

# Memorandum

To: CHAIR AND COMMISSIONERS

CTC Meeting: August 27-28, 2008

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Subject: **REAL PROPERTY RETENTION REVIEW; 2008 ANNUAL REPORT**

## **BACKGROUND:**

The California Department of Transportation (Department) owns real estate worth millions of dollars that provides public transportation infrastructure and services, or houses employees, equipment or materials supporting transportation operations. Government Code Section 11011.18 and Governors' Executive Order S-10-04 mandates that the Department evaluates its real estate portfolio annually and retains only those properties supporting its mission.

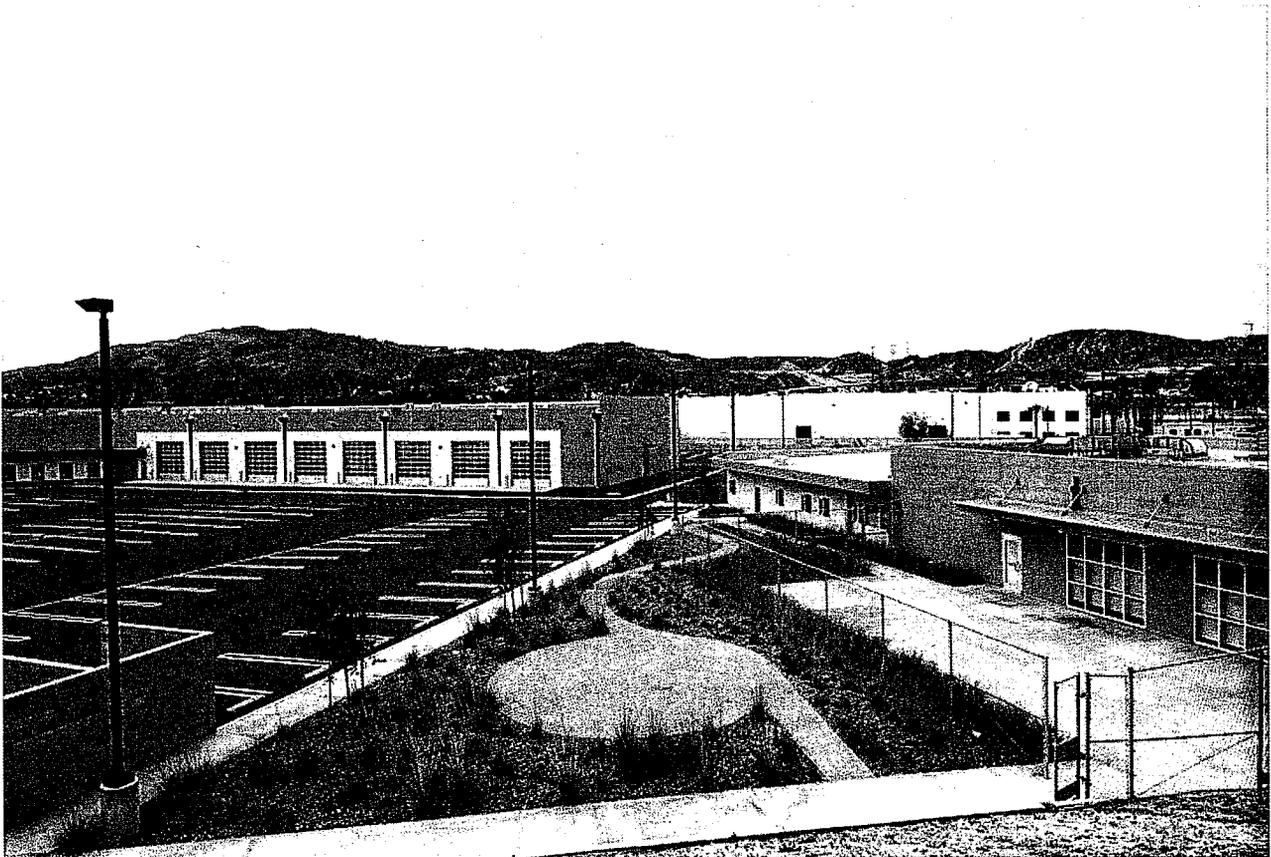
The Real Property Retention Review process is the framework within which the Department assesses its real estate holdings and determines whether or not they are needed to meet long-term operational goals and objectives. To properly fulfill its statutory and administrative obligations, Department Deputy Directive (DD) 21 R3 directs each District Director to annually form a Real Property Retention Review Committee, comprised of senior management representatives from functional areas controlling the Department's real property holdings, to comprehensively review lands and buildings supporting transportation operations, excess land parcels on hold, and parcels being held for viable future projects. While the overwhelming majority of these properties effectively serve the needs of the public and the Department, the Department must identify properties that are underused, not required, or no longer conform to surrounding neighborhood uses and determine appropriate disposition.

## **SUMMARY:**

In conformance with obligations under DD 21 R3, the Department has completed the annual review of its real estate holdings and is submitting a copy of the 2008 Real Property Retention Review Annual Report (Report) to the California Transportation Commission. The Report, completed in July 2008, reflects findings and recommendations associated with the parcel-specific review undertaken by each district between January 2008 and April 2008 of lands and buildings supporting transportation operations, excess land parcels on hold, and parcels needed for future projects. The review examined 4,985 parcels and determined that 1,568 parcels were required to support transportation operations, 548 excess land parcels were to be held for local public agencies, engineering or legal reasons, or environmental mitigation, 216 parcels were being used for current projects, 2,403 parcels should be held for viable future projects, and 238 parcels could be made available for sale or other conveyance. Districts and regions will actively pursue the appropriate disposal of these parcels through their real property disposal plans.

Attachment

DEPARTMENT OF TRANSPORTATION  
REAL PROPERTY RETENTION REVIEW  
2008 ANNUAL REPORT



(The new District 7 Equipment Shop in Sylmar)

Division of Right of Way and Land Surveys  
Office of Real Property Services  
August 2008

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## **EXECUTIVE SUMMARY**

*The Real Property Retention Review (RPRR) compares asset requirements to properties currently in the inventory and identifies surplus parcels available for disposal.*

The California Department of Transportation's (Department) mission of improving mobility across California is comprised of two distinct elements, operating and maintaining a safe and efficient transportation network and delivering transportation infrastructure projects, which enhance or expand the existing system. While both mobility elements have a real estate component, more often than not, popular consideration of its real estate holdings is limited to the 15,000 miles of highways and expressways under Department jurisdiction. Closer examination would reveal the Department owns, leases, otherwise possesses or controls a wide variety of real property assets needed to fulfill its mission which include, but are not limited to office buildings, maintenance facilities, equipment shops, employee housing, transportation management centers, warehouses, rest areas, vista points, park and ride lots, commercial vehicle enforcement facilities, and environmental mitigation sites.

*The RPRR is not only a prudent business practice, but it also satisfies the intent of State statute and Governor's Executive Order, which mandates that State agencies and departments conduct comprehensive annual real property reviews.*

As a conscientious steward of State resources, the Department annually reviews its real estate holdings. It identifies long-term asset needs by program, compares the requirements to properties currently in the inventory and identifies necessary acquisitions or surplus parcels available for disposal. The Real Property Retention Review (RPRR) is not only a prudent business practice, but it also satisfies the intent of State statute and Governor's Executive Order mandating that State agencies and departments conduct comprehensive annual real property reviews.

### 1. Background and Purpose

#### **FINDINGS**

1. Deputy Directive DD-21 R3 is Department policy governing maintenance of real property databases, reviewing real property inventories, and holding property in advance of its use for transportation purposes.
2. The RPRR is the foundation of the Department's firm commitment to efficiently managing its real property assets.

#### **RECOMMENDATIONS**

- The Department will continue to demonstrate effective real property management through continued use of the RPRR process.

### 2. Reviewing Real Property Holdings

#### **FINDINGS**

1. The real property inventory, excluding lands-and-buildings, has shrunk from more than 6,600 parcels in 2004 to under 3,400 in 2008.

2. District Excess Land Disposal Contracts have become an effective antidote to inadequate support or ambivalent leadership.
3. Nine of twelve district RPRR chairpersons were district Right of Way deputies or managers.
4. District-specific Excess Land Disposal Contracts measure achievement of intermediate milestones on the way to attaining ultimate disposal goals.
5. While separate and distinct activities, the district RPRR and Disposal Contract are symbiotic; each is diminished and far less effective without the other.
6. Disposal Plans link RPRR evaluation to action and measurable outcomes.
7. At this point, one may consider the Department's commitment to the RPRR universal.

#### **RECOMMENDATIONS**

- Department district directors will appoint senior managers to chair RPRR committees, which will be actively supported by the district director and provided sufficient resources to adequately conduct the RPRR and satisfy committee property disposal decisions.
- The Department will adopt property disposal cycle time goals consistent with the intent of Streets and Highways Code Section 118.6 (one year disposal of surplus real property).
- District Excess Land Disposal Contracts with the Department Director will continue to be the mechanism for translating RPRR analysis to actionable outcomes.

### 3. Lands and Buildings

#### **FINDINGS**

1. Governor's Executive Order S-10-04 mandates annual property reviews.
2. District personnel are ultimately responsible for accurately maintaining all Department real property databases.
3. Asset Management Inventory (AMI) information may now be accessed via the Intranet.
4. 43% of Department facilities in the AMI that should possess improvement records still do not.
5. The most significant impediment to 100% inventory accuracy is ongoing resistance to use of the AMI by isolated district divisions or functions.
6. The 2008 RPRR identified 21 Department facility assets, which were no longer required for departmental operations.

#### **RECOMMENDATIONS**

- Department divisions and districts will fully embrace their obligation to accurately inventory Department real property assets in the AMI.
- The Department will provide adequate resources to enhance and maintain the AMI.

### 4. Excess Land Holds

#### **FINDINGS**

1. The Department considers its latitude to define when or under what circumstances parcels become excess critical to efficient management of the Department's surplus property holdings.
2. Linking RPRR property disposition decisions to district directors' commitments in Excess Land Disposal Contracts converted analysis to action.
3. By the end of 2008, Excess Land Disposal Contracts between the Department Director and the district directors will have been responsible for increasing the Department's annualized rate of property disposal by about 30%.

4. The Department can dispose of 98 parcels currently being held.
5. Early identification of excess land parcels is critical to continued Department success at reducing its inventory of Excess Land Management System (ELMS) holds.
6. The RPRR committees should treat issuance of the certificate of sufficiency as the point in the process where excess land is identified for disposal, and Construction or Design must justify holding property beyond this point.
7. The Districts do not yet know with certainty the number of parcels held for environmental mitigation purposes.
8. Binding "conveyance" agreements should be executed with "receiving agencies" before the Department acquires environmental mitigation property.
9. Little incentive exists for State departments, local agencies or non-profit conservancies to accept environmental mitigation sites.

**RECOMMENDATIONS:**

- Before acquiring environmental mitigation parcels, the Department will execute agreements defining the terms and conditions of parcel conveyance.
- The environmental mitigation parcels will be inventoried in the ELMS as planning parcels and in the Right of Way Property System (RWPS) with a Use Code of 12 (and removed from the AMI).
- The Division of Environmental Analysis should conduct an independent district-by-district review of its mitigation parcel records.
- The Department will identify excess parcels at issuance of the certificate of sufficiency.
- ELMS Engineering Hold parcels retained for use in future projects different than those for which originally acquired will be removed from the ELMS and inventoried in the RWPS with Use Code 13, which will signify their special status.

**5. Parcels for Future Projects**

**FINDINGS**

1. Approximately 3,400 parcels acquired for use in a transportation project were evaluated during the 2008 RPRR.
2. 60 percent of parcels currently held for future projects are associated with just 8 projects.
3. Data anomalies represented only 2.2 percent of items reviewed during the 2008 RPRR.
4. Department guidance does not explicitly articulate the relationships, roles and responsibilities for data input and system management of myriad interdependent databases.

**RECOMMENDATIONS**

- The Department will issue and enforce policies defining the roles and responsibilities of functions entering, revising, removing or otherwise maintaining information in real property databases.

**6. Continuous Improvement**

**FINDINGS**

1. The 2008 RPRR was possibly the most effective ever, enjoying more institutional support than any of the previous reviews.
2. Use of the Discoverer database management tool and electronic Geographic Information System (GIS) parcel mapping, could, if widely supported and effectively used, raise Department performance to the next level.

3. Integrating Department parcel and project maps with Internet GIS capabilities was one of the most profound RPRR process enhancements since the program's inception.
4. In order to reduce the RPRR to as short a time-cycle as possible, the Department needs to commit the resources needed to establish statewide administrative and electronic data formatting policies.

**RECOMMENDATIONS**

- The Department has begun and will continue to train Division of Right of Way and Land Surveys staff to use the Discoverer database management tool to better manage real property inventories and establish database quality control procedures, which ensure data integrity.
- The Department will establish statewide administrative and electronic data formatting policies in functional manuals for digitizing district parcel and project map inventories and linking them to internet GIS resources.
- The Department will issue guidelines identifying the Document Retrieval System (DRS) as the Department's central map repository, which will standardize warehousing and retrieval of map-related information.

2008 Real Property Retention Review  
Summary of Properties Evaluated

Property Inventory As of December 31, 2008

	LANDS & BUILDINGS				EXCESS LAND MANAGEMENT SYSTEM HOLDS				UNAWARDED FUTURE PROJECTS			
	TOTAL	IN-USE	HOLD	DISPOSE †	TOTAL	IN-USE	HOLD	DISPOSE †	TOTAL	IN-USE	HOLD	DISPOSE †
DISTRICT 1	121	118	2	1	12	1	6	5	45	0	45	0
DISTRICT 2	177	175	2	0	18	0	14	4	4	1	0	3
DISTRICT 3	209	208	0	1	45	0	32	13	96	98	58	0
DISTRICT 4	233	228	4	1	406	0	369	37	728	1	706	21
DISTRICT 5	84	84	0	0	24	0	24	0	49	0	46	3
DISTRICT 6	89	89	0	0	15	0	8	7	301	84	213	4
DISTRICT 7	197	192	2	3	53	0	52	11	548	27	486	35
DISTRICT 8	160	160	0	0	13	0	9	4	94	3	68	23
DISTRICT 9	61	61	0	0	1	0	0	1	2	2	0	0
DISTRICT 10	83	82	0	1	2	0	0	2	378	0	355	23
DISTRICT 11	133	130	2	1	48	0	34	14	503	59	424	20
DISTRICT 12	41	41	0	0	0	0	0	0	2	0	2	0
<b>TOTAL</b>	<b>1588</b>	<b>1568</b>	<b>12</b>	<b>6</b>	<b>647</b>	<b>1</b>	<b>548</b>	<b>98</b>	<b>2750</b>	<b>215</b>	<b>2403</b>	<b>132</b>

† Footnote 1: Disposal includes sale, other conveyance, incorporation into the right-of-way, or administrative adjustment removing a parcel from the active inventory.

Footnote 2: Parcels held for 4 projects comprise 36% of the property on hold in the Excess Lands Management System: ALA-80 (44 parcels), ALA-238 (65 parcels), ALA-896 (73 parcels), SCL-87 (61 parcels).

Footnote 3: Parcels held for 8 projects comprise 61% of the property on hold for Unawarded Future Projects: LA-710 (419 parcels), ALA-238 (396 parcels), SD-52 (299 parcels), SM-1 (148 parcels), TUO-108 (128 parcels), STA-132 (89 parcels), FRE-180 (88 parcels), MER-162 (64 parcels). Parcels for two projects, ALA-238 & LA-710, represent 30% of the total.

General Note: Exclusive of Lands & Buildings, parcels held for just 5 projects comprise 51% (1,561/2,905) of all property held by the Department (348+2,357 = 2,905): ALA-238 (461 parcels), LA-710 (437 parcels), SD-52 (299 parcels), SM-1 (148 parcels), TUO-108 (128 parcels). Parcels for two projects, ALA-238 & LA-710, represent 31% of the total.

**2008 Real Property Summary**

Data as of August 7, 2008

	Lands & Buildings	Future Project Parcels	Parcels Available For Sale	Parcels Under Contract	Surplus Parcels On Hold	Parcels Acquired For Others	Total	2007/08 Disposal Contract	Parcel Disposals To-Date	2008/09 Disposal Contract
DISTRICT 1	123	46	2	6	5	0	182	8	7	2
DISTRICT 2	177	4	1	4	16	3	205	24	27	2
DISTRICT 3	212	60	21	2	23	12	330	57	46	8
DISTRICT 4	231	730	17	125	472	47	1622	296	154	101
DISTRICT 5	89	31	1	2	24	7	154	51	40	11
DISTRICT 6	87	222	1	6	29	42	387	97	78	37
DISTRICT 7	215	468	74	88	91	29	965	203	195	57
DISTRICT 8	158	89	45	54	16	3	365	119	77	27
DISTRICT 9	60	2	6	9	40	3	120	3	17	2
DISTRICT 10	83	338	36	5	18	0	480	42	10	11
DISTRICT 11	132	383	26	31	109	8	689	165	153	50
DISTRICT 12	40	2	2	4	0	18	66	59	57	17
<b>TOTAL</b>	<b>1607</b>	<b>2375</b>	<b>232</b>	<b>336</b>	<b>643</b>	<b>172</b>	<b>5565</b>	<b>1124</b>	<b>861</b>	<b>325</b>

08/21/08

## **1. Background and Purpose**

*The Department annually conducts the RPRR, which evaluates the viability and utility of property held for Department use.*

*The RPRR presumes that Department divisions' and functions' long-range plans will identify long-term asset needs and surplus parcels available for disposal.*

*2007 was spent strengthening procedures to refute unflattering external perceptions that the Department was deficient in its real property management practices.*

The California Department of Transportation's (Department) mission of improving mobility across California is comprised of two distinct elements, operating and maintaining a safe and efficient transportation network and delivering transportation infrastructure projects, which enhance or expand the existing system. While both mobility elements have a real estate component, more often than not, popular consideration of its real estate holdings is often limited to the 15,000 miles of highways and expressways under Department jurisdiction. Closer examination would reveal the Department owns, leases, otherwise possesses or controls a wide variety of real property assets needed to fulfill its mission, which include, but are not limited to office buildings, maintenance facilities, equipment shops, transportation management centers, warehouses, rest areas, employee housing vista points, park and ride lots, commercial vehicle enforcement facilities, and environmental mitigation sites.

As a conscientious steward of State resources, the Department annually reviews its real estate holdings. Within the framework established by California Government Code Section 11011.18, Governors' Executive Order 10-S-04 and Department Deputy Directive DD-21 R3, the Department annually conducts the district-driven RPRR, which evaluates and confirms the viability and utility of property held for Department use within the context of one or more long-range transportation infrastructure plans. The RPRR presumes that Department divisions' and functions' long-range plans will identify long-term asset needs and surplus parcels available for disposal.

As the Department began the 2008 RPRR, it could contemplate significant improvements in the accuracy of its real property inventories, management of its real property holdings, and the number of surplus assets of which it had disposed. The year 2007 had been spent strengthening its procedures to refute unflattering external perceptions that the Department was deficient in its real property management practices. Realizing these pervasive beliefs could be rebutted only through action, the Department Director chose to demonstrate the Department's competence by tackling one particularly troublesome impression, that the Department held unneeded property far beyond any reasonable time required for disposal, which seem to serve as a proxy in the public mind for all other Department property management-related shortcomings. Progress in surplus property disposal could have a more direct, immediate and dramatic affect on external opinions of Department management practices than attempting to resolve complex issues

***Before being able to change external perceptions, the Department had to fundamentally change internal accountability in its excess land disposal process.***

***The RPRR is the foundation of the Department's firm commitment to efficiently managing its real property assets.***

***District directors appoint the chair and members of district RPRR committees.***

***Deputy Directive DD-21 R3 is Department policy governing maintenance of real property databases, reviewing real property inventories, and holding property in advance of its use for transportation purposes.***

associated with properties acquired over 40 years ago for as-yet unbuilt projects, which were not yet ripe for resolution.<sup>1</sup>

Before being able to change external perceptions, the Department had to fundamentally change internal accountability in its excess land disposal process. Department Director Kempton accomplished this by building on a recommendation of the 2007 RPRR Annual Report, which advocated creation of surplus property "disposal projects". While the Department Director modified the concept somewhat, he insisted on instilling project management discipline in the property disposal process by creating Excess Land Disposal Contracts with each district director, which links parcels identified as surplus in the RPRR to process management milestones and disposal dates.

The Department Director's firm support for the RPRR and ongoing engagement with district directors and their Excess Land Disposal Contracts demonstrates the Department's commitment to recognize and fulfill its fiduciary and statutory obligations and conform to prudent business practices in managing its real estate portfolio. The Department Director has clearly articulated his conviction that the RPRR represents the foundation of the Department's unwavering commitment to efficiently managing its real property assets, which obliges senior managers and Department staff to pursue continuous improvement.

## **THE REVIEW PROCESS**

Surplus assets are identified through a comparison of property utility to time-phased operational demand, which is identified in a variety of Department intermediate and long-term plans. To ensure that all assets are properly evaluated, the Department must have accurate real property inventories.

Deputy Directive DD-21 R3 is Department policy governing maintenance of real property databases, reviewing real property inventories, and holding property in advance of its use for transportation purposes. The directive outlines the framework for conducting the Department's annual RPRR. District divisions and functions with operational control of real property assets determine which, if any property should be retained in support of project or program delivery. Adequate review requires responsible parties to assess what is in the inventory under program control and what is needed to deliver its project or program, which should reveal real property assets no longer required. The implicit assumption is that each district has, (1) maintained accurate real property databases, the AMI, the Right of

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<sup>1</sup> The LA-710 and the ALA-238.

*The RPRR committee chairperson represents the district director and acts in his/her stead.*

Way Management Information System (ROWMIS), the RWPS and the ELMS, and (2) appropriately identified short, intermediate and long-range real property needs.

DD-21 R3 also invests district directors with responsibility for appointing the chair and members of district RPRR committees. The committee chairperson represents the district director and acts in his/her stead. As such, the chairperson is generally someone of sufficient rank and experience within the district to command the trust and respect of not only the district director, but also other committee members. RPRR committee membership is comprised of divisional deputies or their designees with authority to speak and act for the division or function during review and clearance of real property holdings, which occurs during RPRR committee meetings. With the assistance of district Right of Way staff, district RPRR committees review the district's lands and buildings inventory to identify surplus facilities, excess land parcels on hold to determine which parcels still need to be retained, parcels being held for unawarded future projects to identify those that may be released for disposal and unneeded operating right-of-way capable of independent development, which could be decertified and sold.

#### **PROPERTY TYPES REVIEWED**

*District RPRR committees review the lands and buildings inventory, excess land on hold and property acquired for use in future projects.*

1. **The Lands and Buildings Inventory** contains facilities supporting transportation operations, which includes, but is not limited to office buildings, maintenance stations, equipment shops, warehouses, laboratories, Transportation Management Centers, safety roadside rest areas, vista points, environmental mitigation sites, park and ride lots, or parcels acquired for future facility development.
2. **ELMS "Holds"** satisfy criteria for being held in one of four ELMS hold categories:
  - (2A), Engineering requires a parcel for a project;
  - (2B), Local agencies arranging parcel acquisition;
  - (2C), Legal or administrative reasons; and,
  - (2D), Environmental compliance or mitigation purposes.
3. **Property Acquired for Unawarded Future Projects** are parcels acquired for routes identified as viable in a local, regional, or departmental transportation system or infrastructure planning document (within 20 years). Any property may be conditionally retained if there is a legitimate, compelling and substantive justification for holding the subject property.
4. **Operating Right-of-Way** not needed for future projects or capable of independent development may be decertified and cleared for disposal.

**RECOMMENDATION:**

⇒ The Department will continue to demonstrate effective real property management through continued use of the RPRR process.

## **2. Reviewing Real Property Holdings**

*The real property inventory excluding lands-and-buildings has shrunk from more than 6,600 parcels reviewed in 2004 to under 3,400 in 2008*

In 2008, district RPRR committees reviewed Department inventories totaling approximately 5,000 parcels. While the lands and buildings inventory element remained static at just under 1,600 items, an abrupt increase in the number of parcels associated with unawarded future projects of just over 300 parcels masked the dramatic reduction of excess land parcels on hold by over 350 parcels. Although the inventory was only fractionally reduced in total, it continued the trend of inventory contraction, which has seen overall non-lands-and-buildings holdings shrink from a little more than 6,600 parcels reviewed in 2004 to just under 3,400 in 2008. Of roughly 3,400 project-related parcels evaluated, slightly more than 200 parcels were being used in a project, 100 were being incorporated into the operating facility or administratively removed from property inventories, and 100 had been sold or were being readied for sale or other disposal, which left roughly 3,000 on hold for Department projects. At current project usage rates, about two-thirds of the parcels currently retained should be consumed by projects or sold by 2010.<sup>2</sup>

*District Excess Land Disposal Contracts have become an effective antidote to inadequate support or ambivalent leadership.*

District Excess Land Disposal Contracts have become an effective antidote to inadequate support or ambivalent leadership. While the Department's emphasis on project delivery still has the potential to adversely affect districts' RPRR performance, this exposure has been mitigated by district directors' Excess Land Disposal Contracts with Department Director Kempton. Experience demonstrates again and again that the greater a district director's personal and consistent interest and involvement in the RPRR, the higher the level of participation by district divisions or functions. With district directors focused on meeting Excess Land Disposal Contract milestones, the level of subordinate staff engagement has never been more apparent. By kicking-off the RPRR and attending one or more committee meetings, district directors communicate the importance of the RPRR process to senior managers and district staff. Although the significant majority of district RPRR committees continue to be chaired by district Right of Way Deputies or managers, district divisions and functions appreciate more than ever before that the RPRR is a shared responsibility.

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<sup>2</sup> Exclusive of Lands & Buildings, parcels held for just 5 projects comprise 51% (1,561/2,905) of all property held by the Department: ALA-238 (461 parcels), LA-710 (437 parcels), SD-52 (299 parcels), SM-1 (148 parcels), TUO-108 (128 parcels). Parcels for two projects, ALA-238 & LA-710, represent 31% of the total.

*Nine of twelve district RPRR chairpersons were district Right of Way deputies or managers.*

*District-specific Excess Land Disposal Contracts measure achievement of intermediate milestones on the way to attaining ultimate disposal goals.*

*While separate and distinct activities, the district RPRR and Disposal Contract are symbiotic; each is diminished and far less effective without the other.*

*Excess Land Disposal Contracts link RPRR evaluation to action and measurable outcomes.*

## **QUANTIFYING PERFORMANCE**

Consistent with the administration of the 2006 and 2007 RPRRs, nine of twelve district RPRR chairpersons were district Right of Way deputies or senior-most managers, and district or region Right of Way organizations provided the majority of process-related resources needed to meet the requirements of district RPRR committees.

A history of insufficient resources or inconsistent participation and tepid support of high-ranking district managers largely came to an end with implementation of District Excess Land Disposal Contracts in 2007 and 2008. Timely allocation of sufficient resources by division or function is a prerequisite for satisfying property disposal objectives articulated during a district's RPRR or actualized through a district's Excess Land Disposal Contract. The RPRR's functional differentiation of intermediate objectives was "merged" with a 2007 RPRR recommendation calling for creation of "disposal projects" for individual property groups, which could more efficiently deploy district resources and enhance the speed, effectiveness and accountability of the review process. The result was creation of district-specific Excess Land Disposal Contracts, which measure achievement of intermediate milestones on the way to attaining ultimate disposal goals.

The 2008 RPRR again confirmed several process axioms. RPRR committees are most successful when lead by district committee chairpersons of senior rank and extensive experience. Committee members with prior RPRR experience and a clear understanding of his/her duties are more competent and efficient. The advent of Excess Land Disposal Contracts provided program staff better direction and support by establishing a connection between RPRR analysis in which surplus real property is identified and actual disposal, which is staged in the district's Excess Land Disposal Contract. While separate and distinct activities, the district RPRR and Excess Land Disposal Contract are symbiotic; each is diminished and far less effective without the other.

## **METRICS AND ACCOUNTABILITY**

The most significant RPRR process enhancement since its inception is not actually part of the RPRR at all. Development of District Excess Land Disposal Contracts has provided the metrics, follow-through and closure the RPRR process lacked. Excess Land Disposal Contracts link RPRR evaluation to action and measurable outcome; a specific number of surplus parcels, many identified by the RPRR, will be designated excess within the year and are committed for disposal by district directors in signed contracts with the Department Director. District directors'

accountability for plan outcomes “motivates” his/her subordinate managers, and this motivation and accountability cascade down throughout each district sustaining functional focus on each metric and commitment to each outcome.

*At this point, one may consider the Department’s commitment to the RPRR universal.*

The joining of district RPRR outcomes to district Excess Land Disposal Contract commitments has been the genesis of renewed dedication on the part of district directors, deputies and senior managers to the RPRR. At this point, one may consider the Department’s commitment to the RPRR universal.

**RECOMMENDATIONS:**

- ⇒ *The Department will adopt property disposal cycle time goals consistent with the intent of Streets and Highways Code Section 118.6 (one year disposal of surplus real property).*
- ⇒ *District directors will appoint senior managers to chair RPRR committees, which will be actively supported by the district director and provided sufficient resources to adequately conduct the real property review and satisfy committee property disposal decisions.*
- ⇒ *The Department Director will use District Excess Land Disposal Contracts as the means for translating RPRR analysis into measurable outcomes.*

### **3. Lands and Buildings**

*Governor's Executive Order S-10-04 mandates annual property reviews.*

The Department is obligated by Governors' Executive Order S-10-04 to annually review its lands and buildings holdings and report inventory changes to the Department of General Services (DGS). The Department complies with this mandate in two ways; first, by reviewing its realty assets in the annual RPRR, and second, through maintaining a comprehensive lands and buildings database, the AMI, from which it reports real property inventory information. The AMI contains land and/or improvement records for approximately 1,600 Department facilities, which include, but are not limited to office buildings, warehouses, parking garages, transportation laboratories, equipment shops, maintenance stations, sand sheds, vista points, park-and-ride lots, transportation management centers, material or disposal sites, resident engineering offices, commercial vehicle enforcement facilities (CVEF) and roadside rest areas.

*District personnel are ultimately responsible for accurately maintaining all Department real property databases.*

#### **INVENTORY INTEGRITY**

Acknowledging delegation of management authority inherent in Departmental reorganizations of the late 1990's and the concurrent depletion of Asset Management resources, DD-21 R3 delegated principal responsibility for planning and managing real property assets to district directors in collaboration with headquarters deputies and division chiefs. In creating a partnership between districts and divisions, DD-21 R3 compelled district directors to operate through division managers, who, in concert with headquarters guidance, were to develop long term facility plans, inventory division or program real property holdings, and determine which realty assets are no longer needed to deliver Department projects or programs. District divisional or functional personnel also became ultimately responsible for accurately maintaining all Department real property databases: the AMI, the ELMS, the RWPS, and the ROWMIS.

*AMI information may now be accessed via the Intranet.*

Although affirmed the Department's "official" lands and buildings inventory in DD-21 R3 and assorted Director's memos, the AMI has only recently achieved the functional utility essential to a real property database of its kind. For years the AMI was maintained in a FoxPro database that allowed no data modifications, additions or deletions. Requests for a new enterprise database solution went unfulfilled due to lack of funding. In order to provide users a useful database that they could maintain, the AMI was converted to a FileMaker platform in 2006, which is a more functional, stable and robust application. The AMI now allows users access

***43% of Department facilities in the AMI that should possess improvement records still do not.***

to information via the desktop FileMaker software or through the Intranet.

Even with a new database platform, the AMI is still not being universally used or maintained. Past RPRR Annual Reports have noted AMI deficiencies in data integrity, but corrective action has been inconsistent and marginally successful. In 2007, it was estimated 70% of facilities that should be reporting structures data were not and about three-quarters of the structures data being reported was inaccurate or incomplete. While district staff was to have updated AMI facility and improvements information by the end of 2007, recent analysis reveals that 43% of Department facilities that should possess improvement records still do not. Those programs or divisions where compliance has been an issue are mobilizing resources to update AMI information.

***The most significant impediment to 100% inventory accuracy is ongoing resistance to use of the AMI by isolated district divisions or functions.***

The most significant impediment to 100% inventory accuracy is ongoing resistance to use of the AMI by isolated district divisions or functions. Since there are no plans to reconstitute the Asset Management function or create another Department entity to maintain facility-related information in the AMI, its viability and accuracy is no longer a function of technology, but one of will.

***The 2008 RPRR identified 21 Department facility assets, which were no longer required for departmental operations.***

#### **SURPLUS FACILITY ASSETS**

The 2008 RPRR identified 21 Department facility assets, which were no longer required for departmental operations. Of these, seven are being readied for sale: one safety roadside rest area, two park and ride lots and four maintenance station sites. Eleven of the remaining surplus facilities await environmental or technical clearances prior to disposal, which is likely to occur in 2009.

#### **RECOMMENDATIONS:**

- ⇒ Department divisions and districts will fully embrace their obligation to accurately inventory Department real property assets in the AMI.***
- ⇒ The Department will provide adequate resources to enhance and maintain the AMI.***

## **4. Excess Land Holds**

*The Department considers its latitude to define when or under what circumstances parcels become excess critical to efficient management of the Department's surplus property holdings.*

The Department does not consider "surplus" parcels excess until completion of administrative tasks required for disposal.<sup>3</sup> Because individual properties often present unique disposal challenges, the Department is permitted this discretion in defining when a parcel is "excess" by California Streets and Highways Code (SHC) Section 118.6.<sup>4</sup> Until ready for sale or other disposal, parcels remain on hold in ELMS. When ready for disposal, the Disposal Unit containing excess parcels changes to inventory category 1A, which signifies its availability. There are four ELMS "hold" categories into which real property assets may be placed before being classified as excess:

- 2A Engineering's request for possible right of way;
- 2B Sale to a public agency;
- 2C Administrative or legal reasons; and,
- 2D Environmental compliance or mitigation.

The Department considers its latitude to define when or under what circumstances parcels become excess critical to efficient management of the Department's surplus property holdings. Although realty may no longer be needed for project or program delivery, it may not yet be ready for disposal.

### **DISPOSED TO SUCCESS**

*Linking RPRR property disposition decisions to district directors' commitments in Excess Land Disposal Contracts converted analysis to action.*

The 2008 RPRR continued to reinforce the new property evaluation and disposal paradigms initiated during 2007. RPRR committees more fully embraced their parcel clearance and decertification authority, which dramatically accelerated surplus determination. Moreover, linking RPRR property disposition decisions to district directors' commitments in Excess Land Disposal Contracts was proving a great success converting analysis to action.

*A new attitude of assuming the negative prevailed.*

Policy changes in 2007 were also having other positive affects on reducing hold inventories. One example is limiting excess land holds for local public agencies to one year (ELMS Category 2B), which reduced the number of such holds to a handful of parcels.<sup>5</sup> The affect of this change was consistent with forging a new RPRR mindset fashioned by small changes occurring throughout the 2008 RPRR process. A new attitude of assuming the negative prevailed; parcels were now surplus and available for disposal

<sup>3</sup> To be considered excess, parcels must have a new deed, disposal map and an estimate of value, which may take from several weeks to several months to prepare.

<sup>4</sup> SHC Section 118.6: "The department shall, to the greatest extent possible, offer to sell or exchange excess real property within one year from the date that it is determined by the department to be excess."

<sup>5</sup> Year-by-year extensions may be granted on a case-by-case basis with payment of a deposit.

until Department divisions or functions or the Department's local agency partners satisfied the burden of proving the necessity of retention.

### **COMMITTING RESULTS**

*By the end of 2008, Excess Land Disposal Contracts between the Department Director and district directors will have been responsible for increasing the Department's annualized rate of property disposal by about 30%.*

The increased number of properties and accelerated pace of disposal is the result of resources and district management support provoked by the Director's Excess Land Disposal Contracts. By the end of 2008, Excess Land Disposal Contracts between the Department Director and district directors will have been responsible for increasing the Department's annualized rate of property disposal by about 30%. Disposal of 1,140 parcels during the contract period ending December 31, 2008 equates to an annualized disposal rate of 450 parcels per year, which exceeds the annualized 10-year moving average disposal rate by 100 parcels per year. Moreover, it will have reduced the average time parcels are held before disposal to slightly more than one year.<sup>6</sup>

*The Department can dispose of 98 parcels currently being held.*

District RPRR committees reviewed 647 parcels on hold in ELMS as of the beginning of January 2008. This was a reduction of 349 from the 996 on hold during the 2007 RPRR. Statewide, it was determined the Department can dispose of 98 parcels currently being held, which represented 15% of the ELMS "hold" inventory. Of the 548 parcels remaining on hold, 233 (42 percent) are being held for just four projects the disposal of which has been encumbered by local issues or legal concerns.<sup>7</sup> Additionally, districts continue to "hold" approximately 100 parcels for environmental mitigation, which further reduces the number of parcels available for potential disposal through 2009.

*Early identification of excess land parcels is critical to continued Department success at reducing its inventory of ELMS holds.*

As future Excess Land Disposal Contract intervals are modified to coincide with fiscal years, the Department is positioned to move beyond the requirements of SHC 118.6 to an environment where properties are not just made available for disposal within 12 months of being declared excess, but complete disposal within a year from being identified as surplus. Actions taken to shrink the Department's inventory of surplus property on hold are driving down the time required to administratively process parcels to a disposal-ready "excess" condition (ELMS Category 1A). This processing period, or "cycle-time," is approaching the point where newly identified surplus parcels can consistently be processed for disposal within discrete Excess Land Disposal Contract intervals. However, reducing cycle-time to accommodate surplus identification and disposal within the same fiscal year requires much better insight into future excess, which may exist within the

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<sup>6</sup> 14 months +/- 2 months for parcels acquired within the last five years.

<sup>7</sup> 44 parcels are being held for ALA-80, 65 parcels for ALA-238, 73 parcels for ALA-880, 51 parcels for SCL-87.

***RPRR committees should treat issuance of the certificate of sufficiency as the point in the project delivery process where excess land is identified for disposal.***

Department's real property portfolio. Early identification of excess land parcels is critical to continued Department success at reducing its inventory of ELMS holds.

Extending advancements in timely excess property disposal will require adopting procedures that anticipate the resources required to process and dispose of excess land as early as possible in the project cycle. Although project scope or complexity often introduces unpredictability (risk) into project delivery, RPRR committees should treat issuance of the certificate of sufficiency as the point in the project delivery process where excess land is identified for disposal, and Construction or Design must justify holding property beyond this point. Even as the Department reduces design re-work, project designers and managers will still want to hold property long after the project's certificate of sufficiency has been provided. However, none of these concerns should prevent future RPRR committees from insisting that issuance of the certificate of sufficiency serves as the new milestone for identifying excess land and initiating the administrative steps necessary for property disposal.

***During the 2008 RPRR, it became apparent the districts did not always know with certainty the number of parcels held for environmental mitigation purposes.***

#### **MITIGATION COUNTS**

During the 2008 RPRR, it became apparent the districts did not always know with certainty the number of parcels held for environmental mitigation purposes. This should have come as no surprise; the 2006 and 2007 RPRRs established that not all parcels acquired as, or that became environmental mitigation were being properly inventoried in ELMS as Category 2D holds and entered into the AMI as mitigation sites. While ELMS contained roughly 100 environmental mitigation parcels at the beginning of 2008, there was still concern this count did not reflect the entirety of Department holdings. Moreover, there was a continuing 10% discrepancy between the numbers of mitigation parcels reflected in ELMS and mitigation sites represented in the AMI.

***The Division of Right of Way and Land Surveys requested that the Division of Environmental Analysis conduct an independent district-by-district review of its parcel records***

In January 2008, the Department initiated an effort to reconcile its mitigation site inventory. The Division of Right of Way and Land Surveys requested that the Division of Environmental Analysis conduct an independent district-by-district review of its parcel records and submit its findings to the Division of Right of Way and Land Surveys. Without comparing what the responsible district program authority believed should be in the inventory against what actually was in the inventory, there could be no credible resolution. Improperly quantifying or qualifying Department mitigation parcel holdings adversely affects its real property reporting compliance and may impede property conveyance to external resource agencies. The review by the Division of Environmental Analysis is ongoing.

### **CONVEYING MITIGATION PROPERTY**

*There is consensus among district RPRR committees that binding “conveyance” agreements should be executed with “receiving agencies” before the Department acquires environmental mitigation property.*

In December 2000, the Department issued “*Improving Caltrans Environmental Planning, Management and Mitigation; Moving From Compliance to Stewardship*,” which was the final report of the Department’s Mitigation Process Improvement Team. Among the many recommendations contained in the report, one continues to have particular significance: convene a mitigation site conveyance team to develop agreements with resource agencies to accept mitigation properties prior to Department acquisition. The team was never formed, the Department still has no Department-wide strategy and districts continue to struggle with the problem of getting mitigation parcels out of the real property inventory because no agency can be found to accept the mitigation parcel(s). The problem plagues every district, and there is consensus among district RPRR committees that binding “conveyance” agreements should be executed with “receiving agencies” before the Department acquires environmental mitigation property.

*Little incentive exists for State departments, local agencies or non-profit conservancies to accept environmental mitigation sites.*

State and local agencies know the Department will not jeopardize project delivery because it cannot find a long-term “steward” for mitigation property. As a result, little incentive exists for State departments, local agencies or non-profit conservancies to accept environmental mitigation sites. Most are reluctant because Department parcels are often “stand-alone” properties (postage-stamp sites), which are more costly to manage and supervise than are larger contiguous tracts. For years, the Department has examined offsetting perpetual property-related supervision and management expenses through “endowments”, which were also addressed at length in the 2000 Environmental Stewardship report. Just as mitigation parcel conveyance at no cost acknowledges that value has been received in delivery of the project, endowments should be recognized as project-delivery costs, and treated accordingly. The issues surrounding mitigation parcel conveyance and endowment should be addressed in the route concept reports and freeway or cooperative agreements, which commit parties to a project.

### **ADMINISTERING PROPERTY ON HOLD**

*The RPRR process provides uniform parcel decertification and disposal guidance.*

The RPRR process provides uniform parcel decertification and disposal guidance, which has been an effective tool for administering or disposing of the significant majority property on “hold” in ELMS. However, the 2008 RPRR identified two issues that if properly addressed could lower the number of parcels on hold in the ELMS inventory, improve inventory clarity and free parcels for disposal: redefining hold characteristics for certain property classes in ELMS and targeting resources to long-held

***A number of parcels currently on hold in the ELMS do not meet the accepted definition of excess.***

***Parcels identified by Design for potential use in an uncompleted project may be held in ELMS for future use on that project.***

***“Hard nuts” are properties with administrative, political or technical impediments to disposal or environmental disposal costs cumulatively greater than their value.***

parcels with seemingly intractable technical or political impediments to disposal.

A number of parcels currently on hold in the ELMS do not meet the accepted definition of excess. While there are many nuances in the definition of excess, it broadly means a parcel is unneeded for any future Department program or project. Two particular parcel types within the ELMS are most troublesome in this regard, environmental mitigation parcels and parcels held by Design for use on a project different from that for which they were originally acquired. Environmental mitigation parcels are not truly surplus until ready for conveyance to a resource agency after project completion, which is subsequent to mitigation acceptance by the permitting agency. It was recommended during the 2008 RPRR that the Department remove environmental mitigation parcels from the active ELMS inventory and instead create “planning” parcels that could identify future workload. Parcels would remain in the RWPS as inventory associated with an existing project and their environmental character noted by special designation.<sup>8</sup>

Parcels identified by Design for potential use in an uncompleted project may be held in ELMS for future use on that project. However, Design often holds parcels on a completed project for use in a different project in the same corridor. While this is perfectly understandable and reflects sound business practice, the parcel(s) should not be held in the ELMS inventory. Since these parcels may be used in a future project and may or may not become surplus, it is appropriate that they refer to an active project Expenditure Authorization (EA), or an overhead EA if a project has not yet been approved, and are inventoried in the RWPS with a designation denoting their special status.<sup>9</sup>

Year after year, certain parcels remain in the ELMS inventory awaiting resolution of some intractable issue, which prevents disposal. These parcels, often referred to as “hard nuts”, are properties with administrative, political or technical impediments to disposal or environmental disposal costs cumulatively greater than their value, which have not yet been “cracked”. Resolving issues associated with these parcels requires resources over and above those typical for disposing of the significant majority of Department surplus real property. While recruiting district directors to settle sensitive local or regional political issues and breach obstructions to excess property disposal is often what is required to achieve closure on a troublesome issue, circumstances arise where a district may be unable to successfully resolve an issue on its own.

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<sup>8</sup> RWPS Use Code 12.

<sup>9</sup> RWPS Use Code 13.

One example illustrating this type of concern deals with properties acquired for State Route 86 in Imperial County (IMP-86). While fewer than 20 parcels, they represent almost 1,400 acres in the Department's ELMS hold inventory.<sup>10</sup> The initial land survey by the Federal Bureau of Land Management (BLM) was completed with significant lot-line and map reference errors. Estimated costs of rectifying survey errors were so high, the BLM chose to do nothing, thrusting the issue onto the State for resolution. The land in question is desert property of little value (less than \$500 per acre), the disposal costs of which are on average, without the surveying issues, ten times more than the land's value. To resolve the issue on its own, the district would need to redirect Right of Way Engineering staff away from project delivery-related tasks to resurveying IMP-86 tracts. Even then, Department maps would be at variance with Federal surveys, which could potentially expose the State to legal liability from prospective purchasers. Rather than incur these costs and risk adversely impacting project delivery due to resource redirection, the district could enlist headquarters' support to form a "project team" with FHWA and BLM to resolve the issue at the Federal level, where it rightly belongs.

**RECOMMENDATIONS:**

- ⇒ *Before acquiring environmental mitigation parcels, the Department will execute agreements defining the terms and conditions of parcel conveyance.*
- ⇒ *The environmental mitigation parcels will be inventoried in the ELMS as planning parcels and in the RWPS with a Use Code of 12 (and removed from the AMI).*
- ⇒ *By August 2008, the Division of Environmental Analysis will submit to the Division of Right of Way a statewide listing of all environmental mitigation parcels.*
- ⇒ *The Department will identify excess parcels at issuance of the certificate of sufficiency.*
- ⇒ *ELMS engineering hold parcels retained for use in future projects different than those for which originally acquired will be removed from the ELMS and inventoried in the RWPS with Use Code 13, which will signify their special status.*

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<sup>10</sup> Two parcels account for over 1,250 acres.

## **5. Parcels for Future Projects**

*Approximately 3,400 parcels acquired for use in transportation projects were evaluated during the 2008 RPRR.*

Approximately 3,400 parcels acquired for use in transportation projects were evaluated during the 2008 RPRR. While the ELMS inventory of parcels on hold was reduced by almost 350, from about 1,000 to 650 parcels, the number of parcels in the RWPS inventory, which reflects non-excess parcels, increased by a commensurate number. This is understandable given the Department's project delivery schedules; more parcels are being acquired and more are going out to projects. What becomes critical is tracking parcel velocity through the system – how long parcels stay in the inventory, which can be more a consequence of project design and local politics than Right of Way practices. Of 2,750 RWPS parcels reviewed in 2008, 215 were being used in, or staged for construction and about 130 had been sold or were subject to other disposal.

*60 percent of parcels currently held for future projects are associated with just 8 projects.*

Once again, 60 percent of parcels currently held for future projects are associated with just 8 projects. Of these, 40 percent (about 1,100) are being held for just four projects (Alameda 238, Los Angeles 710, San Mateo 1 and Tuolumne 108). Just under 1,700 parcels in this inventory are connected to “challenging” projects, which means local issues have kept several of them from construction for as long as 45 years. However, if one considers the balance of somewhat more than 1,000 parcels that remain in the inventory, approximately two-thirds of these will have been used in projects and will not be in the inventory for the 2009 RPRR. Until the sensitive and challenging issues are finally resolved for these “special” few projects, the Department will continue to release 750-800 parcels to projects each year, and the number of RWPS parcels in the inventory will exceed 2,400.

*Data anomalies represented only 2.2 percent of items reviewed during the 2008 RPRR.*

### **DATA INTEGRITY**

The discontinuous nature of the Department's real property databases continues to dictate the pace of improvement in property information quality, and it remains the primary impediment to efficient, error-free information exchange. While the quality of RWPS inventory information has made steady progress, data anomalies represented 4.5 percent in the 2007 RPRR and only 2.2 percent during the 2008, the majority of incorrect items were still parcels that remained active in the RWPS database because parcel and/or EA data from recently awarded or completed projects (award date, completion date, etc.) was not input, input improperly or erroneously provided to the RWPS from upstream databases like the Integrated Right of Way System (IRWS), the Project Management Control System (PMCS) or the Xpert Property

Management system (XPM). Updating information fields like “award date” removes parcels from RPRR consideration by moving RWPS parcel status from active to inactive. When information is not properly maintained in the project management databases, like PMCS or XPM, parcels for projects that have been awarded, moved to construction or completed continue to be erroneously reported in the RWPS.

### **MIS INFORMATION**

Management information systems (MIS) have been at the center of RPRR issues and opportunities since the Department-wide property review was first implemented in the mid-1990s. The RPRR process depends on data extracted from three separate Right of Way databases, which depend on data from at least two systems (PMCS, XPM) located in Project Management, and parcels cannot even be entered into Right of Way databases until set-up in a database controlled by Right of Way Engineering (IRWS). The considerable lack of clarity and precision manifest in this environment is a profound drag on performance and productivity.

No Department guidance explicitly articulates the relationships, roles and responsibilities for data input and system management of myriad interdependent databases, which identifies what is done, by whom and when. For example, there is no policy mandating that district Right of Way Engineering set-up parcels in the IRWS (now ROWMIS). But, without assignment of responsibility, there is no guarantee that district Right of Way Engineering ROMIS/IRWS parcel-creation activities will occur, and they often do not. If Right of Way Engineering does not set-up parcels in ROMIS/IRWS, they cannot be set-up in RWPS or ELMS. One quickly sees how the impacts of unperformed tasks can cascade through the Department to adversely affect the performance of other functions.

The issues are well known and potential solutions have been identified. Once again, taking corrective action is a matter of resolve, but only by expending the effort can the Department hope to approach error-free MIS.

*The RPRR process depends on data extracted from three separate Right of Way databases.*

*No Department guidance explicitly articulates the relationships, roles and responsibilities for data input and system management of myriad interdependent databases.*

### **RECOMMENDATIONS:**

- ⇒ *The Department will issue and enforce policies defining the roles and responsibilities of functions entering, revising, removing or otherwise maintaining information in real property databases.*

## **6. Continuous Improvement**

*The 2008 RPRR was the latest example of the Department's determination to undertake the organizational change needed to realize the full potential of the process.*

*The 2008 RPRR was possibly the most effective ever, receiving more institutional support than any of the previous reviews.*

*Use of the Discoverer database management tool and electronic GIS parcel mapping, could, if widely supported and effectively used, raise Department performance to the next level.*

Improvement in any organization is typically incremental. It is only achieved through regular objective examination and enhancement of internal processes. The 2008 RPRR was the latest example of the Department's determination to undertake the organizational change needed to realize the full potential of the process. From the Department Director's renewed commitment to the RPRR process in 2006 through implementation of District Excess Land Disposal Contracts in 2007 to the inventory reductions and accelerated parcel disposals in 2008, the RPRR has revived management of the Department's real property portfolio; the RPRR has promoted proactive management, strengthened communication, and encouraged operational efficiency.

The 2008 RPRR was possibly the most effective ever, receiving more institutional support than any of the previous reviews. Not that everything was perfect; examples of deficient property descriptions, parcel/construction segment locations, descriptive comments or post-RPRR action plans could still be found. But, more than ever before, overall data integrity improved, the RPRR was taken more seriously and district RPRR analyses more consistently and successfully addressed important concerns: location, use, actions, timing, and responsible party. Moreover, following-through on tasks and deliverables driven by metrics identified in 2008 post-RPRR action plans was essential to districts meeting Excess Land Disposal Contract milestones and deliverables.

Two significant innovations in the 2008 RPRR, use of the Discoverer database management tool and electronic GIS parcel mapping, could, if widely supported and effectively used, raise Department performance to the next level by strengthening data integrity, accelerating real property review, enhancing decision-making and improving portfolio management. The Discoverer database tool is an Oracle software application that allows Department staff to easily query existing legacy systems (ELMS, RWPS) and extract information. Rather than hand-push data that may be days or weeks old, Discoverer allows staff to access data reflecting changes through the previous night, which allows immediate confirmation of data accuracy and tracking of property disposal milestones. Furthermore, Discoverer bridges discrete RPRR lists in an effort to manage property inventories across legacy platforms and align RPRR-provided information with district Excess Land Disposal Contract expectations.

***Integrating Department parcel and project maps with Internet GIS capabilities was one of the most profound RPRR process enhancements since the program's inception.***

Integrating Department parcel and project maps with Internet GIS capabilities was one of the most profound RPRR process enhancements since the program's inception. In a series of independent, yet conceptually related innovations, several district Right of Way Engineering units digitized data from individual parcel and project maps for RPRR properties and linked the information to geospatial references on the Internet. Parcel maps were superimposed over aerial photographs of parcels, which allowed property to be more quickly, easily and thoroughly evaluated. This one change accelerated parcel review by as many as three weeks because RPRR committee members no longer had to wait for paper maps to be produced, copied, and distributed. Moreover, RPRR committee members' ability to view additional parcel-related information such as three-dimensional topography or surrounding property development or use dramatically improved decision-making.

***In order to reduce the RPRR to as short a time-cycle as possible, the Department needs to commit the resources needed to establish statewide administrative and electronic data formatting policies.***

In order to reduce the RPRR to as short a time-cycle as possible – some would say 8 weeks or less is a reasonable expectation - the Department needs to commit the resources needed to establish statewide administrative and electronic data formatting policies in functional manuals for digitizing district parcel and project map inventories and linking them to intranet GIS resources. It is imperative that guidance addresses the roles and responsibilities of parties providing electronic parcel data, adding new parcel maps to the database upon property acquisition or removing parcel maps from the database upon property conveyance. Additionally, Department should issue guidelines identifying the DRS as the Department's central map repository, which will standardize the warehousing and retrieval of map-related information.

**RECOMMENDATIONS:**

- ⇒ The Department has begun and will continue to train Division of Right of Way and Land Surveys staff to use the Discoverer database management tool to better manage real property inventories and establish database quality control procedures, which ensure data integrity.
- ⇒ The Department will establish statewide administrative and electronic data formatting policies in functional manuals for digitizing district parcel and project map inventories and linking them to internet GIS resources.
- ⇒ The Department will issue guidelines identifying the DRS as the Department's central map repository, which will standardize warehousing and retrieval of map-related information.

**Attachment A**

2008 REAL PROPERTY RETENTION REVIEW

DISTRICT SUMMARIES

**2008 Annual Report  
Real Property Retention Review Committee  
District 1**

District Director: Charles C. Fielder  
RPRR Committee Chair: Janel D. Tarczy

District 1's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory

The list contains three (3) properties: the former Klamath and Weitchpec Maintenance Stations. These parcels are currently under lease. The Klamath Maintenance Station is also included in List 2. Cultural studies for both Maintenance Stations will be accomplished through the Klamath Grade Project. When environmental clearance is obtained for the Maintenance Stations, the Department will continue in the necessary steps to sell them. The remaining parcel, a Park & Ride lot, was added to the list during the RPRR. The Committee cleared this parcel to be sold. Excess Land will request environmental clearance and initiate the other steps necessary to sell the parcel.

Excess Land Holds

There are six (6) entries in this report. Two (2) of the entries are for properties that have been cleared for sale and are scheduled in the 2008 Excess Lands Sales Contract. One (1) parcel is the former Klamath Maintenance Station discussed above. The remaining four (4) parcels are on various holds for the upcoming year.

Property Held for Unawarded Future Projects

There are forty-six (46) parcels included in the six (6) entries in this report. All forty-six (46) parcels are recommended for continued hold for unawarded projects.

Property Held for Future Projects Incorporated Into the Right-of-Way

There are five (5) entries on this list. One (1) entry will remain; geotechnical reviews are needed to determine slope stability in the area. The remaining four (4) parcels are duplicate entries and are presented elsewhere in the report. The 2007 RPRR Committee and the 2008 RPRR Committee recommends removal of these parcels from List 4.

  
\_\_\_\_\_  
CHARLES C. FIELDER  
DISTRICT DIRECTOR

*March 11, 2008*  
\_\_\_\_\_  
DATE

2008 Annual Report  
Real Property Retention Review Committee  
District 2

District Director: Brian Crane  
RPRR Committee Chair: Janel D. Tarczy

District 2's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

### **Summary of Significant Issues**

#### Lands and Buildings Inventory

The list contains two (2) properties. The Old Buckhorn Maintenance Station Employee House needs to be held until a project is completed that will change the drainage on the facility and separate out the State right of way drainage from the facilities drainage. The property will be leased until construction is completed. The property will be evaluated for sale at that time. The Newell Maintenance Station is currently under lease with the National Park Service and it is the desire of all parties to transfer the property to the Bureau of Land Management once we have obtained US Congressional approval, special resource studies, and environmental studies. It is estimated to take approximately 3-5 years should the US Congress approve the completion of the special resource study. The RPRR Committee recommends that the Department continue pursuing this transfer.

#### Excess Land Holds

There are thirteen (13) disposal units in this report encompassing eighteen (18) parcels. One (1) disposal unit is on the 2008 Excess Land Sales contract. Two (2) disposal units are contained on List 1 and are duplicated in this list. The remaining ten (10) disposal units will remain on various holds.

#### Property Held for Unawarded Future Projects

There are four (4) parcels included in this list. All four (4) have erroneously been reported in the Property Management System and as a result have appeared in this list. The RPRR Committee recommends that the Property Management System be corrected and that all four (4) parcels be removed from List 3.

#### Property Held for Future Projects Incorporated Into the Right-of-Way

There are two (2) entries on this list. The RPRR Committee recommends that two (2) of the entries be studied further to determine if there is any excess land. One (1) entry needs to be held until a drainage study has been completed to determine if the land is needed by the Department or not. The one (1) remaining entry requires a survey to be completed to determine if there is any excess; it is the Department's desire to work with the county and city to transfer any excess over for a bike/pedestrian walkway.

  
BRIAN CRANE  
DISTRICT DIRECTOR

March 13, 2008  
DATE

**2008 Annual Report  
Real Property Retention Review Committee  
District 3**

District Director: Jody Jones  
RPRR Committee Chair: Janel D. Tarczy

District 3's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory

The list only contains one (1) facility, the closed Williams Maintenance Station. The parcel is on the 2008 Excess Land Sales Contract.

Excess Land Holds

There are thirty-seven (37) entries in this report. Of which, eight (8) are a part of the 2008 Excess Lands Disposal Contract. Fourteen (14) are a part of the Live Oak/Gridley Bypass. This route was rescinded by the CTC in December but the parcels cannot be sold for two years pending the local government agencies having a first right of refusal. Six (6) parcels were part of the Placerville Operations Project and the Department will pursue clearing through a direct sale with the City of Placerville or to the adjoining property owners. The remaining nine (9) parcels are under various holds.

Property Held for Unawarded Future Projects

There are ninety-six (96) parcels included in the twenty-seven (27) entries in this report. Seven (7) entries are for projects that are currently in construction, entries should fall off of List 3. Four (4) of the entries are leases of operating right of way, and should be removed from List 3. Property Management has been notified. Two (2) are for properties in Downville; Planning is working on a relinquishment to transfer ownership to the County. Five (5) are for parcels owned at the intersection of Hwys 99 and 20 that are being held in conjunction with the City's General Plan and SACOG's long term plan. Four (4) are for addition parcels encompassing the Live Oak / Gridley Bypass as discussed above. The remaining 5 entries are being held for future projects (Lincoln Bypass, SUT 70 widening, etc.).

Property Held for Future Projects Incorporated Into the Right-of-Way

There are two (2) entries on this list. One (1) contains an RE office and should be removed from the list. The other should be removed from the list as it is on List 2.

  
\_\_\_\_\_  
JODY JONES  
DISTRICT DIRECTOR

3/21/08  
DATE

2008 Annual Report  
Real Property Retention Review Committee  
District 4

District Director: Bijan Sartipi  
RPRR Committee Chair: R.A. Macpherson

District 4's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory (List 1)

The District identified four (4) operational facilities in the Lands and Building inventory. The Ettie Street Maintenance Station is closed and cannot be used until hazardous materials are cleaned up. With the completion of construction of the new South Oakland Maintenance Station, scheduled for October 2009, the Department will be able to close and dispose of both the old South Oakland Maintenance Station and the Hayward Maintenance Station. The former South San Francisco Maintenance Station site has been identified for sale. The District is working with the City of South San Francisco and SamTrams on a joint venture project to relocate the existing Caltrain station to a portion of the former South San Francisco Maintenance Station site.

Excess Land Holds (List 2)

The District has 406 parcels in the Excess Lands Hold Inventory in ELMS. Of the 406 parcels, 139 are being held for Engineering purposes, 43 for Public Agencies, 195 for Administrative or Legal reasons, 26 for Environmental Clearance or Environmental Mitigation. Unplanned parcels for sale in 2008 include: One (1) parcel sold, One (1) parcel currently optioned for sale and One (1) parcel ready for sale. Within the Excess Land Hold category 28 have been identified for sale in 2009 and Seven (7) to be incorporated into the right of way.

Property Held for Unawarded Future Projects (List 3)

The District has 728 parcels purchased for future projects. Of these 728 parcels: One (1) is In Use, 10 parcels are identified for sale in 2008 and are included in the 2008 Delivery Plan, Four (4) parcels are identified for sale in 2009, Seven (7) parcels are being administratively removed from the database, and 706 are being held for future projects. A majority of the parcels being held for projects are on Ala-238, Mm-101, and SM-1.

Property Held for Future Projects Incorporated Into the Right-of-Way (List 4)

The District identified four (4) areas of extra-wide operating right of way and is investigating with Design and Transportation Planning for their ultimate disposition.

  
BIJAN SARTIPI  
District Director

3-27-08  
Date

2008 Annual Report  
Real Property Retention Review Committee  
District 5

District Director: Richard Krumholz  
RPRR Committee Chair: Jamie Lupo

District 5's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, and Asset Management worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory

No Holdings of this kind were identified in the District.

Excess Land Holds

There are twenty-one (21) Disposal Units comprised of twenty-four (24) parcels. Eight (8) Disposal Units with (8) eight parcels will continue to be held for Environmental purposes. Four (4) Disposal Units with six (6) parcels are to be held for project purposes. Nine (9) Disposal Units with ten (10) parcels will require administrative action for incorporation into a new project EA and/or relinquishment.

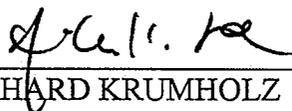
Property Held for Unawarded Future Projects

There are six (6) Disposal Units comprised of thirty-eight (38) parcels being placed on hold for future unawarded projects.

Property Held for Future Projects Incorporated Into the Right-of-Way

There are four (4) Disposal Units comprised of twenty-four (24) parcels being placed on hold for future projects incorporated into the right-of-way.

District Director Approval

  
RICHARD KRUMHOLZ

3/27/08  
DATE

2008 Annual Report  
Real Property Retention Review Committee  
District 6

District Director: Malcom Dougherty  
RPRR Committee Chair: Jamie Lupo

District 06's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory

Item 1 on the List 1-Surplus Lands and Building Inventory is presently in use by Maintenance. Maintenance would like this property off List 1, due to the continue use for Caltrans operational needs.

Excess Land Holds

There are fifteen (15) Disposal Units comprised of fifteen (15) parcels. Eight (8) disposal units with eight (8) parcels will continue to be held for future projects. Four (4) disposal units with four (4) parcels are to be sold this year and are on the 2008 Director's Excess Land Disposal Contract. Two (2) disposal units with two (2) parcels are to be sold in 2009. One (1) disposal unit with one (1) parcel will be incorporated into the right of way.

Property Held for Unawarded Future Projects

There are thirty-six (36) Disposal Units comprised of three hundred one (301) parcels. Six (6) Disposal Units with eighty-four (84) parcels are presently in use for operational needs. Twenty-seven (27) Disposal Units with two hundred thirteen (213) parcels are being held for future projects. Two (2) Disposal Units with two (2) parcels have been sold. One (1) Disposal Unit with two (2) parcels require administrative action.

Property Held for Future Projects Incorporated Into the Right-of-Way

Three (3) disposal units with four (4) parcels are to be held for Caltrans operational needs.

District Director Approval

  
MALCOM X. DOUGHETRY

3/27/08  
DATE

2008 Annual Report  
Real Property Retention Review Committee  
District 7

District Director: Doug Failing  
RPRR Committee Chair: Richard Chiang

District 7's District Director supports the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R3.

### **Summary of Significant Issues**

#### **Lands and Buildings Inventory**

Six (6) facilities were reviewed by the District. One facility will be utilized for District's operational needs. Five (5) facilities were identified as surplus to the District's operational and project needs. The committee recommended to conditionally retain 1 facility and dispose 4 of the 5 surplus facilities.

The facility that will be utilized by the District is the former Moorpark Maintenance Station. Division of Construction will be utilizing the facility as a Resident Engineer's Office.

The facility that the District is conditionally retaining is the Route 105/Vermont Avenue Park & Ride (P&R) West. This P&R is under utilized and is surplus to the District's operational and project needs. However, this facility is not cleared for disposal due to requirements of the Route 105 Consent Decree. District Legal Division advised that a formal court dismissal, specifically for the P&R requirement, is needed before the facility can be disposed.

Four (4) facilities are recommended for disposal consisted of 2 P&Rs and 2 maintenance stations. Route 105 Hawthorne Boulevard P&R has been sold and Route 105 Wilmington P&R is committed for sale in the District's Contracted Delivery Plan. Arroyo Seco Maintenance Station is recommended for administrative action as the rights to this property contain a reversionary clause to City of Los Angeles. Boyle Avenue Maintenance Station is committed for sale in the District's Contracted Delivery Plan.

#### **Excess Land Holds**

District reviewed 41 disposal units (63 parcels) that have been placed on hold status per 2008 RPRR List 2.

Two (2) disposal units (4 parcels) are committed for sales in the 2008 Delivery Plan and 4 disposal units (4 parcels) are cleared for sales.

2007 Annual Report  
Real Property Retention Review Committee  
District 7

It is recommended to conditionally retain 34 disposal units (52 parcels). Out of the total number of retained disposal units, 39% (16 disposal units/18 parcels) are linked to Route 710. These disposal units were retained either due to the South Pasadena Law Suit or being held due to not having a final environmental document for the Gap Closure Project. The remaining disposal units are being retained predominantly due to environmental and hazardous waste matters.

The committee recommended to re-incorporate 1 disposal unit (3 parcels) as it is within the proposed footprint of the Route 710 Expansion Project (EA# 07-249900).

**Property Held for Unawarded Future Projects**

This report segment is comprised of 17 Expenditure Authorizations (EAs) containing 479 parcels.

Seven (7) construction contracts are currently in progress in which 27 parcels are in use. The District will follow-up on the disposition of these parcels upon the completion of the construction contracts.

There are 432 parcels being held in this report segment for 4 future projects. Of these held parcels, 416 parcels (96%) are committed to the I-710 Extension Project in Los Angeles County.

There are 6 completed construction projects listed, RWMS will be updated accordingly.

**Property Held for Future Projects Incorporated Into the Right-of-Way**

A vacant parcel located in the vicinity of Route 405 Post Mile 16.5 was identified and reviewed. This property is located in the southeast quadrant of Artesia Boulevard and Prairie Avenue in the City of Torrance in Los Angeles County, and is bounded by the southbound Route 405 on-ramp on the northeast. This parcel was previously declared excess (DD 056058-01-01) and subsequently re-incorporated back into the right of way for a proposed P&R project. Due to oppositions from the local community and elected officials, the proposed P&R project was abandoned. It is determined that this property is not needed for any future project or District's operations. The committee recommended to dispose this property.

  
\_\_\_\_\_  
DOUG FAILING  
DISTRICT DIRECTOR

4/9/08  
\_\_\_\_\_  
DATE

**2008 Annual Report  
Real Property Retention Review Committee  
District 8**

District Director: Michael Perovich  
RPRR Committee Chair: Martin Tatera

District 08's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

List #1 – Surplus Lands and Buildings Inventory

No properties/facilities of this type in District 08.

List #2 – Excess Land Holds

13 parcels were reviewed of which 9 parcels are to remain on hold, 0 to be disposed of, 4 parcels to be sold, 1 parcel is in use, 0 parcels to be incorporated into the right of way, and 0 parcels require administrative action by district personnel.

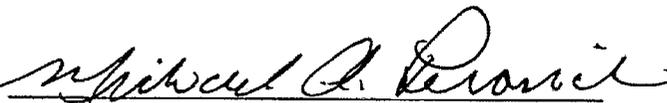
List #3 – Property Held for Unawarded Future Projects

79 parcels were reviewed of which 57 parcels are to remain on hold, 1 parcel is to be sold/disposed of, 0 parcels have been sold, 23 parcels are in use, 0 parcels to be incorporated into the right of way, and 19 parcels require administrative action by district personnel.

List #4 – Future Project Parcels Incorporated Into the Right-of-Way

No properties/facilities of this type in District 08.

District Director Approval

  
MICHAEL A. PEROVICH

2008 Annual Report  
Real Property Retention Review Committee  
District 9

Date: April 16, 2008

District Director: Tom Hallenbeck  
RPRR Committee Chair: Nancy Escallier

District 09's District Director supported the efforts of the RPRR Committee. Meeting and committee members worked closely to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

We held our meeting on Wednesday February 27, 2008. In attendance where; John Fox, Sr. TE Mtc Engineering; Tom Hallenbeck, District Director; Suzanne Carter, Business Services & Facilities Manager; Tom Dayak, Chief Eastern Sierra Environmental Branch; Nancy Escallier, Sr. RW Agent; John Beischel RW Engineering; Lora Rischer, RW Agent; and, Linda Weier, DDD Administration.

### Summary of Significant Issues

- 1) Lands and Buildings Inventory:** The 2007 Lands and Building Inventory sheet was not changed during the 2008 meeting.
- 2) List 1 – Surplus Lands and Buildings Inventory:** No holdings of this kind were identified in the district.

2008 Annual Report  
Real Property Retention Review Committee  
District 9

**3) List 2 - Excess Land Holds, pulled from the Excess Land Management or ELM system (excess land being held before selling):**

- a) DD 000450-02-01, Inyo 190. Was identified as needing to stay in a 2-D Hold Status. Hold Request documents updated and sent to the Excess Land Section, Fresno Office.
- b) DD 003153-01-02, Kern 58. The D-9 Mtc Crews are responsible for maintaining this parcel so Tom Hallenbeck needs to be updated as to the status of this parcel. Hold type to remain as OPT ; the Option Agreement is still in litigation.
- c) DD003405-01-01, Kern 202/Tehachapi Blvd. This strip of land is required for access purposes by D-9 Mtc Dept. It is used to inspect the Hwy 202 over-crossing of the RR. This parcel should be incorporated back into the operating right of way and should drop off this list in the future. On 3/26/07 Excess Land Branch took parcel out of the ELM system. We have requested memo from Mtc so that RW Engineering has record of said request to change the rw record mapping.
- d) DD003304-01-01, Kern 58 (one of the 46 noted Hwy 58 Bypass Disposal units, containing 1 parcel). This parcel has been identified by D-9 Maintenance Dept. as being needed for their purposes, per the clearance performed by Excess Land Branch 11/2006, and should be incorporated back into operating right of way, dropping off of this list in the future. On 2/27/08 Excess Land Branch took parcel out of the ELM system. We have requested memo from Mtc so that RW Engineering has record of said request to change the rw record mapping.
- e) DE 005767-01-03, Mono 203. This parcel was the easement portion and it was sold and deed recorded 1/18/06. Excess Land Branch has updated this parcel info in ELMS, it should not show up on the 2009 lists.
- f) DD 005767-01-02, Mono 203. This parcel was the underlying fee portion and it was sold and deed recorded 10/2007. Excess Land Branch has updated this parcel info in ELMS, it should not show up on the 2009 lists.

**4) List 3 - Property Owned by the State (state is owner of record) being Held for Unawarded Future Projects, pulled from the RW Property Management or RWPM system:**

- a) Under project EA 09-280101 "Topaz/Larson Lane Turn Pockets/Lanes" one parcel has been identified -- 3752, as being owned by the State (recorded deed). To date this project should go to Construction in Spring/Summer 2009. This parcel is "In use".
- b) Under project EA 09-214801, now EA 2144u1 "Indy-Manzanar 4-lane" one parcel has been identified -- 3811, as being owned by the State (recorded deed). This project has been certified by RW and should go to Construction in Summer/Fall 2008. This parcel is "In use".

2008 Annual Report  
Real Property Retention Review Committee  
District 9

5) List 4, for District awareness purposes, - Property in the RW Which is Possibly Not Needed or which is being Held for Future Projects or which could be Incorporated Into the Right-of-Way:

We reviewed the 4 East Kern, Hwy 58, parcels identified in 2006 and 2007 reports (3149-1, 3153-1, 3154-1, and 3411-1).

a) It was identified that Parcel 3154-1 could have excess. John Beischel in D-9 RW Engineering will work out a map depicting what the State needs to keep for hwy purposes and what can actually be conveyed as excess. This will then go to Excess Lands Branch, Fresno Office, for proper handling.

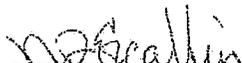
b) It was identified that Parcel 3411-1, purchased for the Mojave Bypass project, now has a current "reseeding" type project on it, under EA 06-OE3700. So it remains active and "in use" at this time and should become excess once the revegetation work is completed.

c) It was identified that the status of both Parcel 3149-1 and 3153-1 cannot be declared excess at this time. Tom Hallenbeck would like to be kept in the loop on the status of these 2 parcels because D-9 Mtc Crews are responsible for them, and they should become excess once revegetation work is complete.

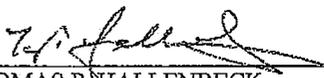
d) It was identified that we did not know the status of parcel 3676. Tom Hallenbeck wants to be kept informed of all parcels that D-9 Mtc Crews are responsible for. As noted in the 2007 RPRR Report: "Kern 14, Parcel 3676 has been identified as being purchased just for drainage purposes and needs to be placed on List 4. Parcel 3676 also needs to be re-engineered to capture the exact areas of the parcel that are required for drainage. What remains would therefore be excess to the project and could be sold. It is requested that a portion of this parcel be decertified." Nancy Escallier will initiate this process for 2008.

e) It was identified that Parcel 5001 (easement), DWP as fee owner, is too large for our needs with the upcoming 4-lane project EA 09-2144u2 "Indy-Manzanar". A portion of the easement was decertified during the RPRR Meeting and will be disposed of. RW Engineering, Jeff Thompson, will process and update rw record maps.

Recommended by:

  
\_\_\_\_\_  
NANCY ESCALLIER date  
Field Office Chief, Right of Way  
Central Region - Bishop Office

District Director Approval:

  
\_\_\_\_\_  
THOMAS P. HALLENBECK 4/23/08  
District 9 Director date

2008 Annual Report  
Real Property Retention Review Committee  
District 10

District Director: Kome Ajise  
RPRR Committee Chair: Michael Rodrigues

District 10's District Director supported the efforts of the RPRR Committee. Right of Way Excess Lands, Property Management, Asset Management and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2.

**Summary of Significant Issues**

Lands and Buildings Inventory

Item 1 on the List 1-Surplus Lands and Building is being placed on Environmental hold. Item 2 is being submitted for clearance and to be sold in 2009.

Excess Land Holds

There are two (2) Disposal Units comprised of two (2) parcels to be sold in 2008.

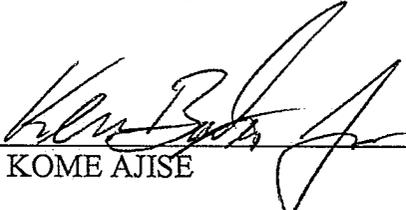
Property Held for Unawarded Future Projects

There are thirty-six (36) Disposal Units comprised of three hundred nine (374) parcels. Thirty-one (31) Disposal Units with three hundred fifty four (354) parcels are presently being held for future projects. Two (2) Disposal Units with three (3) parcels are to be sold in 2009. Four (4) Disposal Units with seventeen (17) parcels require administrative action.

Property Held for Future Projects Incorporated Into the Right-of-Way

There are two (2) disposal units with twenty-four (24) parcels. One (1) Disposal Unit with twenty-three (23) parcels is being held for co-operative agreement with City of Los Banos. One (1) Disposal Unit with one (1) parcel to be sold in 2009.

District Director Approval

  
KOME AJISE

3/27/08  
DATE

**2008 Annual Report  
Real Property Retention Review Committee  
District 11**

District 11 Director: Pedro Orso-Delgado  
RPRR Committee Chair: Janet Schaffer, Deputy District Director Right of Way

**Summary of Significant Issues**

**LIST 1 SURPLUS LANDS AND BUILDINGS INVENTORY**

The Ramona and Bostonia Maintenance Stations remain on List 1: Bostonia due to necessary remediation efforts and Ramona for its strategic location relative to critical emergency staging purposes. D-11 continues to work with the County of San Diego to find an alternate staging site in Ramona, but none have been identified at this time. An appraisal is currently underway with the expectation that negotiations will continue.

**EXCESS LAND HOLDS**

The RPRRC reviewed 48 parcels. Eleven parcels were used on the SR 94 project and have been incorporated into the right-of-way. Two parcels and one slope easement are to be decertified and sold, and another 13 parcels are existing and/or proposed mitigation holds. Of the remaining parcels, 13 relate to the continuing title/survey issues on IMP 86. The RPRRC agreed that R/W Engineering would review the locations to determine if any should be held for future development and dispose of the remainder by selling to the adjoining owner(s). Quitclaim deeds would reference the title problem and carry a caveat regarding the property line disparity. While it will take approximately four months to review and possibly another six for appraisals, the RPRRC is pleased to report that an action plan is in place.

**PROPERTY HELD FOR UNAWARDED FUTURE PROJECTS**

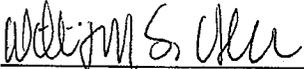
The RPRRC reviewed 24 project EA's consisting of 453 parcels. All are valid project holds with the exception of 43 parcels held for SR 54. While this route/project was dropped by the City of El Cajon, the County of San Diego has indicated they want to include it in the 2020 General Plan. It is not, however, in the existing RTP. D-11 will continue to work with the County regarding the disposition of these parcels.

**SUPPLEMENTAL**

In addition to reviewing the above listed properties, D-11 utilized the RPRR process to expedite the disposition of a significant excess land parcel: the Town and Country Mobile Estates:

Purchased as part of the SR 52 Extension project, this is a low income Mobile Home Park located in Santee, CA. All affected residents have been relocated. The South Remainder is vacant land (2.89 acres) that will not be used for the project. Agencies will receive a 60 day notice to purchase for low cost housing, followed by a public auction (if no agency interest) later in the year (September through December 2008). Reconfiguration for sale will be completed in December, and utility concerns will be addressed prior to sale. Gary Rinehart is the contact for the disposal and marketing plan.

**FINAL DISPOSITION:** The RPRR Committee agreed to sell the South Remainder. No opposition noted.

  
\_\_\_\_\_  
Pedro Orso-Delgado  
DISTRICT DIRECTOR

28 MARCH 08  
DATE

2008 Annual Report  
Real Property Retention Review Committee  
District 12

District Director: Cindy Quon  
Committee Chair: Jim Beil

The District 12 District Director supports the efforts of the Real Property Retention Review Committee (RPRR). Right of Way Excess Lands, Property Management, Asset Management, Right of Way Engineering, and Land Surveys worked closely and in full cooperation with RPRR Committee members to comprehensively review the District's real estate portfolio and fully comply with the intent of Deputy Directive 21 R2. The Orange County Transportation Authority (OCTA) participated in discussions of all identified properties.

### **Summary of Significant Issues**

#### Lands and Buildings Inventory

There are no Lands and Building Inventory identified for disposal in 2008.

#### Excess Land Holds

There are no Excess Land Holds identified for disposal in 2008.

#### Property Held for Unawarded Future Projects

There are two properties to be held for Unawarded Future Projects in 2008.

- F 1839-4, Triangular parcel of operating right of way between Imperial Highway (SR-90), the Riverside Freeway (SR-91), and the Santa Ana River.

*A portion of the parcel will be needed for SR-91 CMIA project widening, landscaping and a possible storm water treatment facility. To be reassessed next year after the highway widening environmental document is prepared.*

- F 1839-5, Triangular parcel of operating right of way along eastbound SR-91 and the SR-90 to eastbound SR-91 on-ramp - next to Caliber Motors.

*A portion of the parcel will be needed for SR-91 CMIA project widening, noise wall, landscaping and a possible storm water treatment facility. To be reassessed next year after the highway widening environmental document is prepared.*

2008 Annual Report  
Real Property Retention Review Committee  
District 12

Property Held for Future Projects Incorporated Into the Right-of-Way

The attached "List 4 - Future Project Parcels in R/W" identifies two properties in existing operating right of way with active hold requests as follows:

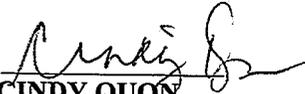
- F-1622-12, Operating right of way at the old off-ramp from northbound SR-55 to Lincoln Avenue.

*The District will map with appropriate easement reservations and process for clearance and sale.*

- F-1612-2, Operating right of way between Newport Blvd. (SR-55), Pacific Coast Highway (SR-1), and Old Newport Blvd. Parcel is improved with a concrete paved parking lot that was formerly leased under the air space lease program.

*The District will map with appropriate easement reservations and process for clearance and sale.*

**District Director Approval**

  
CINDY QUON

4-1-08  
Date

**Attachment B**

2008 REAL PROPERTY RETENTION REVIEW

RPRR POLICY GUIDANCE

## Real Property Retention Review Guidelines

### 1 – Information Gathering

To meet Real Property Retention Review Committees' (RPRRCs') needs, data about the Department's real property portfolio is extracted from several sources:

1. The Asset Management Inventory (AMI) lists the Department's Lands and Buildings holdings;
2. The Right of Way's Excess Lands Management System (ELMS);
3. The Right of Way's Property System (RWPS);
4. The Integrated Right of Way System (IRWS);
5. The prior year's RPRR reports; and,
6. Review of project histories and Right of Way route maps.

Extracted information is refined into reports distributed for review by district divisions:

- List 1 identifies surplus Lands and Buildings holdings (subsequent to AMI review);
- List 2 catalogs environmental mitigation sites and conditionally retained real property;
- List 3 identifies real estate interests associated with as-yet unawarded future projects, and,
- List 4 identifies parcels for proposed (unfunded) projects where land has been incorporated into operating R/W.

### 2 – Determining Status; “In-Use” or “Not In-Use”

The RPRRC chairperson distributes inventory information and process instructions to each district division (via e-mail or RPRRC meeting). The RPRRC chairperson and district functional managers review the properties in each of the inventories to determine if properties are “In-Use” or “Not In-Use”. Steps 3 and 4 explain in greater detail the process for establishing “Use”.

### 3 – Properties “In-Use”

During the annual RPRR, each district division reviews parcels in its sub-set of the real estate portfolio to verify that intended “uses” support Department goals, division strategies or district plans within the context of the district's 20-year corridor and facility master planning horizons. The RPRRC constantly attempts to identify incentives for redirection, exchange or disposal of surplus, underused or nonconforming real estate holdings.

Property is considered “In-Use” if it meets any of the following criteria:

1. *The property provides or supports transportation services.*  
This category of “In-Use” property rarely converts to “Not In-Use” status. However, to the extent that property “In-Use” for transportation purposes turns out to be no longer used, it should be identified as such and reclassified as “Not In-Use”.
2. *The property provides or supports facilities for employees, equipment, or materials.*

The Department owns over 1,600 different properties that provide facilities for the traveling public, employees, equipment or materials. Many different types of events occur that can change the status of these properties from "In-Use" to "Not In-Use"<sup>11</sup>. For example;

- Consolidation within functional operations
- Consolidation between functional operations
- New facilities acquired to replace old facilities
- Department policy reduces or eliminates the need for the facilities

Few incentives exist for divisions to voluntarily relinquish property no longer required to meet district or division requirements. These properties may prove to be the largest base of potentially disposable inventory. District divisions must; (1) verify the accuracy of Lands and Buildings information in the AMI, (2) ensure that Lands and Buildings holdings are consistent with the district's Facility Master Plan and Transportation System Development Program, and (3) provide a list of any surplus Lands and Buildings property to the RPRRC chairperson for inclusion in List 1.

3. *The property is needed for a programmed project.*

The RPRRC must confirm that properties reflected in Lists 2 and 3 are being held for viable projects. Many parcels included in these reports were acquired for currently programmed, but as-yet unawarded projects. Others were acquired for projects whose funding/programming status has changed, but they continue to be viable projects within the district's [local transportation planning agency's] longer-range planning. Retention of properties for these projects, if properly documented, is consistent with Department policy. However, changing priorities may result in properties within these inventories being re-classified as "Not In-Use".

Programmed projects may be identified from any of the following State and Federal sources:

- Statewide Transportation Improvement Program (STIP)
- Interregional Transportation Improvement Program (ITIP)
- State Highway Operation and Protection Program (SHOPP)
- Ten-Year SHOPP
- Traffic Systems Management Plan (TSM)
- Federal Transportation Improvement Program (FTIP)
- Federal State Transportation Improvement (FSTIP)

Suggestions for confirming parcels' programming status by using expenditure authorization (E.A.) numbers:

- Search for the EA in the Project Management Control System (PMCS). Does the project have a STIP number (a.k.a. PPNO)? If so, it's a programmed project.
- Search for the EA in the district Status of Projects (hardcopy or district Website). Many districts' Status of Projects includes a PPNO number.
- Search for the EA within hardcopy programming documents. Each district's Office of Program-Project Management maintains hardcopies of these documents. They may also be obtained from HQ Transportation Programming.

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<sup>11</sup> A facility's operational utility should be determined within the framework of a Division and District Facility Master Plan, which provides the standards-based context within which objective resource allocation decisions may be made.

#### 4 – Properties “Not In-Use”

Property is considered “Not In-Use” if:

1. It fails to meet any of the “In-Use” criteria.
2. It no longer provides or supports transportation services.
3. It no longer provides facilities for the public, employees, equipment or materials.
4. It is not needed for viable transportation projects.
5. It is a property on hold in List 2, which no longer meets any conditional retention criterion.

Properties found to be “Not in Use” will be identified as such, disposition determined and recommendations noted in the appropriate List. Steps 3 and 4 evaluate and isolate only Departmental properties “Not In-Use”.

#### 5 – Treatment of “Not In-Use” property

The RPRRC chairperson distributes Lists 1, 2, 3 & 4, process instructions and “*Conditional Retention Criteria*” (See Step 6) to each Deputy District Director. Through e-mail, memo or RPRRC meeting, the chairperson outlines the RPRR process and describes the responsibilities of parties requesting conditional property retention (See Step 7). Functional unit review should take no more than two weeks.

The district RPRR process will determine the appropriate disposition of “Not-In-Use” Departmental real property, whether conditional retention or disposal. “*Conditional Retention Criteria*” and “*Disposal Criteria*” assist functional managers and RPRRC members in determining the disposition of “Not In-Use” properties. For conditionally retained properties, the requesting unit must develop an action plan, assign someone to manage the property to its desired disposition, and provide regular written project status reports to the RPRRC chairperson<sup>12</sup>.

#### 6 – Conditional Retention Criteria

RPRRCs regularly review district real property inventories to determine the appropriate disposition of “Not In-Use” properties has occurred. Each RPRRC uses the following “*Conditional Retention Criteria*” to test the soundness of conditional retention requests for “Not In-Use” property. **Requestors seeking conditional retention of “Not In-Use” property must demonstrate a legitimate, compelling and substantive justification for holding the subject property.**

There are two categories of property eligible for retention:

*Category 1: Potential disposal predicated upon completion of interim actions;*

- Retained until completion of a construction project.
- Retained until property can be exchanged for another property.
- Retained until contamination can be cleaned (and the property certified).
- Retained until legal issues are resolved.

*Category 2: Potential project use;*

- Retained until incorporated into a programmed transportation project.
- Retained until incorporated into an operational facility.

<sup>12</sup> Reporting frequency associated with specific parcels will be determined by the RPRRC based on the nature of the individual retention request; however, the reporting frequency will not be less than once per quarter.

- Retained for purposes of environmental mitigation.

*There are six primary "Conditional Retention Criteria" used to classify parcels (regardless of category):*

1. USE IN A TRANSPORTATION OR FACILITY PROJECT

Is the property likely to be required for a viable project? Each of the following questions must be answered and the responses supported with pertinent details.

- a) Is there a high probability the project will be funded?
- b) Is the project a priority with Caltrans or a local transportation agency?
- c) Is the project consistent with the Department's goals?

To substantiate the response, the project should be mentioned in one or more of the following:

- Adopted Regional Transportation Plan
- District/Division Facility Master Plans
- 10-Year SHOPP
- Circulation Element of the Local General Plan
- Corridor Protection Plan
- Regional Rail Plan
- Caltrans Route Concept Report
- Legislation
- Pending Environmental Documents/Reports
- Other non-Caltrans funding sources/programs – local, other governmental agencies, private, etc.
- Conditional Retention Agreement<sup>13</sup>

2. POLITICAL OR LEGAL ISSUES

Do any political or legal issues exist which make immediate disposal impractical?

- a) Is the property subject to pending litigation?
- b) Is the property subject to existing or pending legislation?
- c) Do strong local political positions of record exist supporting retention of the property/project?

3. TEMPORARY CONSTRUCTION NEED<sup>14</sup>

Is the property needed until a construction project is completed?

- a) Does the property abut the project in question?
- b) If sold prior to completion of construction, will the use of the property be disrupted, significantly reducing its marketability/value?
- c) Will safety be compromised as a result of property disposal?
- d) Are there unresolved design or utility issues, which may adversely impact disposal?

4. ENVIRONMENTAL HOLD/MITIGATION SITES

Is the property being held for environmental mitigation purposes?

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<sup>13</sup> An agreement between Caltrans and Local entities, developed as a result of property being conditionally retained, stipulating obligations, necessary action and commitment for the project in question.

<sup>14</sup> Without a Temporary Construction Easement (TCE).

- a) Are there identifiable project mitigation requirements consistent with the type property being held for a programmed project?
- b) Are funds programmed/available for the anticipated mitigation use?
- c) Is the property likely to be included in a "conservation land bank"?
- d) Will disposal of the parcel adversely impact, directly or indirectly, adjacent or nearby parcels containing critical or important habitat?

Is the property contaminated with hazardous waste?

- a) Is remediation required for disposal and, if so, what is the anticipated cost?
- b) If remediation is required, are funds programmed/available?
- c) What is the course of action if no funds are programmed/available?

Are there other constraints associated with the parcel?

- a) Are there identifiable resource values (e.g. architectural, archaeological) associated with the project?
- b) Are there community or environmental justice issues associated with the parcel?
- c) Are there legal or regulatory constraints associated with the parcel (e.g. Coastal Zone restrictions [PRC 30609.5], State Highway Code restrictions [Section 118.6])?

#### 5. EXCHANGES

Will the retained property be exchanged for property or improvements required for transportation purposes?

- a) Do exchange agreements/commitments currently exist?
- b) Is an agreement imminent? How long have exchange negotiations been in progress?
- c) Are the exchange agreements or desired property part of a programmed project? (If not, apply criteria under item 1.)

#### 6. FINANCIAL CONSIDERATIONS

- a) Does Caltrans currently own, or could it acquire lower valued properties to meet the same need satisfied by the property proposed for retention?
- b) Since no funds may exist to remediate a contaminated property, where remediation is required, disposal may not be possible.
- c) Will disposal proceeds exceed disposal costs?

For requests justified under #6, the following information must be provided in the conditional retention request:

- An estimate of property value.
- An estimate of potential replacement property value.
- Documentation of significant up-front costs and potential funding sources.

### **7 – Conditional Retention of “Not In-Use” Properties**

Once the requesting program believes the property in question meets one or more of the six “*Conditional Retention Criteria*”, a written retention request (and justification) is forwarded to the RPRRC chairperson. If, after reviewing the request, the RPRRC approves conditional retention of a property, the responsible functional manager must:

1. Assign a transaction coordinator to the property,

2. Prepare an action plan culminating in the parcel's use or disposal for RPRRC approval, and
3. Commit to provide periodic written status reports to the RPRRC.

## **8 - Disposal Criteria**

In order to determine which properties are to be retained, the District RPRRC chairperson asks all district divisions and programs to review the property Lists 1, 2, 3 & 4 (Step 5). Property not conditionally retained will be properly accounted for in the departmental real property inventory reports and disposed of according to the RPRRC's direction. Real property interests will be recommended for disposal when:

1. They fail to meet any "*Conditional Retention Criteria*"; or,
2. They no longer meet the "*Conditional Retention Criteria*" or the objectives of previous action plans (for properties currently on hold).

If either disposal criterion is met, the RPRRC will recommend disposal of the property in question. However, renegotiation and approval of revised action plan objectives may prevent immediate disposal.

### A special note regarding property retained for financial reasons.

One of the six "*Conditional Retention Criteria*" is "Financial Considerations". If no funding allocation yet exists to clean a property, a time extension may be granted by the RPRRC once the property coordinator's revised action plan is reviewed and approved.

### The Property Disposal Process:

Each district's Right of Way Excess Lands unit generally handles real property disposal; however, in unique situations, other Department divisions may take the lead in property disposal:

Route Rescissions: Transportation Planning has responsibility for obtaining the rescissions.

Desertification: Right of Way, Right of Way Engineering, and Project Development have responsibility for obtaining desertification.

## **9 – RPRR Committee Meetings**

Each year, district RPRRCs meet to consider disposition of "Not-In-Use" parcels. The RPRRC must determine that there is legitimate, compelling and substantive justification for holding parcels proposed for conditional retention. During the meeting, the committee will consider:

- Candidates for conditional retention;
  - Narrative responses to the "*Conditional Retention Criteria*";
  - Property-specific action plans;
  - Verbal presentations on newly retained properties; and,
  - Property transaction coordinators' reports on existing conditionally retained properties.
- (See also, Step 8 – Disposal Criteria)

The RPRRC will recommend either extending conditional retention or outline the conditions for property disposition.

## **10 –Preparation and Submission of District Annual Reports**

Following the last RPRRC meeting, each district chairperson prepares an annual report comprised of a narrative summary of issues and accomplishments and updated Lists 1, 2 and 3. The report is routed through all RPRRC members for concurrence before being forwarded to the District Director for review and approval. The chairperson coordinates responses to questions, comments or issues raised by committee members or the District Director.

Each district report is forwarded to HQ Right of Way Asset Management for consolidation into the statewide report submitted to the Directorate. Lists 1, 2, 3 & 4 have been formatted to simplify the reporting process, provide consistency among and between districts, and assure year-to-year continuity; therefore, no changes to the existing report format will be allowed during the current-year cycle. Suggestions for format improvement or revision are welcome for out-year application.

## **11 - Post RPRR Review & Preparation of Annual Report**

HQ Right of Way reviews and compiles all twelve district (one page) Annual Reports and sets of Lists (1-4) into a statewide survey. District/region representatives are invited to attend a post-RPRR process review in which participants identify ongoing Department challenges, share best practices information and identify performance improvement measures.

The accomplishments, insights and challenges identified during the review meeting, along with the data in the district Lists, is used to develop the RPRR Annual Report, which is submitted to the Director and the CTC.

## **12 - Annual Report Submission to the Director**

HQ Right of Way Asset Management's goal is to submit the RPRR Annual Report to the Director by the date specified in the calendar published at the beginning of each RPRR cycle. To actively support this process, the Department Director wants each district to:

- Adhere to the process guidelines outlined herein;
- Retain property only if absolutely necessary, especially parcels for unawarded projects;
- Involve local partners where transportation corridors (and measure parcels) are involved; and,
- Support HQ Right of Way Asset Management in sustaining the statewide RPRR process.

The Annual Report submitted to the Director will summarize:

- The number of parcels reviewed, in-use, not in-use, conditionally retained, and recommended for disposal;
- Recommendations made, actions taken and significant issues engaged by each district; and,
- A comparison of current-year to prior-year holdings and actions.

## **13 - Annual Report Submission to the California Transportation Commission**

Once the RPRR Annual Report has been submitted to the Department Director, the report is placed on the California Transportation Commission (CTC) calendar as an information item for commissioners' review.

## **14 – Follow-up and Management of Retained and Disposal Properties**

Each district's RPRRC chairperson works closely with the responsible functional unit to manage the disposition of property reviewed by the committee and recommended for conditional retention or disposal.

### Conditionally Retained Properties:

1. Within 30 days of the District Director's approval of the final district report, the RPRRC chairperson will confirm the assignment of property transaction coordinators and completion of property-specific action plans with the managers of each division requesting conditional retention of one or more parcels.
2. The RPRRC chairperson will review action plan implementation and achievement of goals and objectives with property coordinators on a quarterly basis (at minimum).
3. The RPRRC chairperson will work with property coordinators to achieve the desired property-related outcomes and report quarterly to the District Director and HQ Right of Way Asset Management on the general progress toward the goals embodied in retained-parcel action plans.

### Properties Awaiting Disposal:

1. District RW Excess Lands will monitor and report quarterly to the district RPRRC chairperson, the District Director and HQ Right of Way Asset Management on progress toward disposing of real estate interests consistent with RPRRC recommendations.
2. District RW Excess Lands will track the transfer (to ELMS) and disposal of real estate interests consistent with RPRRC recommendations. These parcels may not currently be in the ELMS and may require additional action before transfer to the ELMS may occur: examples include decertifications and route rescissions.
3. District RW Excess Lands will quantify the number of properties transferred to ELMS as the result of RPRRC actions and track properties until they are removed from the ELMS. Property coordinators, the RPRRC chairperson and the district's RW Excess Land unit work together to ensure that all necessary steps are taken to put parcels in a disposable condition (environmental clearances, etc.) and that previously held and released, decertified, or rescinded parcels are sold or otherwise appropriately conveyed.

## **15 - Review of New Excess Land Hold Requests**

District RPRRC chairpersons work closely with the RW Excess Lands unit to review new excess land hold requests on an ongoing basis throughout the year ("as required" between annual RPRRC cycles). In response to conditional retention requests made after the annual RPRRC review (as part of a "round-robin"), the RPRRC chairperson may:

1. Approve "*interim*" holds for up to one month after the next annual RPRRC meeting.
2. Convening a special RPRRC meeting in response to a substantial number of hold requests.

## **Attachment C**

2007 REAL PROPERTY RETENTION REVIEW

ACRONYM TABLE

### **Acronym Table**

AMI	Asset Management Inventory
BSA	Bureau of State Audits
DD	Deputy Directive
DGS	Department of General Services
EA	Expenditure Authorization
ELMS	Excess Lands Management System
HQ	Headquarters
IRWS	Integrated Right of Way System
PMCS	Project Management Control System
RPRR	Real Property Retention Review
RW	Division of Right of Way
RWEL	Right of Way Excess Lands
RWPM	Right of Way Property Management
RWPS	Right of Way Property System
SHOPP	Statewide Highway Operations Planning and Preservation
SPI	Statewide Property Inventory
STIP	Statewide Transportation Improvement Plan
XPM	Xpert Project Management