans may include alternative office opportunities, transportation and parking issues, land use strategies, site planning, and facility massing alternatives.

Policy and Standards Unit. Identifies, reviews and consolidates the real estate and facility related policies and standards for the RESD. It works with all branches within the division, and its customers, to ensure a clear understanding of policies and standards. This unit works closely with the division's executive committee, assists in the development of new policies, and suggests appropriate revisions to existing policies and standards.

1310.4 ASSET ENHANCEMENT SECTION

(Revised 06/05)

The goal of the Asset Enhancement Section is to achieve the comprehensive planned management of the state's diverse portfolio of real estate to ensure optimum use for the state's operations and maximum value from its excess property holdings. The staff is available to assist state agencies in developing comprehensive plans for their properties and in implementing various proactive asset management strategies and activities.

1310.5 LOCAL GOVERNMENT ASSESSMENTS

(New 06/05)

Pursuant to Article XIII C & D of the California State Constitution, California State Agencies may be subject to Assessments levied by local government agencies on real property that receives a special benefit. Said Articles were added to the Constitution as a result of Proposition 218 which received voter approval in the November 1997 election. The DGS developed SAM Section 1310.5 per Government Code Section 53752, which provided that compliance standards be developed to inform owners of state property of their duties and responsibilities with regard to Article XIII.

Existing law, Government Code Section 53752, prescribes specific procedures for notice, protest, and hearing for the levying of new or increased assessments by local government agencies pursuant to Article XIII D of the California Constitution. These statutory procedures supercede other statutory provisions applicable to the levying of these assessments and are subject to the approval process set forth in Section 4 of Article XIII D of the California Constitution.

Upon receipt of an invoice, statement, tax bill or other notification with a line item assessment or information

pertaining to the development of an Assessment District, all State agencies are required to review the information and obtain its legal council's opinion in determining if the Assessment District was constituted pursuant to the procedures prescribed by law and further evaluate whether or not the state property within the District receives a special benefit. Agencies receiving bills from Districts constituted prior to 1996 should verify that the Districts have gone back and followed the procedures established in current law which would allow the State's participation. If the validity test is met, then the state agency which owns or controls the property is required to promptly pay its share of the assessment. Management Memo 05-17 Assessments Levied by Local Government Agencies describes the DGS policy with regards to Local Government Assessments.

http://www.documents.dgs.ca.gov/osp/sam/mmemos/MM05_17.pdf
