

**GUIDELINES FOR
CAMPUS CAPITAL OUTLAY MANAGEMENT PLANS FOR
DELEGATION OF CAPITAL OUTLAY MANAGEMENT AUTHORITY**

INTRODUCTION

CSU Executive Order No. 672, Delegation of Capital Outlay Management Authority and Responsibility, was issued in 1997 and delegated authority to campus presidents to directly manage the capital outlay process subject to campus compliance with the provisions of the Delegation of Capital Outlay Management Authority agreement.

This executive order also established a Certification Review Board (Board) to: 1) review capital outlay management plans and campus performance in managing projects, and 2) recommend to the Executive Vice Chancellor, Business and Finance, a management delegation status for each campus. Campuses are required by the executive order to maintain a current capital outlay management plan, and submit updates to the Board. To support compliance with the executive order, the Board has developed these Guidelines and the Capital Outlay Management Plan Template, which are available at <http://www.calstate.edu/cpdc/cm/forms/#outlay>.

GUIDELINES

Campuses are required to update the capital outlay management plans each January, and whenever there are staff changes, or the plan no longer reflects campus practice. These updates may be signed by the campus Vice President for Administration (VPA), however, should an update include a new VPA or other revision concerning the VPA, the update shall be signed by the campus President. With each update, campus staff shall download the management plan template to ensure they are using the most current version.

The Capital Outlay Management Plan Template includes the following key elements:

1. Compliance statement that the campus will follow all applicable laws, executive orders, and the state university administrative manual (SUAM) in fulfilling its capital outlay management responsibilities;
2. Organizational chart for administration of capital projects, on which campus shall:
 - indicate a direct relationship between the campus Deputy Building Official and the Chief Building Official at CPDC, and between the campus IOR and the campus Deputy Building Official;
 - provide signature authority for every position on the organizational chart (please note that positions filled by consultants shall have no contractual or monetary signature authority);
 - provide a resume for every employee position on the organizational chart;
 - indicate which positions serve as executive facilities officer, deputy building official, risk manager, certified access specialist, construction administrator, project manager, and inspector of record; indicate how the project manager and inspector positions are staffed (i.e. consultant or employee); if any of these positions are project-specific hires and are not currently under contract, then indicate "TBD" (To be Determined);
3. Narrative describing how your campus is addressing project management for auxiliary projects. Include any relevant documentation, such as sample agreement documents between campus and auxiliary. If auxiliaries manage their own projects, provide an organization chart and resumes for the auxiliary project management staffing.
4. Report of training completed for each staff member;
5. Summary of projects that are in planning, design, and in construction, as well as those projects that are completed within the past two years which the campus has managed under delegated authority. If any of the projects listed are contracted under a TO-CA MEA, please so indicate "TO-CA" in addition to the delivery method (CM at Risk or Collaborative Design-Build).

Should questions arise, contact the [Assistant Vice Chancellor-CPDC](#), [Chief of Construction Management](#), or [Principal Construction Program Manager](#) directly, or e-mail your question to cocm@calstate.edu.