STATEWIDE PROPERTY INVENTORY
LEASE DATA ENTRY
INSTRUCTION MANUAL

PART 1

INTRODUCTION

The Statewide Real Property Inventory (SPI) was mandated by the California legislature in order to implement a pro-active approach to managing the State's Real Property assets. Assembly Bill 3932 (Government Code Section 11011) required the Department of General Services (DGS) to create and maintain a Statewide Real Property Inventory of all Real Property held by the State. The DGS created a computerized information system (SPI) to support and assist in the State's management of its assets.

The database that was created gave the decision makers more reporting capabilities and provided better information than previously available. A pro-active asset manager requires information about state owned real property, state leased facilities and state space requirements. This allows for informed decisions about whether purchasing or leasing is appropriate in a specific case. Also, decisions to sell real property may be affected by current state leases in the area, or the possibility of generating revenues by other uses of the property.

The SPI has two major components: 1) State Owned Real Property and Structures, 2) DGS Managed Leases. The first component has been supported by the agencies since 1989, with the data being verified by the agencies annually. The second component was not required to be reported by the agencies and has only been used by DGS. Executive Order S-10-04 now requires the agencies to report all their leases to the SPI.

The attached forms and instructions are to be used to provide the SPI Unit with the necessary information to enter any leases not being managed by DGS for the agency. Additionally, all leases, licenses, operating and concession agreements (State Owned Leases) must be reported where the State is the lessor.

The SPI Unit realizes the agencies are dealing with the unknown or confusing requirements from the SPI. The SPI is also unfamiliar with the way the agencies have written Leases and State Owned Leases. The SPI Unit is therefore requesting that a copy of the document(s) be forwarded along with the data entry forms. This will assist data entry and preclude having to contact the agency in many cases.

The SPI staff will be available to answer questions and assist you. Please contact the following individuals:

Chris Duval – Leasing	(916) 375-4055
Gina Smith – State Owned	(916) 375-4052
Joe White – SPI Lead	(916) 375-4056

Table of Contents

STATEWIDE PROPERTY INVENTORY

INSTRUCTIONS FOR COMPLETING

LEASE DATA ENTRY FORM 1100

LEASE DATA ENTRY FORM

1. Action Type (Mandatory): ☐ Add ☐ Change ☐ Delete

LEASE

2. Managing Agency Number (Mandatory): __ __ __ __ __
3. Lease Number: __ __ __ __ __ __ __ __ 4. Lease Type Code: __
5. Real Property Number: __ __ __ __ __ __ __ __ 6. Lessor/Lessee Agency Number: __ __ __ __ __
7. Lessee Customer Account Number / Division Number: __ __ __ __ __
8. Agency Lease Number: ____ (25 Char)
9. Rent Without CPI: __ __ __ __ __ __ __ __ __ __ __ . __ __
10. Current Monthly Rent: __ __ __ __ __ __ __ __ __ __ __ . __ __
11. Payments Per Year: __ __ 12. CPI Base Month/Year: __ __ / __ __ __ __
13. CPI Dollar Multiplier: __ __ __ __ __ __ __ __ __ __ __ . __ __
14. CPI Table Code: __ __ 15. Lessor Federal Tax ID Number: __ __ __ __ __ __ __ __ __
16. Master Lease Flag: __ 17. New Lease Flag: __ 18. New Lease Date: __ / __ / __ __ __ __ (MM/DD/YYYY)
19. Lease Comments:

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LEASE TRANSACTION HISTORY

20. Document Type: __ __ __ __ 21. Amendment Number: __ __
22. Entered Into / Written Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
23. Commencement / Beginning Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
24. Firm / Cancellation Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY) 25. Prior Notice Days: __ __
26. Ending / Expiration Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
27. Occupancy / Effective Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
28. Document Project Number: ______________________________

CONTACT

29. Contact Number: __ __ __ __ __ __ __
30. Contact Name 1: ____ (40 Char)
31. Contact Name 2: ____ (40 Char)
32. Address Number: __ __ __ __ __ __ __ __ 33. Address Street: __ __ __ __ __ __ __ __ __ __ __ __ __ __ __ __
34. Address 2: ____ (30 Char)
35. City Code: __ __ __ __ 36. County Code: __ __ 37. State Code: __ __
38. Zip Code: __ __ __ __ __ - __ __ __ __ 39. Country Code: __ __
40. Phone Number: (__ __)(__ __ __) __ __ __ - __ __ __ __
41. Phone Number 2: (__ __)(__ __ __) __ __ __ - __ __ __ __
42. Fax Phone Number: (__ __)(__ __ __) __ __ __ - __ __ __ __
43. E-Mail Address: ____ (100 Char)
44. Contact Comments: ____ (60 Char)

LEASE CONTACT

An individual lease will have multiple lease contacts.

45. Contact Code: __ __ 46. Contact Number: __ __ __ __ __ __ __
45. Contact Code: __ __ 46. Contact Number: __ __ __ __ __ __ __
45. Contact Code: __ __ 46. Contact Number: __ __ __ __ __ __ __
45. Contact Code: __ __ 46. Contact Number: __ __ __ __ __ __ __

LEASE CHARACTERISTICS

An individual lease may have multiple lease characteristics.

47. Lease Characteristic Code: __ __ __ __ 48. Effective Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
49. Notification Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY) 50. Number of Days Prior Notice: __ __ __
51. Dollar Obligation: __ __ __ __ __ __ __ __ __ __ __ __ . __ __
52. Lease Characteristics Comments: ____

____

47. Lease Characteristic Code: __ __ __ __ 48. Effective Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
49. Notification Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY) 50. Number of Days Prior Notice: __ __ __
51. Dollar Obligation: __ __ __ __ __ __ __ __ __ __ __ __ . __ __
52. Lease Characteristics Comments: ____

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LEASE DATA ENTRY FORM

PURPOSE OF RESD FORM 1100

This form is used to enter specific information for a particular state-leased facility or site (land lease) to the Statewide Property Inventory (SPI) database.

GENERAL INSTRUCTIONS

Specific items on this form will direct the user to the look up tables.

The primary source of information about a specific lease will be the lease document.

The following list of documents or information will be required to be sent to the SPI at the time the lease record(s) are entered on the database:

- Managing Agency Name
- Customer Account Number (CAN)
- Number of Current Full Time / Part Time Employees at the Leased Facility
- Lease Occupancy Date
- Copy of the Current Lease Document
- Copy of All Current Lease Amendments
- Any Updated Contact Information for the
    - Lessor
    - Lessor's Contact
    - Lessor's Payee

1. **Action Type (Mandatory)** – Check the appropriate box for the type of action to be taken. This identifies the action that will be taken to process a particular record. There are three action types:

    Add – Use this action type when entering a new Lease record to the SPI database for the first time.

    Change – Use this action type when any change is being applied to an existing SPI Lease record.

    Delete – Use this action type to have an existing Lease record removed from the SPI database. Items 1 and 3 must be completed in order for the SPI to process this request.

Lease

2. **Managing Agency Number (Mandatory)** – Enter the appropriate Uniform Codes Manual (UCM) Organization Code that corresponds to the managing agency of a particular Lease. For Department of General Services (DGS) managed leases, enter 1770. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of all current UCM Codes or see a listing of UCM Codes used by the SPI on page 24 – Agency Table.

3. **Lease Number** – This is the unique number assigned by the SPI Unit which identifies each Lease.

    This item will be left blank for a new Lease to be entered on the SPI database. The SPI Unit will assign this number and transmit the number to the agency via a Lease report. The Lease report will allow the agency to review and confirm the information entered for the Lease.

    The SPI Lease Number must be entered in this item for a change or delete action type to be processed by the SPI Unit.

4. **Lease Type Code** – Enter one of the following codes to describe the type of Lease being entered:

   1 – Leased Space - State is Lessee for a leasehold interest from a private vendor or another governmental entity, such as the USA, BLM, County, etc.

   2 – State Owned Leases - State is the Lessor and is leasing state-owned property to private a individual, company or another governmental entity, such as the USA, BLM, County, etc.

5. **Real Property Number** – Not applicable if Lease type code 1 was entered in item 4.

   Enter the SPI Real Property Number if Lease type code 2 was entered in item 4. The SPI Real Property Number can be found on the SPI annual verification reports sent to the agency each year.

6. **Lessor / Lessee Agency Number** –

   Lease Type 1 - The UCM Organizational Code which corresponds to the agency which is paying the rent to the lessor of any leased facility or site.

   Lease Type 2 – Use the following UCM Organizational Codes where the State is the lessor.

   99996 = Miscellaneous Private Organizations
   99997 = Federal Government
   99998 = Local Government (Cities and Counties)

7. **Lessee Customer Account Number (CAN) / Division Number** –

   Lease Type 1 – The DGS CAN that designates a particular division/office within an agency that occupies and pays rent for a leased space.

   Lease Type 2 – The DGS CAN that designates the individual or organization leasing property from and may compensate the state for the lease.

8. **Agency Lease Number** – This is the agency's own number that uniquely identifies a lease. The agency is encouraged to complete this field in order to facilitate the reconciliation of data between the agency and the SPI.

9. **Rent Without CPI** – This is the current monthly rent of a given lease exclusive of Consumer Price Index (CPI) adjustments. If the lease has annual, semi-annual or quarterly rent listed, divide the rent by the appropriate number to get the monthly equivalent.

10. **Current Monthly Rent** –

    Lease Type 1 - The current monthly rent paid by a state agency for leased space, including all operating, and amortization charges. This will be the same as the Rent Without CPI unless a CPI adjustment has occurred. If so, then this is the adjusted monthly rent.

    Lease Type 2 – Enter the current monthly rent being paid by the lessee to the State per the State Owned Lease.

11. **Payments Per Year** – Enter the number of rent payments the lease has per year. For example, a lease with monthly rent will have 12 payments, while a lease with annual rent will have 1 payment.

12. **CPI Base Month / Year** – This is the base month used for CPI adjustment calculations. As an example the lease document may have phrase like "for the month of January, 2004, which shall be the base period." This field may not be applicable to all leases.

13. **CPI Dollar Multiplier -** This is the base amount used for CPI adjustment calculations. Look for a sentence in the lease document like "The amount of the monthly rental adjustment shall be determined by multiplying $________ by the percentage…" . This field may not be applicable to all leases.

14. **CPI Table Code –** The code that indicates the CPI Table to be used to calculate CPI adjustment figures. Enter the appropriate code to match the CPI description in the Lease document. This field may not be applicable to all leases.

CPI Table Code	CPI Table Code Description
1	US CITY AVERAGE/1967=100/URB WAGE EARN & CLK WKRS
2	SAN FRANCISCO-OAKLAND-SAN JOSE/1967=100/URB WAGE
3	LOS ANGELES-RIVERSIDE-ORANGE CO/1967=100/URB WAGE
4	SAN DIEGO/1967=100/URB WAGE EARN & CLK WKRS
6	US CITY AVERAGE/1982-84=100/URB WAGE EARN & CL WKR
7	SAN FRANCISCO-OAKLAND-SAN JOSE/82-84=100/URB WAGE
8	LOS ANGELES-RIVERSIDE-ORANGE CO/82-84=100/URB WAGE
9	SAN DIEGO/1982-84=100/URB WAGE EARN & CLK WKRS

15. **Lessor Federal Tax ID** –

Lease Type 1 – The unique tax identification number assigned to certain lessors. For lessors that are partnerships, corporations, and other nonperson entities use Federal Tax ID numbers. For lessors that are persons, Social Security numbers are used. Enter zeros in this field if there is no Federal Tax ID (Governmental Entities).

Lease Type 2 – Not Applicable. No entry is required

16. **Master Lease Flag** – Enter "**Y**es" or "**N**o" to indicate whether or not the lease is a master lease. A master lease is a lease with more than one agency or CAN.

17. **New Lease Flag –** Not Applicable, for SPI use only. No entry is required.

18. **New Lease Date** – Not Applicable, for SPI use only. No entry is required.

19. **Lease Comments** – Enter any pertinent comments relating to a given Lease.

LEASE TRANSACTION HISTORY

A lease can have multiple Lease Transaction History records for an individual lease. A transaction record will be created for each activity that occurs on a lease, i.e., new lease entry, amendment(s), etc.

20. **Document Type** – Enter the four digit code that represents the type of document being processed: i.e., Lease, Amendment, etc. See a listing of document types used by the SPI on page 61 - Manner Acquired Table.

21. **Amendment Number** – Lease amendments are documents that change the terms and conditions of the original lease.

22. **Entered Into/Written Date** – The date the lease or amendment was written.

23. **Commencement/Beginning Date** – The commencement date of a lease or amendment.

24. **Firm/Cancellation Date** – The date the lease may be terminated.

25. **Prior Notice Days** – The number of days notice specified for the early termination date.

26. **Ending/Expiration Date** – Enter the date that the lease expires.

27. **Occupancy/Effective Date** – The effective start date for the lease or amendment.

28. **Document Project Number** – The number written on the document as being DGS' Activity Based Management System (ABMS) project number. Enter if known or leave blank.

CONTACT

29. **Contact Number** – The unique number assigned by the SPI Unit to identify a particular lease contact. No entry is required by the agency.

30. **Contact Name 1** – The name as it appears on the lease document used to identify a lessor, property manager, payee or other correspondent. Use the lessor's name as Contact Name 1.

31. **Contact Name 2** – The name in Contact Name 2 will be c/o or Attention of the Lessor's contact.

32. **Address Number** – Enter only the numeric portion of the contact's street address: i.e., **123** Main St. For P.O. Box numbers, put the "P.O. Box" in the Address Number field and put the "box number" in the Address Street field.

33. **Address Street** – Enter the address street name (only) of the contact: i. e., 123 **Main St**.

34. **Address 2 –** Enter additional pertinent address information, i.e., suite no., room no., floor no., etc.

35. **City Code** – Enter the City Code for where the Contact address is located. See a listing of City Codes used by the SPI on page 30 – City Table.

36. **County Code** – Enter the County Code for where the Contact address is located. See a listing of County Codes used by the SPI on page 59 – County Table.

37. **State Code** – Enter the State Code for where the Contact address is located. See a listing of State Codes used by the SPI on page 62 – State Table.

38. **Zip Code** – Enter the official US Postal Zip Code and Zip + 4 (+4 zip code is optional) for where the Contact address is located.

39. **Country Code** – Enter the Country Code for where the Contact address is located. Enter 01 for USA or see a listing of Country Codes used by the SPI on page 58 – Country Table.

40. **Phone Number** – Enter the Contact's telephone number (International 2 digit code) + (area code) + the 7 digit phone number if available. Leave the International Code blank for telephone numbers in the USA.

41. **Phone Number 2** – Enter an alternate Contact telephone (International 2 digit code) + (area code) + the 7 digit phone number if available. Leave the International Code blank for telephone numbers in the USA.

42. **Fax Phone Number** – Enter the Contact's Fax telephone (International 2 digit code) + (area code) + the 7 digit phone number if available. Leave the International Code blank for telephone numbers in the USA.

43. **E-Mail Address** – Enter the Contact's E-Mail Address up to 100 characters if available. Only one E-Mail Address can be entered for a contact.

44. **Contact Comments** – Enter any pertinent comments relating to the Contact up to 60 characters in length.

LEASE CONTACT

An individual lease will have multiple lease contacts.

45. **Contact Code** – Enter the assigned Contact Code(s) that describes the type(s) of lease contacts associated with a particular lease. Multiple entries may be made for a particular lease.

Contact Code	Contact Description
1	LESSOR/LESSOR'S CONTACT
2	LESSOR'S PROPERTY MANAGER
3	PAYEE
4	PRIMARY CORRESPONDENT
5	ADDITIONAL CORRESPONDENTS
6	PRIMARY LEASE ADDRESS
7	LESSEE
8	FACILITY
9	AGENCY HDQTRS
10	BLDG MGR/PLANT OPS

Note: Every Type 1 Lease should have a contact for contact codes 1, 3 and 4. Type 2 Leases should have a contact for contact codes 2 and 7.

46. **Contact Number** – The assigned number that uniquely references the name and address information for a lease contact. This number will be assigned by the SPI Unit in Item 29.

LEASE CHARACTERISTICS

An individual lease will have multiple lease characteristics.

47. **Lease Characteristic Code** – The specific code(s) for an individual characteristic regarding options, obligations, constraints, and other detailed terms and conditions connected to a lease. See a listing of Lease Characteristic Codes used by the SPI on page 59 – Lease Characteristic Code Table.

48. **Effective Date** – Enter the date that any lease provision becomes effective or operative.

49. **Notification Date** – The dates to notify lessee agencies as well as DGS staff of upcoming lease events; such as, rent increases and alteration inspections. Enter this date for DGS managed Leases only.

50. **Number of Days Prior Notice** – This is the number of days that prior written notice must be given by the lessee agency before the exercise of certain options; such as, the cancellation of the lease and the exercising of a purchase option.

51. **Dollar Obligation** – Any dollar amount that is associated with a lease characteristic.

52. **Lease Characteristics Comments** – These are essential comments relating to a given lease characteristic. They may be used for special instructions or clarification.

STATEWIDE PROPERTY INVENTORY

INSTRUCTIONS FOR COMPLETING

STRUCTURE DATA ENTRY FORM 1040L

STRUCTURE DATA ENTRY FORM

1. Action type (Mandatory) ☐ Add ☐ Change ☐ Delete

STRUCTURE

2. State Owned Code: __ 3. Structure Group: __ 4. Structure Number: __ __ __ __ __
5. Real Property Number: __ __ __ __ __
6. Real Property Name: ______________________________ (50 Char)
7. Structure Name: ______________________________ (40 Char)
8. Address Number: __ __ __ __ __ __ __ __ __ __ 9. Address Street: __ __ __ __ __ __ __ __ __ __ __ __ __ __
10. Address 2: __
11. City Code: __ __ __ __ 12. County Code: __ __ 13. State Code: __ __
14. Zip Code: __ __ __ __ __-__ __ __ __ 15. Country Code: __ __
16. Thomas Bros.: Map Book: __ __ __ __ Page: __ __ __ Grid: __ __
17. Agency Region: __ __ __ __ __ __ __ __ __ __
18. Agency Structure Number: __
19. Billing Code: __ __ __ __ __
20. Owner Agency Number: __ __ __ __ 21. Owner Agency Acronym: __ __ __ __
22. Managing Agency Number: __ __ __ __ 23. Managing Agency Acronym: __ __ __ __
24. Structure Type Code: __ __ __ __ 25. Condition Code: __ 26. Number of Floors: __ __
27. Square Footage: __ __ __, __ __ __, __ __ __ 28. Year Built: __ __ __ __
29. Current Program Use: __ __ __ __
30. Projected Program Use: __ __ __ __ 31. Projected Program Use Date: __ __/__ __/__ __ __ __ (MM/DD/YYYY)
32. Structure Comments:

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STRUCTURE CHARACTERISTIC(S)

An individual Structure may have multiple Structure Characteristics.

33. Structure Characteristic Code: __ __ __ __ 34. Applicable Date: __ __/__ __/__ __ __ __

35. Estimated Cost: $___, ___, ___, ___.__

36. Structure Characteristic Comments:

____

____

____

33. Structure Characteristic Code: __ __ __ __ 34. Applicable Date: __ __/__ __/__ __ __ __

35. Estimated Cost: $___, ___, ___, ___.__

36. Structure Characteristic Comments:

____

____

____

FLOOR

Note: Type 1 Leases do not require a Floor record.

An individual structure may have multiple floor records.

37. Floor ID: __ __ __ 38. Net Office Area: __ __ __ __ __ __ __

39. Net Storage Area: __ __ __ __ __ __ __ 40. Added Facilities: __ __ __ __ __ __ __

41. Tare: __ __ __ __ __ __ __ 42. Garage: __ __ __ __ __ __ __ 43. Floor Inside Gross: __ __ __ __ __ __ __

37. Floor ID: __ __ __ 38. Net Office Area: __ __ __ __ __ __ __

39. Net Storage Area: __ __ __ __ __ __ __ 40. Added Facilities: __ __ __ __ __ __ __

41. Tare: __ __ __ __ __ __ __ 42. Garage: __ __ __ __ __ __ __ 43. Floor Inside Gross: __ __ __ __ __ __ __

37. Floor ID: __ __ __ 38. Net Office Area: __ __ __ __ __ __ __

39. Net Storage Area: __ __ __ __ __ __ __ 40. Added Facilities: __ __ __ __ __ __ __

41. Tare: __ __ __ __ __ __ __ 42. Garage: __ __ __ __ __ __ __ 43. Floor Inside Gross: __ __ __ __ __ __ __

37. Floor ID: __ __ __ 38. Net Office Area: __ __ __ __ __ __ __

39 Net Storage Area: __ __ __ __ __ __ __ 40. Added Facilities: __ __ __ __ __ __ __

41. Tare: __ __ __ __ __ __ __ 42. Garage: __ __ __ __ __ __ __ 43. Floor Inside Gross: __ __ __ __ __ __ __

OCCUPIED SPACE

An individual Structure or Lease may have multiple occupied space records.

44. Structure Number: __ __ __ __ __
45. Lease or Assignment Number: __ __ __ __ __ __ __ __ 46. Occupying Agency Number: __ __ __ __
47. Customer Account Number (CAN): __ __ __ __ __ 48. Space Type Code: __ __ __ __ 49. Floor ID: __ __ __
50. Percent of Rent Applicable: __ __ __ 51. Rent Dispersment: __ __ __
52. Suite or Room: ______________ (20 Char) 53. Quantity of Unit: __ __ __ __ __ __ __ 54. Urate Flag: __
55. Consolidatable Flag: __ 56. Load Factor: __ __ __ __ __ . __ __
57. Usable Rate: __ __ __ __ __ __ __ __ . __ __ __ 58. Rentable Rate: __ __ __ __ __ __ __ . __ __ __
59. Occupancy / Begin Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
60. Actual Vacated Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
61. Personnel Full Time: __ __ __ __ 62. Part Time Personnel: __ __ __ __
63. 5 Year Personnel Projection: __ __ __ __ 64. 10 Year Personnel Projection: __ __ __ __
65. Personnel Base Year: __ __ __ __ 66. Square Feet 5 Year Projection: __ __ __ __ __ __ __
67. Square Feet 10 Year Projection: __ __ __ __ __ __ __ 68. Planning Area Code: __ __
69. Occupied Space Comments: ____

____

44. Structure Number: __ __ __ __ __
45. Lease or Assignment Number: __ __ __ __ __ __ __ __ 46. Occupying Agency Number: __ __ __ __
47. Customer Account Number (CAN): __ __ __ __ __ 48. Space Type Code: __ __ __ __ 49. Floor ID: __ __ __
50. Percent of Rent Applicable: __ __ __ 51. Rent Dispersment: __ __ __
52. Suite or Room: ______________ (20 Char) 53. Quantity of Unit: __ __ __ __ __ __ __ 54. Urate Flag: __
55. Consolidatable Flag: __ 56. Load Factor: __ __ __ __ __ . __ __
57. Usable Rate: __ __ __ __ __ __ __ __ . __ __ __ 58. Rentable Rate: __ __ __ __ __ __ __ . __ __ __
59. Occupancy / Begin Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
60. Actual Vacated Date: __ __ / __ __ / __ __ __ __ (MM/DD/YYYY)
61. Personnel Full Time: __ __ __ __ 62. Part Time Personnel: __ __ __ __
63. 5 Year Personnel Projection: __ __ __ __ 64. 10 Year Personnel Projection: __ __ __ __
65. Personnel Base Year: __ __ __ __ 66. Square Feet 5 Year Projection: __ __ __ __ __ __ __
67. Square Feet 10 Year Projection: __ __ __ __ __ __ __ 68. Planning Area Code: __ __
69. Occupied Space Comments: ____

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STRUCTURE DATA ENTRY FORM FOR LEASES AND STATE OWNED LEASES

PURPOSE OF RESD FORM 1040L

The RESD Form 1040L is used to enter address and general information for a state leased facility or site (land lease) (Lease Type 1) and state owned leases (Lease Type 2).

INSTRUCTIONS AND DEFINITIONS

1. **Action Type (Mandatory)** – Check the appropriate box for the type of action to be taken. This identifies the action that will be taken to process a particular record. There are three action types:

   Add – Use this action type when entering a new Structure or Site Improvement record to the SPI for the first time.

   Change – Use this action type when any change is being applied to an existing SPI Structure or Site Improvement record.

   Delete – Use this action type to have an existing Structure or Site Improvement record removed from the SPI database. Items 1 and 4 must be completed or the SPI Unit will not be able to process the request.

STRUCTURE

2. **State Owned Code** – Enter one of the following codes to indicate whether the structure being reported is a leased or state owned.

   1 = LEASED
   3 = STATE OWNED

3. **Structure Group** – Enter one of the following codes:

   1 = Land Lease
   2 = Structure (Building): i.e., Office Building, Dormitory, Garage, etc.

4. **Structure Number** – The SPI unit will assign the Structure Number (Str#) if action type "Add" was checked in item 1. The Str# must be entered if action type "Change" or "Delete" was checked in item 1 for an existing Structure. The Structure Number can be found on the RESD Structure Report RE24 sent to the agency for the annual verification.

5. **Real Property Number** –

   Not applicable if state owned code 1 was entered in item 2.

   If state owned code 3 was entered in item 2, the Real Property Number (RP#) will be assigned by the SPI Unit if the structure is being added to a new real property. Enter the RP# found on the RESD Structure Report RE20 sent to the agency for the annual verification if the structure is located on an existing Real Property.

6. **Real Property Name** – No entry is required.

7. **Structure Name –**

   Optional if state owned code 1 was enter in item 2.

   This item must be completed for all new state owned structures if state owned code 3 was entered in item 2. The name used is either the name designated by the legislature or the agency. The name designated by the legislature will take precedence over a name assigned by the agency.

8. **Address Number** – Enter the number portion of the street address for the structure: i.e., **1234** State Road.

9. **Address Street** – Enter the street name for the structure: i.e., 1234 **State Road**.

10. **Address 2** – Enter any additional address information: i.e., **PO BOX 567**.

11. **City Code** – Enter the City Code for where the structure is located. See a listing of City Codes used by the SPI on page 30 – City Table.

12. **County Code** – Enter the County Code for where the structure is located. See a listing of County Codes used by the SPI on page 59 – County Table.

13. **State Code** – Enter the State Code for where the structure is located. See a listing of State Codes used by the SPI on page 62 – State Table.

14. **Zip Code** – Enter the official US Postal Zip Code and Zip + 4 (Zip 4 is Optional) for the location of the structure.

15. **Country Code** – Enter the Country Code for where the structure is located. Enter 01 for USA or see a listing of Country Codes used by the SPI on page 57.

16. **Thomas Bros** – This item is optional. This item would be completed using a Thomas Brothers Map book. Indicate the map book name: (i.e., Sac for Sacramento), the page number and grid in which the property is located.

17. **Agency Region** – The agency can assign a structure to a specific geographic area (region or district). The region/district can be identified using ten characters: i.e., District 10, Region IX, etc. Completing this item will enable reports to be generated by a particular region/district.

18. **Agency Structure Number** – The identifier assigned by the agency to a specific Structure or Site Improvement. When completed, this number would cross-reference to the SPI Structure Number. No entry is required for Type 1 Leases.

19. **Billing Code** – For SPI Use Only. No action is necessary.

20. **Owner Agency Number** – The Uniform Codes Manual (UCM) Organization Code for the agency that has control and jurisdiction of the Structure. See www.dof.ca.gov/html/calstars/ucm.htm for a listing of all current UCM Codes or see a listing of UCM Codes used by the SPI on page 24 – Agency Table". No entry is required for Type 1 Leases.

    The agency must contact the Department of Finance to establish new organization codes. When reporting new Real Properties or new Structures, the organization code must be reported to the SPI.

21. **Owner Agency Acronym** – Enter the standard abbreviation for an agency's name. See a listing of Agency Acronyms used by the SPI under Agency Table on page 24 – Agency Table. Submit a change to correct your Agency's Acronym if it is incorrect. No entry is required for Type 1 Leases.

22. **Managing Agency Number** – Normally this is the same number used in item 20. If the owning agency is allowing another organization to manage a structure, then the other organization's UCM code would be entered. Contact the SPI unit for assistance.

23. **Managing Agency Acronym** – Normally this is the same acronym used in item 21. Contact the SPI unit for assistance if another organization is managing the structure.

24. **Structure Type Code** – A code used to identify the primary purpose of a Structure. A Structure may have multiple uses, however, enter only the code for the primary use: i.e., a warehouse (primary use) may also contain a small office area. See a listing of Use Codes used by the SPI on page 68 – Use Codes/Definitions Table. Select the appropriate use for the structure being entered from the table and enter the code in this item.

25. **Condition Code** – Enter one of the following codes:

Condition Code		Condition Description
1	=	New: Newly constructed, no previous tenant improvements and in compliance with all applicable codes and ordinances.
2	=	Good: Existing structure and improvements in compliance with all applicable codes and ordinances – should be easy to maintain and modify.
3	=	Fair: Existing structure and improvements require minor modifications to comply with codes.
4	=	Poor: Existing structure and improvements requiring “major” or “minor” capital outlay to comply with codes.
5	=	Untenable: Officially condemned or restricted from its intended use or the code compliance modification expense is higher than the building value.

26. **Number of Floors** – Enter the number of floors contained within the structure.

27. **Square Footage** – Enter the total inside gross square footage of the structure. The measurement is the sum of the areas of each floor within the surface of the exterior walls.

28. **Year Built** – Enter the four digit year in which the structure was built or completed.

29. **Current Program Use** – A code that identifies the agency's current program use status for a structure. A program is defined as a group of interdependent or interrelated activities directed toward the achievement of a common goal or objective: i.e., operation of a prison facility. Use one of the following codes:

   Codes: 1000 – Used for state program
   9000 – Not used for state program

   No entry is required for Type 1 Leases.

30. **Projected Program Use** – A code that identifies the agency's projected program use status for a structure. This item would use the same code entered in item 29 until it is anticipated that the use would change. Use one of the following codes:

Codes: 1000 – Used for state program
9000 – Not used for state program

No entry is required for Type 1 Leases.

31. **Projected Program Use Date** – Enter the date the structure entered into service or the projected date the use status of the structure will change.

32. **Comments** – Enter all pertinent comments relating to the structure: i.e., an additional name for the structure, additional funding sources, additional cost information, etc.

STRUCTURE CHARACTERISTICS

An individual Structure may have multiple Structure Characteristics.

33. **Structure Characteristic Code** – A unique code that identifies a particular characteristic of a building such as fire/life safety and asbestos inspection. See a listing of Structure Characteristic Codes used by the SPI on page 62 – Structure Characteristic Table. Select the appropriate structure characteristics for the structure being entered from the table and enter the code in this item.

34. **Applicable Date** – The date used to determine when a Structure Characteristic is to be applied: i.e., state fire marshal report, asbestos survey date, etc. A date is mandatory. If no specific date is applicable, enter the current date.

35. **Estimated Cost** – The estimated cost associated with a given Structure Characteristic or predicted future cost to correct applicable condition. No entry is required for Type 1 Leases.

36. **Structure Characteristic Comments** – Additional comments related to the Structure Characteristic.

FLOOR

Note Items 37 to 43 are not applicable to Lease type 1 and do not have to be entered.

37. **Floor ID** – The numeric or letter designation for a floor in a building including : mezzanines, basements, annexes, etc.

38. **Net Office Area** – The total assignable square feet of "Office Quality Environment."

39. **Net Storage Area** – The total square footage of storage space on a floor; i.e., unimproved (not including office quality lighting, HVAC, or janitor service).

40. **Added Facilities** – Any special use area assigned at normal office rate, such as; employee rooms, cafeterias, auditoriums, etc.

41. **Tare** – Utility areas required for the function of the building (i.e., stairways, elevators, dedicated corridors, public lobbies, toilets, duct shafts, fan and boiler rooms).

42. **Garage** – Any Parking facility net area located within a structure.

43. **Floor Inside Gross** – The total square feet of all types of space. The sum of the areas within the inside surface of the exterior walls.

OCCUPIED SPACE

44. **Structure Number** - Leases may encompass more than one structure.

    Lease Type 1 – Create the appropriate number of occupied space records for the lease and structures being entered. The SPI Unit will assign the SPI Structure Number.

    Lease Type 2 – Enter the appropriate SPI Structure Number(s).

45. **Lease or Assignment Number –** No entry required. The SPI Unit will assign this number.

46. **Occupying Agency Number** – Enter the appropriate Uniform Codes Manual (UCM) Organization Code that corresponds to the occupying agency of the occupied space.
    See www.dof.ca.gov/html/calstars/ucm.htm for a listing of all current UCM Codes or see a listing of UCM Codes used by the SPI on page 24 – Agency Table.

    Use one of the following codes for Type 2 Leases:

    99996 = Miscellaneous Private Organization
    99997 = Federal Government
    99998 = Local Government

47. **Customer Account Number (CAN)** –

    Lease Type 1 - The DGS CAN as provided by an agency that identifies the account to be billed for RESD charges. The CAN is still needed even if RESD does not manage or have billing charges for the Lease.

    Lease Type 2 – The DGS CAN as provided by an agency that identifies the lessee that is associated with the lease and may be billed for the lease.

48. **Space Type Code** – Enter the applicable code from the Use Table which identifies the type space being leased. See a listing of Use Codes used by the SPI on page 68 – Use Code/Definitions Table.

49. **Floor ID** – The numeric or letter designation for a floor in a building, including: mezzanines, basements, annexes, etc.

50. **Percent of Rent Applicable** – This percentage is used as a rent basis for the effective office rate and storage rate calculations. For a lease with one or more occupied space records, the sum of this field for all records must be equal to 100%. Enter the 3-digit percentage (not the decimal equivalent).

51. **Rent Dispersment** – A percentage of the current monthly rent attributable to each occupying agency in a master lease.

52. **Suite or Room** – The optional value that may be used to identify a specific suite or room of an occupied space.

53. **Quantity of Unit –** The number of units used in occupied space. This quantity is associated with the unit of measure specified in the Unit Code. The unit code is automatically linked to the Use Table (Referred Space Type Code in Item 47).

Unit Code		Description
01	=	Acres
02	=	Square Feet
03	=	Spaces

54. **Urate Flag** – A flag used in the Usable Rate calculation to denote whether parking has "no value," or if there is an "actual parking charge" to be considered. Enter "N" unless there is a specific parking rate, then all occupied space records will be entered with "Y".

55. **Consolidatable Flag** – Not applicable. A flag assigned and used by the Asset Planning and Enhancement Branch (APE) to identify if a leased space is consolidatable.

56. **Load Factor** – A percentage value provided by the lessor that converts the usable square footage to the rentable square footage in a building.

56. **Usable Rate** – The effective office rate charged per unit of usable state occupied space. This field may be entered, but it is calculated to a true value periodically. The exact calculation used depends on the "type" of space, and if "parking charges" apply (see Urate Flag).

All parking records:
(Current Monthly Rent * pct of rent)/Qty of Unit

Non-parking records, Urate_Flag = "N":
(Current Monthly Rent * pct of rent)/Qty of Unit

Non-parking records, Urate_Flag = "Y":
(Curr. Monthly Rent - $pkg) * pct of rent)/Qty of Unit

57. **Rentable Rate** – No entry is required. The SPI application calculates this rate if a load factor has been entered.

58. **Occupancy/Begin Date** – This date is the beginning or occupancy date for leases. For state owned occupied spaces, this is the beginning date of the assignment. This is the first date that rent is charged to the agency and does not change with superseding leases.

59. **Actual Vacated Date** – The actual date that an occupied space has been vacated, i.e., an agency, due to program cuts may need to move out before the lease expires and seek a backfill tenant. This field will allow an occupied space to be vacated and excluded from reports and inquiries without actually being deleted yet.

60. **Personnel Full Time** – The number of full-time personnel for which the state occupied space was designed. This number is provided by APE for DGS managed Leases.

61. **Personnel Part Time** – No entry required. The number of part-time personnel for which the occupied space was designed. This number is provided by APE for DGS managed Leases.

62. **5 Year Personnel Projection** – No entry required. The total number of personnel projected to be occupying a given space in five years. This number is provided by APE for DGS managed Leases.

63. **10 Year Personnel Projection** – No entry required. The total number of personnel projected to be occupying a given space in ten years. This number is provided by APE for DGS managed Leases.

64. **Personnel Base Year** – No entry required. The year in which the Five Year Personnel Projection and Ten Year Personnel Projection figures are determined.

65. **Square Feet 5 Year Projection** – No entry required. The estimated amount of space needed five (5) years hence from a base year to house the total space requirements for an agency. This number is provided by APE.

66. **Square Feet 10 Year Projection** – Not applicable. The estimated amount of space needed ten (10) years hence from a base year to house the total space requirements for an agency. This number is provided by APE.

67. **Planning Area Code** – No entry required. A geographical location code assigned and used by APE to support their planning decisions. This number is provided by APE.

68. **Occupied Space Comments** – Enter any pertinent comments relating to the Occupied Space Record.