



COUNTY OF SAN LUIS OBISPO

GENERAL SERVICES AGENCY

Administrative Policy

Title: Alternate Ways to Deliver Projects

Effective Date: July 20, 2012
Prepared by: Architectural Services, Facility Services – Maintenance and CI-ESC
Subcommittee on Alternate Ways to Deliver Projects
Review Date: July 20, 2013
Approved by: CI-ESC

1. PURPOSE

The purpose of this policy is to provide customer departments with a policy and procedure for an alternate way to deliver facility related projects. This policy is intended to be consistent with all County Policies, County Code, Civil Service rules, Ordinances, Procedural Guidelines, the Uniform Public Construction Cost Accounting Act, Government Code 31000 and all applicable safe work practices, ordinances and regulations.

2. SCOPE

This policy is to be used as part of the standard procedure for considering a project as a viable candidate for an alternate means of delivery (Alternate Ways project).

3. PROCEDURE

3.1 Requesting Department responsibilities

- 3.1.1 The designated departmental contact person will discuss proposed project concept with the Department Head.
 - 3.1.1.1 The Department Head must agree with the concept for it to move forward.
- 3.1.2 If the proposed project is agreed to by the Department Head the following questions must be addressed:
 - 3.1.2.1 Is the project under \$10,000
 - 3.1.2.2 Will the project meet County standards?
 - 3.1.2.3 Do you have staff members skilled in planning and executing projects?
 - 3.1.2.4 Do you have a clearly defined scope and budget?
 - 3.1.2.5 Does the proposed project avoid all infrastructure and structural changes?
 - 3.1.2.6 Does the proposed project utilize a single trade (plumbing, electrical, HVAC)?
 - 3.1.2.6.1 This is to help define complexity
 - 3.1.2.7 Is the facility clean of all hazardous materials such as lead or asbestos?
 - 3.1.2.8 Does the proposed project avoid triggering ADA remediation?
 - 3.1.2.9 Will the proposed project avoid impacting any adjacent departments?

- 3.1.2.10 Will the proposed project avoid outside Agency involvement?
 - 3.1.2.10.1 APCD, Planning, Fire Marshall, CEQA, Coastal Commission, CSD, etc.?
- 3.1.2.11 Is the proposed project below the Capital Asset Policy thresholds and definitions of a Capital Asset?
 - 3.1.2.11.1 This may require a discussion with the Auditor-Controller's office.
- 3.1.3 If the answer is yes to all the above questions:
 - 3.1.3.1 Submit the **Alternate Project Request Form** request form with Department Head signature
 - 3.1.3.2 Deputy Director General Services signs **Alternate Project Request Form** request form
 - 3.1.3.3 Project is scheduled to begin
 - 3.1.3.3.1 Periodic consultations with Architectural Services continue until project is complete.
- 3.1.4 If the answer to any of the above questions is NO the requesting Department must have a discussion with Architectural Services to address any of the areas of concern.
- 3.2 Architectural Services responsibilities
 - 3.2.1 Will consult with the requesting Department to assist in clarifying and answering the questions posed in 3.1.2
 - 3.2.2 Determine if the project is to address a critical need or an emergency.
 - 3.2.2.1 If the project is an emergency and not a candidate for Alternate Ways process:
 - 3.2.2.1.1 Assist the Department in submitting a mid-year emergency CIP request.
 - 3.2.2.2 If the project is not an emergency and not a candidate for Alternate Ways:
 - 3.2.2.2.1 Assist the Department in submitting the project as part of the annual CIP submittal process.
- 3.3 Reporting
 - 3.3.1 Architectural Services shall list Alternate Ways projects as a section of their monthly status reports
 - 3.3.1.1 A separate report shall be dedicated to listing Alternate Way projects.
 - 3.3.2 Departments will report their progress at the quarterly CI-ESC meetings.

4. DEFINITIONS

- “Alternate Way Project” A project not totally controlled, coordinated or managed by General Services (Architectural Services or Facility Services). A project managed by the customer with some degree of oversight from Architectural Services or Facility Services.
- Capital Asset Capital assets are major assets that have an initial useful life that extend beyond a single fiscal period. Capital assets may be either intangible (e.g., easements, water rights, software) or tangible (e.g., land, improvements to land, buildings, vehicles, machinery, equipment and infrastructure).
- Emergency Is a situation demanding immediate action and may include health and life safety issues.
- Improvements Improvements are additions made to, or changes made in structures, other than maintenance, to prolong life or to increase efficiency or capacity.
- Infrastructure The substructure or underlying system that allows the facility to function. The basic, services and installations needed for the

- Remodels successful functioning of the building or facility. For example: Sewer, water or electrical systems are considered infrastructure. Remodels of office space are generally not capitalized because they represent a reconfiguration of an existing asset and do not result in extending the useful life or significantly increasing the value or utility of the building or structure.
- Structural That part of the building affecting or involved in structure or construction. That element of the building which provides inherent support and structure – for example, a load-bearing wall, beams, joists and rafters. Not ornamental elements.
- Structures Structures are physical property of a permanent nature, such as buildings, structural attachments and fixtures, storage tanks, and parking areas. Structures also include facilities, such as airports, parks, and golf courses. Sidewalks, driveways, alleyways and other access ways in connection with structures, buildings, or facilities would also be classified as „structures and improvements.

5. OTHER AGENCY INVOLVEMENT

Capital Improvement – Executive Steering Committee members

6. RELATED DOCUMENTS

- Alternate Ways to Deliver Projects flow chart
- County Capital Asset Policy
- Alternate Project Request Form

7. EXCEPTIONS

None at this time.

8. REVISION HISTORY

Version	Date	Chapter/Section	Details
1.0	07/01/12	All	New Policy