

**SAM—REAL ESTATE SERVICES DIVISION**

**Chapter 1300 INDEX**

<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	<b>1300</b>
<b>ORGANIZATIONAL STRUCTURE</b>	<b>1301</b>
<b>ASSET MANAGEMENT BRANCH</b>	
<b>Program Summary, Resources, And Contacts</b>	<b>1310</b>
<b>Organizational Structure</b>	<b>1310.1</b>
<b>Portfolio Management Section</b>	<b>1310.2</b>
<b>Terms and Definitions</b>	<b>1310.3</b>
<b>Local Government Assessments</b>	<b>1310.4</b>
<b>Asset Enhancement Sections</b>	<b>1310.5</b>
<b>Managing Surplus State Lands</b>	<b>1310.6</b>
<b>Statewide Real Property Inventory</b>	<b>1310.7</b>
<b>PROJECT MANAGEMENT AND DEVELOPMENT BRANCH</b>	
<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	<b>1320</b>
<b>Organizational Structure</b>	<b>1320.1</b>
<b>Transfer Of Funds To The Architecture Revolving Fund (RESD Form 22)</b>	<b>1321.1</b>
<b>Request For Project Undertaking By State Agency (RESD Form 23)</b>	<b>1321.12</b>
<b>Agencies With Separate Authority To Undertake Projects</b>	<b>1321.13</b>
<b>State Space Allowance Standards</b>	<b>1321.14</b>
<b>Alternative Office Strategies</b>	<b>1321.15</b>
<b>Requests For Planning Strategies</b>	<b>1321.16</b>
<b>Acquiring Modular System Furniture</b>	<b>1321.17</b>
<b>Code Requirements For State-Controlled And State-Owned Facilities</b>	<b>1321.18</b>

(Continued)

**SAM—REAL ESTATE SERVICES DIVISION**

(Continued)

Chapter 1300 INDEX (Cont. 1)

**REAL ESTATE LEASING AND PLANNING SECTION**

<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	<b>1322</b>
Leasing Services Unit	1322.1
Lease Management Unit	1322.12

**REAL PROPERTY SERVICES SECTION**

<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	<b>1323</b>
Leases On State Property	1323.1
Acquisition Of Real Property	1323.12
Posting Of State Property	1323.13
State Property Easements	1323.14

**ENVIRONMENTAL SERVICES**

<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	<b>1326</b>
---	-------------

**CONSTRUCTION SERVICES BRANCH**

<b>PROGRAM SUMMARY, RESOURCES, AND CONTACTS</b>	
Major Policies and Services	
Available Services	
Quality Assurance Inspection and Testing	
Code Inspection to Ensure Compliance with Building Codes and Regulation	1328
Field Level Management of Construction	
Change Order Estimating and Negotiation	
After-Contract Guarantee Enforcement and Dispute Resolution	
Administration of Construction Contracts	
Construction Services Section	1328.1

Note: Building and Property Management sections 1330 through 1330.8 moved to Chapter 1330 in September 2016

**APPENDICES**

<b>FORMS:</b>	
Public Works Project Authorization And Transfer Request (RESD Std. 22)	A-1
Request For Project Undertaking By State Agency (RESD Std. 23)	A-2

## SAM—REAL ESTATE SERVICES DIVISION

### REAL ESTATE SERVICES DIVISION

#### PROGRAM SUMMARY, RESOURCES, AND CONTACTS

1300

(Revised 6/2014)

The Department of General Services (DGS), Real Estate Services Division (RESD) offers a full range of real estate and property management services to all state agencies. RESD is dedicated to providing effective, high quality and value-added services to our customers and incorporates all organizational elements necessary to provide these services to customers.

The Asset Management Branch (AMB) is the initial point of contact for all new requests for services from RESD. New project requests are submitted from the customer agency to AMB via Global CRUISE: RESD's electronic project request system. To obtain a Global CRUISE user account, access <http://globalcruise.dgs.ca.gov/> and click on the "Click here to create a user account" link. For assistance with Global CRUISE, contact the AMB Customer Services Management Unit at 916-376-1800. Customer Services Managers are assigned by agency and are available to provide needed assistance and training. Additionally, the "HELP" tab in Global CRUISE includes a handy user guide.

Additional information on the RESD's services and operations may be obtained from the RESD home page located at <http://www.dgs.ca.gov/resd/Home.aspx> or by telephone at 916-376-1800.

## SAM—REAL ESTATE SERVICES DIVISION

### ORGANIZATIONAL STRUCTURE

1301

(Revised 9/2016)

The organizational structure for RESD is composed of the Deputy Director, Assistant Deputy Director, and four branches:

Asset Management Branch (AMB)	<i>SAM Section 1310</i>
Project Management and Development Branch (PMDB)	<i>SAM Section 1320</i>
Construction Services Branch (CSB)	<i>SAM Section 1328</i>

Note: Building and Property Management Branch was renamed the Facilities Management Division in July 2016 and its descriptions and functions are found in Chapter 1330 as of September 2016.

(Continued)

**SAM – REAL ESTATE SERVICES DIVISION**

**ORGANIZATIONAL STRUCTURE**

**1301 (Cont. 1)**

(Revised 9/2016)

**RESD Branches and their Functions**

(Continued)

<p><b>Asset Management Branch (AMB)</b></p>	<p>The Asset Management Branch (AMB) is the first point of contact for state agencies requesting RESD services and is a liaison to RESD for state agencies. AMB reviews new project requests to ensure RESD services are provided from a statewide, strategic asset management perspective and reflect state management, policy, and statutory priorities. Additionally, AMB manages occupancy in state-owned, DGS-controlled office buildings, develops regional plans for future state office requirements, identifies and implements value enhancement solutions for selected surplus properties, sells or exchanges other state-owned surplus real estate in an “as is” condition, and negotiates the long-term ground lease of underutilized properties in order to generate revenue for the General Fund. The Statewide Real Property Inventory (SPI) is managed by staff in AMB. SPI is a comprehensive statewide inventory of all real property held by the State of California.</p>
<p><b>Project Management and Development Branch (PMDB)</b></p>	<p>PMDB includes all of the architectural and engineering services, space planning and interior design, leasing, lease management, real estate sales and acquisitions, energy and environmental services, and other related competencies such as seismic retrofits, toxic site investigation and hazardous materials remediation.</p>
<p><b>Construction Services Branch (CSB)</b></p>	<p>CSB provides construction management, code and contract document compliance inspection services for construction projects undertaken by the state.</p>

## SAM – REAL ESTATE SERVICES DIVISION

### ASSET MANAGEMENT BRANCH

#### PROGRAM SUMMARY, RESOURCES, AND CONTACTS

1310

(Revised 6/2014)

The Asset Management Branch (AMB) 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. AMB also provides regional and facility planning services which present strategies for most effectively meeting the state's office space needs.

AMB's Customer Services Management unit is the initial point of contact for requesting new RESD projects. The Customer Services Manager (CSM) serves as a liaison to RESD for state agencies. Customers seeking RESD services should contact their RESD CSM or call the Customer Services Management unit at (916)376-1800.

More information about the Asset Management Branch is available on the AMB website at: <http://www.dgs.ca.gov/resd/Programs/AssetManagement.aspx> or by telephone at (916)376-1800.

**SAM – REAL ESTATE SERVICES DIVISION**

**ORGANIZATIONAL STRUCTURE**  
(Revised 6/2014)

**1310.1**

The Asset Management Branch is made up of the Portfolio Management and Asset Enhancement sections.

## SAM – REAL ESTATE SERVICES DIVISION

### PORTFOLIO MANAGEMENT SECTION

1310.2

(Revised 6/2014)

The Portfolio Management Section is the initial point of contact for new RESD projects and serves as a liaison to RESD for state agencies.

Customer Services Managers (CSMs) are assigned by agency and are the central point of contact to RESD. CSMs review incoming CRUISE requests for completeness and direct each request to the appropriate branch for project execution. This unit maintains an understanding of the customers programs, real estate and facility requirements, and assists with collaboration among RESD programs.

Regional Portfolio Managers (RPMs) review all project requests to ensure RESD services are provided from a statewide, strategic asset management perspective and reflect state management, policy and statutory priorities. The RPMs also maintain a profile of the state's real estate portfolio by managing the utilization of space in a state-owned or DGS-controlled office building, assisting agencies with planning short and long term real estate needs, and developing regional plans for future state office requirements.

While managing space assignments in state facilities pursuant to the [State Administrative Manual Management Memo 04-17](#), the following terms and conditions in the [DGS Building Occupancy Policy](#) (Policy) pertain to state agencies (occupant agencies) that hire from the DGS certain premises with the appurtenances situated in various cities within the State of California. Occupant agencies are assigned space subject to the terms contained in the Policy, Building Rules and Regulations, Space Assignment GS4091, legislative mandates, and any and all applicable State of California statutes, policies, and regulations.

**TERMS AND DEFINITIONS**

**1310.3**

(Revised 6/2014)

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

## SAM – REAL ESTATE SERVICES DIVISION

### LOCAL GOVERNMENT ASSESSMENTS

1310.4

(New 6/2014)

[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. DGS developed SAM Section 1310.4 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 supersede 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. Procedures to determine if the state is required to participate in proposed or existing Business Improvement or Special Assessment Districts can be found at [Business Improvement Districts](#) and includes the Assessment District Questionnaire (to be completed by a state agency when participating in an Assessment District).

**SAM – REAL ESTATE SERVICES DIVISION**

**ASSET ENHANCEMENT SECTION**

**1310.5**

(Revised 6/2014)

The Asset Enhancement staff identifies and implements value enhancement solutions for unused or underutilized state-owned properties. This section is responsible for the disposition of state-owned real property which has been declared surplus to future state needs.

## SAM – REAL ESTATE SERVICES DIVISION

### MANAGING SURPLUS STATE LANDS

1310.6

(Revised 6/2014)

Surplus land refers to land acquired by the state through purchase, condemnation, or donation, which is no longer needed for any state purpose.

Identification of Surplus State Lands—(Responsibility of state agencies)

[Government Code Section 11011](#) et seq. requires each state agency to annually review all proprietary lands under its jurisdiction to identify and report to RESD any land that is excess to the agency's foreseeable needs.

Reporting of Surplus State Lands—(Responsibility of DGS)

DGS is required to annually report to the Legislature the lands identified as excess by state agencies and request authorization to dispose of the lands by sale or otherwise.

The Annual Report to the State Legislature on Surplus Proprietary Land is prepared by –AMB's Asset Enhancement Section. This report provides information about the excess properties submitted by agencies. It also serves as the basis for DGS sponsored legislation each year to obtain authorization to carry out the disposal of surplus properties.

Disposing of Surplus State Lands

After the Legislature authorizes the disposal of surplus properties, AMB's Asset Enhancement Section performs the activities necessary to carry out the sale, lease, exchange, or other disposition.

## **SAM – REAL ESTATE SERVICES DIVISION**

### **STATEWIDE REAL PROPERTY INVENTORY**

**1310.7**

(Revised 6/2014)

#### The DGS' Responsibility

DGS is required to maintain a complete and accurate statewide inventory of all real property held by the State of California. This is called the Statewide Real Property Inventory (SPI) and is a comprehensive database of all state proprietary land holdings.

#### Agency's Responsibility

State agencies that acquire, encumber, or dispose of real property are required to provide information to DGS for inclusion in the SPI and routing to the Secretary of State Archives. For assistance in determining the appropriate documents to be submitted, contact RESD's SPI Unit at (916) 375-4052.

## SAM – REAL ESTATE SERVICES DIVISION

### PROJECT MANAGEMENT AND DEVELOPMENT BRANCH

#### PROGRAM SUMMARY, RESOURCES, AND CONTACTS

1320

(Revised 1/2015)

The mission of the Project Management and Development Branch (PMDB) within RESD is to deliver quality, cost effective and timely real estate services to State Agencies. This includes management of the planning, design and construction of major and minor capital outlay projects and leasing projects within the scope, budget, and schedule that meet the program requirements of our clients and the authorization of the Legislature. This may be done either through the capital outlay process or alternative forms of delivery. The PMDB services also include architectural and engineering, space planning and interior design, leasing and lease management, real estate sales, appraisals, acquisitions, energy and environmental services (including toxic site investigation and remediation) etc.

The SAM Sections [6801 through 6899](#) provide a detailed explanation of PMDB's role in the state's capital outlay process.

The RESD's Asset Management Branch AMB is the initial point of entry for requesting new services online through CRUISE (Customer Requests: Upgraded Information Sharing Environment):

<http://www.webapps.dgs.ca.gov/resd/cruise>

State Agencies use CRUISE to submit requests for RESD services.

Additional information on PMDB's services and operations may be accessed from the RESD home page located at [www.dgs.ca.gov/resd](http://www.dgs.ca.gov/resd). PMDB contact information:

Project Management and Development Branch  
Real Estate Services Division  
707 Third Street, 4<sup>th</sup> Floor  
West Sacramento, CA 95605  
916-376-1700  
(IMS Code Z-01)

**ORGANIZATIONAL STRUCTURE**

**1320.1**

(Revised 1/2015)

The services provided by PMDB include:

***Real Estate Leasing and Planning***

Provides services to assist state agencies in acquiring leases for office, warehouse, labs, and other specialized facilities in privately owned buildings. These services include space planning, lease negotiation, execution and lease management services. See SAM Section 1322 for more details.

***Real Property Services***

Provides appraisal services, appraisal review, acquisition services, real property transaction review, leases of State-owned property, and telecommunications leases to State agencies, and executes the sale of surplus state-owned property. See SAM Section 1323 for more details.

***Architecture and Engineering Services***

Provides in-house architectural services, civil engineering, structural engineering, mechanical engineering, electrical engineering. PMDB prepares cost estimates for all phases of construction projects including change order estimates, value engineering and estimates of project fees.

***Program and Project Management***

Provides management of large and/or complex projects and programs including capital outlay projects and programs, design-build, lease build-to-suit, special repairs, hazardous materials assessments and remediation, underground storage tank programs, and energy projects. Strategic planning, budgeting, estimating,

***Energy and Sustainability***

(Moved to Chapter 1800, September 2016)

***Environmental Services***

The Environmental Services program provides environmental due diligence studies and compliance, including the preparation, review and oversight of Environmental Impact Reports/Statements, Initial Studies/Negative Declarations, and permits as required by the California Environmental Quality Act ([CEQA](#)), the National Environmental Policy Act ([NEPA](#)), and other environmental laws; hazardous materials assessments and remediation, consultation/permitting with regulatory agencies, and construction monitoring. See SAM Section 1325 for more details.

**SAM – REAL ESTATE SERVICES DIVISION**

**TRANSFER OF FUNDS TO THE ARCHITECTURE  
REVOLVING FUND (RES D FORM 22)  
(Revised 6/2014)**

**1321.1**

For clients using the Architecture Revolving Fund (ARF), the client agency must first transfer the funds to the ARF via [RES D Form 22](#) before design and construction support services can be provided. DGS/RES D will prepare and provide the completed Form 22 to the client agency for their approval and subsequent submission to the Department of Finance for funding approval.

**SAM – REAL ESTATE SERVICES DIVISION**

**REQUEST FOR PROJECT UNDERTAKING BY  
STATE AGENCY (RES. FORM 23)**  
(Revised 2/2015)

**1321.12**

Except as otherwise noted in Public Contract Code Section [10107](#), the erection, construction, alteration, repair, or improvement of any state structure, building, road, or other state improvement of any kind is generally under the sole charge and direct control of DGS. **Exceptions** from this requirement may be granted if DGS determines its services in connection with such projects are not required.

When state agencies request authorization to carry out a project that meets the requirements of Public Contract Code Section [10108](#) or [10108.5](#), they must use the Request for Project Undertaking by State Agency ([RES Form 23](#)). *Note: All projects must be reviewed and signed by the appropriate requesting agencies before the Form 23 is submitted to DGS. See SAM Appendix A-2 for a copy of the Request for Project Undertaking by State Agency (RES Form 23).*

[Click here for instructions on completion of the Form 23.](#)

**SAM – REAL ESTATE SERVICES DIVISION**

**AGENCIES WITH SEPARATE AUTHORITY TO UNDERTAKE PROJECTS**

**1321.13**

(Revised 12/2014)

The following agencies have authority to execute projects without DGS review or oversight:

Board of State Harbor Commissioners	Department of Water Resources
Department of Boating and Waterways	Regents of the University of California
Department of Transportation	Trustees of the California State University and Colleges
Community Colleges	CalFire (as determined on a project by project basis by DOF)

## **SAM – REAL ESTATE SERVICES DIVISION**

### **STATE SPACE ALLOWANCES STANDARDS**

**1321.14**

(Revised 12/2002)

The RESD is responsible for developing and implementing planning and design standards and determining space needs for state-owned and leased facilities. The following table delineates the maximum space allowances and space types for each job category. The allowances indicate net square feet and do not include space for circulation and special requirements outside the office/workstation space. These standards are general guidelines and can be modified and developed to meet specific job requirements of individual agencies and their employees.

Once an agency's design standards and space allocations have been developed and approved by RESD, any modifications must be reviewed and approved by RESD.

(Continued)

**SAM – REAL ESTATE SERVICES DIVISION**

**STATE SPACE ALLOWANCES STANDARDS**

**1321.14 (Cont. 1)**

(Revised 12/2002)

State Space Allowances		Maximum Net Square Feet by Space Type				
Job Category	Examples of Typical Job Titles	**CF Private	** CF Open	**CF Group	**MSF Open	**MSF Group
<b>Executive</b>	Cabinet Secretary, Agency Administrator, Board Chairperson, Department Director, Commissioner	300				
<b>Administrators</b>	Deputy Director, Asst. Director, Executive Secretary, Dept./Division Chief, Branch/Office Chief, Board Member	200				
<b>Managers</b>	Bureau Chief, Deputy or Asst. Chief, Section Head	150				
<b>Managers</b>	Dept. Administrative Officer or Fiscal Officer, middle managers	150	150		112	
<b>Supervisors*</b>	Supervisor of Large Unit (10 or more)		125		96	
<b>Supervisors*</b>	Supervisor of Small Unit (9 or less), Asst. Unit Supervisor, First-Line Supervisors		110		96	
<b>Attorneys***</b>	Attorney	150	100	100	80	80
<b>Technical Professionals</b>	Architect, Engineer			100	80	80

*\* The need for privacy and confidentiality of personnel/labor relations issues should be considered through the effective location and configuration of work stations or placement of quiet rooms.*

*\*\* Definition of Terms*

*\*\*\* Applies to Trial Attorneys only, unless justification is submitted to RESD for review and approval*

**SAM – REAL ESTATE SERVICES DIVISION**

**STATE SPACE ALLOWANCES STANDARDS**  
(Revised 12/2002)

**1321.14** (Cont. 2)

State Space Allowances		Maximum Net Square Feet by Space Type				
Job Category	Examples of Typical Job Titles	**CF Private	** CF Open	**CF Group	**MSF Open	**MSF Group
<b>Working Professionals</b>	Analyst, Accountant, Social Service Worker, Business Service Officer, Correctional Officer, Referee		100	100	64	64
<b>Clerical Supervisors*</b>	Clerical Supervisor		75		64	
<b>Clericals</b>	Account Clerk, Office Technician, Office Assistant, Stock Clerk		75	60	64	40

*\* The need for privacy and confidentiality of personnel/labor relations issues should be considered through the effective location and configuration of work stations or placement of quiet rooms.*

*\*\* Definition of Terms*

*\*\*\* Applies to Trial Attorneys only, unless justification is submitted to RESD for review and approval*

## SAM – REAL ESTATE SERVICES DIVISION

### STATE SPACE ALLOWANCES STANDARDS

1321.14 (Cont. 3)

(Revised 12/2002)

- CF            Conventional Furniture: Freestanding furniture used to make up a workstation, whether in traditional open office design.
- MSF        Modular Systems Furniture: System of interconnecting acoustical panels and hang-on components used to make up a workstation. Used in open office design.
- Private     One person, individual, hardwall constructed office for classifications indicated. The RESD staff is available to work with agencies to prepare justifications for exceptions to these standards.
- Open        Office design with a minimum of private offices. Emphasizes flexibility of reconfiguration, uses MSF or screens and conventional furniture.
- Group       Hardwall constructed office with two or more persons sharing the working area. Used with compatible work functions.

Throughout the design process, RESD Space Planners shall work with the client to establish allocations of personal and programmatic storage and file space for each employee as appropriate to the selected strategies.

\*\*\* Applies to Trial Attorneys only, unless justification is submitted to RESD for review and approval.

## SAM – REAL ESTATE SERVICES DIVISION

### ALTERNATIVE OFFICE STRATEGIES

1321.15

(Revised 12/2002)

RESD shall assist agencies/departments in the design of office space through the use of appropriate Alternative Officing (AO) methodologies to better utilize existing and proposed space and to support employee alternative work schedules. AO strategies are:

<b>Universal Plan</b>	Standardized design of workstation area that allows departments to move people rather than furniture
<b>Team Space</b>	Open workspace arrangement involving workstations with fewer, lower partitions to facilitate communication and collaboration.
<b>Shared Workspace</b>	Two or more employees sharing a single, assigned workspace either during the workday or on different shifts or schedules.
<b>Teleworking</b>	Employees work at home, fielded offices or designated Teleworking Centers one to five days a week on either a formal or informal schedule.
<b>Satellite Office</b>	A full service office location used by full-time employees living nearby.
<b>Free Address</b>	Non-dedicated, unassigned workspace at an agency/department location available to the employee on a first-come, first served basis.
<b>Hoteling</b>	Non-dedicated, unassigned workspace at an agency/department location reserved by the employee via a designated coordinator, on an as-needed basis.

**SAM – REAL ESTATE SERVICES DIVISION**

**REQUESTS FOR PLANNING SERVICES**

**1321.16**

(Revised 1/2015)

Requests for space planning and alteration design services (excluding maintenance or repair) to state-leased or state-owned office and warehouse space, relocatable buildings, and trailers shall be submitted to AMB via CRUISE. Requests to increase or decrease space shall be accompanied by a Space Planning Data form, RESD Form 4083.

## SAM – REAL ESTATE SERVICES DIVISION

### ACQUIRING MODULAR SYSTEMS FURNITURE

1321.17

(Revised 7/2015)

This policy and procedures sets forth for state agencies (departments) wishing to acquire Modular Systems Furniture (MSF). MSF utilizes components including panels, work surfaces, storage, and accessories that can be configured in a variety of combinations to create workstations.

It is the policy that surplus MSF will be utilized to the greatest extent possible by Executive Branch departments wishing to acquire MSF. This policy is in concert with Public Contract Code Section [12153](#) that authorizes the Department of General Services ([DGS](#)) “to draft, establish, and implement policies that ensure the procurement and use of recycled resources.”

As described in [Management Memo 11-01](#), “Cost-Effective Use of Surplus Property,” departments wishing to acquire MSF must first contact the DGS Office of Fleet and Asset Management ([OFAM](#)) to determine if surplus MSF will meet their needs.

If OFAM notifies the requesting department that its needs cannot be met using surplus furniture, the department is to contact California Prison Industry Authority ([CALPIA](#)) for the purchase of revitalized furniture. If CALPIA revitalized furniture is not available, the department will work with the DGS Real Estate Services Division project manager (DGS project manager) to submit a CALPIA form titled, “CALPIA Request for Modular Systems Furniture” to CALPIA.

If CALPIA accepts the project, it will notify the DGS project manager, and the project will then proceed through coordination of the design, purchase, manufacturing, shipping, installation and final completion phases. Tenants are cautioned about altering or redesigning office layouts without the assistance of RESD to prevent code violations (Fire and Life Safety Codes, Americans with Disabilities Act or Industrial Relations regulations) and to maintain the functional integrity of the office plan.

CALPIA may indicate on the request form that it is waiving the project because either it cannot meet the department’s needs, or it has scheduled or scope concerns. If CALPIA waives the project, the requesting department, with assistance from the DGS project manager, may contact the MSF vendor designated in the current DGS Open Office Panel Systems contract.

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**ACQUIRING MODULAR SYSTEMS FURNITURE**  
(Revised 7/2015)

1321.17 (Cont. 1)

**OBTAINING A DGS EXEMPTION**

The process for obtaining a DGS exemption is:

1. The requesting department sends a written exemption request to the DGS project manager. This request must:
  - a. be addressed to the DGS Director;
  - b. include a compelling argument for the exemption; and
  - c. be signed by the requesting department's director or his/her designee.

The request will be part of the complete package forwarded to the DGS Director for final determination.

The requesting department, with assistance from the DGS project manager, determines the cost of the MSF by requesting a Cost Comparison Estimate (CCE) from both CALPIA and the DGS Master Contract Vendor (Vendor). A description of the information that must be provided to CALPIA and the Vendor can be found at:

[http://www.documents.dgs.ca.gov/dgs/resd/Cost\\_Comparison\\_Estimate\\_Package.pdf](http://www.documents.dgs.ca.gov/dgs/resd/Cost_Comparison_Estimate_Package.pdf)

2. The project information referenced above is concurrently submitted to both CALPIA and the Vendor via electronic mail (email).

Within two weeks of the request, and based on the project information provided by the requesting department, CALPIA and the Vendor will each submit a MSF CCE package (for evaluation purposes only) to both the requesting agency and to the DGS project manager. The specific information that must be provided by CALPIA and the Vendor in the CCE package can be found at:

[http://www.documents.dgs.ca.gov/dgs/resd/Cost\\_Comparison\\_Estimate\\_Package.pdf](http://www.documents.dgs.ca.gov/dgs/resd/Cost_Comparison_Estimate_Package.pdf)

3. The MSF CCE package shall be final upon receipt by the requesting department. No subsequent modifications or adjustments to the MSF CCE will be accepted. The unit pricing and discounted rate in the MSF CCE shall be effective for the duration of the designated project. The DGS project manager will assist the requesting department in evaluating the CCE package for procedural compliance.
4. After review by the requesting department and the DGS project manager, the two completed CCE packages will be forwarded to the DGS Director or his/her designee, along with the written exemption request from the requesting department, to determine the disposition of the exemption request.
5. The DGS Director's decision will be sent to each MSF provider and the requesting department within two weeks of the submittal to DGS Director, unless otherwise instructed by DGS.

*\*\* See [Management Memo 15-05](#) for additional information \*\**

## SAM – REAL ESTATE SERVICES DIVISION

### CODE REQUIREMENTS FOR STATE–CONTROLLED AND STATE–OWNED FACILITIES

1321.18

(Revised 1/2015)

**State Fire Marshal.** Plans and specifications for new space and for alterations to existing space must be submitted to the State Fire Marshal for code compliance review and approval before commencement of alterations. PMDB obtains approval for all projects that it executes.

**Health and Safety Code Compliance.** Projects undertaken by the RESD meet all applicable regulations of the Department of Industrial Relations, Department of Health Services, and the Occupational Safety and Health Agency. The RESD's state leased space complies with local building and fire codes and state-owned space complies with Title 24 as administered by the State Fire Marshal.

**Seismic Certification.** All buildings considered for occupancy by the state must meet a seismic performance objective of substantial life safety as outlined in FEMA 178, or meet 75 percent of the current building code.

**American with Disabilities Act Requirements.** All state facilities must comply with the requirements of the Americans with Disabilities Act ([ADA](#)) access guidelines and Title 24 accessibility requirements. Current regulations are found in the [California Administrative Code, Title 24](#), State Building Standards, and the Americans with Disabilities Act. PMDB coordinates the review and approval of plans by the Division of State Architect's Access Compliance Unit for projects in state-owned facilities.

Projects in leased facilities are reviewed by PMDB for conceptual compliance with the ADA and Title 24 during the preparation of preliminary plans. Final compliance of the construction documents and completed facility is the responsibility of the building owner/lessor.

## SAM – REAL ESTATE SERVICES DIVISION

### REAL ESTATE LEASING AND PLANNING SECTION

#### PROGRAM SUMMARY, RESOURCES, AND CONTACTS

1322

(Revised 1/2015)

The Real Estate Leasing and Planning Section ([RELPS](#)) provide real estate services under the broad authority assigned to DGS for centralized business management functions. RELPS consists of two primary units: Leasing Services and Lease Management Services. RELPS mission is to contribute to the success of customer agencies and to the prosperity of all Californians by making the best use of the state's real estate assets and providing quality facilities for state operations in the most effective manner.

AMB is the initial point of entry for requesting leasing services. Request for new leases, amendments to existing leases, or renewals for offices, warehouses, or other facilities are to be submitted via CRUISE, approved by someone specifically authorized by the requesting agency. For assistance with Global CRUISE, contact the AMB Customer Services Management Unit at 916-376-1800. Agencies should allow as much lead time as possible when submitting their request (18 months for new existing space and 36 months for a build to suit) and they should provide full information about staffing, functions to be conducted, and any special requirements or equipment to be housed. Staffing information and rental budget may require confirmation by the Department of Finance ([DOF](#)).

## SAM – REAL ESTATE SERVICES DIVISION

### LEASING SERVICES UNIT

1322.1

(Revised 1/2015)

**Privately owned space.** The RELPS Leasing Services Unit provides services to assist state agencies in leasing office, warehouse, labs and other specialized facilities in privately owned buildings pursuant to the statutory authority contained in Government Code Section [14669](#). In carrying out RELP's responsibility for leasing privately owned space, the Leasing Services Unit performs the following functions:

1. Initiates, negotiates, bids, and executes leases of real property for use by state agencies, including lessor financed, build to suit projects, and related amendments, extensions, and terminations related thereto.
2. Performs ongoing administration of leases to enforce compliance with lease terms and conditions.
3. Initiates, negotiates, bids, and executes leases with purchase options for modular buildings.

**State-owned space.** Responsibility for the assignment, design, and alteration of space in state-owned office buildings controlled by DGS is assigned to the RESD PMDB, (SAM Section 1320) in coordination with the AMB and the BPMB. See SAM Sections 1310 and 1330 for information on these Branches.

Department of Finance Approval

[DOF](#) approval is required if either of the following conditions exist:

1. Rental costs (excluding one-time costs) as determined by RELPS are estimated to exceed \$300,000 in any year of the firm term of the lease. (Lease renewals are exempt unless a 10 percent or greater space increase or budget augmentation is required.)
2. The requesting agency will require a budget augmentation for any year within the firm term of the proposed lease. One-time costs associated with the space request, including moving, equipment, furniture, telephones, and data processing related costs must be considered.

During the development of a project, if it is determined that the actual costs are going to exceed DOF approved level initially estimated by RELPS, additional review and approval of DOF is required prior to execution of the lease.

(Continued)

## SAM – REAL ESTATE SERVICES DIVISION

(Continued)

### LEASING SERVICES UNIT

1322.1 (Cont. 1)

(Revised 1/2015)

Sublease of State-Leased Space—Leased space that becomes excess to the tenant agency's operations may be considered for sublease to other governmental or private sector tenants only after it has been determined that the space cannot be used by another state agency and the lease cannot be terminated by the state. Requests for subleasing space should be submitted to AMB via CRUISE.

Interagency Agreement—An agency proposing to make a portion of its leased space available to another state agency should prepare an Interagency Agreement form, STD. 13.

Requests for Warehouse or Storage Space—All requests for new warehouse or storage space exceeding 2,000 square feet will be reviewed by RELPS and the DGS Procurement Division, Material Services Section. They determine how an agency's needs can be accommodated, or if other alternatives exist, for example, the use of DGS Transit Storage warehousing services.

Leasing Market Information—RELPS leasing staff are familiar with rental rates and market conditions in most locations throughout the state, and often are knowledgeable about specific properties. In addition, RELPS has contracted with private brokerage firms in metropolitan areas to assist in the solicitation and selection of potential buildings for state agencies.

Food Preparation and Vending Machines—The Department of Rehabilitation ([DOR](#)) has priority for providing all food service facilities on state property. Tenant agencies must pay all costs for the construction of the facility, the monthly rental for the space, and utilities. Before vending machines may be installed in space that is controlled by the state, the department with control of the space must contact the Business Enterprise Program ([BEP](#)) located in the DOR. If the BEP elects not to provide the service, vending machines may be installed by another entity. All vending machine income, including commissions from those machines, must be forwarded to BEP pursuant to Welfare and Institutions Code Sections [19625](#) and [19630](#). A copy of the contract with the vending machine operator must be forwarded to DOR as soon as it is fully executed.

California Environmental Quality Act ([CEQA](#)) CEQA requires consideration of the environmental impact of specific state projects, which includes office leasing. It is generally the responsibility of the requesting agency (lead agency) to comply. The Environmental Services program in PMDB is available on a fee basis to handle CEQA filing requirements. See SAM Section 1320 for more details.

## **SAM – REAL ESTATE SERVICES DIVISION**

### **LEASE MANAGEMENT UNIT**

**1322.12**

(Revised 1/2015)

The RELPS manages all leases executed by DGS on behalf of state agencies. This includes post occupancy activities that are necessary to ensure lease compliance by lessor and state agencies, the administration of escalation clauses, and the legal administration of ownership changes, address changes, and assignments. In emergency situations involving the health and safety of tenants, the agency should take immediate and necessary action to address the situation, contacting RELPS as soon as practical. Examples of such emergencies are: fire; broken water pipes and plumbing overflows; the presence of toxic, explosive, or noxious fumes or vapors; vandalism, and broken locks or glass.

Facilities Development Overview Training for Client Agency Personnel – Training that covers information and instructions on procedures to request new or additional leased space is recommended. It is available in a two-day course specifically designed for state agencies' business and facilities staff assigned to work with RELPS in the development of leased space. A course manual is available which provides detailed information for all aspects of leased facilities development. For more information about this course, contact RESD Training Coordinator at (916) 376-1853 or 376-1854.

## SAM – REAL ESTATE SERVICES DIVISION

### REAL PROPERTY SERVICES SECTION

#### PROGRAM SUMMARY, RESOURCES AND CONTACTS

1323

(New 6/2005)

The Real Property Services Section (RPSS) offers a full range of real estate and property management services to all state agencies. The RPSS serves as the state's agent in the acquisition and disposal of state-owned real property for many state agencies, providing centralized services in the following areas:

Site selection	Leasing of state-owned property
Appraisal review	Appraisal review
Relocation assistance	Surplus property sales
Property management	Review of real estate transactions conducted by other state agencies
Appraisal	Due diligence studies for verification of title

**LEASES ON STATE PROPERTY**

**1323.1**

(Revised 01/2017)

The Asset Management Branch is the initial point of entry for real estate services. To request real estate services, agencies submit a request via CRUISE. See [Section 1300 and 1310](#).

***Leasing State-Owned Real Property to Others.***

The Director of DGS, with the consent of the state agency concerned, may lease state- owned real property to others for a period not to exceed five years. Leases of state-owned property are required to reflect fair market rental, with certain exceptions. Leases of state- owned real property for radio and television purposes (telecommunications leases) and other specified uses may exceed the five-year limit. When space permits, agencies may request that space in state facilities be leased to financial institutions in order to provide for Automated Teller Machines.

***General Competitive Bidding Requirement for Leases of State-Owned Property.***

Competitive bids shall be solicited for new leases or renewal of existing leases of state- owned real property, except for the following:

1. Leases where prior approval has been received from DGS to lease without solicitation and at a rental rate consistent with fair market value.
2. Renewal of a lease for up to three five-year extensions where prior approval has been received from DGS and at a rental rate consistent with fair market value.
3. Leases to nonprofit organizations.
4. Leases to governmental agencies.
5. Telecommunications leases.

***Commercial Advertising Signs.***

There are restrictions regarding commercial advertising signs on state property. To obtain guidelines before entering into a lease for signage, clients may contact DGS.

## SAM – REAL ESTATE SERVICES DIVISION

### ACQUISITION OF REAL PROPERTY (Revised and Renumbered 6/2005)

1323.12

The DGS has the general responsibility for approving the acquisition of real property, including exercising purchase options, for nearly all state agencies.

***Appraisal of Real Property, Agencies with Real Estate Staff.*** The RPSS prepares appraisals of real property or specific property rights upon request. An appraisal review is an independent review of real estate appraisals that ensures the appraisals are prepared in conformance with accepted appraisal principles and techniques.

***Acquisition of Real Property, Agencies without Real Estate Staff.*** As a full service real estate organization, RPSS can carry out all the necessary activities to acquire real property on behalf of state agencies. The RPSS can also provide advice and assistance to blend the efforts of agency staff and PSB staff when appropriate.

***Acquisition of Real Property, Agencies with Real Estate Staff.*** Some state agencies have authority, staff resources, and expertise to carry out their own property acquisitions. In these cases the RPSS provides procedures for agencies to use. (Note: The procedures do not apply to acquisitions by the [Department of Transportation](#) or to the [Department of Water Resources](#).)

***Role of the State Public Works Board.*** The State Public Works Board approves the selection and acquisition of real property on behalf of the state.

***Relocation Assistance.*** Public agencies, including the State of California, are required to provide relocation assistance and benefits to persons and businesses displaced as result of a public acquisition of real property. The RPSS prepares relocation plans and entitlement reports and provides relocation assistance for state agencies upon request.

***Gifts of Real Property.*** Acceptance of gifts of real property to the state is subject to the approval of the Director of the Department of Finance ([DOF](#)). Prior to DOF approval, DGS reviews certain elements of the proposed gift. The agency being gifted will furnish documentation to RPSS to facilitate the review.

***Transfers of Jurisdictions Between State Agencies.*** The DGS' approval is required for transfer of state-owned real property from one agency to another. Any compensation paid shall be at fair market value at the time of the transfer. Agencies are advised to obtain an appraisal from the RPSS or a certified appraiser to determine value. A transfer of property between two agencies financed from a common fund may be made with no compensation being paid, provided approval of the DOF has been obtained, and both agencies agree to the transfer.

**SAM – REAL ESTATE SERVICES DIVISION**

**POSTING OF STATE PROPERTY**

**1323.13**

(Revised & Renumbered 6/2014)

Posting state-owned or state-leased property in an effort to protect it from misuse, destruction, vandalism, or criminal activity is the responsibility of the agency or department who controls the property. The agency or department shall coordinate the posting of property with the [California Highway Patrol](#).

## **SAM – REAL ESTATE SERVICES DIVISION**

### **STATE PROPERTY EASEMENTS**

**1323.14**

(Revised 1/2015)

Agencies are required to submit any proposed acquisitions of easements requiring execution or approval by the Director of DGS to RPSS. Acquisition of easements where the total amount to be paid by the state is less than \$1,000 are exempt, as long as the agency uses an agreement Form previously approved in writing by RPSS.

Requests to grant easements across state property generally require execution or approval of the Director of DGS. When such approval is required agencies should not negotiate with the grantee about the terms and conditions of the proposed grant until the RPSS determines the consideration for the grant.

Landholding agencies shall consider the effect of the proposed grant upon the environment and provide RPSS with the appropriate environmental document (s). RESD can assist agencies in developing the necessary environmental documents. Agencies shall not permit potential grantee use of state lands until authorized by an executed document.

## **SAM – REAL ESTATE SERVICES DIVISION**

### **STATE PROPERTY EASEMENTS**

**1323.15**

(Revised 1/2015)

Agencies are required to submit any proposed acquisitions of easements requiring execution or approval by the Director of DGS to RPSS. Acquisition of easements where the total amount to be paid by the state is less than \$1,000 are exempt, as long as the agency uses an agreement Form previously approved in writing by RPSS.

Requests to grant easements across state property generally require execution or approval of the Director of DGS. When such approval is required agencies should not negotiate with the grantee about the terms and conditions of the proposed grant until the RPSS determines the consideration for the grant.

Landholding agencies shall consider the effect of the proposed grant upon the environment and provide RPSS with the appropriate environmental document (s). RESD can assist agencies in developing the necessary environmental documents. Agencies shall not permit potential grantee use of state lands until authorized by an executed document.

**ENVIRONMENTAL AND SUSTAINABILITY PROGRAM**  
(Renumbered 09/2016 and moved to section 1802)

**PROGRAM SUMMARY**

1326

(Revised 1/2015)

The Environmental Services program has extensive experience in environmental due diligence including the preparation, review and oversight of environmental studies and documents, environmental impact reports/statements, and permits as required by the California Environmental Quality Act ([CEQA](#)), the National Environmental Policy Act ([NEPA](#)), and other environmental laws. Environmental Services staff prepares environmental documents and analyses for a full range of projects and programs such as State facilities (e.g., offices, communication towers, fire stations, hospitals, parks, museums, hatcheries, and laboratories), infrastructure improvements, environmental restoration, and regulatory programs.

The Environmental Services program has extensive experience in environmental due diligence including the preparation, review and oversight of environmental studies and documents, environmental impact reports/statements, and permits as required by the California Environmental Quality Act (CEQA), the National Environmental Policy Act (NEPA), and other environmental laws. Environmental Services staff prepares environmental documents and analyses for a full range of projects and programs such as State facilities (e.g., offices, communication towers, fire stations, hospitals, parks, museums, hatcheries, and laboratories), infrastructure improvements, environmental restoration, and regulatory programs.

CEQA requires consideration of the environmental impacts of public projects, including but not limited to those involving public works, improvements to public structures, leases and permits, and laws and plans involving such projects. It is the responsibility of the requesting agency (lead agency) to comply. Refer to the Public Resources Code [21000](#) et seq. for more information. The Environmental Services staffs are available on a fee basis to complete environmental studies, compliance, and State and federal requirements. Specialized services include:

(Continued)

**SAM – REAL ESTATE SERVICES DIVISION**

(Continued)

**PROGRAM SUMMARY**

(Revised 1/2015)

**1326 (Cont. 1)**

Specialized services include:

1. Permits and/or consultation with regulatory and environmental agencies, including SHPO, US Army Corps of Engineers, US Dept. of Fish and Wildlife, California Dept. of Fish and Wildlife, Coastal Conservancy, FAA, Water Quality Control Board, Dept. of Toxic Substances Control, local and regional agencies.
2. Site suitability studies as part of site selection and acquisition.
3. Community planning meetings, consensus building, public outreach and involvement.
4. Studies and assessments include cultural resources (archaeology, architectural history, and historic resources), biological resources (wetlands, endangered species, and stream crossings), visual impacts, traffic, air quality/greenhouse gas emissions, geology/soils, hydrology/water quality, and toxics.
5. Environmental project management, planning, budgeting.
6. Hazardous Materials investigation and remediation, Underground Storage Tank Compliance
7. Construction monitoring, SWPPP, Mitigation Monitoring and Reporting Plans

## SAM – REAL ESTATE SERVICES DIVISION

### CONSTRUCTION SERVICES BRANCH

#### PROGRAM SUMMARY, RESOURCES, AND CONTACTS

1328

(Revised 9/2016)

The Construction Services Branch (CSB) provides construction management and contract document compliance inspection services for construction projects undertaken by the state.

#### MAJOR POLICIES AND SERVICES

- Available Services
  - Quality Assurance Inspection and Testing
  - Code Inspection to Ensure Compliance with Building Codes and Regulation
  - Field Level Management of Construction
  - Change Order Estimating and Negotiation
  - After-Contract Guarantee Enforcement and Dispute Resolution
  - Administration of Construction Contracts

Contact information and additional program information on CSB's services and operations may be accessed from our home page located at <http://www.dgs.ca.gov/resd/Home/ConstructionServicesBranch.aspx>

## SAM – REAL ESTATE SERVICES DIVISION

### CONSTRUCTION SERVICES

1328.1

(Revised 1/2015)

#### Statutory Authority

Government Code Section [14951](#) states: “The State Architect has general charge, under the DGS, of the erection of all state buildings and shall have an inspector assigned to each building during its construction.” Responsibility for this inspection has been delegated to CSB by the State Architect.

The focus of CSB is to ensure that state building and related facilities are constructed in accordance with approved design and contract documents, in compliance and applicable codes and regulations, and to the highest quality standards. CSB headquarters is located in Sacramento but area offices are strategically located throughout the state.

The CSB offers the following services:

1. Quality assurance inspection and testing
2. Code inspection to ensure compliance with building codes and regulations
3. Construction management services
4. After-contract guarantee enforcement
5. After-contract dispute resolution

**SAM – REAL ESTATE SERVICES DIVISION**

**BUILDING AND PROPERTY MANAGEMENT BRANCH  
(Sections Moved to DGS FACILITIES MANAGEMENT DIVISION 09/2016)**

**1330**

**Sections 1330 through 1330.8 were moved to the new Chapter 1330, DGS Facilities Management Division, in September 2016.**

# SAM – REAL ESTATE SERVICES DIVISION

## SAM – REAL ESTATE SERVICES DIVISION

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES

### PUBLIC WORKS PROJECT AUTHORIZATION AND TRANSFER REQUEST – FORM 22

RESD Form 22 (Rev. 06/99)

**RESD**  
**ORIGINATING OFFICE**

PSB     PMB

B&PM     Other

DOCUMENT NUMBER
WORK ORDER NUMBER
DATE

The Department of General Services is hereby authorized to proceed with the following project, and the State Controller is hereby requested to transfer funds to the Architecture Revolving Fund in the amount shown below in accordance with Sections 14967 et seq of the Government Code.

**DESCRIPTION OF PROJECT**

PUBLIC WORKS BOARD APPROVAL DATE	TOTAL ESTIMATED PROJECT COST
PRIOR EXPENDITURES FOR PRELIMINARY PLANNING (To be capitalized on completion of project)	APPROVED, DEPARTMENT OF GENERAL SERVICES
<b>\$0.00</b>	<i>[Signature]</i>
	TITLE
	DATE

**SPACE BELOW FOR AGENCY USE**

**SOURCE OF FUNDS**

(IF MORE THAN ONE FUND OR APPROPRIATION, SHOW AMOUNT TO BE TRANSFERRED FROM EACH)

FUND	APPROPRIATION (Name and Chapter Number)

APPROVED BY	DATE	BUDGET ALLOTMENT TITLE	DATE
<i>[Signature]</i>		UNENCUMBERED BALANCE BEFORE POSTING THIS ESTIMATE	
I hereby certify upon my own personal knowledge that budgeted funds are available for this encumbrance.		(AFTER T.B.A. OR B.R. NO.)	
APPROVED BY		AMOUNT TO BE TRANSFERRED:	DATE
<i>[Signature]</i>		TITLE	DATE

**DEPARTMENT OF FINANCE APPROVAL**

SIGNATURE	TITLE	DATE
<i>[Signature]</i>		

**DISTRIBUTION:** 1. Original - CONTROLLER, ACCOUNTING    2. PSB / PMB / B&PM    3. AGENCY    4. DEPT OF FINANCE    5. ACCOUNTING (Cap. Outlay)

# SAM – REAL ESTATE SERVICES DIVISION

State of California

**Request for Project  
Undertaking  
By State Agency**



STATE OF CALIFORNIA  
DEPARTMENT OF GENERAL SERVICES

Department \_\_\_\_\_ No. \_\_\_\_\_  
 Organization Unit \_\_\_\_\_ Date: \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Contact Person \_\_\_\_\_

**RESD Form 23 (REV 4-13)**

Authorization is requested for a above-named agency to do the following described work under its own supervision. The total cost of each project listed below will not exceed limitations imposed by law.

Projects will be advertised for bids in compliance with Public Contract Code Sections 10108 and 10140 and SAM Section 1321.13. Projects for public buildings and facilities will comply with Section 4454 of the Government Code, "Access to Public Buildings by Physically Handicapped Persons."

Description of proposal work and estimated cost of project:  
(Use additional page if necessary)

**Project Name:**

\* Inspections are required pursuant to California Government Code Section 14951, to be completed by the Department of General Services (DGS), Real Estate Services Division (RESD), Construction Services Branch (CSB) which has been delegated by the State Architect to provide inspection services for all State Buildings. Contact CSB to coordinate at (916) 375-4838.

\* CEQA is required pursuant to Public Resources Code Section 21000 et seq. and the State CEQA Guidelines (California Code of Regulations Section 15000 et seq.) and shall be reviewed or completed by DGS Environmental Services Section for determination of applicability and for appropriate form of environmental documentation for the project.

Plans and  Specifications included:

Work is proposed to be done by:

Contract  DGS/Direct Construction Unit Explain why if the work is proposed to be done by Direct Construction Unit

<b>State Fire Marshal Approval</b> Date:	<b>DSA Access Compliance Approval</b> Date:	<b>DSA Essential Services Building Approval</b> Date:	<b>SHPO Approval</b> Date:	<b>CEQA Approval</b> Date:
The undersigned certifies that all work to be done under this request complies with requirements of CCR Title 24 Agency Officer or Designee Title: Date:		I hereby certify upon my own personal knowledge that budgeted funds are available for the function and object of the expenditure as indicated above. Agency Accounting Officer: Title: Date:		Estimated Project Cost  Date of Estimate:

**For Use Only by Real Estate Services Division**

**Project Rejected (see attached) or Approval Denied (see attached)**

**DGS/Direct Construction Project**  
 The estimated cost of work to be performed by Direct Construction does not exceed the statutory limits under Public Contract Code Section 10108. Authorization is granted to perform the above work.

**Contract Project**  
 The estimated cost of the project does not exceed the statutory limits under Public Contract Code Section 10108 and, in our opinion, the services of the Department of General Services are not required except for CSB inspections as required. The above State agency is hereby authorized to carry out the above project subject to the provisions of law.

Approved by: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** Approval to proceed with this work does not indicate approval of any contracts necessary for the completion of projects. The applicable laws pertaining to such construction are referenced in Title 1, Division 5, Chapters 1, 2, 3 and 4 of the Government Code and Part 7, Chapter 1, Articles 1, 2, 3, and 4 of the Labor Code, as amended.

Estimated cost must be completed by agency.

Form 23

[Click Image to Download](#)