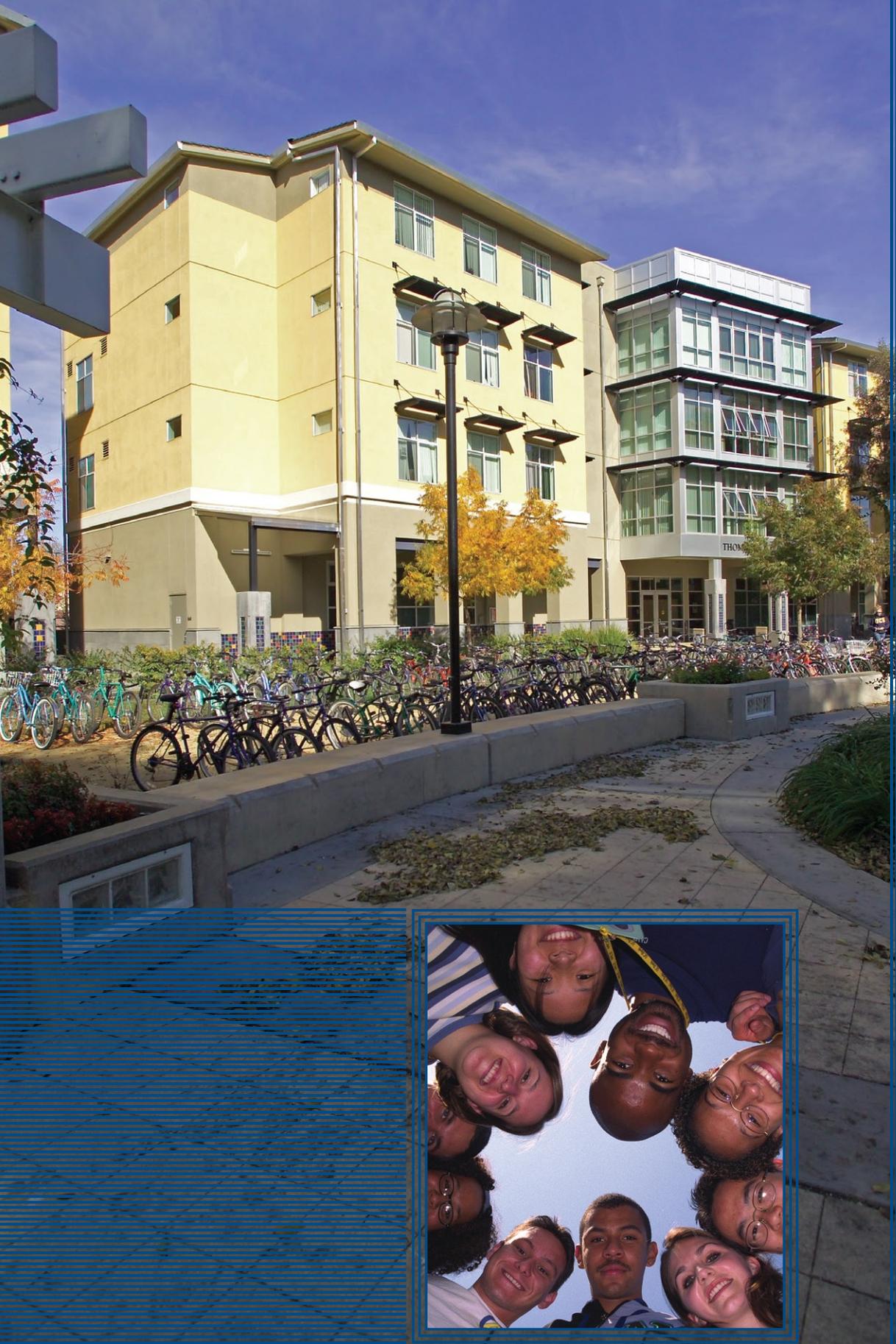


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STUDENT
HOUSING

a department of Student Affairs

STRATEGIC
PLAN
2008



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INTRODUCTION

During fall of 2007, the Student Housing Leadership Team determined it was time to update the departmental long term planning document which was written in March of 2001. The strategic plan that follows focuses on the next ten years and includes the collective thinking of the department's current leaders. The planning effort began with a revision of the Student Housing Mission Statement. The team then took into consideration new and ongoing programmatic initiatives, freshmen enrollment projections, capital projects, identified goals for on-campus housing and the development of the West Village neighborhood. During the past year, key Student Affairs leaders have been consulted for input. (See Appendix A for a list of Student Housing and Student Affairs leaders).

The Student Housing Strategic Plan focuses on housing for undergraduate students and utilizes historical enrollment information and future enrollment projections to determine demand. Housing needs were based upon a variety of assumptions with the primary focus on new freshmen and new transfer students. Guarantee comparisons were made with other UC campus housing departments, and it was quickly noted that Davis is one of only two campuses that does not provide a guarantee for new transfer students.

The potential on campus housing needs for faculty and/or staff are not addressed in this report.

A campus map is available at www.visit.ucdavis.edu/map.

DEPARTMENTAL FRAMEWORK

Mission Statement

The mission of Student Housing is to provide educational living and dining environments that facilitate a successful transition to UC Davis for new students. Additional housing is provided for continuing students in apartments, living groups and cooperative houses. Student Housing programs are designed to support academic success, leadership development, positive decision making and responsible citizenship.

Student Housing values and creates environments that foster community which are diverse, inclusive, educational, safe, well maintained and environmentally sustainable while achieving a high standard of fiscal responsibility.

Student Housing works in partnerships with campus and community organizations to bring the best educational and community resources to our residents. These partnerships aid the transition process and allow for academic success.

Key Functions:

In support of the Student Housing Mission, the following functions are critical:

- Provide residential education programming for 5000 residence hall students.
- Foster community building for student families living in on campus apartment complexes.
- Deliver effective and efficient operations, maintenance, and renovation of 1.8 million gross square feet in 105 buildings.
- Manage student accounts in excess of 50 million dollars.
- Deliver a highly diverse dining and food service program.
- Recruit, develop and retain exceptional professional and student staffs.
- Plan capital projects to accommodate future needs.

Strategic Initiatives:

- Maintain housing guarantee to all incoming freshmen.
- Resume housing guarantee for all incoming transfer students.
- Develop partnership opportunities with West Village that may help us in addressing transfer student and second year students' housing needs.
- Partner with campus constituents to evaluate opportunities to increase graduate student offerings.
- Assess and refine our organizational structure to more effectively meet the needs of a larger and more diverse population of students.
- Explore and engage in emerging revenue generating opportunities.

STUDENT POPULATIONS SERVED

The need for housing and the determination to serve student populations at UC Davis is largely impacted by our campus culture and our relationship with the City of Davis. In addition to our desire to provide transition support to all student groups who are newly arriving to the campus, the college town atmosphere of the City of Davis provides safe, good quality housing with desired amenities for student populations who have already established strong connections to the campus. By continuing to administer our annual Davis Apartment Vacancy and Rental Rate Survey, we are able to monitor the availability and affordability of community housing (see Appendix B). We also have strong partnerships with our third party developments (Primero Grove, Russell and LaRue Park, and The Colleges) in providing additional on-campus housing for continuing students. These partnerships will soon include the West Village neighborhood.

First Year Students:

Student Housing remains committed to providing guaranteed housing for first year students. Our current capital plans, in conjunction with campus enrollment planning, confirm our ability to meet this guarantee now and into the future. Our offerings include single, double and triple accommodations which balance students varying needs and desires related to housing. Our major maintenance program is adequately funded and supported to ensure all of our facilities are attractive, safe and secure living environments for our residents.

First Year Transfer Students:

Student Housing has not been able to guarantee housing for first year transfer students since 2002. Although the City of Davis provides a significant number of apartment rental opportunities for transfer students, we are concerned that the lack of on campus housing will become a competitive disadvantage to our recruitment efforts. Beginning 2009 we will be the only UC campus that does not offer a transfer guarantee. We have found that the majority of transfer students prefer apartment living and an optional meal plan when choosing living accommodations. In addition to new construction plans, we are pursuing a partnership within the campus's West Village neighborhood. This would allow Student Housing the option of guaranteeing a number of units to be occupied by incoming transfer students and to provide the marketing to attract these students during the campus's spring recruitment period.

Second Year Housing:

The UC Davis cultural trend is for the majority of students to live on campus for one year and then to move off campus for subsequent years. Student Housing, until recently, has been able to provide some amount of housing for students who are interested in returning to the residence halls for a second year. However, for the past three years, based on first year enrollment, we have been unable to offer any spaces to returning residents. We are concerned about the message

this sends to families as they make decisions regarding where their students will choose to go to school. In the future, it is our plan to have sufficient housing available so that we can offer spaces for returning residents even if we are fairly confident that only a small number of students will actually choose to remain on campus for a second year. With a planned partnership at West Village for transfer students, our current capital plan has the goal of providing sufficient bed spaces for approximately 10% of our students to return to the residence halls for a second year if they are interested in doing so.

Continuing Students:

As mentioned above, the cultural trend of UC Davis students is to move off campus into apartments in the community, of which there is a large supply. For this reason there has not been the same demand from continuing students to provide on campus housing, and University resources have gone primarily to first year student housing. In the early 1980's under the leadership of Pat Kearney, UC Davis entered into a ground lease with Tandem Properties, one of the first privatized housing partnerships in the system. Since that time, three more ground leases have been executed, two more with Tandem and one with EAH, Inc. In this privatized housing mix, more than 1200 on-campus apartment units provide over 600 students housing for families, single graduate, and primarily continuing undergraduate students. As these ground leases will continue from 2035 through 2065, we continue to utilize these agreements to provide additional housing to continuing and graduate students.

In this mix, there is also a ground lease with Tandem Properties to provide fraternity or living group housing for approximately 180 continuing students. There are four large buildings to house approximately 30 to 35 residents each, and four small houses accommodating 14 residents each. These properties continue to be a challenge, both in terms of finding appropriate registered student organizations to agree to the terms of the lease, as well as managing student conduct. There have been some suggestions by the Office of Resource Management and Planning to possibly enter into a long term lease for office space, but this has been difficult to "pencil out" due to revenue stream necessitated by this ground lease and limited campus resources.

Graduate Students:

Currently, our Orchard and Solano Park Apartments are the only Student Housing operated facilities that are available for graduate students. However, even within these facilities, students with children have priority for lease offerings. Although Russell and LaRue Parks and the Atriums are also available as on campus apartments, there remains a lack of housing for graduate students.

One option to address this situation is the land where Castilian Hall is currently

located. It has been determined that this Hall has a poor seismic rating. It has also been determined that the seismic renovations that are needed for this facility are not cost effective. Student Housing's current plan is to house students in this residence hall through academic year 2010-11; and thereafter to look at opportunities to redevelop the land for new apartments that could serve the graduate student population.

Another option would be to provide specific services to graduate students to ease their transition to the Davis community. The City of Davis is one of the last remaining 'college towns.' As noted above, historically the local supply of rental apartments has been sufficient to house continuing and graduate students. The lease process is cyclical, with typical lease commitments lasting 12 months from September 1 through August 31. Demand for off campus housing has resulted in continuing students obtaining and renewing leases as early as March for the new lease year. This makes it difficult for incoming students to find housing since Statement of Intent to Register deadlines can be as late as June 1st. Until 1993, Student Housing provided assistance with off campus housing in its Community Housing office. This service was relocated to Graduate Studies and currently resides within ASUCD. Our goal will be to begin exploring the possibility of integrating services previously provided by the Community Housing office in order to support graduate student housing needs.

FUTURE PROGRAMMING AND COLLABORATIVE EFFORTS

The educational programming that occurs within the residence halls is an essential component of our overall Student Housing program. In recent years, our efforts have been modeled for the first year student population. We have been purposeful in ensuring that their transition to the University is supported by our many connections to our campus partners. As we look to the future, we will consider opportunities to amend our programs to also benefit potential lease agreements with transfer students and second year residents. Advising Services, Learning Skills Center, Internship & Career Center, Education Abroad and the four major academic Dean's Offices have all played a role in Student Housing's current program and will all be consulted regarding ways we can continue to support these student populations as the overall program expands.

There are currently strong Academic Theme Programs (ATPs) and Specialty Programs within residence hall communities based upon specific academic studies or common interests of students. New communities are under consideration to meet the needs of future students and include themes related to sustainability, psychology, business and transfer students. For example, the campus will be moving forward with a new "Sustainable Agriculture" major which is a great opportunity to create a new ATP to fit this new program and maybe partner with our existing dining program as an additional layer.

Student Housing may also take a more direct role in the growth and development of the existing freshmen seminar, "Understanding and Navigating the Research University", a one-unit course designed to assist new students in becoming more familiar and comfortable with their new academic environment. This may involve the hiring of more professional staff to assist with this program and to network with University faculty to garner additional support.

A valuable part of the overall development of our programming is student input. Through our annual "Community Assessment" each January, ongoing community focus groups and our Residence Hall Advisory Board (RHAB), there are a variety of ways in which to dialogue, problem solve, and develop our program for current and future years.

Overall, there will be a slight redirection to our philosophical approach in the Student Housing Residential Education program. Many of our partners across campus have faced, and will be facing budget challenges that greatly impact their respective programs and staffing. When possible, and where appropriate, Student Housing will continue to reach out to our academic support partners to ensure that resident academic success will not be impacted. It is our belief that first year students who are exposed to, and educated on, all of the services and resources on campus, will have higher retention rates from their second year on to graduation.

STRATEGIC PLAN PRINCIPLES

Student Housing maintains a ten year business plan to ensure our mission and strategic initiatives can be met. Appendix C is a simplified version of the document which illustrates the sources and uses of Student Housing funds and the department's reserve projections through academic year 2016-17. Overall, our plan is dynamic and serves to demonstrate housing operations for multiple years. It also allows us to visualize and identify the year to year specifics of the many impacts to our operating budget and reserves, particularly related to capital planning. While rate increases may vary over time, our current plan balances sufficient debt and cash to meet our objectives. At the same time, there are a number of policy issues that have significant impact on our department and will need further discussion.

The following are key principles used in our strategic plan:

- To maintain affordability for students.
- To meet the residential education programming needs of students transitioning to the University.
- To remain competitive with other UC campuses with regard to cost, quality and amenities.
- To meet all of our financial obligations and commitments.
- To integrate health, safety and security measures into our planning.
- To provide exceptionally maintained housing and dining facilities.
- To cultivate sound decision-making practices which consider future impact.

HOUSING RESERVES

During the past five years, Student Housing reserves increased substantially due to debt capacity caps imposed by the Office of the President. These restraints on borrowing have recently been lifted, allowing the department to go forward with the planning described in the following section of this report entitled Capital Projects. Specifically, we have restarted the Tercero Phase II project, increasing the number of bed spaces from 400 to 600, and we are moving forward with the Segundo Services Center project. Our ability to drawdown planned equity funding is in keeping with our commitment to provide flexibility for the future by ensuring reasonable long-term debt.

We also remain committed to affordability for students during our annual rate setting process. As we look to the next ten years, our business plan reflects the planning assumptions articulated in the section entitled Strategic Plan Principles. At the same time, it is important to mention the impact of recent requirements to provide assessment funding to both Student Affairs and the campus, which could continue in the future, as well as the ongoing component of unpredictable risk that must be factored into our planning. In addition, the current California state budget concerns and UC's response related to the number of students projected for admission in the next few years are excellent examples of how quickly planned occupancy and revenues can change. Our planning for meeting operating expenses stresses the highest level of fiscal responsibility from our department managers as day-to-day spending decisions are made. However, external impacts will always mean a certain level of vulnerability for our program.

BED SPACE SUPPLY AND DEMAND

Student Housing remains committed to providing guaranteed housing for first year students. In addition, our goal is to provide a transfer guarantee in concert with the West Village neighborhood beginning in 2011. In the interim, we will look for opportunities to partner with other third party developments. Current state budget impacts on enrollment targets may result in the offering of a returning resident option as early as next year (09-10). By 2014, with the construction of additional residence hall spaces in the Tercero area and in partnership with West Village, we have established a goal of providing housing for 10% of our returning students.

Appendix E illustrates our current bed space projections for the next ten years, indicating we have sufficient resources to accommodate base demand within the framework of our historical take rates and known enrollment projections. In addition, we have the ability to utilize a tripling strategy desired by students who find the option more affordable. However, as UC experiences enrollment fluctuations, it will be important that campus communications to Student Housing are maintained and are provided as early as possible in the academic year planning cycle. This allows us to respond with a marketing plan that maximizes our ability to attract sufficient students to our residence hall facilities once our guarantees are met. For example, in order for us to provide housing to returning residents, we need to make them aware of availability no later than the beginning of February, because that is when the apartment leasing cycle begins in the City of Davis. Similarly, when recruiting for transfer students during UC Decision days in the spring, it is essential that we have a specific message regarding availability of on campus housing.

CAPITAL PROJECTS

Capital project and renovation work will be very active during the next six years. Currently, there are three capital projects in the queue: Tercero South Phase II, Segundo Service Center and Tercero South Phase III. There are also two significant renovation projects: Oxford Circle Dining Commons and Segundo High-rises. (See appendix F). The impacts of these projects on bed space availability are illustrated in Appendix G.

The Tercero South Phase II project has a budget of 55M and includes the development of a new residence hall complex comprised of three, four-story buildings housing approximately 600 students. The project is scheduled for a fall quarter 2010 occupancy.

The Segundo Service Center project has a budget of 30M. The project will be a new facility encompassing 30,000 gsf to house services for the Segundo Area, including an advising center, area office, area service desk, computer center, convenience store, mailboxes and recreation area. This facility will also house administrative offices for Facilities Services, the maintenance shop for Segundo, the Student Housing Paint Shop and the Student Housing Upholstery Shop. The project also includes the demolishing of the old dining facility, construction of central mechanical infrastructure and the re-landscape of the Segundo Quad. The project is scheduled for occupancy fall quarter 2011.

The Tercero South Phase III project has an estimated budget of 50M and includes the demolishing of Leach Hall, the construction of two, four-story buildings to house 400 residents and the re-landscape of the area. This project will continue to be assessed as the bed count number could increase if needed and if financially feasible. The project will begin planning September 2009 with a planned occupancy date of fall quarter 2014. Leach Hall will be decommissioned July of 2012.

The Oxford Circle Dining Commons (OCDC) renovation project has a budget of 7M and includes the renovation of OCDC to incorporate platform style dining and full integration of sustainable practices. The project will be in construction spring 2009 through fall 2009 with a reopening scheduled for winter 2010.

The Segundo High-rises (Malcolm, Ryerson, Bixby, and Gilmore) will be renovated during the same construction window as the Segundo Service Center. During this time, the four buildings will be off-line for the academic year 2010-2011. This project will include installation of fire sprinkler systems, assessment of site piping, installation of carpet and room amenity upgrades. The budget for this project is still developing as a Tier1 Seismic Assessment is in process.

As part of Student Housing's Capital Project Plan the decommissioning of Castilian Hall will take place after academic year 2010-2011. Castilian Hall requires

significant renovation work and it is not cost effective to renovate the facility. Student Housing is evaluating the potential sale or privatized redevelopment of this property.

Additionally, actions will begin this fall 2008 to initiate a master plan for the redevelopment of Orchard and Solano Parks apartments. These properties are both more than 40 years old. We anticipate moving forward with redevelopment of either one or both sites by 2018. At the same time, given the current location and proximity of the Domes housing to Orchard Park, we will be assessing the future viability of these alternative living facilities in order to optimize land use.

Fire sprinkler installation within all residence halls that do not have them is in our Capital Project Plan. The Regan complex was our first fire sprinkler retrofit project and it was completed summer 2008. The next project will be installation at the Segundo High-rise buildings with completion by fall 2012. This will result in all Segundo residence halls having fire sprinkler systems.

Fire sprinkler retrofit projects will then move to the Cuarto Area. Webster Hall will have fire sprinklers installed summer of 2012 and Emerson Hall will have fire sprinklers installed summer of 2013. The Cuarto Area will then have full fire sprinkler installation. (Castilian Hall will be taken off-line during the summer of 2011 and will no longer be used by Student Housing. Therefore retrofit work will not be needed at that facility.)

Within the Tercero Area, the Leach Hall complex will be taken off-line summer of 2012 for demolition. The Pierce/Thille complex will be scheduled after the Tier 1 Seismic Assessment is complete, tentatively these facilities are slated for summer 2014 and summer 2015 installations. The Tercero Area will then have full fire sprinkler installation.

Orchard and Solano Parks apartments will not undergo fire sprinkler installation projects as these properties are being evaluated for redevelopment opportunities.

Student Housing will continue to install security cameras within residence hall facilities. All new projects incorporate the use of security cameras and a number of existing facilities have had cameras installed. These existing facilities are in the Cuarto Area where the properties are more vulnerable to intruders during academic breaks. Currently, the department is evaluating a network video recording solution for greater ease of camera deployment. We plan to install security cameras within all residence hall properties. These security cameras are not actively monitored but do store recordings for two to four weeks. The system is used as a deterrent and aid to police investigations.

FUTURE STAFFING NEEDS

Student Housing's staffing needs during the next ten years will be greatly impacted by the transition of food service workers to University employment and the increase of students being served as a result of our capital plans. We have reviewed our current organizational structure and begun to make changes. This section describes some of the specifics of our plan which will continue to evolve over the next several years (See Appendix H).

Student Housing's Department Leadership:

Previously the department was led by a director and four associate directors with responsibility for administration, facilities, finance and information systems and residential education. A new associate director has been added to provide leadership in the day-to-day business operations area. Focus will be on continued integration of our purchasing, accounts payable, travel and entertainment activities in keeping with campus accounting efforts. This change also allows us to refocus and expand our information systems unit, as well as to increase our long range financial planning efforts.

Publication Coordination/Website:

As online services become more the norm for business operations, coordination of our website activities has become more critical. Although we will continue to provide some paper publications, our focus will continue to be increasing communications via our website. Recent organizational changes will allow us to support our website activities and publication needs into the future.

Payroll/Personnel Office:

The conversion of food service workers to University employment results in an additional 125 career Student Housing employees. This will require additional staffing in the payroll/personnel office to address the full range of human resources services for these individuals. In particular, this new staff group typically is not familiar with online services and will require more face-to-face and one-on-one assistance for payroll and benefits related activities. In addition, we anticipate an increase of labor relations activities which will need to be shared by the human resources manager and the payroll/personnel supervisor.

Purchasing:

Our near term plan is to continue with contracted food service. However, if it is determined that dining services will be moved to self operation at some point during the next ten years, it is anticipated that an additional two FTE will be required to support purchasing activities for food. Duties would include establishing purchasing agreements, as well as transaction processing of orders. Coordination with other UC campuses and involvement with the Office of the President's strategic sourcing plans will be key to our ability to successfully make this type of transition.

Area Offices:

It has been determined that the addition of Tercero South Phase II in 2010 and the opening of Segundo Services Center in 2011, will result in the need for an additional office coordinator. This person would have a primary office location of Tercero, but would float between the other area offices as a back up to the other office coordinators during periods of absence. The recent reorganization of the area office functions to the Residential Education unit supports the coordination of the work that flows through these administrative offices.

Residential Services:

It is difficult to assess staffing needs in this area, based on the recent efficiencies gained through technology. The increase in online services for students and their parents has resulted in greater opportunities for automated customer service responses that are not limited by the typical 8 a.m. to 5 p.m. business day. Currently, the Residential Services, Residential Education and Residential Student Accounts offices are adequately staffed with no need for additional personnel, even with the anticipated growth in residents served. The manager in this area has been asked to continue to monitor workload to determine future needs.

Facilities Services Leadership Team:

The team is currently comprised of three Assistant Directors for Maintenance, Custodial and Auxiliary & Shop Services. Discussions have begun regarding the possibility of a fourth Assistant Director for Dining Facilities Maintenance. The dining facilities maintenance position will evolve as the plan for the dining services program develops. Initially, this position will serve as the liaison with dining services with regard to facility maintenance, capital improvements and oversight for preventive maintenance. As Student Housing takes on responsibility for maintenance of all dining facilities, this position, as well as the support staff needed, will be identified.

Sustainability:

Student Housing is committed to partnering with the Davis campus to create and operate sustainable facilities. A new Sustainability Coordinator position (Analyst III) has been approved and will be recruited in the near future. This position would actively track utility usage, recommend energy efficiencies, integrate resources into TMA and collaborate with our residential education office and student interns concerning sustainability educational outreach.

Custodial Unit:

The custodial unit currently handles all of the custodial services for the residence halls and housing administrative building. There is a custodial contract in

place for Orchard and Solano Parks. This contract covers apartment turns and common areas. Custodial operation for our dining facilities is managed by our management contract provider. Any changes to this model would require additional custodial staffing. The Tercero South Phase II project planned to open fall 2010, will require an estimated eight to ten additional senior custodians to service three new buildings. Segundo Services Center will require two to three additional senior custodians. Supervisory needs for these increases will also need to be evaluated.

Maintenance Unit and Minor Capital Projects:

Recruitment was just completed for a new Physical Plant Mechanic Supervisor to oversee the Cuarto and Segundo areas and to implement a new model for maintenance staff supervision and minor capital project oversight. This new supervisor will coordinate the in-house and minor capital projects occurring within the residential areas they oversee. As we assume responsibility for dining facility maintenance, one of our two current Assistant Engineers will begin supervising this activity. The remaining Assistant Engineer position will eventually be phased out as the PPM Supervisors take on these responsibilities. As Student Housing takes over full responsibility for dining facility maintenance, three physical plant mechanics will need to be hired. An additional physical plant mechanic will be needed in Tercero when Phase II is completed.

Privatized Housing:

Privatized Housing has three components: 1) liaison role with private property management staff to problem solve ground lease contract issues related to annual rate setting, facility management and student conduct; 2) liaison with university departments that provide service to privatized housing areas regarding annual costs, delivery of service and risk management issues; and 3) interaction with student tenants regarding Environmental Health and Safety inspections and violations, fire inspections and violations, event requests (Living Groups), complaints regarding privatized housing management decisions, eligibility requirements for living on campus and student conduct issues. The first two components require a high level of administrative work and are managed by the Associate Director of Business Services position. The third component can be less predictable and time consuming. An assessment is currently underway to determine the best option for placement of this responsibility within the department.

Budget Office:

This office is comprised of a Budget Manager and three administrative assistants with responsibility for budget and rate setting, accounts payable and major maintenance accounting. Currently we are considering adding an analyst to this unit to provide high level analysis and accounting support to the unit and to

help manage a full transition to TMA (facilities operations management database software) to encompass inventory, preventative maintenance, capital project accounting and other facility management needs.

Computer Services Unit:

The team is currently comprised of five programmer analysts and one computer resource specialist, all directly supervised by the Associate Director. Our plans include adding a manager to direct and supervise staff and provide consulting services between users and developers for future automation and application development efforts. Student Housing's computer centers are currently staffed by hourly student staff. In the future, we are considering adopting an unstaffed business center model. A pilot program is currently underway with camera surveillance and electronic card access installed to address security issues. The new business center model would hopefully allow for adjacencies to the Academic Advising Center so one person can serve as a customer resource. A residential computing support program is also being piloted with the goal of enhancing computer safety and security awareness, education and support for residents and monitoring and maintaining the computer centers. Between these two pilot programs, the information being collected will establish what type of program will be optimally offered in the Computer Centers in the future.

Residential Education Office (REO) Leadership Team:

The team is currently comprised of an Associate Director and four Assistant Directors. It is our assessment that the staffing is adequate for the demands of each position. Our future plans include the creation of a new Assistant Director with responsibility for Academic Development. This would prove beneficial to the department and several other campus departments. This individual would oversee the operation and collaborative efforts with the Residence Hall Advising Team, Housing's role in the "Understanding and Navigating the Research University" Freshman Seminar, Academic Theme Programs, Advising Centers and overall academic programming in the halls. Depending on how large the campus would like to expand the aforementioned freshmen seminars, creating a new position supervised by the new Assistant Director may also prove beneficial.

REO Area Coordinator Teams (ACT):

The experience and services offered by the ACT have proven to be a valuable asset to the community and the department. Strong relationships have been formed with outside offices and faculty, aiding in the transition of first year students. At the same time, two issues have hampered the staff's ability to focus completely on the major components of their position. These are roommate conflicts and parent interactions, which require significant amounts of staff time due to their frequency and the need for immediate response. As a result, we have hired an

additional Conduct Coordinator for the Tercero area. Based on our current plans for additional beds in 2010, we anticipate an additional coordinator will be needed in that area in order to maintain a 1:400 professional staff/student ratio.

Conference Housing Office:

The Conference Housing Office is functioning well with the current staffing model. The peak time, obviously during the summer, is augmented with the hiring of student staff to assist with reservations, setup and cleanup of conference operations. The continued growth of the University Guest Residence Program (UGR), which is housed on the first floor of Manzanita in the Primero Grove area, has not yet impacted our current staffing pattern. However, as we consider expansion opportunities, we will monitor this. In the future, we will assess the possibility of expanding our operation to encompass all three floors of the Manzanita building.

Media Resource Center (MRC):

The viability of the Media Resource Center for the long term was assessed during the past several years. Through tracking, a report completed by a Davis Honors Challenge student workgroup, and conversations internally, the decision has been made that the MRC program will be reduced significantly in the coming years. An important element of this decision was determined while planning the new Segundo Services Center. The costs to establish a new MRC infrastructure and program similar to the current form were quite significant. In addition, the current underutilization of the program and assessed need for the future resulted in the inability to justify the costs. Therefore, it was decided that the Assistant Director for the Media Resource Center (SAO III) and our Senior Television Technician positions would be eliminated effective October 2009. In the future, MRC activities will only include movies, educational programming and entertainment over the four Student Housing Channels. There will also be limited equipment available to create and edit internal videos for training and educational purposes.

Programming for Apartment Residents in Orchard and Solano Parks:

There is currently a very strong program offered for both Park areas. The variety of educational and community based programs for students and their families is extremely comprehensive and lends to supporting students at UC Davis who have children. There is currently a Coordinator who lives off-site and has oversight for both of the Parks areas. In the event that position became vacant, Student Housing may choose to hire a live-in staff member for each area to provide an on-site staff member while at the same time supporting other needs within the department.

Student Judicial Affairs Officer:

This position is located in the central housing office and has functioned well over the past several years to alleviate the workload of individual Conduct Coordinators and/or the Assistant Director of Policy & Conduct, particularly at the beginning of the academic year. Although, this is beneficial, we plan to evaluate the possibility of adding more of a leadership/supervision element to the position in the future, which would create more of a promotional opportunity for existing Coordinator staff. There may also be opportunities to assist the Office of Student Judicial Affairs during their peak times by allowing the Housing SJA Officer to work 5-10 hours a week in the Dutton Hall Office.

Innovative Housing/Cooperative Living Group:

The recent organizational change to move these residents under the residential education umbrella results in programming continuity for all of our residents, as well as increased accountability for these residents. In the future, REO will be evaluating the possibility of a local or live-in staff member overseeing the area and attending evening and weekend programs and meetings. This model may also be achieved through a live-in person at Orchard or Solano Park, which is mentioned above.

Residential Education Student Staff:

Student Housing provides a significant number of student employment opportunities, particularly within the residential education unit. Significant leadership skills are gained through the experience of serving in these roles. This staffing model is working well and continues to be a great resource for residents who connect with student staff in a way that is more difficult to achieve with professional staff. As we consider future opportunities, we are committed to continually assessing how to recruit the most diverse pool of candidates possible in order to represent our resident population. We have also found that the addition of Community Assistant (RA Alternate) positions has proven to be an asset in ensuring we have backup staff in case we lose Resident Advisors during the summer or early fall. We plan to continue to hire the same number of community assistants each spring to ensure that we have a sufficient number of students available at the beginning of each year.

APPENDIX A

STUDENT HOUSING STRATEGIC PLAN WORK GROUP AND CONSULTANTS

Emily Galindo	Director, Student Housing
Tracy Bennett	Associate Director, Student Housing
Ramona Hernandez	Associate Director, Student Housing
Branden Petitt	Associate Director, Student Housing
Mike Sheehan	Associate Director, Student Housing
Fred Wood	Vice Chancellor, Student Affairs
Jan Gong	Senior Associate Vice Chancellor, Student Affairs

APPENDIX B

2007 DAVIS APARTMENT VACANCY AND RENTAL RATE SURVEY UC DAVIS STUDENT HOUSING

The UC Davis Student Housing Department has conducted a Vacancy and Rental Rate Survey on apartments in Davis since fall quarter 1975. The purpose of this survey is to provide the campus and the Davis community with information for future planning.

The 2007 Vacancy Survey was conducted in October and November. Questionnaires were sent to all apartments in Davis with five or more rental units. Mailing of questionnaires coincided with the last day to add or drop classes to ensure the information solicited reflected final enrollment data. The vacancy report has remained consistent in reflecting data at the time of final registration and enrollment deadlines. Enrollment figures used are for fall quarter only and do not represent the academic year.

A total of 187 questionnaires were mailed. Apartment managers and owners who did not return the surveys were again contacted by phone and mail. In all, 172 of the 187 complexes participated by providing data. The total number of units in the 15 apartment complexes which did not respond is approximately 194. The surveys requested information on capacity, vacancies, and rent by type of market rate units. Type of unit denotes the number of bedrooms and whether the apartment is furnished or unfurnished.

Subsidized apartments, those which require an income eligibility test to qualify low-income residents for reduced rent, were not included in this report. Most students are not eligible for these units. While we have considerable confidence in our data collection and analysis, the reliability of the information reported is dependent upon the accuracy of information provided by the apartment owners and managers.

Construction of new complexes, conversions and demolition of some units, as well as non-participation in the survey by some apartment complexes, affects overall totals.

TABLE 1. 2007 Vacancy Rate by Type of Unit - Fair Market Units Profile

UNIT TYPE	# UNITS	# VAC	% VACANT
Studio - Unfurnished	213	1	0.5%
Studio - Furnished	19	0	0.0%
1-Bedroom - Unfurnished	2497	9	0.4%
1 Bedroom - Furnished	10	0	0.0%
2 Bedroom - Unfurnished	3955	14	0.4%
2 Bedroom - Furnished	86	0	0.0%
3 Bedroom - Unfurnished	1220	21	1.7%
3 Bedroom - Furnished	0	0	n/a
4 Bedroom - Unfurnished	630	18	2.9%
4 Bedroom - Furnished	0	0	n/a
5-Bedroom - Unfurnished	0	0	n/a
6 Bedroom - Unfurnished	4	0	0.0%
TOTALS	8634	63	0.7%

VACANCY RATES

The 2007 data reflect a vacancy factor for apartments in Davis of 0.7% overall. Table I illustrates the type and number of units currently rented in the city. For the purpose of this survey, if tenants have the option to rent a unit furnished or unfurnished, half of these are reported as furnished, and half as unfurnished.

Economists and planners typically regard a vacancy rate of 5% as the ideal balance between the interests of the landlord and the tenant. This is largely predicated on the assumption that it serves as a deterrent to unjustified rent increases, while still allowing property owners to make a fair return on their investment. Likewise, it provides landlords an incentive to maintain facilities in good working order and gives renters a choice and an opportunity to negotiate contractual terms.

Table II provides historical data on UC Davis enrollment and the apartment vacancy rates for the past ten years.

TABLE 2. UC Davis Enrollment And Vacancy Rate - Historical Data

YEAR	ENROLLMENT	TOTAL APARTMENTS	DAVIS VACANCY RATE
1997	24,299	7,591	1.4
1998	24,485	7,482	0.7
1999	25,092	7,981	0.3
2000	26,094	8,228	0.5
2001	27,292	8,636	0.3
2002	29,087	8,600	0.2
2003	30,229	9,200	1.7
2004	30,065	8,790	3.3
2005	29,637	8,750	4.2
2006	30,475	8,740	1.8
2007	30,685	8,634	0.7

RENTAL RATES

Table III reflects the percentage change in rental rates from 2006 to 2007 for all apartment types. The overall mean average increase was 4.18% in 2007.

To draw any conclusions about the rate would require analysis of each property, since we report an average rate. Factors contributing to rental increases may include profit, overall inflation, utility rates, property sales, current or planned renovations, refinancing, and/or other expenses.

TABLE 3. 2007 Average Rental Rate Comparison By Type of Unit (Fair Market Units)

UNIT TYPE	# UNITS	2007 AVE. RENT	2006 AVE. RENT	% CHANGE
Studio - Unfurnished	213	\$747	\$705	5.96%
Studio - Furnished	19	\$752	\$730	3.01%
1-Bedroom - Unfurnished	2497	\$893	\$867	3.00%
1 Bedroom - Furnished	10	\$771	\$766	0.65%
2 Bedroom - Unfurnished	3955	\$1,172	\$1,112	5.40%
2 Bedroom - Furnished	86	\$1,039	\$1,045	-0.57%
3 Bedroom - Unfurnished	1220	\$1,714	\$1,648	4.00%
3 Bedroom - Furnished	0	n/a	n/a	n/a
4 Bedroom - Unfurnished	630	\$2,279	\$2,226	2.38%
4 Bedroom - Furnished	0	n/a	n/a	n/a
5-Bedroom - Unfurnished	0	n/a	\$2,738	n/a
6 Bedroom - Unfurnished	4	\$2,575	\$2,500	3.00%
MEAN AVERAGE INCREASE				4.18%

This is a weighted average based on the number of units of each type.
 The apartment complexes with more units contribute more to this figure.

The 2007 Davis Apartment Vacancy and Rental Rate Survey is subject to a variety of interpretations. It is our hope that the information provided in this report will provide a framework for future discussions concerning rental housing in the campus and Davis communities.

APPENDIX C

TEN-YEAR RESERVE PROJECTIONS / SOURCES AND USES OF FUNDS

	07/08	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17
Income										
Residence Halls	\$ 33,619,342	\$ 34,310,104	\$ 35,344,328	\$ 34,091,276	\$ 37,392,441	\$ 36,941,725	\$ 37,939,151	\$ 42,484,042	\$ 43,631,111	\$ 44,809,151
Parks Apartments	\$ 3,679,940	\$ 3,786,658	\$ 3,896,471	\$ 4,009,469	\$ 4,125,743	\$ 4,245,390	\$ 4,368,506	\$ 4,495,193	\$ 4,625,553	\$ 4,759,694
Conference Housing	\$ 3,261,677	\$ 3,375,836	\$ 3,493,990	\$ 3,616,280	\$ 3,742,850	\$ 3,873,849	\$ 4,009,434	\$ 4,149,764	\$ 4,295,006	\$ 4,445,331
Sales & Service	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,822	\$ 355,823
Board Dining	\$ 12,580,056	\$ 13,560,678	\$ 14,483,133	\$ 14,510,689	\$ 16,477,225	\$ 16,896,616	\$ 17,994,896	\$ 20,850,216	\$ 22,205,480	\$ 23,648,836
STIP	\$ 2,169,939	\$ 2,129,775	\$ 1,869,430	\$ 1,076,310	\$ 1,034,886	\$ 1,307,582	\$ 1,184,542	\$ 1,004,792	\$ 1,117,591	\$ 1,198,835
Total Income	\$ 55,666,776	\$ 57,518,873	\$ 59,443,174	\$ 57,669,846	\$ 63,128,967	\$ 63,620,984	\$ 65,862,351	\$ 73,339,829	\$ 76,230,563	\$ 79,217,670
Expenses										
Salaries	\$ 5,555,936	\$ 5,667,055	\$ 5,922,072	\$ 6,188,565	\$ 6,467,051	\$ 6,758,068	\$ 7,062,181	\$ 7,379,979	\$ 7,712,078	\$ 8,059,122
Benefits	\$ 1,728,936	\$ 1,815,383	\$ 1,906,152	\$ 2,001,460	\$ 2,101,533	\$ 2,206,610	\$ 2,316,940	\$ 2,432,787	\$ 2,554,426	\$ 2,682,148
Supplies, Expenses & Service Agreements	\$ 9,974,361	\$ 10,373,336	\$ 10,788,269	\$ 11,219,800	\$ 11,668,592	\$ 12,135,338	\$ 12,620,749	\$ 13,125,579	\$ 13,650,602	\$ 14,196,626
Food Prep - Housing	\$ 14,382,105	\$ 15,316,942	\$ 16,312,543	\$ 17,372,888	\$ 18,502,094	\$ 19,704,730	\$ 20,985,537	\$ 22,349,597	\$ 23,802,321	\$ 25,349,472
Miscellaneous	\$ 1,017,384	\$ 1,550,390	\$ 2,647,251	\$ 1,885,116	\$ 2,925,104	\$ 2,662,504	\$ 3,041,186	\$ 5,862,649	\$ 6,177,417	\$ 6,509,393
Campus & Student Affairs Assessment	\$ -	\$ 1,961,673	\$ 2,027,212	\$ 1,997,506	\$ 2,162,822	\$ 2,169,402	\$ 2,240,034	\$ 2,470,051	\$ 2,553,389	\$ 2,640,565
Total Expense	\$ 32,658,722	\$ 36,684,779	\$ 39,603,499	\$ 40,665,305	\$ 43,827,196	\$ 45,636,650	\$ 48,266,627	\$ 53,620,642	\$ 56,450,233	\$ 59,437,326
Net Revenue from Operations	\$ 23,008,054	\$ 20,834,094	\$ 19,839,675	\$ 16,984,541	\$ 19,301,771	\$ 17,984,334	\$ 17,585,724	\$ 19,719,187	\$ 19,780,330	\$ 19,780,344
Expenditures From Reserves										
Existing Debt	\$ 7,494,984	\$ 8,070,798	\$ 8,068,234	\$ 8,060,101	\$ 8,053,216	\$ 8,051,813	\$ 8,052,589	\$ 8,050,140	\$ 8,036,090	\$ 7,749,586
Tercero Phase 2 Debt	-	-	-	1,397,633	1,677,160	2,062,651	2,062,651	2,062,651	2,062,651	2,062,651
Segundo Service Center Debt	-	-	-	-	958,333	1,150,000	1,414,325	1,414,325	1,414,325	1,414,325
Tercero Phase 3 Debt	7,494,984	8,070,798	8,068,234	9,457,734	10,688,709	11,264,464	11,529,565	13,347,949	13,698,066	13,913,779
Subtotal - Debt Service	3.1	2.6	2.5	1.8	1.8	1.6	1.5	1.5	1.4	1.4
Debt Service Coverage										
Major Maintenance	20,736,199	10,468,700	3,408,900	2,872,100	3,125,100	3,655,300	3,996,520	4,371,862	4,784,738	5,263,212
Sodexo Loan	866,672									
Tercero Phase 2 Equity	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000	13,000,000
Segundo Service Center Equity	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000
Tercero Phase 3 Equity	29,097,858	31,559,501	29,477,136	17,329,836	13,813,811	21,104,837	21,711,158	17,719,812	18,482,805	19,176,992
Total Exp From Reserves	\$ (6,089,804)	\$ (10,705,407)	\$ (9,637,461)	\$ (335,295)	\$ 5,487,960	\$ (3,120,503)	\$ (4,125,434)	\$ 1,999,375	\$ 1,297,525	\$ 603,352
Beginning Reserve Balance	\$ 42,240,229	\$ 36,150,425	\$ 25,445,018	\$ 15,807,557	\$ 15,472,262	\$ 20,960,222	\$ 17,839,719	\$ 13,714,285	\$ 15,713,659	\$ 17,011,184
Ending Reserve Balance	\$ 36,150,425	\$ 25,445,018	\$ 15,807,557	\$ 15,472,262	\$ 20,960,222	\$ 17,839,719	\$ 13,714,285	\$ 15,713,659	\$ 17,011,184	\$ 17,614,536

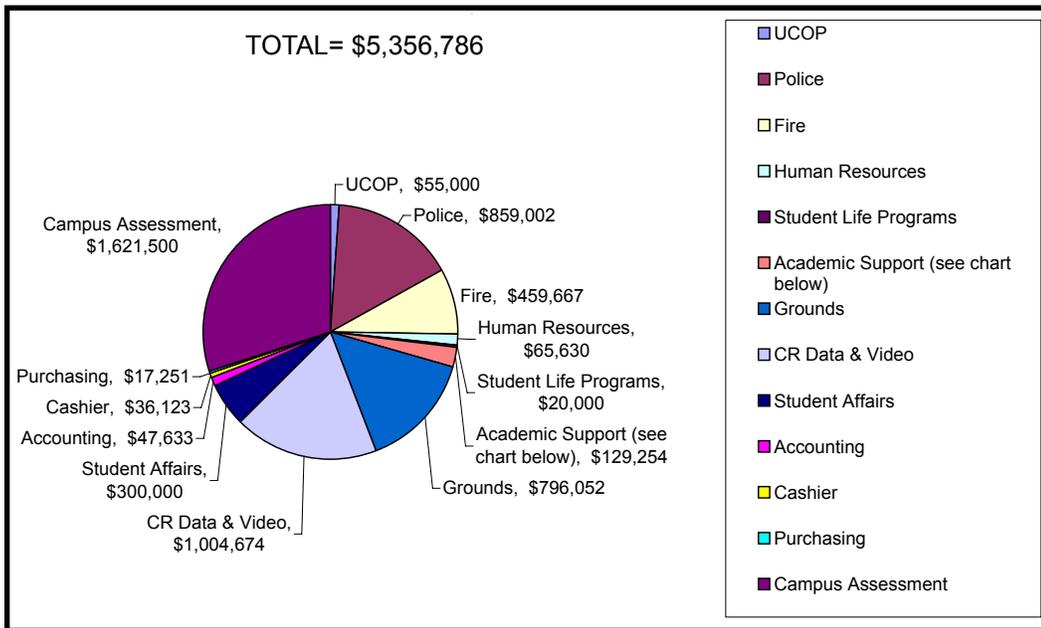
APPENDIX D

CAMPUS SUPPORT AND SERVICE AGREEMENTS FY 08/09

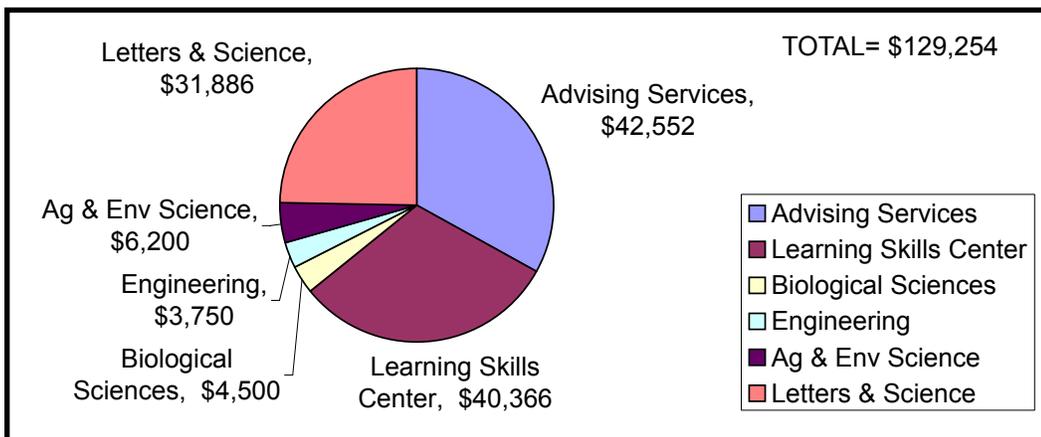
As an auxiliary, Student Housing’s operating budget includes campus support and service agreements of more than \$5 million dollars annually. These funds directly and indirectly serve residents and are illustrated below.

In addition, Student Housing reserves support \$5 million to \$10 million dollars in annual major maintenance spending, much of which is allocated through campus departments such as Operations & Maintenance and Architects & Engineers.

CAMPUS SUPPORT AND SERVICE AGREEMENTS - FY 08/09



ACADEMIC SUPPORT - FY 08/09



APPENDIX E

10-YEAR PLAN

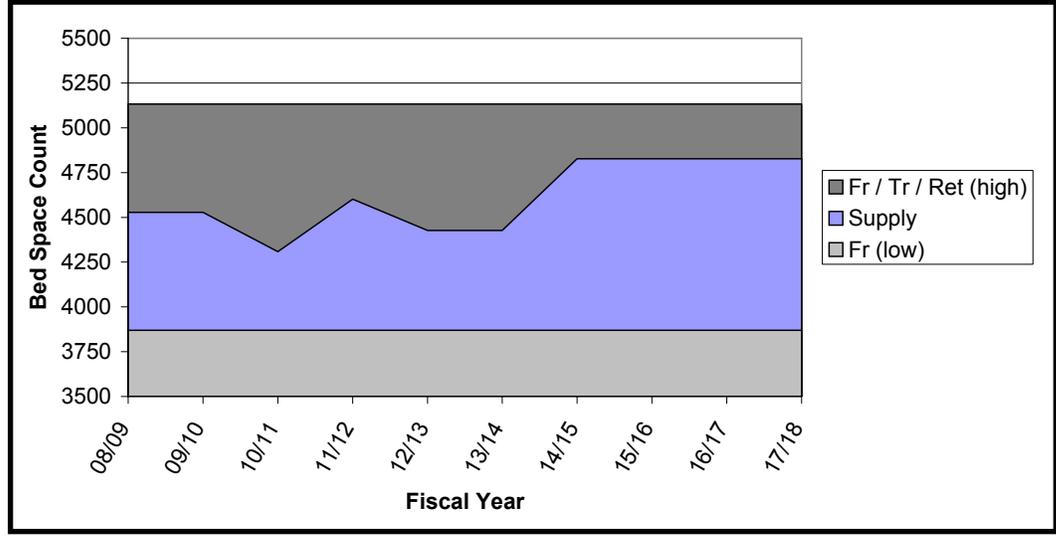
RESIDENCE HALL BED SPACE SUPPLY & DEMAND

The following table and graphs portray supply and demand projections through academic year 2017-18 for the populations served by Student Housing. Supply projections are based on existing and future residence hall revenue generating bed space including all currently planned new construction, renovation and facilities' retirements (Appendix F). Demand forecasts are projected based on the August 2008 Campus Enrollment Plan for the 2009-10 Regents Budget with the following planning assumptions for enrollment and Student Housing take rates (in priority order):

DEMAND	ENROLLMENT		HOUSING TAKE	
	LOW	HIGH	LOW	HIGH
1. Freshman Demand (90% Take)	4300	4800	3870	4320
2. Transfer Demand (20% Take)	1600	1900	320	380
SUBTOTAL	5900	6700	4190	4700
3. Freshman Returners Demand (10% Take)			387	432
TOTAL			4577	5132

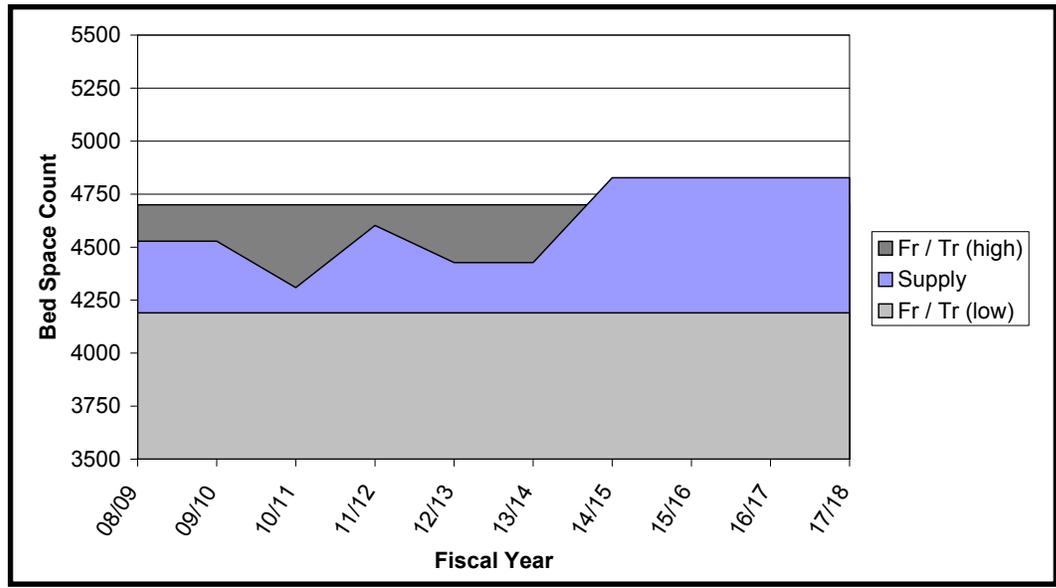
The Department's mission of fiscal responsibility is achieved in many ways, but in no more important way than by strategically balancing uncertain enrollment and admissions patterns with bed space inventory and capital planning. As the graphs illustrate, the tiered priority of the populations served provides flexibility to address the large range (low to high) of enrollment and housing demand. This is a conservative financial strategy and may contrast with other UC campuses which do not have a competitive off-campus housing market as does Davis and may therefore provide housing guarantees to a larger portion of their student population.

GRAPH 1. ResHall Bed Space Count - Supply v Demand Range - All Populations



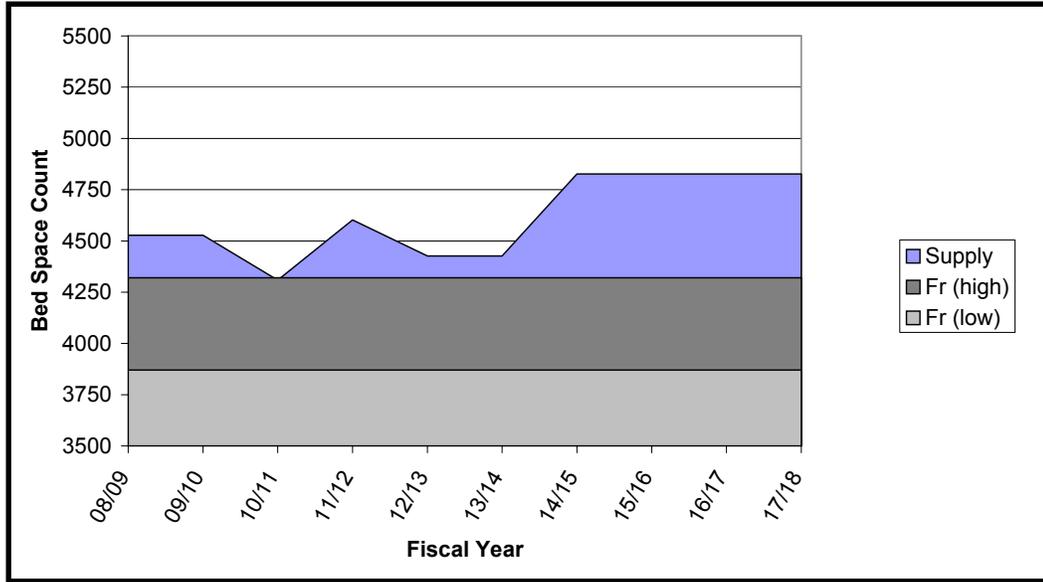
As Graph 1 illustrates, bed space supply is in the middle of the low-to-high range of demand for all populations served throughout the 10-year time horizon. This is ideal. A supply less than demand would not be capable of meeting programmatic goals and supply exceeding demand would represent financial risk.

GRAPH 3. ResHall Bed Space Count - Supply v Demand Range - Freshman + Transfer Populations



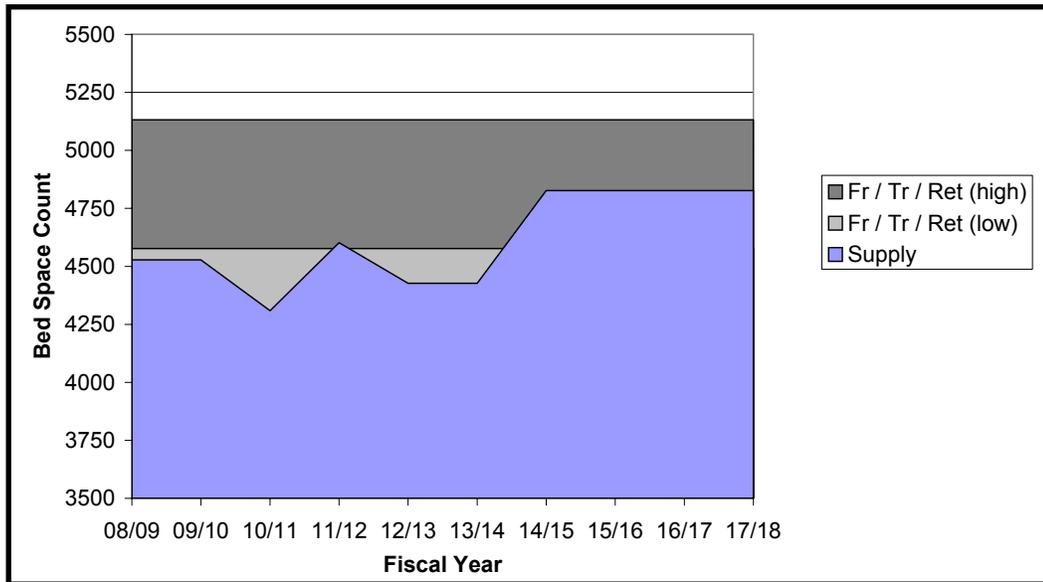
As Graph 3 illustrates, over the 10-year timeframe, bed space supply satisfies the middle to the highest-level projections when the Transfer Student population is added. Because the 20% housing goal is an on-campus goal shared between Student Housing and the West Village neighborhood project, in fact, we can expect to meet the Transfer Student demand to live on-campus when the first phase of West Village is completed.

GRAPH 2. ResHall Bed Space Count - Supply v Demand Range - Freshman Population



As Graph 2 illustrates, bed space supply is at or above the highest projections of Freshman demand in all years, demonstrating our ability to meet the Freshman guarantee.

GRAPH 4. ResHall Bed Space Count - Supply v Demand Range - Freshman + Transfers + Returner Populations



Finally, as Graph 4 illustrates, beginning in FY 14/15, bed space supply satisfies the mid-level range of projections when the Returning Freshman Students are added. This corresponds with the completion of Tercero Phase 3. Again, this is ideal, providing options to this student population while not over-building and venturing too close to the demand threshold for all populations.

While the graphs portray the low-to-high range of each group, in reality, enrollment, admissions and take rates will fluctuate within each range and the actual number of any population served will vary based on actual experience.

APPENDIX G

RESIDENCE HALLS BED SPACE PROJECTIONS

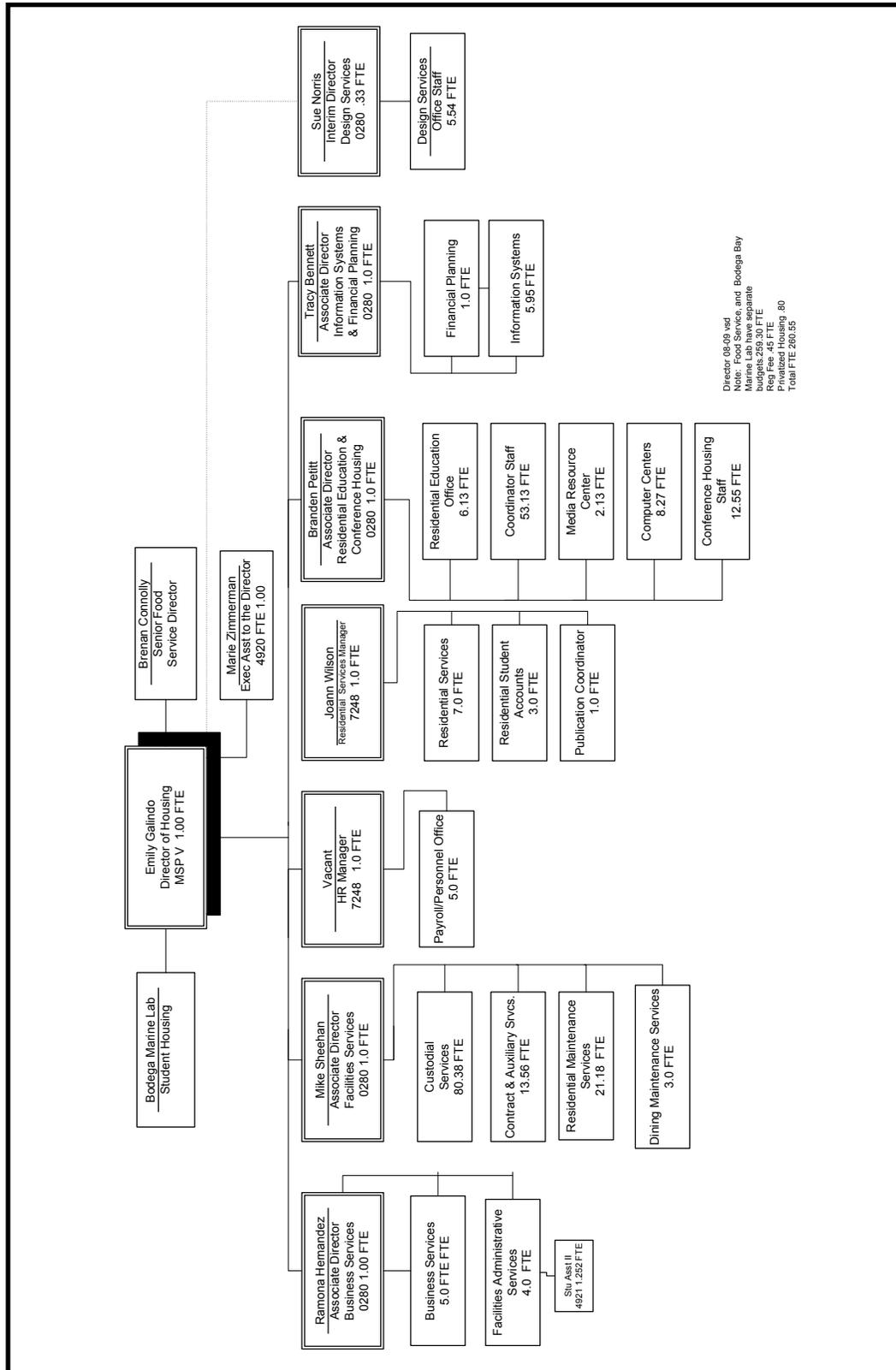
The following table summarizes the Residence Hall revenue-generating bed space supply projections according to the current capital project plans and timetable. These projections form the basis of the Department’s business plan and financial forecasts.

ResHall Revenue Generating Bed Space Projection

	FY 08/09	FY 09/10	FY 10/11	FY 11/12	FY 12/13	FY 13/14	FY 14/15	FY 15/16	FY 16/17	FY 17/18
Current Bed Space Supply	4528	4528	4528	4528	4528	4528	4528	4528	4528	4528
Capital Project Impacts										
Tercero South Phase II (new)			579	579	579	579	579	579	579	579
Tercero South Phase III (new)						400	400	400	400	400
Leach (retire)					-175	-175	-175	-175	-175	-175
Castilian (retire)					-505	-505	-505	-505	-505	-505
Segundo High Rise Renovation*			-798							
Subtotal of Changes			-219	74	-101	-101	299	299	299	299
Total Supply	4528	4528	4309	4602	4427	4427	4827	4827	4827	4827
*Facility offline for 1 year (online in 11/12)										

APPENDIX H

ORGANIZATIONAL CHART - 2008-2009



Director 08-09 and
Bodega Marine Lab and Bodega Bay
Marine Lab have separate
budgets: 259.30 FTE
Reg Fee 45 FTE
Privatized Housing 80
Total FTE 200.35



UC DAVIS
STUDENT
HOUSING
a department of Student Affairs

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