EXECUTIVE BRIEF

STATE BOARD OF EQUALIZATION

Fiscal Year 2009-10

Facilities – Headquarters

Background

The Board of Equalization (BOE) Headquarters building located on 450 N Street, (referred throughout as Headquarters) was constructed to provide office space for approximately 1,900 employees. The BOE moved in after construction completion beginning in February 1993.

The Headquarters building is faced with three issues:

- Occupancy which exceeds recommended optimum occupancy levels.
- On-going investigation, evaluation, testing and repair of the building and building systems.
- The need for staff relocations based on the two issues above.

The Headquarters building design intent provided office space for approximately 1,900 employees, with a recommended maximum design occupancy of 2,200 (Office Optimization Study, 1997).

- On June 27, 2007 the headquarters building estimated occupancy is 2,521 positions.
- The BOE received 20.0 new Headquarters positions in Fiscal Year (FY) 2007-08 increasing the occupancy to 2,541 positions (employees).
- 73.0 positions are identified in the FY 2008-09 increasing the estimated occupancy to 2,615 positions.

This increase in building occupancy exceeds the recommended occupancy as identified in the Space Optimization Study (1997) by 415.0 positions, which includes 45 positions housed in the annex portion of the building.

The building has a well-documented history of water intrusion issues including an exterior glass curtain wall, 23rd floor decks and the roof. In addition to these external problems, age, use and possible deterioration of mechanical systems (e.g. heating, ventilation and air conditioning (HVAC), plumbing, elevators) has lead to some interior pipe failures which resulted in water intrusion that caused property damage, interrupted BOE's work and gives rise to health concerns in the staff. The building also experiences problems with the elevators which cause them to be offline for days at a time interrupting work and causing apprehension for staff. At BOE's requests, the Department of General Services (DGS) has retained a forensic architect to perform a comprehensive investigation of the building and building systems to evaluate its condition, need for repair or other maintenance. BOE anticipates that any repair effort will require closing of work areas and relocation of staff. In addition to planned repairs, based on the history of the building, BOE also anticipates there will continue to be unexpected situations (e.g. water leaks, electrical) that will require repairs which result in the closure of work areas and relocation of staff.

The history of the water intrusion issues have resulted in a series of events that BOE staff has had to endure. Not only have these events interrupted the important work performed by BOE in the collection of revenues that are critical to the operation of the State, but they have also caused fear, anxiety and mistrust in BOE staff. BOE management takes their employees concerns very seriously and are working to preserve and maintain employee trust by establishing an employee reporting mechanism for building events, retaining our own indoor air quality consultant and physician to address employee's concerns, and working cooperatively with Unions to address on-going employee concerns.

EXECUTIVE BRIEF

At this point, 57 new claims for Worker' Compensation (WC) benefits were filed by BOE employees who are currently or were previously housed in the 450 N Street building. These claims allege that their illnesses were related to the building. Several employees have provided physicians substantiation requesting Reasonable Accommodations (RA) to relocate within the building, or to positions outside of the building.

The mental, physical and emotional health and safety of BOE employees is our primary concern. BOE is diverting significant resources to protect our employees, which causes a large drain on BOE's resources and productivity that were originally allocated to achieve BOE's mission, but must now be used to address these critical concerns and protect the health and safety of all building occupants.

At this time, BOE has been informed that DGS intends to investigate, evaluate, test and repair as needed, or perform needed maintenance in the following areas in the building:

- All (44) bathrooms
- All (41) break rooms
- The first floor, lobby, guard station
- All elevator shafts (13)
- Paint and carpet removal and replacement
- HVAC flex hose replacement
- Lighting retrofit

BOE is also advised that DGS continues to monitor the efficacy of the curtain wall/punch window repairs. This may result in the need for additional investigation, evaluation, testing and repairs in the building.

It is estimated that each area of potential investigation, evaluation, testing and repairs will take 8-10 weeks (per area) unless the investigation results in the discovery of mold. If mold is found, remediation for each area is estimated at, a minimum, 6 months and would require staff to be relocated. Many of these repairs will require the temporary relocation of staff into rented swing space.

Request

This proposal requests a $5,740,000 ($3,289,000 General Fund, $894,000 Special Funds, and $1,557,000 Reimbursements) in FY 2009-10, $8,509,000 ($4,878,000 General Fund, $1,323,000 Special Funds, and $2,308,000 Reimbursements) in FY 2010-11 and ongoing to permanently establish 6.0 positions and related resources to address the additional space needs and ongoing issues related to the Headquarters building.

Current Need

Approval of this request for authorized staff and resources on a permanent basis are necessary to address the investigation, evaluation, testing and repair needs of the Headquarters facility. With the requested positions, BOE will form a team that will plan, organize, and facilitate the headquarters facility space issues and the additional space costs of those functions/units/staff that require relocation outside the 450 N Street Building. BOE must research ongoing and long-term solutions to address our facilities needs.

Workload to be addressed

Approval of this request will allow the BOE to perform relocation activities associated with the investigation, evaluation, testing and repairs, restore occupancy levels to the required levels as recommended in the Study, address the health and safety of the employees, timely process WC claims and RA requests and secure the collection of revenues for the BOE.

STATE BOARD OF EQUALIZATION
FISCAL YEAR 2009-10
PROPOSAL No. XX

TITLE OF PROPOSED CHANGE:

Facilities - Headquarters

SUMMARY OF PROPOSED CHANGES:

The Board of Equalization (BOE) requests a budget augmentation of $5,740,000 ($3,289,000 General Fund, $894,000 Special Funds, and $1,557,000 Reimbursements) in Fiscal Year (FY) 2009-10, $8,509,000 ($4,878,000 General Fund, $1,323,000 Special Funds, and $2,308,000 Reimbursements) in FY 2010-11 and ongoing to permanently establish 6.0 positions and related resources to address the ongoing additional space needs relating to the Headquarters building.

The Headquarters building is faced with three issues:

- Occupancy which exceeds recommended optimum occupancy levels.
- On-going investigation, evaluation, testing and repair of the building and building systems.
- The need for staff relocations based on the two issues above.

BOE has also had an increase in the number of Workers' Compensation (WC) claims from claimants claiming building related injury. This caseload (57 new claims) represents workload above the baseline programmed in the Human Resources Division (HRD).

BOE must develop a comprehensive plan to address these needs while continuing to ensure the health and safety of BOE employees.

STATE BOARD OF EQUALIZATION

Fiscal Year 2009-10

Facilities - Headquarters

A. Nature of Request

The Board of Equalization (BOE) requests a budget augmentation of $5,740,000 ($3,289,000 General Fund, $894,000 Special Funds, and $1,557,000 Reimbursements) in Fiscal Year (FY) 2009-10, $8,509,000 ($4,878,000 General Fund, $1,323,000 Special Funds, and $2,308,000 Reimbursements) in FY 2010-11 and ongoing to permanently establish 6.0 positions and related resources to address the ongoing additional space needs relating to the Headquarters building.

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BOE must develop a comprehensive plan to address these needs while continuing to ensure the health and safety of BOE employees.

B. Background/History

Occupancy Issues:

The BOE Headquarters building located on 450 N Street, (Headquarters) is a twenty-four story office building which includes a four level parking structure. Construction of the building began in 1991 and was completed in January of 1993. The building is owned by the State of California, and managed and maintained by the Department of General Services (DGS). BOE rents the building and moved their headquarters operations into the building in February 1993.

This office building measures approximately 610,000 gross square feet and includes 460,000 useable square feet. The adjacent concrete parking structure consists of 711 parking spaces and has been refurbished to include a ground floor cafeteria and children's daycare center including an outdoor play area which is approximately 6,703 square feet.

The Headquarters building initially provided office space for approximately 1,900 employees. While occupying the building, BOE continued to grow at a steady rate. DGS contracted for an Office Optimization Study for the building which was completed by Dreyfuss & Blackford in August 1997. The Dreyfuss & Blackford study recommended a maximum occupancy of 2,200. As of June 27, 2007 Headquarters occupancy has

increased to 2,521 positions, which includes 45 positions housed in the annex portion of the building.

Also during this time, BOE continued to develop its revenue generating programs, increasing funds to the State of California. BOE's budget proposals for Fiscal Years 2007-08 and 2008-09 include 93.0 new Headquarters positions.

BOARD OF EQUALIZATION
POSITION CHANGE

Fiscal Year	Headquarters	District Office	Total	Total Revenue *
1998-99	9.0	0.0	9.0	$35.53
1999-00	20.0	-1.0	19.0	39.46
2000-01	-1.0	-13.0	-14.0	41.25
2001-02	21.0	-5.0	16.0	40.48
2002-03	-126.0	-115.0	-241.0	41.90
2003-04	3.0	0.0	3.0	44.46
2004-05	68.0	23.0	91.0	49.95
2005-06	96.0	7.0	103.0	52.98
2006-07	62.0	29.0	91.0	53.87
2007-08	20.0	8.0	28.0	N/A
2008-09	73.0	209.0	282.0	N/A
Total	**245.0**	**142.0**	**387.0**	
	Last 3 Years Average:	**133.7**		
	Last 5 Years Average:	**119.0**		
	Last 11 Years Average:	**35.2**		

* Total Revenue in billions.

In FY 2007-08, the BOE received 20.0 new Headquarters positions increasing the occupancy to 2,541 positions. In FY 2008-09, BOE has budget proposals totaling another 73.0 positions increasing the estimated occupancy to 2,615 positions. This increase in building occupancy will exceed the recommended maximum occupancy as identified in the Dreyfuss & Blackford Office Optimization Study (1997) by approximately 415.0 positions.

Water Intrusion and Building Issues:

The building has a well-documented history of water intrusion issues including an exterior glass curtain wall, 23rd floor decks and the roof. In addition to these external problems, age, use and possible deterioration of mechanical systems (e.g. heating, ventilation and air conditioning (HVAC), plumbing, elevators) has lead to some interior pipe failures which resulted in water intrusion that caused property damage, interrupted BOE's work and gives rise to health concerns in the staff. The building also experiences problems with the elevators which cause them to be offline for days at a time interrupting work and causing apprehension for staff. At BOE's request, DGS has retained a forensic architect to perform a comprehensive investigation of the building and building systems to evaluate its condition, and need for repair or other maintenance. BOE anticipates that any repair effort will require closing of work areas and relocation of staff. In addition to planned repairs, based on the history of the building, BOE also anticipates there will continue to be unexpected situations (e.g. water leaks, electrical) that will require repairs which necessitate the closure of work areas and relocation of staff.

The series of events that BOE staff has had to endure are outlined in Exhibit I. Not only have these events interrupted the important work performed by BOE in the collection of revenues that are critical to State operations, but they have also caused fear, anxiety and mistrust in BOE's staff as outlined in Exhibit II, the "*Report from Facilitated Group Sessions, Final Report*", prepared by MHN Session Facilitator, Karen Mindt Howell, MFT, MBA. BOE management takes their employees' concerns very seriously and are working to preserve and maintain employee trust by establishing an employee reporting mechanism for building events, retaining our own indoor air quality consultant and physician to address employee's concerns, and working cooperatively with Unions to address on-going employee concerns.

At this point, 57 new claims for WC benefits were filed by BOE employees who are currently or were previously housed in the Headquarters. These claims allege that their illnesses were related to the building. Several employees have provided physicians substantiation requesting Reasonable Accommodations (RA) to relocate within the building, or to positions outside of the building.

The mental, physical and emotional health and safety of BOE employees is our primary concern. BOE is diverting significant resources to protect our employees, which causes a large drain on BOE's resources and productivity that were originally allocated to achieve BOE's mission, but must now be used to address these critical concerns and protect the health and safety of all building occupants.

At this time, BOE has been informed that DGS intends to investigate, evaluate, test and repair as needed, or perform needed maintenance as follows:

- All (44) bathrooms
- All (41) break rooms
- The first floor, lobby, guard station
- All elevator shafts (13)
- Paint and carpet removal and replacement
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- Lighting retrofit

BOE is also advised that DGS continues to monitor the efficacy of the curtain wall/punch window repairs. This may result in the need for additional investigation, evaluation, testing and repairs in the building.

It is estimated that each area of potential investigation, evaluation, testing and repairs will take 8-10 weeks (per area) unless the investigation results in the discovery of mold. If mold is found, remediation for each area is estimated at, a minimum, 6 months and would require staff to be relocated. Many of these repairs will require the temporary relocation of staff into rented swing space.

As staff relocate back to completed floors, the BOE hopes to complete a restacking plan of the building at this time as well. The restacking plan will allow the BOE to address the above optimum occupancy levels, align program functions/activities, identify additional offsite lease space needs and plan for 2-3 year growth.

The timeline outlined in Exhibit I reflects the historic overview related to the headquarters building that BOE is aware of.

C. State Level Considerations

This proposal is consistent with BOE's Strategic Plan goals and objectives. Specifically, Goal 3: Improve the BOE's Organizational Efficiency and Goal 5: Foster a Skilled, Motivated and Diverse Workforce by providing a safe and healthy work environment that allows employees to work efficiently and effectively.

D. Justification and Analysis of All Feasible Alternatives

The positions and related resources requested in this proposal are necessary to address the current and ongoing problems the Headquarters building is currently facing. With the requested positions, BOE plans to form a team which will plan, organize and facilitate the headquarters facility space issues and the additional space costs of those functions/units/staff that have/will relocate to leased space outside of the 450 N Street Building. BOE must research ongoing and long-term solutions to address our facilities needs. Some of the options that BOE will consider are:

- Remain in the current headquarters building while DGS investigates, evaluates, tests and repairs as necessary; relocate staff above optimum occupancy to other location(s).
- Permanently relocate all staff to a single site headquarters location other than 450 N Street.
- Permanently relocate all staff to offsite decentralized multiple locations.
- Permanently relocate all staff to an offsite complex of buildings which would comprise the headquarters location.

Alternative 1 – Approve budget augmentation of $5,740,000 in FY 2009-10, $8,509,000 in FY 2010-11 and ongoing, to establish 6.0 positions and related resources on a permanent basis.

The BOE Headquarters facility is populated above optimum between 415.0 to 715.0 positions. Exceeding optimum occupancy level increases the stress on mechanical systems within the Headquarters facility. The latest series of investigation, evaluation, testing and repair events began in September 2007 and continues today. These events require the relocation of staff (see Exhibit III for relocation cost estimates). Approval of the requested resources in this alternative would allow the BOE to continue with its core mission of revenue generation and processing, while providing a safe and healthy work environment for employees to work efficiently and effectively. Exhibit IV provides a detailed description of the functions and workload associated with the requested positions.

CLASSIFICATIONS	POSITIONS
Administration Department	**FY 2009-10 and Ongoing**
Administrative Support Division:	
Staff Services Manager III	1.0
Associate Governmental Program Analyst	1.0
Associate Business Management Analyst	2.0
Associate Info. Systems Analyst (Spec.)	1.0
Human Resources Division:	
Associate Personnel Analyst	1.0
TOTAL POSITIONS	**6.0**

Pros:

- Provides resources to:
  - Address exceeding optimum occupancy level of the Headquarters building and reduce mechanical systems stress risks.
  - Develop and maintain a growth plan for all facilities needs.
  - Develop and maintain a stacking plan for the headquarters facilities.
  - Manage increased workload in WC, RA and return to work areas due to Headquarters related claims.
- Minimizes staff disruptions from the relocation to available space rather than planned space.
- Possible cost avoidance by reducing the length of time WC claims remain open, therefore reducing handling and administrative costs and State Compensation Insurance Fund (SCIF) investigations.
- Helps to ensure that the BOE may continue with its core mission of revenue generation and processing.
- Provides a safe and healthy work environment that allows employees to work efficiently and effectively.

Cons:

- Requires a budget augmentation.
- Increases level of authorized positions.

Alternative 2 – Fund the additional space request and redirect staff.

While there would be a cost savings by redirecting staff there would be significant impact upon current workload. Currently, staff is absorbing the workload associated with DGS' investigation, evaluation, testing and repairs in the building. Staff must work overtime to complete the normal workload and that associated with the investigation, evaluation, testing and repairs efforts.

Pros:

- Does not require increased level of authorized positions.
- Provides resources to address exceeding optimum occupancy level of the Headquarters building and reduce mechanical systems stress.

Cons:

- Requires a budget augmentation.
- BOE workload related to investigation, evaluation, testing and repairs would not be completed in a timely manner.
- Normal workload would be significantly impacted and some items would not be completed.
- Increase in WC claims, RAs and return to work areas due to delay in Headquarters investigation, evaluation, testing and repairs and inability to process these in a timely manner due to staff shortages which would result in additional cost to the BOE.
- Extends the timeframe to address population and employee health and safety concerns due to a lack of dedicated staff.
- Does not provide resources to:
  - Develop and maintain a growth plan for all facilities needs.
  - Develop and maintain a stacking plan for the headquarters facilities.
  - Adequately address workload related to these two items.

Alternative 3 – Deny this request.

The building will continue to age and experience intermittent, unpredictable system failures (e.g. pipe bursts, electrical outages). As investigation, evaluation, testing and repair efforts will require lengthy timelines due to the unavailability of space to move employees from the areas requiring investigation, evaluation, testing and repairs. Also, if funding is not provided for the additional space, the maximum occupancy will continue to exist and increase. The maximum occupancy could lead to mechanical failures in critical areas (i.e., electrical, vertical transport, airflow capacity, etc.). If the structure of the building is allowed to continue to deteriorate, so does the potential for impacting the health and safety of the BOE employees and the workload to administer the revenue generating programs and processes.

Pros:

- Does not require funding of the positions in this Budget Change Proposal (BCP).
- Failure to address the identified issues will ultimately result in increased costs to the State.

Cons:

- Workload related to investigation, evaluation, testing and repairs would require lengthy timelines.
- Normal workload would be significantly impacted and some items would not be completed.
- Increase in WC claims, RAs and return to work areas due to delay in Headquarters investigation, evaluation, testing and repairs and inability to process these in a timely manner due to staff shortages which would result in additional costs to the State.
- Risk of adverse ramifications with California Occupational Safety and Health and labor union initiated health and safety walk out from Headquarters building.
- Continuing employee distrust and fear, impacted performance and an emotionally and mentally impacted workforce, at all levels, due to lack of action.
- Population exceeding optimum occupancy places a strain on the building infrastructure (mechanical systems, electrical, elevators, etc.) which will result in increased maintenance costs and decreased equipment life expectancy.
- Would provide no resources to:
  - Address exceeding optimum occupancy level of the Headquarters building and reduce mechanical failure risks.
  - Develop and maintain a growth plan for all facilities needs.
  - Develop and maintain a stacking plan for the headquarters facilities.

E. Facility/Capital Outlay Considerations

This BCP addresses the BOE Headquarters facility and the need for offsite leased space due to staff exceeding optimum occupancy levels and investigation, evaluation, testing and repairs activities.

F. Outcomes and Accountability

This proposal will enable the BOE to address the workload demands from the population and relocation efforts of the Headquarters building. Staff will be utilized to develop and maintain a restacking plan of the Headquarters building, address relocation activities due to additional leased space required, and facilitate the investigation, evaluation, testing and repair related activities within the Headquarters building. Long term goals include the

development of district and out-of-state offices exceeding optimum occupancy levels and long term lease needs. These positions will also develop a growth plan for all BOE facilities operations needs.

The Deputy Director of Administration will maintain control and oversight of program operations.

G. Timetable

Upon approval of the recommended alternative, the BOE will proceed to fill the positions and implement this proposal beginning July 1, 2009. BOE will complete all duty statements and job announcements prior to July 1, 2009. Please see chart below for details.

FY 2009-10	FY 2010-11	FY 2011-12
Develop duty statements and job announcements.	Continue to coordinate investigation, evaluation, testing and repair activities with DGS.	Continue to coordinate investigation, evaluation, testing and repair activities with DGS.
Advertise positions.	Continue relocation activities.	Continue relocation activities.
Hire and train staff, effective July 1, 2009.	Update and maintain building stacking plan.	Update and maintain building stacking plan.
Identify areas exceeding optimum occupancy levels by floor, unit, etc.	Coordinate long term goals and objectives for space needs of BOE Headquarters.	Coordinate long-term goals and objectives for space needs of BOE District and Out-of-State Offices.
Develop restacking plan.	Begin process to identify areas exceeding optimum occupancy levels in district offices.	Continue to identify areas exceeding optimum occupancy levels in district and Out-of-State offices.
Develop 2-3 year growth plan.	Begin to coordinate the long-term goals and objectives for space needs of BOE District and Out-of-State Offices.	Identify additional lease needs; work with DGS to acquire additional leased space.
Identify additional lease needs; work with DGS to acquire additional leased space.	Identify additional, new and/or optional lease needs; work with DGS to acquire additional leased space for District and Out-of-State offices.	Continue to identify additional, new and/or optional lease needs, work with DGS to acquire additional leased space for District and Out-of-State offices.
Coordinate investigation, evaluation, testing and repair activities with DGS.	Coordinate relocation activities.	Coordinate relocation activities.
Coordinate relocation activities.	Manage increased workload in WC, RA, and return to work areas due to Headquarters related claims.	Manage increased workload in WC, RA, and return to work areas due to Headquarters related claims.
Manage increased workload in WC, RA, and return to work areas due to Headquarters related claims.		

H. Recommendation

Alternative 1 is recommended. By providing permanent budget augmentation of $5,740,000 in FY 2009-10, $8,509,000 in FY 2010-11 and ongoing to establish 6.0 positions

and related resources; BOE will be able to address the space issues of the 450 N Street Headquarters building. This alternative will allow BOE to adjust to and accommodate DGS' need regarding access and relocation of BOE employees. This will assist DGS in performing a more thorough and timely investigation, evaluation, testing and needed repairs, provide restacking of employees to proper population levels, and the ability to identify the need for additional leased spaced, which will eliminate the risk of mechanical failures in critical areas due to overpopulation. This alternative will provide the effective and efficient resources necessary for WC case management necessary to reduce the liability to the State of California, respond timely to reasonable accommodation requests to avoid litigation and penalties while providing the opportunity for possible cost avoidance in these areas. This alternative will also allow BOE to regain and preserve employee trust and Union cooperation while continuing with its revenue generating and processing programs.

I. Fiscal Detail

See attached "Fiscal Detail" schedules.

Facilities – Headquarters
Historical Overview[1]

General Headquarters Background:

450 N Street is a twenty-four story office building which includes a four level parking structure. The single building tenant is occupied by the State of California BOE. Construction of the building began in 1991. The construction was completed in January of 1993.

The building is a steel framed structure with lightweight concrete floors over steel decking. The exterior building envelope is a combination of extruded aluminum glazing and pre-case concrete panels with punched window openings that highlight the building corners; the twelfth floor mechanical floor, and the twenty-third and twenty-fourth floor parapets.

The original four level concrete parking structure encompassed the entire Project block. The northeast portion was removed to construct the office tower as it is now. The fourth (roof) level of the parking structure aligns with the third level of the office building. Adjustments and additions of roof drains were made but the slope of the original parking structure was not altered. Curbs and planters were installed on the garage structure at the cut sections located adjacent to the office building. Also, roof decks extend over occupied office space between the parking structure and the set-back office building at the west and south elevations at the fourth level of the parking structure. A separate elevator core and stairwell service the parking structure from the ground floor of the office building. A covered expansion joint on the roof level of the parking structure separates the parking structure from the office tower on the west and south elevations.

Uses for the first floor of the office tower include the main entry and security services as well as meeting rooms, a reproduction service area and general building services. The remaining upper floors are tenant occupied office space generally with open plans or partition walls forming private offices, service and meeting rooms organized around the central elevator core. The adjacent concrete parking structure has been refurbished to include a ground floor cafeteria and children's daycare center.

- June 1998 – Capitol Square Water Infiltration Investigation (representing CalPERS, the building owner).
- December 2003 – Curtain Wall Glazing System Leaks Investigation Report (DGS Real Estate Services Division contracted with McGinnis Chen Associates LLP).
- July 15, 2004 – Letter to LAO from DGS responding to the request that DGS review the potential for legal action against the manufacturer of the windows at 450 N Street.
- January 2005 – Exterior Envelope Remediation (Project to remediate the water intrusion through the glazing system, precast concrete panels, and the 23rd floor balcony decks identified in the McGinnis report of 2003).
- January 20, 2005 – Project Cost Summary of Exterior Envelope remediation completed by DGS.

[1] The information provided in Exhibit I is a general overview of historic events related to this headquarters building. It is not intended, nor should it be interpreted as all inclusive. For more information on the building please contact DGS and see the BOE web page at http://www.boe.ca.gov/info/building_update.html which contains reports provided to BOE by consultants.

- February 14, 2005 – DGS submits request (Finance letter in the form of a BCP) to DOF for the repair of the exterior curtain wall project.
- February 26, 2005 – DOF returns Finance Letter to DGS requesting repair of exterior curtain wall without approval.
- April 27, 2005 – Senate Subcommittee discussion item on agenda regarding BOE Headquarters Window Repair Project.
- July 28, 2005 – Public works project authorization and transfer request (form 22) initiated by DGS for the preliminary plans and working drawings phases for the exterior curtain wall project.
- October 13, 2005 – DGS Estimate Summary for the safety scaffolding around building.
- October 14, 2005 – Form 22 initiated by DGS for the emergency safety and protective measures to protect public from spandrel glass breakage per cost estimate.
- October 31, 2005 – Emergency Declaration released by the DGS regarding the Life and Safety Deficiencies at the Capital Square Building, 450 N Street (letter serving as written notice of an emergency posed by spandrel glass breakage resulting in falling glass at 450 N Street).
- October 18, 2005 through January 17, 2006 – DGS construction progress reports under the emergency letter of direction (fencing, scaffolding etc., due to falling glass).
- November 2005 – Glass Breakage Evaluation Report.
- November 29, 2005 – DGS memo from Construction Services Branch, Direct Construction Unit to DCU Area #2 Office Sacramento, notifying that construction funding approved by DOF for safety scaffolding around building.
- December 6, 2005 – Memo from BOE to DOF regarding curtain wall project.
- December 15, 2005 – Request for funding deficiency and section 26.00 request from BOE to DOF regarding glass falling from the building.
- January 4, 2006 – Notification of receipt and approval of deficiency funding request from the BOE and notification of receipt of section 26.00 request from the BOE letter from DOF to Legislature regarding glass falling from the building.
- January 4, 2006 – Change order (install sidewalk canopies to provide overhead debris protection to pedestrians).
- January 9, 2006 – Form 22 initiated by DGS for the transfer of fund in ARF for the construction phase for the repair of Exterior Curtain Wall Project.
- January 30, 2006 – Curtain wall remediation estimate summary completed.
- February 2, 2006 – Emergency work items performed (erect safety scaffolding, fencing and bracings).
- February 5, 2006 – Preliminary estimates completed for the 450 N Street Exterior Envelope Remediation.
- February 9, 2006 – Change order (install overhead canopy protection at first floor area near cafeteria and fourth floor parking area).
- April 18, 2006 – Bid tabulations and project cost summary completed for the Exterior Curtain Wall Project.
- August 25, 2006 – Standard agreement signed between BOE and SR Trucking Moving and Storage for moving services.
- August 29, 2006 – Request for transfer of funds completed for Repair of Exterior Curtain Wall Project.

[1] The information provided in Exhibit I is a general overview of historic events related to this headquarters building. It is not intended, nor should it be interpreted as all inclusive. For more information on the building please contact DGS and see the BOE web page at http://www.boe.ca.gov/info/building_update.html which contains reports provided to BOE by consultants.

- September 28, 2007 – 22nd and 23rd floor employees begin to be relocated.
- September 27, 2007 – Employees not allowed on the south and east sides of floors 22 and 23.
- October 29, 2007 – Sterling & Associates prepares report for DGS.
- October 27, 2007 – The Department of General Services and their consultants completed a walk through of the BOE Headquarters.
- October 24, 2007 – Executive Director's report to the Board.
- October 22, 2007 – BOE unveils new webpage for building assessment updates and information.
- October 19, 2007 – Department of General Services determines state emergency for BOE Headquarters Building. Department of Finance concurs.
- October 19, 2007 – Mail room wall cleaning began and air and surface tests were conducted. Test results are, "unremarkable and not expected to be of consequence to building occupants," according to on–site industrial hygienists.
- October 18, 2007 – Employee report of something suspicious on a concrete mail room wall. Area inspected by industrial hygienist.
- October 18, 2007 – Employee information regarding water intrusion issues solicited from Executive Director.
- October 17, 2007 – Executive Director's Building Update to the Board at Shell Beach Assessor's Conference.
- October 12, 2007 – Inspection and assessment of boxes, files and laptops began by independent Industrial Hygienists.
- October 11, 2007 – Move of 114 legal staff to FTB began.
- October 10, 2007 – BOE independent consultants, BOE executive team and DGS representatives meet to discuss roles and responsibilities.
- October 10, 2007 – Met with independent consultants for briefing and roundtable discussion regarding building issues. Tour also conducted.
- October 10, 2007 – Process of retaining independent medical, building and remediation consultants began.
- October 5, 2007 – BOE executive team and DGS team met to discuss plan of action.
- October 5, 2007 – Employees not allowed on the 24th floor.
- October 1, 2007 – All employees remaining on the 23rd floor were moved to other floors.
- October 1, 2007 – DGS began removing and replacing all building air filters.
- November 25, 2007 – Cleaning and pack out of personal property on south side of the 23rd floor completed.
- November 15, 2007 – BOE's consultants meet with DGS' consultants to review preliminary plan of action.
- November 15, 2007 – Executive Director's report to the Board.
- November 14, 2007 – SEIU 1000 representatives second visit to building.
- November 13, 2007 – BOE invites SEIU to participate in investigation and assessment.
- November 7, 2007 – BOE launches survey on website seeking employee input and assistance in identification of areas of concern.
- November 6, 2007 – BOE is provided with DGS' preliminary plan of action, and plan is sent to BOE's consultants.
- November 1, 2007 – SEIU 1000 representatives, including SEIU's National Director of Health and Safety, toured the BOE headquarters building at 450 N Street and spoke with employees.

[1] The information provided in Exhibit I is a general overview of historic events related to this headquarters building. It is not intended, nor should it be interpreted as all inclusive. For more information on the building please contact DGS and see the BOE web page at http://www.boe.ca.gov/info/building_update.html which contains reports provided to BOE by consultants.

- December 24, 2007 – Cleaning, boxing and testing of personal items taken from the 24th floor began. Delivery of those personal items to BOE employees temporarily housed at FTB also began.
- December 17, 2007 – BOE management and consultants meet with SEIU representatives and consultants to coordinate efforts related to the ongoing building evaluation.
- December 17, 2007 – BOE and DGS and respective consultants and management meet to discuss ongoing building evaluation and remediation plans proposed by DGS.
- December 12, 2007 – Executive Director's report to the Board.
- December 7, 2007 – Frequently Asked Questions section added to Building Assessment webpage.
- December 7, 2007 – BOE consultant Hygientech responds to proposed containment protocol.
- December 7, 2007 – Proposed containment protocol received from DGS consultants.
- December 3, 2007 – Joint meeting of BOE and DGS consultants to discuss remediation plan and next steps.
- January 16, 2008 – CASE union representative tour of building.
- January 7, 2008 – BOE and DGS management and respective consultants meet to discuss building investigation progress.
- January 4, 2008 – Major storm event water intrusion source identification, and addressing and removing water begins.
- January 4, 2008 – Major storm event causes some water intrusion.
- February 19, 2008 – BOE and DGS management and respective consultants meet to discuss continuing building investigation progress.
- February 1, 2008 – Executive Director's report to the Board.
- March 19, 2008 – Executive Director's report to the Board.
- March 17, 2008 – BOE and DGS management and respective consultants meet to discuss continuing building investigation.
- March 7, 2008 – Chiller supply line pipe on 12th floor breaks and causes water intrusion on 11th and 10th floors.
- April 8, 2008 – Executive Director's report to the Board.
- May 29, 2008 – Executive Director's report to the Board.
- May 9, 2008 – Subject Matter/Medical Expert Panels.

[1] The information provided in Exhibit I is a general overview of historic events related to this headquarters building. It is not intended, nor should it be interpreted as all inclusive. For more information on the building please contact DGS and see the BOE web page at http://www.boe.ca.gov/info/building_update.html which contains reports provided to BOE by consultants.

Report from Facilitated Group Sessions
March 26, 2008
State Board of Equalization
Sacramento, CA

Final Report

Prepared by MHN Session Facilitator
Karen Mindt Howell, MFT, MBA
April 21, 2008

Assessment Summary

This report reflects participant feedback from facilitated group sessions conducted March 26, 2008. Four sessions were held at two locations: Franchise Tax Board, 9646 Butterfield Way, Sacramento; and Board of Equalization, 450 N Street, Sacramento. These sessions were conducted to provide a review of concerns about the mold/health issues in the building at 450 N Street, Sacramento, CA. The employees specifically requested that this report be given to the Executive Director and the Board Members. Additionally, they requested that a copy of this report be made available to them. According to the sign in sheets, a total of 164 employees were present. The following is a summary of the concerns and possible solutions shared during those meetings

Summary of Concerns

Health and Wellness Concerns

It was the general consensus of the attending employees that a health risk is present in the building at 450 N Street. In 3 of the 4 sessions approximately 75% of the employees reported that they had or were having health problems, which they believed could be attributed to something in the building.

Specific symptoms sited by the employees included:

- Headaches
- Difficulty in thinking and concentration
- Itchy eyes
- Sinus congestion or infection
- Asthma
- Sneezing
- Rashes
- Staph infections (skin lesions)
- Neurological problems
- High blood pressure
- Vertigo
- Fatigue
- Lung problems
- Coughing
- Pneumonia
- One case of meningitis
- One case of cancer

There was a general sense among employees that these health/medical symptoms were attributed to molds in the building. Employees expressed that the symptoms improved or were completely alleviated when they were out of the building, either over the weekends, or when the employees were moved to another location. Symptoms seemed to increase and escalate with longer exposure, after re-entering the building. Some employees spoke of needing to get fresh air during breaks in order to be able to continue working through the day. When files moved from the exposed floors (22 23, 24) were reopened at the FTB location, some employees reported the return of physical symptoms.

Employees raised concerns that they may be carrying mold/pathogens home on their clothing or personal items and exposing family members or contaminating their own home. Special concerns were raised over potentially exposing persons with compromised immune systems. Concerns were also raised that the pathogen causing the illness may be something other than mold and the question was raised regarding what else is being tested. For instance, participants speculated as to whether Legionnaires Disease was being considered.

In additional to physical ailments, employees overwhelmingly reported feeling:

- Angry
- Stressed
- Depressed
- Frightened

They also stated that the situation has had an impact on morale and productivity on the job. Employees at the Butterfield site indicated that being off-site, away from co-workers and necessary documents, having inadequate equipment and unprofessional working conditions, and longer commute times makes it impossible for them to perform their job. However, employees indicated that deadlines and expectations have remained the same.

Overall, employees indicated a lack of confidence that the problem is being addressed adequately at this time.

Lack of Trust

Employees repeatedly raised the issue of mistrust regarding what they have been told and what is being done about the problem they feel is occurring in the building. Generally, concern was expressed that they are not getting accurate and timely information about the problem or about what is being done to correct it.

Employees in each group expressed:

- Speculation that there might be a cover-up of the problem and that their health was being put at risk
- Frustration that accurate and timely information was not being given; that the website where information is posted is difficult to access
- A perception of an indirect message to leave, if they did not like their working environment, after reporting to Executive Director Ray Hirsig in December 2006 that people were ill and there was a problem
- Distrust in not receiving accurate information from my summary report; concern that the information would be modified
- A perception that employee health and wellbeing were being sacrificed for money; that "no one cared about them"
- Retaliation was also a concern for employees, if they raised or pursued this issue relating to the mold. It was stated that employees who had filed either a lawsuit or a Workers Comp claim had been retaliated against, including promotions promised but not given.
- Fear of being labeled a 'trouble maker' if they spoke up or filed a Workers Comp claim and that this had been their experience in the past
- Fear of being retaliated against by attending the EAP sessions.

- Concern that they had to go to doctors for medical evaluations that they believed may be biased toward their employer.
- Discussions took place regarding the filing of Workers Comp claims being denied because illnesses could not be directly attributed to molds/irritants in the building, and that such claims had been made prior to the lawsuit.
- A sense that the mold problem was denied until after a lawsuit was filed
- Belief that the truth will not be told because it would jeopardize BOE's position in the current lawsuit
- Frustration that the mold problem was known in 2004 but was not addressed
- Some former managers indicated that they were directed not to use the "M" word (mold) and that the problem was known but avoided
- Concern that while people are moved off effected floors that others are being moved onto those same floors
- Concern about being moved back onto the upper floors in August without the problem being effectively alleviated.
- Concern that email inquiries related to illnesses/building issues were not responded to.

Valid Tests for Molds

All groups questioned the validity of the testing for molds and other pathogens.

Employees had the following concerns:

- Testing was done in the air, not when molds were 'disturbed'
- Testing was not being done where the molds most likely existed – in the walls and ceilings and in specific locations on particularly effected floors
- Room temperatures were dropped for the testing, leading employees to question why tests were being done in atypical conditions
- Tests were conducted on some floors but not others
- Concerns expressed that testing is being done only to defend the current lawsuit

In general, a perception exists that a comprehensive approach is not being taken to assess the problem. Questions were also raised about whether the Department of General Services is expert enough to handle the problem and if the issue should be taken to the EPA at the Federal level.

Water Leakage

Employees discussed their perceptions that water leakage was an ongoing problem, since the building had been built. Employees indicated that the floors most often reported to have water leakage were 11, 17, 22, 23, 24; and also to a lesser degree floors 3, 10, 20 and 21.

The employees gave the following examples:

- Water pouring out of the ceiling "like a fire hydrant"
- Employees being required to put on hard hats and rain coats and continue working.
- Employees had to place plastic sheets on desks and file cabinets at the end of the day
- Standing water on carpets
- Refusal to replace damaged carpeting, due to water damage
- Use of large funnels to direct running water into large bins

- Blackened ceiling tiles
- New ceiling tiles were placed over old ceiling tiles which contained "growing hairy mold"
- Ceiling tiles falling on and within close proximity to desks
- Opened ceilings
- Black substances visible on the sprinkler system and light fixtures
- Janitorial services were consistently substandard; specifically, rugs were not replaced nor shampooed after being soaked with water and they were not regularly vacuumed.

The ventilation system was also identified as an area of concern. There was a fear expressed that mold on some floors might travel to the rest of the floors through the ventilation system and the elevators, or that mold could get trapped between the walls; downstream from the water leakage. It was also reported that elevators frequently malfunction and the question was raised about how water damage may have impacted elevator functioning and safety. General concerns were also raised regarding water leakage through bad seals in the windows.

Suggested Solutions

At the conclusion of each session, employees were asked what they would like to see as a solution to this problem. The following reflects the solutions they recommended:

- Give employees honest, factual, timely and regularly scheduled reports on air quality testing and how the problem is being or will be addressed
- Select a point person within the organization who can be contacted for all matters relating to the problem in the building. Employees are not clear about how to get the most current information, how to file a Workman's Comp claim, or how to request a move to another location
- Develop a comprehensive plan for the testing and resolution of the problem, as well as a contingency plan to protect the health of employees. This master plan would include identification and resolution of the problem as well as managing the current requisite moves of people, floors and files (i.e., 11th floor move)
- Move all employees off site (preferably close to headquarters) until the problem is identified and remedied
- Move employees to a location where they are able to work with their work group and have adequate equipment and space
- Allow employees to telecommute who are able to do so
- Get employees settled in a permanent location as soon as possible
- Improve janitorial services to include regular cleaning of carpeting and workspace
- Have the Board and Executive Director address the employees directly to answer questions and present information
- Have the executive team review the overwhelming evidence that many people are sick and this may be more than just allergies
- Provide a safe environment for employees to speak up without fear of retaliation
- Allow the health of the exposed employees to be evaluated/tested with independent doctors (not representatives of BOE)
- Reimburse employees for parking costs they are incurring while not using the parking lots, vacation and sick leave taken due to building-related illnesses
- Take the investigation of the problem up to the Federal level

Relocation Estimates
For Recommended Alternative 1

Relocation Estimates Per Each Group of 100 Positions				
Activity	**One-time /Ongoing**	**Cost Per 100**	**Cost for 500 Relocated**	**Cost for 800 Relocated**
Relocation Costs	One-time	$840,000	$4,200,000	$6,720,000
Estimated Space Needs (usable sq. ft.)	Ongoing	17,500	87,500	140,000
Annual Rent $3.00 - $4.25 per usable sq. ft., per month plus tenant improvements (TI)				
Rent at $3.00 plus TI	Ongoing	$1,003,800	$5,019,000	$8,030,400
Rent at $4.25 plus TI	Ongoing	$1,266,300	$6,331,500	$10,130.400
Rent average $3.63 plus TI	Ongoing	$1,135,050	$5,675,250	$9,080,400

Position Description and Workload Justification For Recommended Alternative 1

ADMINISTRATION DEPARTMENT

Administrative Support Division (ASD)

The ASD is the Change Agent for the BOE and staff is committed to providing support for the needs and expectations of the BOE. The ASD is responsible for administering the business management activities and programs which include Processing and Facilities Management, Business Services, Contracts and Procurement (Acquisition Program), and Publishing, Printing and Supply Warehousing. The mission of the ASD is to provide a high level of customer service through the delivery of services in areas of leasing, property acquisitions and dispositions; building management and maintenance; administration of: incoming and outgoing mail services; the BOE's cashiering and deposit responsibilities; the acquisition program for the purchase of necessary goods and services, the telecommunications program; and printing, publishing, graphics; emergency preparedness, and other related administrative services. The ASD staff has a critical role in providing for the physical work environment for all BOE employees. Existing staffing levels do not allow ASD to complete the workload necessary to provide for the physical work environment under this program. In order to support these needs, ASD requires the addition of 1.0 Staff Services Manager III, 1.0 Associate Governmental Program Analyst, 2.0 Associate Business Management Analysts and 1.0 Associate Information Systems Analyst (Specialist) listed below:

1.0 Staff Services Manager (SSM III)

The establishment of 1.0 permanent SSM III position is required in FY 2009-10 to oversee multiple sections of the ASD engaged in facilities operations and projects. This position will also serve as the Assistant Chief for the ASD, which has realized a significant increase in building project activity including critical activity impacting the health and safety of the BOE staff. Those projects specific to the BOE Headquarters located at 450 N Street includes the Curtain Wall Project to stop the water intrusion into the facility and the investigation, evaluation, testing and repair project that has resulted in three full floors being evacuated thus far.

The SSM III primary first year workload will consist of addressing the ongoing facilities related health concerns of BOE staff in the headquarters building as the full scope of water intrusion impact is discovered. Because there have been long term problems with this facility, the DGS has hired a forensic architect for a full building assessment and recommendation for corrective action. As this corrective action is identified, the SSM III will have responsibility and oversight for staff impact activities such as relocations, swing space, determining benefit-to-cost ratios for repairs with the focus on employee safety. The SSM III will act as a subject matter expert and provide recommendations to Executive staff, Board Members and the DOF on facilities issues including leasing new space as needed to address investigation, evaluation, testing and repair activities, ongoing building functionality and projected growth. As the Assistant Chief, this position will have ongoing workload to supervise subordinate staff in the most complex facilities

and business processing operations being conducted by the most complex facilities and business processing operations being conducted by the Processing and Facilities Management Unit and the Business Services Section. The Assistant Chief will also direct staff in the development of long-term solutions to address our facilities needs. These activities will include the district offices which include over 25 locations statewide and the out-of-state offices located in New York, Chicago and Houston. The field offices throughout California and out-of-state are also reaching critical capacity levels and will require relocation as opposed to simple lease extensions, as the facilities have reached their maximum occupancy load.

The table below provides the estimated workload for this position.

FY 2009-10 and Ongoing				
Workload Detail				
Classification: SSM III	**Time Measure**			
Activity	**H = Hours M = Minutes**	**Time Per Occurrence**	**Occurrences Per Year**	**Total Hours**
Provide project management oversight on leasing activities, office remodeling and relocations.	H	2	Daily	520
Manage daily activities of Business Services and Facilities units. Coordinate overlapping functions in relation to ongoing building investigation, evaluation, testing and repair, and the space planning and facilities work.	H	4	Daily	1,040
Provide consultation to Executive Staff, Board Members, DOF, DGS, and leasing agents in regard to space needs, business processing, acquisitions, cost/benefit analysis and budgeting.	H	2	Daily	520
Assume duties of Division Chief in their absence	H	8	15	120
Total Hours per year				**2200**
Position based on 1,800 hours				**1.2**

1.0 Associate Governmental Program Analyst (AGPA)

The establishment of 1.0 permanent AGPA position is required in FY 2009-10 and ongoing to perform analytical work relating to the BOE facilities management and business processing operations. The ASD has realized a significant increase in building project activity including critical activity impacting the health and safety of the BOE staff. The position will provide direct analytical support to the Assistant Chief of the ASD. The AGPA will be responsible for gathering source and reference data pertaining to these projects, analyze the impact on business operations and develop workable solutions presented in the form of decision or issue papers. The AGPA will provide recommendations to the Assistant Chief for improvements in the business operations of the division, the streamlining of processes or procedural changes for the purpose of management review and decisions. Once the Headquarters activities are worked and investigation, evaluation, testing and repair diminishes, the position will provide ongoing analytical work for ASD engaged in facilities operations and projects in over 25 locations statewide.

In conjunction with other staff members, the AGPA will be responsible for meeting with programs to determine their current/future business needs as it relates to required space for staff, files, business adjacencies and potential growth. In addition, the AGPA will act as the lead in coordinating and collecting all necessary information needed to develop cost/benefit analysis reports, provide recommendations for management review and develop BCPs as it pertains to the state of the populace in our facilities operations.

The table below provides the estimated workload for this position.

FY 2009-10 and Ongoing				
Workload Detail				
Classification: AGPA	**Time Measure**			
Activity	**H = Hours M = Minutes**	**Time Per Occurrence**	**Occurrences Per Year**	**Total Hours**
Provides analytical project support to Assistant Chief	H	40	12	480
Gather data/costing, review/analyze data, develop cost benefit ratios, research provide recommendations for management decisions	H	40	18	720
Develop analysis reports, issue papers, develop budget change proposals	H	120	4	480
Meeting with programs on current/future business needs	H	80	2	160
Total Hours per year				**1,840**
Position based on 1,800 hours				**1.02**

2.0 Associate Business Management Analysts (ABMA)

The establishment of 2.0 permanent ABMA positions is required in FY 2009-10 and ongoing to address the increase workload in space planning services for ASD. The ABMA's have a critical role in employee move and relocation projects. The ABMA's primary workload will consist of space planning services including project planning, interior design, computer aided drafting and design, project cost analysis, project management and lease management. Because there have been numerous long term problems with the 450 N Street facility, DGS has hired a forensic architect to conduct a full building assessment and recommendation for corrective action. As this corrective action is identified, the ABMA's will have responsibility for activities such as staff relocations, swing space, and space planning. In addition to the immediate concerns, this facility has exceeded its maximum capacity and the ABMA's will continue to have workload planning for new facility projects in leased space. It is estimated that 415.0 - 715.0 staff will need to be relocated from 450 N Street alone, and will increase in the next several years due to projected growth in revenue generating positions. Our field offices throughout California and out-of-state are also reaching critical capacity levels and will require relocation as opposed to simple lease extensions as the facilities have reached their maximum occupancy load.

The table below provides the estimated workload for this position.

FY 2009-10 and Ongoing Workload Detail				
Classification: ABMA	**Time Measure**			
Activity	**H = Hours M = Minutes**	**Time Per Occurrence**	**Occurrences Per Year**	**Total Hours**
Provide project management on leasing activities, office remodeling and relocations. Coordinate activities with DGS, property managers, leasing agents and construction staff on tenant improvement projects.	H	8	Daily	2,080
Perform routine space planning and facilities work such as modular furniture reconfigurations and reasonable accommodation requests.	H	2	Daily	520
Perform space needs assessments, analyze special program requirements, and perform design services using CADD. Perform site searches with the DGS to identify appropriate state owned or leased space that meet the BOE program needs.	H	3	Daily	780
In-State travel to field offices for site evaluations	H	8	15	120
Out-of State Travel for site evaluations	H	36	4	144
Requisition office furnishings and modular work station components	H	16	4	64
Total Hours per year				**3,708**
Position based on 1,800 hours				**2.06**

1.0 Associate Information Systems Analyst - AISA (Specialist)

The establishment of 1.0 permanent AISA (Specialist) position is required in FY 2009-10 to provide telecommunications services for ASD engaged in facilities operations. The AISA (Specialist) has a critical role in employee move and relocation projects. Continuity of communications services is a critical business need for staff and to the public that must conduct business with BOE. The AISA (Specialist) primary workload will consist of project planning for voice requirements at each property, cost planning, project cabling for voice/data transmission, owner operated key systems and public switches, wireless services. In addition to the immediate concern that this facility has reached its maximum capacity, the AISA will continue to have workload planning new facility projects in leased space. It is anticipated that over 500 staff will need to be relocated from 450 N Street in the next several years due to projected growth in revenue generating positions. The AISA will determine system configurations using the latest technology trends.

The table below provides the estimated workload for this position.

FY 2009-10 and Ongoing Workload Detail				
Classification: AISA (Specialist)	**Time Measure**			
Activity	**H = Hours M = Minutes**	**Time Per Occurrence**	**Occurrences Per Year**	**Total Hours**
Provide project management on telecommunications activities, office remodeling and relocations. Coordinate activities with DGS, property managers, public utility companies and construction staff on cabling projects.	H	2	Daily	520
Perform routine additions moves and changes for telecom services in support of BOE staff movement and changes. Provide user support for wireless communication devices.	H	2	Daily	520
Perform telecommunications needs assessments, analyze special program requirements, and perform system design services. Research evolving technology trends for BOE applications and project planning.	H	2	Daily	520
Requisition telecommunications components and services.	H	2	150	300
Total Hours per year				**1,860**
Position based on 1,800 hours				**1.1**

Human Resources Division (HRD)

The HRD is responsible for maintaining personnel administrative duties for all BOE employees. Within HRD, the WC/Health & Safety Section is requesting 1.0 Associate Personnel Analyst (APA) position to address the workload caused by the indoor air quality/building investigation, evaluation, testing and repair issues. The WC/Health & Safety Section provides guidance, consultation, and recommendations to program managers and supervisors regarding a wide variety of personnel management issues, including injury/illness prevention, WC, RA, return-to-work, fitness-for-duty, disability retirements, medical terminations, ergonomic evaluations, safety/wellness, labor relations, and the Employee Assistance Program.

1.0 Associate Personnel Analyst (APA)

The establishment of 1.0 permanent APA position, effective FY 2009-10 is required to handle the significant workload caused by the increased filing of WC claims and RA requests due to the indoor air quality/building investigation, evaluation, testing and repair issues at the Headquarters building. To date there are 57 new WC claims. The APA will be addressing increasing workloads in the areas of WC claims, RA request, return-to-work, fitness-for-duty, disability retirements, and medical terminations. By providing the additional APA position, WC/Health & Safety Section will be able to address the increased workload, fulfill its role to comply with the laws, and timeliness in meeting the mandated five-day calendar timeframe to notice SCIF for WC claims and 20-day timeframe when responding to RA requests.

The table below provides the estimated workload for this position.

FY 2009-10 and Ongoing				
Workload Detail				
Classification: APA	**Time Measure**			
Activity	**H = Hours M = Minutes**	**Time Per Occurrence**	**Occurrences Per Year**	**Total Hours**
Workers' Compensation Claims (WC cost control and case management)	H	14.5	57	827
Reasonable Accommodation Requests (non-equipment RAs)	H	16	45	720
Return-to-Work (Review job vacancies for potential placement and medical to determine eligibility and recommend RTW placement).	H	8	23	184
Medical Issues (Fitness for Duty Evaluations, Disability Retirements, Medical Terminations)	H	16	5	80
Total Hours per year				**1,811**
Position based on 1,800 hours				**1.0**

BCP No. XX
DATE: September 16, 2008

STATE OF CALIFORNIA
BUDGET CHANGE PROPOSAL--FISCAL DETAIL
STATE OPERATIONS
FISCAL YEAR 2009-10
(Dollars in Thousands)

Title of Proposed Change: **Facilities - Headquarters**

Program/Element/Component: **All Programs/All Elements**

	PERSONNEL YEARS					
	CY	BY	BY + 1	CY	BY	BY + 1
TOTAL SALARIES AND WAGES _a/		6.0	6.0		$382	$382
Salary Savings		-.3	-.3		-19	-19
NET TOTAL SALARIES AND WAGES		5.7	5.7		363	363
Staff Benefits_a/					134	134
Distributed Administration_b/					418	619
TOTAL PERSONAL SERVICES		5.7	5.7		$915	$1,116
OPERATING EXPENSE AND EQUIPMENT						
General Expense					$77	$13
Distributed Administration					104	155
Printing						
Communications					9	6
Postage						
Travel--In-State					35	36
Travel--Out-of -State					27	28
Training					12	4
Facilities Operations					4,555	7,151
Consulting & Professional Services: Interdepartmental						
Consulting & Professional Services: External						
Department of Technology Services						
Data Processing					6	
Equipment						
Other Items of Expense: (Specify Below)						

_a/ See page 28 of 29 for itemized staff benefits and classification detail.

_b/ Represents Distributed Administration costs resulting from this BCP. The Distributed Administration costs for existing BOE programs will reflect a corresponding decrease which will be addressed in the Planning Estimate process.

		CY	BY	BY + 1
TOTAL OPERATING EXPENSE AND EQUIPMENT			$4,825	$7,393
TOTAL EXPENDITURES (State Operations)			$5,740	$8,509
Source of Funds				
General Fund	(0001)		$3,289	$4,878
Special Funds:				
Breast Cancer Fund	(0004)		8	12
State Emergency Telephone	(0022)		16	24
Motor Vehicle Fuel Account	(0061)		377	558
Occupational Lead Prevention Fund	(0070)		18	26
Childhood Lead Poisoning Prev. Fund	(0080)		11	16
Cig. and Tobacco Prod. Surtax Fund	(0230)		80	119
Oil Spill Prevention and Admin. Fund	(0320)		5	7
Integrated Waste Management	(0387)		14	20
Underground Storage Tank Fund	(0439)		54	80
Energy Resources Programs Account	(0465)		5	7
CA. Children and Families First Trust Fund	(0623)		136	202
Federal Trust Fund	(0890)			
Timber Tax Fund	(0965)		48	71
Gas Consumption Surcharge Fund	(3015)		8	12
Water Rights Fund	(3058)		10	15
Elec. Waste Recovery and Recycling Acct.	(3065)		104	154
Cig. and Tobacco Prod. Compliance Fund	(3067)			
Federal Funds				
Other Funds				
Reimbursements	(0995)		$1,557	$2,308
Net Total Augmentation (Source of Funds)			$5,740	$8,509

DETAIL OF STAFF BENEFITS AND PERSONAL SERVICES

Staff Benefits Detail:	CY	BY	BY + 1
		(Whole Dollars)	
OASDI		$27,770	$27,770
Health Insurance		43,156	43,156
Retirement		61,699	61,699
Workers' Compensation		148	148
Industrial Disability Leave		260	260
Non-Industrial Disability Leave		188	188
Unemployment Insurance		56	56
Other		957	957
TOTAL		$134,234	$134,234

Classification	Positions CY	Positions BY	Positions BY + 1	Salary Range _a/	Amount CY	Amount BY	Amount BY + 1
ADMINISTRATION DEPT _b/							
Admin Support Division:							
Associate Budget Mgmt Analyst		2.0	2.0	$58,200		$116,400	$116,400
Associate Govt. Program Analyst		1.0	1.0	$58,200		$58,200	$58,200
Associate Info. Systems Analyst (Spec.)		1.0	1.0	64,164		64,164	64,164
Staff Services Manager III		1.0	1.0	85,524		85,524	85,524
HR Division:							
Associate Personnel Analyst		1.0	1.0	58,200		58,200	58,200
Blanket Funds:							
Overtime (Various)							
Temporary Help							
TOTAL SALARIES AND WAGES		6.0	6.0			$382,488	$382,488

_a/ The salary is the mid-step of the salary range for the stated classification.

_b/ All positions effective 7-1-09.

DEPARTMENT: State Board of Equalization
BCP NO. XX
FISCAL YEAR 2009-10
DATE: September 16, 2008

SUPPLEMENTAL INFORMATION

Dollars in Thousands

	Current Year	Budget Year	Budget Year + One
Proposed Equipment:			
N/A			
Total			
Proposed Contracts:			
N/A			
Total			
One-Time Costs:			
General Expense		$64	
Communications		3	
Training		8	
Data Processing		6	
Total		$81	
Future Savings:			
N/A			
Total			
Full-Year Cost Adjustments:			
N/A			
Total			