

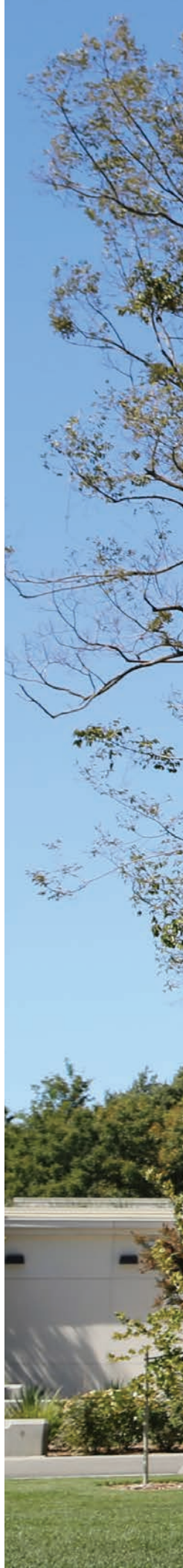


Strategic Plan

2014

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I. Introduction

The UC Davis Student Housing Leadership Team began the process of updating the department strategic plan in spring 2013. The strategic planning process was initiated with an information-gathering phase that included discussions with the leaders and managers within the department, a survey sent to student residents and staff, interviews with key campus partners and a review of the annual community-assessment survey. In addition, focus groups organized by functional areas were conducted in May 2013. The focus groups were open to all staff and were well attended.

In the context of the input from our multiple stakeholders, and taking into account the Chancellor's growth plan for the campus, the Student Housing Leadership Team has prepared a plan that describes our mission, primary activities, key priorities, and strategic initiatives as we move forward over the next 3–5 years. This document will serve not only as a planning framework, but also as a reference point as we respond to shifting campus priorities and unanticipated needs.



II.

Student Housing Mission and Values

In recent years Student Housing has assumed responsibility for a broader range of services. With this in mind, and with input from our staff, the leadership team has adjusted the mission statement to more accurately reflect the work we do.

Mission

Student Housing's mission is to provide living, dining and academic support services that facilitate a successful transition to the UC Davis community and foster ongoing learning and life-skill development.

Values

Our values are our departmental compass and define our priorities as an organization.

- Safety: The safety and security of students, staff and all members of our community is our first priority.
- Student-centered: We plan our services, programs and facilities with students' needs and interests as our guide.
- Fiscal responsibility: We manage our resources in a responsible and fiscally sound manner.
- Social justice and inclusivity: We develop and nurture inclusive communities and learning environments. We place a priority on hiring a diverse staff. We structure our programs and services to be welcoming for all members of our community.
- Environmental sustainability: We design, build and maintain our facilities with sustainability as a guiding priority. We operate our programs and services with sustainable practices and products.
- Collaboration and partnership: We work collaboratively with all of our campus and community partners and value the efficiencies and mutually beneficial outcomes of those partnerships.

III.

What We Do and Whom We Serve

Overview

Student Housing provides living accommodations, and student and community development programming to nearly 6,000 students: 5,000 in residence halls and 844 (including some family members) in 476 on-campus apartments. We also provide 600 bed spaces in lease-back arrangements in off-campus apartments and 955 bed spaces via third-party housing providers on campus.

Student Housing manages more than 100 buildings of various types and comprises 350 career staff and 900 student employees. We manage student accounts in excess of \$79 million.

UC Davis Student Housing provides oversight of three residential dining commons, three retail centers/convenience stores, and catering and bakery operations. On average, 55,000 meals are served each week. While all dining facilities and services are open to the campus population and general public, 95 percent of usage is by residence hall students. The dining program emphasizes local products, healthy options and sustainability.

During the summer months, the Student Housing's Conference Housing Office provides rooms and public spaces to many different groups both internal and external to the university. Conference housing allows the department to generate additional revenue for operational needs in buildings that do not have planned preventive maintenance or renovation projects. Campus constituents and external groups who have utilized this opportunity include UC Davis summer session students, the UC Davis Orientation program, Intercollegiate

Athletics, Special Olympics and UCA/NCA cheerleader camp.

In addition to our academic year and summer housing and dining programs, the department also provides a number of campus life services and programs, most notably academic advising and orientation. More than 10,500 incoming students and their family members and guests attend campus orientation each summer.

Housing Guarantee

In support of UC Davis' mission and in line with other UC campuses, housing is guaranteed to all incoming freshmen. In 2009, this guarantee was extended to all incoming transfer students. In 2012, Student Housing further expanded the housing guarantee to second-year students. More than 90 percent of all incoming freshmen and 20 percent of incoming transfer students contract to live in student housing. These figures grow larger each year.

Student Populations

Student Housing's capital plans are designed with the housing guarantee to first-year freshman students as a foundational priority. These accommodations are provided in single, double, or triple residence hall rooms. First-year transfer student accommodations are largely provided in lease-back apartments located in Davis or in the third-party communities at Primero Grove and The Colleges.

The majority of continuing students prefer to live off campus for their second year and beyond. Less than five percent of our bed spaces are generally filled in this manner. While only a

small number of continuing students prefer to stay on campus, the availability of such housing is important to students and families when they are considering which campus to attend.

To ascertain the off-campus housing supply and demand, Student Housing analyzes annual vacancy and rental information within the City of Davis. In the past, Student Housing has administered an annual survey to gather this data. Moving forward, a third-party consultant will collect and analyze rental and vacancy figures and provide up-to-date information regarding the availability and affordability of community housing. The department also fosters strong partnerships with the third party developments: Primero Grove, Russell and LaRue Park, The Colleges and West Village apartments.

Incoming international students are integrated with other UC Davis students in the standard housing options. While international students do not prefer specialized or separate housing, they do have needs that vary from domestic students related to distance and travel. Many international students arrive to campus and check in prior to our scheduled move-in periods and stay on campus during holiday closure periods.

Graduate student housing is also a priority for UC Davis and we are currently in the process of constructing facilities that will increase the beds available to graduate students from 825 to 1,063. Approximately 18 percent of graduate students live on campus, primarily in our Orchard and Solano Park apartments.

In addition to the traditional offerings, Student Housing manages a ground lease with Tandem Properties to provide group living opportunities for approximately 180 continuing students, primarily fraternity and sorority members. These properties consist of four large buildings that house approximately 30–35 residents each and four small houses accommodating 14 residents each.

Student Programs and Services

Student Housing provides a robust residential education program that includes the Residence Hall Advisory Board, leadership development opportunities, living-learning and academic themed communities, social and extracurricular activities and a broad range of academic support programs. To facilitate these programs and services, Student Housing employs professional and student staff who also provide for the safety, community development and individual needs of student residents.

To facilitate positive community and ensure residents are in compliance with Student Housing policy and the UC Davis Standards of Conduct for Students, Student Housing has professional staff and student peer-review boards who meet with students involved in alleged policy or behavioral violations. In most instances, an educational and developmental solution can be found. For serious or repetitive situations, a student's housing contract and/or their

overall student status may be reviewed. Student Housing also manages the student organization conduct process for incidents allegedly involving any UC Davis registered student organization.

To augment our residential program, Student Housing began coordinating a First-Year Experience program in the 1990s. The First-Year Experience program includes academic advising, tutoring, academic workshops, peer advising and other academic support programs.

In addition to advising and other support programs, all UC Davis housing residents have access to the Computer Centers, which provide space for group study and review sessions, access to computers, printers, shredders, scanners and free printing. Drop-in, on-call and personal computing support is available to all residential students.

Closely coordinated with the academic advising program, Student Housing also manages the UC Davis Orientation program. Each summer, approximately 4,700 students (99.8 percent of the freshman class) attend a two-day, one-night program with concurrent but separate student and family programs. In addition, approximately 2,600 transfer student (88 percent of the incoming transfer population) attend a one-day orientation program. Student Housing also conducts orientation sessions specifically planned and organized for incoming international students. While attending orientation, students register for fall classes and learn about resources, campus culture and student life at UC Davis.

In 2008, Student Housing assumed responsibility for the Office of Sorority and Fraternity Life. Ten percent of UC Davis students belong to one of 70 fraternities and sororities registered at UC Davis.

Dining, Retail and Catering Services

Dining, Retail and Catering Services provide a wide variety of healthy, tasty food in three dining commons, three convenience stores, and concession and retail locations. In addition to our broad residential food program, we offer Starbucks coffee, bakery items, catering services and several branded food options (Taco Bell, Pizza Hut and Carl's Jr.). We provide two food trucks in addition to other proprietary options, offering a variety of choices for both our residential students and the broader campus population. Vegetarian, vegan, gluten-free and other health needs are met in these locations and the third-party provider works closely with the Residential Education office to provide programmatic opportunities via themed meals, barbecues, and other specialty meals.

Campus Collaborations

Collaboration is a key value for UC Davis Student Housing. In support of that value, we partner with a variety of campus and community entities and organizations to deliver our services and programs. Appendix A shows a complete list of the regular and ongoing committees and group meetings we attend and/or facilitate.

IV.

Housing Supply and Demand

Undergraduate Demand

Student Housing conducts ongoing analysis of student enrollments, housing guarantees, and take rates for admissions and housing offers. We stay in alignment with campus goals by planning in advance to provide the necessary bed spaces, taking care not to overbuild and create a financial liability for the campus.

Appendix B, “Residence Hall Bed Space Supply and Demand,” illustrates our current bed-space projections for the next 10 years and shows that we have sufficient resources to accommodate first-year freshman base demand within the framework of our historical take rates and known enrollment projections. In addition, we can increase the number of triple-occupancy rooms for students who prefer the enhanced affordability of that option.

Demand from transfer students has remained steady, but the availability of residence hall beds has decreased (as a direct result of freshman enrollment increases). We have responded by increasing the number of master-leased apartments off campus. Student Housing does not have any plans to build transfer apartment housing and will continue to rely on either third-party apartments located on campus and/or apartments in the Davis community to meet this demand.

During the first year of the second-year housing guarantee, less than two percent of the 2012 residents contracted for this option. Student Housing expects this number will increase slightly as the program develops and parents opt towards the security of this second-year option. Student Housing will meet this demand in the residence halls, and if the freshman demand is such that this is not possible, will offer apartment beds in the master-leased apartments off campus.



Graduate Demand

Interest in graduate student housing has increased in recent years, especially for families. Student Housing is working with the campus to offer solutions, whether through the existing third-party housing or other options in the Davis community. Student Housing is also working to develop two new graduate-student apartment communities: one at the former location of Castilian Hall (Wake Forest Drive) and the other at Orchard Park.

Public/Private and Community Partnerships

In the early 1980s, UC Davis entered into a ground lease with Tandem Properties, one of the first privatized housing partnerships in the UC system. Since that time, three more ground leases have been executed, two more with Tandem and one with EAH. This privatized housing mix, which includes almost 650 on-campus apartment units, provides housing to over 600 students. These spaces are utilized primarily by families, single graduate and continuing undergraduate students. West Village, immediately adjacent to campus, provides 2,000 beds for single students and families. Student Housing is leasing back one complex completely (Primero Grove) and several units at The Colleges. The ability to utilize these third-party beds has provided a financially sound and

reliable method for meeting our housing guarantees.

Cooperative Housing

Student Housing has been responsible for two cooperative housing areas since the early 1970s: Baggins End (The Domes) and the Tri Co-Op houses (Davis Student Co-Op, Pierce Co-Op and Agrarian Effort Co-Op). In August 2011 Baggins End was closed as a result of extensive renovations needed to the fiberglass structures. Solar Community Housing Association (SCHA) entered into a five-year ground lease with Real Estate Services to make necessary repairs and the project re-opened in November 2011. Student Housing maintains a liaison relationship with SCHA via a housing board chaired by Real Estate Services.

Student Housing continues to work with the Tri Co-Ops community (approximately 30–40 students) to meet their objective for communal living, which embraces sustainability, while maintaining the on-campus community standards and expectations.

V.

Facilities Operations and Planning

Student Housing operates and maintains over 1.8 million gross square feet within a variety of building types and locations, including residence halls, apartments, dining facilities, retail centers, computer labs and classrooms. In addition to daily custodial services and the delivery of residential and dining maintenance services, Student Housing oversees a variety of operational logistics. These logistics include our furniture and upholstery programs, fire safety, sustainability, energy management and approximately 25 outsourced agreements such as grounds, locksmith and carpet cleaning.

Design Services

The office of Design Services serves both Student Housing and the Division of Student Affairs by providing interior architectural solutions for buildings managed by Student Housing and Student Affairs. Design Services provides assistance with planning, design and project management for maintenance, tenant improvements, renovations and new construction projects.

Computer Services

Computer Services provides the information technology infrastructure for the department. This department performs application development, system administration, and desktop and user support for all residential students and department

staff. We also manage three residential computing centers and collaborate with departments in the Division of Student Affairs and Division of Information and Education Technology (IET) on development projects, security and network administration. The unit integrates Tier 1 and Tier 2 campus and departmental information systems (financial, payroll, student, and user registry) and ensures reliable and secure information exchange as well as efficient and effective business practices in the department.

Major Maintenance

Student Housing's major maintenance program addresses maintenance project needs and the equipment, soft costs and labor associated with completion of the projects. These projects range from the purchase of windows to the replacement of roofs to the major renovation of a building. Major maintenance funds are the primary funding source for significant maintenance and renovation projects. Student Housing's major maintenance program is adequately funded and supported to ensure all of our facilities provide safe and secure living environments for our students.

Capital Projects

All Student Housing capital projects are coordinated with the office of Design and Construction Management and include

direct involvement of Student Affairs.

Recent construction projects include the Segundo North 380-bed residence hall, the Segundo Dining Commons, the Tercero South I 400-bed residence hall, the Tercero South II 600-bed residence hall and the Segundo Services Center. Major renovation projects include the Tercero Dining Commons renovation, the Cuarto Dining Commons renovation, the Regan renewal project and the Segundo high-rise renewal. Renovation projects focused on various aspects including seismic upgrades, fire safety, mechanical upgrades, amenity upgrades, square footage increase, roof/siding/window upgrades, security and technology.

New construction has just completed for Tercero Phase 3, a 1,200-bed residential complex that will replace the 800 beds in the Pierce/Thille properties. Construction has also been completed for the Castilian Hall third-party development. Planning has begun for the redevelopment of Orchard Park. Additionally, Tercero Phase 4 will replace 180 beds at the Leach complex with 500 new beds. Occupancy is planned for fall 2017.

Ten-Year Capital Plan

The campus initiative for enrollment growth, along with our expanded responsibility for all retail dining facilities and our continuing commitment to guarantee housing for first-year freshmen and transfer students and second-year returning students, will result in many facility investments over the next 10 years. Below is a summary of our current 10-year capital plan.

Fall 2014	Tercero Phase 3 comes online with 1,200 beds	Fall 2020	Emerson Hall goes off-line for demolition and construction of replacement beds
Fall 2014	Castilian third-party redevelopment project comes online with ~230 beds*	Fall 2023	Emerson Hall comes back online with ~600 beds
Fall 2014	Orchard Park apartments go off-line for redevelopment*		* Third-party developments utilize privatized financing and therefore are not included in the campus capital-plan documents.
Fall 2014	Leach Hall goes off-line for demolition and construction of Tercero Phase 4		
2014-2016	Two-phase renovation of the South Silo, Silo and Silo Courtyard		
Winter 2016	New Scrubs dining facility comes online		
2015-2016	Tercero Dining Commons interior seating expansion and mechanical renewal		
Fall 2017	Tercero Phase 4 comes online with ~500 beds		
Fall 2017	Webster Hall goes off-line for demolition and construction of replacement beds		
Fall 2020	Webster Hall comes back online with ~300 beds		



VI.

Financial Planning

Housing and Dining Rates

UC Davis Student Housing is committed to providing affordable housing to our residents. Our student housing and dining rates are consistently mid-range in comparison to other UC campuses. Over the past three years our average annual rate increase was 4.8%. We anticipate an average annual increase of 4.3% over the next 10 years; however this data is currently under review to ensure our ability to meet updated reserve balance goals from the Budget and Institutional Analysis department. We will continue to control costs and make strategic decisions to remain affordable as we work to achieve our mission.

Revenues, Expenses and Reserves

We achieve our commitment to affordability while still providing quality facilities and services by preparing and adhering to a long-term strategic financial plan. Our 10-year plan outlines our funding sources and uses, and provides for the allocation of reserves for necessary renovation, upgrade and construction projects. In recent years, new construction and major renovation projects have been financed with a combination of equity and cash. This approach reduces future debt obligations. As debt financing is quite affordable and reserve minimum balances will need to be maintained, this strategy will be reconsidered for future projects. It is essential to retain sufficient reserves to meet all of our planned project and financial obligations as an auxiliary enterprise.

Appendix C, “Ten-Year Reserve Projections,” provides a summary of the sources and uses of Student Housing funds.

Campus Assessments

As an auxiliary and revenue-generating unit, Student Housing is responsible for an overhead recovery auxiliary agreement that covers services including campus police, fire services, campus central human resources, purchasing, accounts payable, cashiers and an additional self-supporting income assessment. In addition to the \$5.6 million allocated as a general campus assessment, another \$713,820 is budgeted for general student affairs support. See Appendix D, “Campus Assessment and Service Agreements,” for more detailed information.

VII.

Future Organizational Development and Staffing Needs

The department has undergone a great deal of growth and transition in the past five years and the staffing patterns have changed accordingly. At the senior leadership level, the Student Housing director has taken on responsibility for financial oversight for the Division of Student Affairs with an accompanying title change to associate vice chancellor. Our senior leadership team now consists of three directors and a food service contract manager. A revised organizational chart can be found in Appendix E.

In the next 3–5 years, we anticipate a number of campus and administrative changes. In this context, we are committed to ensuring that position descriptions accurately reflect the totality of the work assigned, classifications are appropriate, and compensation reflects the market as well as individual performance. In addition to preparing for planned changes, we are committed to being nimble and responsive to unanticipated needs. When prudent and appropriate, adjustments will be made as staff members leave, new opportunities arise, or campus priorities shift.

Student Development

As part of the overall campus growth and anticipated needs of international students, Orientation will need to hire 1–2 student affairs officers, one analyst and additional administrative support staff. With the addition of new bed

spaces, Residential Education will also add 3–5 student affairs officers to the team as well as one position to assist with the case management of students in distress – a growing concern for the division. Additional student staff will also be needed in these areas.

Facilities Operations

With Tercero Phase 3 coming online fall 2014, there will be a need to add one senior custodial supervisor, one lead custodian and 15 senior custodians. The maintenance operation is staffed appropriately to handle the increased workload. The growth of our operation merits ongoing human resources review and we will begin succession planning for the retirement of our two fire safety coordinators.

Dining, Retail and Catering Services

In 2012, following the merger of retail and residential dining, the department began an extensive financial review of our food-service contract. The initial findings recommended more focused oversight of the contract. A new food service contract manager has joined the leadership team to serve in this capacity. In addition, a human resources specialist and financial analyst have been hired to provide consistent management of university staff, and for deeper analysis and review of the financial elements of the dining contract.

Administration

As a result of the campuswide Operational Excellence Initiative, the Shared Service Center was created to improve efficiencies and realize budget savings by coordinating transactional work in support of purchasing, travel and entertainment, payroll and human resources. This transition, in addition to an effort to flatten reporting lines in Student Affairs, has resulted in the elimination of seven administrative staff. Staffing levels and workload will be evaluated and adjusted as needed in response to updated processes in support of this effort.

In addition, the University of California system is moving towards centralizing all human resources and payroll transactions—an effort known as UC-PATH. UC Davis is scheduled to transition to UC-PATH in January 2015. This transition will include a change to the campus based accounting system and the use of online pre-purchasing software. In preparation for the UC-PATH transition, all UC campuses moved non-exempt (hourly) employees to a bi-weekly payroll system. In addition, all staff are now using an updated time reporting system. This effort will result in continued adjustments and changed expectations of supervisors and staff in this area.



VIII.

Strategic Initiatives

Student Housing's strategic initiatives represent our priorities over the next 3–5 years. During this time, we will develop specific goals, identify applicable metrics and commit the time and resources necessary to ensure continued progress.

Student Program Enhancements

The demographics of our student population are ever changing. As such, we will continue to evolve and enhance our program in both anticipation of and response to students' changing needs. In response to the campus plans for increasing numbers of international students, we will partner with other UC Davis offices to ensure we are providing a smooth transition to the university and incorporating these students into the overall campus community. Students with preexisting mental health concerns and those students who may not transition well to campus are another focus area for program enhancement. We will also proceed with continued enhancements to our academic advising programs, possibly expanding our efforts beyond residence hall students to include more segments of the general student population.

Dining Services

Student Housing works closely with a third-party vendor to operate our dining and retail program. The partnership changed substantially in 2009 and again in 2012 with the

university taking over the majority of the staffing and property management components. We will continue to monitor the contract carefully as we move forward. We will also partner with the campus to construct a new facility in the Vet Med area and continue our efforts to upgrade current retail dining facilities. In addition, we will continue our focus on sustainability initiatives and infuse healthy food options and education as a priority, while evaluating if this contract is the most efficient method of delivering food service to the campus community.

The dining facilities inventory includes the following:

- Segundo Dining Commons – 805 seats
- Tercero Dining Commons – 820 seats
- Cuarto Dining Commons – 338 seats
- Bakery
- Culinary Support Center
- Catering
- Silo – 300 seats
- Scrubs – 220 seats
- Bio Brew



- Cargo Coffee (King, Sproul, Ghausi)
- Concessions
- Hub (West Village)
- Coffee House – seats 566
- Coffee House South

Space Planning and Asset Management

We will continue our efforts to provide adequate student-centered space. These needs include bed spaces, student-support space as well as administrative services space. We will implement an internal process to identify and provide for any unmet space-use needs as well as educate staff on the available options. In addition to providing space, we will continue our efforts to procure and implement a new asset management system (AMS). This effort will include staffing changes, the development of user interfaces and staff education.

Marketing and Communications

We will enhance communication and information sharing for both our internal and external audiences. These enhancements will include but not be limited to website improvements as well as expanded use of social and print media. External communication initiatives will include close collaboration with our third-party dining contractor, Student Affairs Marketing and Communications as well as the campus Strategic Communications group. Internally, we will evaluate the quantity and structure of our department and unit meetings, enhance opportunities for staff social interaction, and revisit the use of a department newsletter.

Professional Development and Succession Planning

Student Housing provides a broad range of professional development opportunities for our staff. We will continue to enhance these efforts with a focus on providing a more structured array of opportunities. In addition, we will work to identify project-based and interim/short-term assignments that will prepare staff for future advancement while also contributing to department needs and goals.

IX.

Appendices

Appendix A – Campus Collaborations

GENERAL PLANNING and COLLABORTION

Name: Budget Office Meeting

Attendees: Student Housing (Emily, Ramona) Administrative & Resource Director (Director, Budget Director, Analyst)

Frequency: Two times per year

Name: University Admissions

Attendees: Student Housing leadership team, University Admissions (exec director, deputy director, misc supervisors)

Frequency: One time per year

FACILITIES COLLABORATION

Name: Umbrella Project Advisory Committee Campus Housing Projects

Attendees: Student Housing, Campus Planning, Campus Architect, Landscape, Budget, Real Estate Services, Building Maintenance Services

Frequency: Monthly

Name: Umbrella Project Advisory Committee Campus Dining

Attendees: Student Housing, Campus Planning, Budget, Dining Services, Coffee House, Contracts, Design and Construction Management

Frequency: Monthly

Name: Housing/Grounds Coordination

Attendees: Student Housing, UC Davis Grounds

Frequency: One time per quarter

Name: Housing/Fire Prevention Coordination

Attendees: Student Housing, Fire Prevention

Frequency: One time per quarter

Name: Housing/Building Maintenance Services Coordination

Attendees: Student Housing, Building Maintenance Services

Frequency: One time per quarter

Name: Housing/Custodial Coordination

Attendees: Student Housing, Campus Custodial Services

Frequency: One time per quarter

Name: Housing/Campus IT Coordination

Attendees: Student Housing, IT

Frequency: One time per quarter

Name: Housing/Minor Cap Coordination

Attendees: Student Housing, DCM Minor Cap Group

Frequency: One time per quarter

OFFICE of STUDENT DEVELOPMENT COLLABORATION

Name: Crisis Response Team

Attendees: Student Housing, Police, Counseling and Psychological Services, Student Judicial Affairs, Campus Violence Prevention Program.

Frequency: One time per week

Name: Police/Office of Student Development

Attendees: Student Housing, Police

Frequency: Two times per month

Name: Residence Hall Advisory Team

Attendees: Student Housing, staff from Dean's offices, Student Academic Success Center

Frequency: One time per quarter (or more frequently as necessary)

Name: Orientation

Attendees: Orientation, Student Affairs Administration, most departments within the Student Affairs Division, several departments/units outside of Student Affairs

Frequency: ongoing and extensive

Name: Fall Welcome Week Committee

Attendees: Student Housing, Campus Recreation, City of Davis representatives, UCD Government Relations, Aggie Pack staff, many Student Affairs units.

Frequency: Monthly from January through September

Name: University Religious Council

Attendees: Student Housing, AVC Student Affairs, various local religious leaders from the City of Davis.

Frequency: Quarterly

Name: Parent Programs Meetings

Attendees: Student Housing, Orientation, Admissions, News Services, Athletics, Cal Aggie Alumni Association/Parent Programs

Frequency: Monthly

Name: Campus Coordinated Response Team

Attendees: Student Housing, Orientation, Greek Life, Student Health, Campus Violence Prevention Program, UCDPD, Cross Cultural Center, Women's Resource & Retention Center, Harassment & Discrimination Assistance and Prevention Program, Yolo County Sexual Assault Prevention, Athletics.

Frequency: Quarterly

BUSINESS COLLABORATION

Name: Case Management Team

Attendees: Student Housing, HR staff, Custodial Supervisor, Risk Management, Workers Comp, Disability Management, Shared Service Center Leaves Management, Sodexo HR Manager and Safety Coordinator

Frequency: One time per month

Name: Occupational Health Accident Report Review

Attendees: Student Housing, Occupational Health, Environmental Health and Safety, Risk Management, Sodexo HR Manager and Safety Coordinator

Frequency: One time per quarter

Name: Shared Services Center

Attendees: Student Housing, Shared Service Center leadership

Frequency: Twice per month

Name: Operational Excellent Customer Advisory Committee

Attendees: 3 Student Affairs reps (Ramona is one); end users from admin units

Frequency: One time per month

Name: Business Officers and Administrators Committee – Student Affairs

Attendees: HR/Payroll and Financial managers in all units

Frequency: Every other month

Name: Kualii Phase 3 Focus Group

Attendees: Lourdes Gomez is one of three representatives for Student Affairs. Comprised of various departments across campus, participation ranges from Budget Analyst to Director of Budget and Planning (all financial folks and Kualii users).

Frequency: started every other month but as we get closer to the implementation date, meetings are becoming monthly.

Name: Administrative Management Group (ADMAN)

Attendees: Lourdes is the only representative from Student Affairs. Consist of middle managers from various administrative and academic departments on campus.

Frequency: Once a month

Name: Travel & Entertainment User Group

Attendees: Lourdes is the only representative from Student Affairs. Consist of middle managers and processors from various administrative and academic departments on campus.

Frequency: Once a month

Appendix B – Residence Hall Bed Space Supply and Demand

	Actuals FY 13/14	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23
Design Capacity	4524	4524	4968	4968	4968	5178	5178	5528	5528	5528
Design Capacity Changes	4791									
Primero Grove		-560								
Tercero Student Housing Phase 3 new Fall 2014		1183								
Leach Hall (Retire)		-179								
Tercero Phase 4 new Fall 2017					475					
Webster offline Fall 2017					-265					
Webster online Fall 2020								350		
Emerson offline Fall 2020								-500		
Emerson online Fall 2023 (650)										
Subtotal of Changes		444			210			-150		
Design Capacity - Total Supply		4968	4968	4968	5178	5178	5178	5378	5528	5528
Projected Demand (20/20 initiative)	4755	4664	4778	4896	5014	5173	5314	5451	5451	5451
Excess Demand (Demand-Supply)	-231	-140	190	72	-46	5	-136	77	77	77

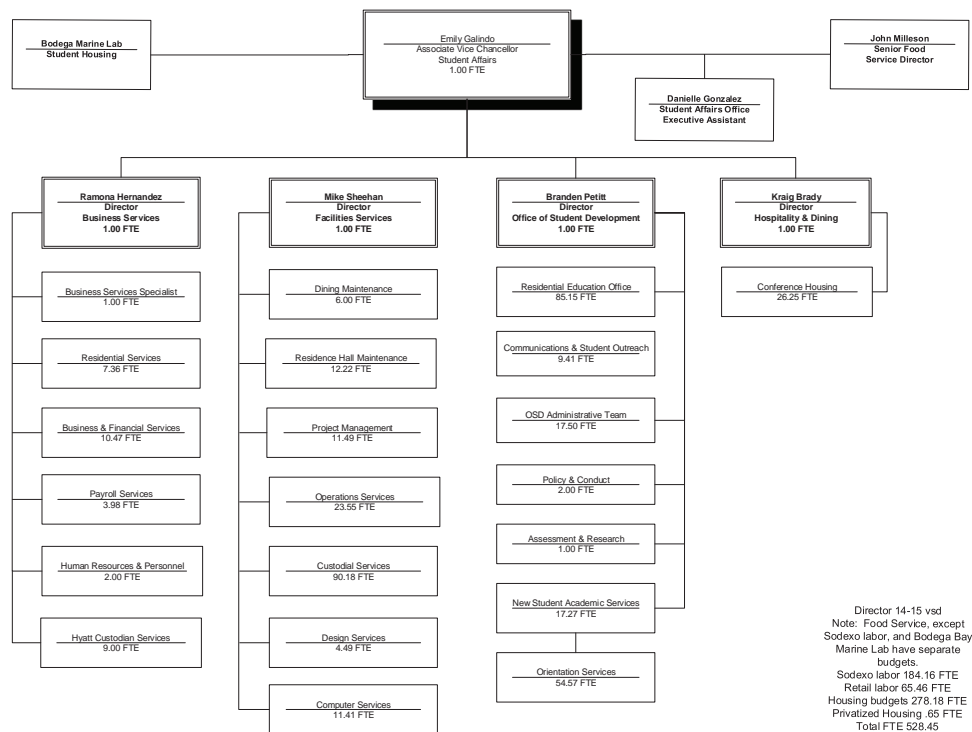
Appendix C – Ten-Year Reserve Projections, Sources and Use of Funds

	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Beginning Reserve Balance	\$ 18,616,644	\$ 17,384,397	\$ 13,085,083	\$ 9,542,431	\$ 7,819,772	\$ 2,156,646	\$ 3,764,631	\$ 11,663,193	\$ 9,921,372	\$ 9,187,955
Annual Operating Income										
Residence Hall	\$ 44,478,050	\$ 45,961,825	\$ 47,110,871	\$ 49,563,505	\$ 52,502,619	\$ 54,905,720	\$ 57,578,391	\$ 59,082,626	\$ 61,507,715	\$ 63,045,408
Parks Apartments	\$ 2,533,296	\$ 2,533,098	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Housing Apartments	\$ 7,997,921	\$ 8,183,130	\$ 8,387,709	\$ 8,597,401	\$ 8,855,323	\$ 9,076,706	\$ 9,303,624	\$ 9,536,215	\$ 9,774,620	\$ 10,018,986
Conference Housing	\$ 3,326,288	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720	\$ 3,381,720
Sales & Services	\$ 612,958	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487	\$ 412,487
Vending & Retail Income	\$ 826,552	\$ 843,083	\$ 859,945	\$ 877,144	\$ 894,686	\$ 912,580	\$ 930,832	\$ 949,448	\$ 968,437	\$ 987,806
Board Dining	\$ 25,132,040	\$ 24,851,190	\$ 25,472,470	\$ 26,625,801	\$ 28,280,864	\$ 29,761,713	\$ 31,272,312	\$ 32,092,315	\$ 32,894,623	\$ 33,716,988
Total Operating Income	\$ 84,907,105	\$ 86,166,533	\$ 85,625,202	\$ 89,458,058	\$ 94,327,699	\$ 98,450,926	\$ 102,879,366	\$ 105,454,811	\$ 108,939,602	\$ 111,563,395
Annual Operating Expenses										
Salaries	\$ 16,484,772	\$ 16,979,315	\$ 17,488,695	\$ 18,013,355	\$ 18,553,756	\$ 19,110,369	\$ 19,683,680	\$ 20,274,190	\$ 20,882,416	\$ 21,508,888
Benefits	\$ 7,977,966	\$ 8,489,658	\$ 8,744,347	\$ 9,006,678	\$ 9,276,878	\$ 9,555,184	\$ 9,841,840	\$ 10,137,095	\$ 10,441,208	\$ 10,754,444
Supplies, Expenses	\$ 8,651,091	\$ 8,824,113	\$ 9,000,595	\$ 9,180,607	\$ 9,364,219	\$ 9,551,503	\$ 9,742,534	\$ 9,937,384	\$ 10,136,132	\$ 10,338,855
Food Prep - Housing	\$ 16,587,146	\$ 16,753,018	\$ 16,920,548	\$ 17,258,959	\$ 17,258,959	\$ 17,604,138	\$ 17,956,221	\$ 18,315,345	\$ 18,681,652	\$ 19,055,285
Miscellaneous	\$ 7,969,229	\$ 8,128,614	\$ 8,291,186	\$ 8,457,010	\$ 8,626,150	\$ 8,798,673	\$ 8,974,646	\$ 9,154,139	\$ 9,337,222	\$ 9,523,966
Assessments & Service Agreements	\$ 5,230,588	\$ 5,335,200	\$ 5,441,904	\$ 5,550,742	\$ 5,661,757	\$ 5,774,992	\$ 5,890,492	\$ 6,008,301	\$ 6,128,467	\$ 6,251,037
Total Operating Expense	\$ 62,900,792	\$ 64,509,918	\$ 65,887,275	\$ 67,467,351	\$ 68,741,719	\$ 70,394,859	\$ 72,089,413	\$ 73,826,454	\$ 75,607,097	\$ 77,432,475
Net Revenue from Operations	\$ 22,006,313	\$ 21,656,615	\$ 19,737,927	\$ 21,990,707	\$ 25,585,980	\$ 28,056,067	\$ 30,789,953	\$ 31,628,357	\$ 33,332,505	\$ 34,130,920
Existing & Projected Capital Project Debt										
Existing Debt	\$ 9,245,000	\$ 9,356,000	\$ 9,235,000	\$ 9,156,000	\$ 9,135,000	\$ 7,161,000	\$ 8,094,000	\$ 8,073,000	\$ 8,076,000	\$ 7,949,000
Tercero Phase 3 Debt	\$ 2,735,200	\$ 3,282,240	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323	\$ 4,347,323
Silo South Phase 1 Debt	\$ -	\$ 35,000	\$ 60,000	\$ 72,649	\$ 72,649	\$ 72,649	\$ 72,649	\$ 72,649	\$ 72,649	\$ 72,649
Scrubs Vet Med Debt	\$ -	\$ -	\$ 426,360	\$ 511,632	\$ 619,492	\$ 619,492	\$ 619,492	\$ 619,492	\$ 619,492	\$ 619,492
Silo North Phase 2 Debt	\$ -	\$ -	\$ 225,000	\$ 450,000	\$ 544,867	\$ 544,867	\$ 544,867	\$ 544,867	\$ 544,867	\$ 544,867
Tercero Phase 4 Debt	\$ -	\$ -	\$ 1,108,500	\$ 2,660,400	\$ 3,221,253	\$ 3,221,253	\$ 3,221,253	\$ 3,221,253	\$ 3,221,253	\$ 3,221,253
TDC Bakery & Seating	\$ -	\$ -	\$ 212,910	\$ 319,365	\$ 386,692	\$ 386,692	\$ 386,692	\$ 386,692	\$ 386,692	\$ 386,692
Grad Housing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,650,000	\$ 1,800,000	\$ 2,179,467	\$ 2,179,467	\$ 2,179,467
Webster Demo & Redevelopment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,553,808	\$ 3,092,190	\$ 3,092,190	\$ 3,092,190
Emerson Redevelopment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,790,557
Total Capital Project Debt	\$ 11,980,200	\$ 12,673,240	\$ 15,615,093	\$ 17,517,369	\$ 18,327,276	\$ 18,003,276	\$ 21,640,084	\$ 21,998,551	\$ 22,539,933	\$ 27,203,490
Reserve Allocations										
Major Maintenance	\$ 3,300,000	\$ 2,865,000	\$ 3,525,000	\$ 1,380,000	\$ 790,000	\$ 1,317,690	\$ 1,449,459	\$ 1,594,405	\$ 1,753,845	\$ 1,929,230
CSC Catering Improvement	\$ 856,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Silo Ph. 1 Student Affairs Repayment	\$ -	\$ -	\$ -	\$ -	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -
Tercero Buggy Project	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Scrubs Vet Med Equity	\$ 1,065,900	\$ 1,065,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Silo North Phase 2 Equity	\$ 625,000	\$ 1,250,000	\$ 625,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Tercero Phase 4 Equity	\$ 3,695,000	\$ 7,390,000	\$ 3,695,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TDC Bakery & Seating	\$ 887,125	\$ 887,125	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grad Housing	\$ -	\$ -	\$ -	\$ 5,000,000	\$ 5,000,000	\$ -	\$ -	\$ -	\$ -	\$ -
Webster Demo & Redevelopment	\$ -	\$ -	\$ -	\$ -	\$ 5,320,434	\$ 5,320,434	\$ -	\$ -	\$ -	\$ -
Emerson Redevelopment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,980,326	\$ 9,980,326	\$ -
Total Reserve Allocations	\$ 11,429,225	\$ 13,458,025	\$ 7,845,000	\$ 6,380,000	\$ 13,110,434	\$ 8,638,124	\$ 1,449,459	\$ 11,574,731	\$ 11,734,171	\$ 1,929,230
Ending Reserve Balance	\$ 17,213,532	\$ 12,909,747	\$ 9,362,917	\$ 7,635,769	\$ 1,968,042	\$ 3,571,313	\$ 11,465,041	\$ 9,718,268	\$ 8,979,773	\$ 14,186,155
Debt Service Coverage	1.84	1.71	1.26	1.26	1.40	1.56	1.42	1.44	1.48	1.25

Appendix D - Campus Assessment and Service Agreements—2012-2013

Campus Support / Agreements	Amount	Comments
Overhead Recovery Auxilliary DCA	\$ 2,674,680	Includes DCA for Police, Fire, central campus accounting, purchasing, cashiers, HR, payroll and 3% income assessment
Fire Prevention DCA	\$ 12,086	Additional costs that weren't included in the Fire DCA mention above
SSC Support	\$ 62,473	SSC Recharge True up for 2011-2012 costs
SSC Support	\$ 761,775	SSC Recharge for 2012-2013 costs
Student Affairs SSC Reduction	\$ 396,320	Student Affairs 2012-2013 SSC budget reduction
Student Accounting DCA	\$ 8,820	
Grounds DCA	\$ 978,918	
OP Tax Assessment	\$ 757,995	1.52% OP tax assessment on all 2010-2011 expenses
OP Tax Assessment	\$ 27,264	Additional OP tax assessment on 2010-2011 expenses from the Retail and Hyatt Labor
Subtotal Campus Support	\$ 5,680,330	
Student Affairs Support / Assessments	Amount	Comments
Contribution to VCSA and SJA	\$ 341,000	
SAMC Marketing Comm. Specialist position	\$ 61,354	
Conference Housing Surcharge	\$ 71,835	Student Affairs assessment on each conference guest
Housing VSP/Supervisor ratio reduction	\$ 219,632	
Contribution to Student Life units	\$ 20,000	Contribution is reviewed annually
Subtotal Student Affairs Support	\$ 713,820	
Total Support / Assessments	\$ 6,394,151	

Appendix E – Student Housing Organizational Chart





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STUDENT HOUSING

housing.ucdavis.edu
www.facebook.com/UCDavisStudentHousing
studenthousing@ucdavis.edu

160 Student Housing
University of California, Davis
Davis CA 95616

530-752-2033
530-752-4345 (fax)