

8. OUTLINE OF RESERVE ACQUISITION PROCESS UC NATURAL RESERVE SYSTEM

I. SCREENING PHASE

- A. Potential new reserves or satellite lands to existing reserves are typically identified by members of the faculty, the NRS Systemwide staff, or reserve managers. In some instances, lands that could become reserves are offered to the University by public or private agencies or individuals.
- B. Requests for consideration of potential new reserve sites should be provided to the NRS Executive Director who will coordinate the first visit(s) and initial screening of the site with a designated campus or campuses; campus screening is crucial, and the screening group should include knowledgeable individuals. The NRS Systemwide staff and designated campus will complete a preliminary investigation and background research on the site to determine if further evaluation is merited.

II. EVALUATION PHASE

A. Campus Advisory Committee

If the NRS Executive Director determines that a site should receive further evaluation, s/he will notify the UCOP Vice Provost for Research, affiliated campus Chancellor and the Universitywide Advisory Committee. The NRS Executive Director will contact the affiliated campus and request that its campus NRS advisory committee (or equivalent) evaluate the proposed reserve from the campus perspective. That evaluation should be coordinated with appropriate NRS Systemwide staff. (Note: In certain instances, it may be necessary to involve more than one campus in the evaluation.)

At least one field investigation of the site will be made by the campus advisory committee, using the “Guidelines for Reserve Description” (Attachment A) as a basis for collecting data on the

potential reserve. The committee will recruit whatever expertise is needed from its campus community to evaluate the proposed reserve. After completing its investigation, the committee will make a written recommendation to the NRS Executive Director, who will notify the campus Chancellor, campus NRS administrative officer, the Vice Provost for Research, and the Universitywide Advisory Committee on this action.

B. “Three-Campus” Committee

If the campus advisory committee recommends acquisition of the potential reserve (through purchase, acceptance of gift, lease, MOU, etc.), and the NRS Executive Director and Chancellor concur, the next step is a “three-campus” committee evaluation of the proposed reserve.

The NRS Executive Director, in consultation with the Chair of the Universitywide Committee and the affiliated campus representative, will recruit experts for the “three-campus” committee. The review committee should include (as possible) NRS campus representatives from both the affiliated campus and two other campuses. The committee should also include other faculty and staff experts as appropriate, and NRS staff as appointed by the NRS Executive Director. All efforts should be made to include a reserve manager. The three-campus committee will prepare a written recommendation to the Director following the criteria outlined in Attachment B. The NRS Executive Director will present this to the Universitywide committee for review.

C. Universitywide Committee

The Universitywide committee will review the report and recommendation of the three-campus committee, as well as any appropriate background reports. These reports should be received by Universitywide committee members at least one week before the committee makes its final recommendation to the NRS Executive Director.

III. APPROVAL PHASE

It is the current policy that “any new NRS reserves or additions to existing reserves will be approved only if financial support has been secured from either the associated campus or private sources. The Office of the President will not provide additional funding for the costs associated with managing and operating new reserves or additions to existing reserves.” (Letter from VP-ANR Gomes to NRS Director Glazer, February 16, 1999.)

In view of this policy, the NRS Executive Director will make a decision whether or not to proceed with the reserve approval process based on the fiscal and administrative resources of the Natural Reserve System, as well as academic needs from a systemwide perspective. The Chancellor will determine if the campus can commit the necessary personnel and funding for a new reserve, which would be affiliated with his/her campus.

If the NRS Executive Director, Chancellor and Vice Provost for Research agree that the property should be acquired as a new (or satellite) reserve, the NRS Director will prepare a recommendation for The Regents. That recommendation is first reviewed and approved by the Vice Provost for Research, campus Chancellor, General Counsel, Treasurer, Senior Vice President – Administration, and Vice President – University Relations. The recommendation is then reviewed by the appropriate Regents’ Committee(s) and finally the President, who presents it to The Regents. If approved, the reserve establishment process proceeds. In unusual circumstances, it may be necessary to follow other emergency or interim approval procedures.

IV. RESERVE ESTABLISHMENT

All real property and legal documents will be drafted and finalized by Office of the President staff (including the NRS, General Counsel, and Treasurer’s Office), in close consultation with the affiliated campus during all phases.

The University may begin use of the reserve once final transfer of the title or execution of license/lease/use agreements is completed.

Attachment A

Guidelines For Reserve Description

- I. Proposed name and local name (property reference)
- II. Location (including legal property description, if available)
- III. Size and ownership of property
- IV. General use history and environmental status of property
- V. General description (brief introductory overview)
- VI. Description of physical environment
 - A. Topography and geographic setting
 - B. Geology
 - C. Climate
 - D. Soils
 - E. Hydrology
- VII. General ecological description (overview including habitats and their significance)
- VIII. Flora
- IX. Fauna
- X. Archeology and human use
- XI. Overview of special features
 - A. Rare or unusual species and associations
 - B. Physical features
 - C. Archaeological, paleontological, historical, and cultural features
- XII. Facilities and infrastructure
 - A. Potential research and/or instructional support facilities
 - B. Roads, parking, power, telephones, water supply, sewage treatment facilities
 - C. Potential sites for new facilities and infrastructure
- XIII. Appendices (if available and appropriate)
 - A. Maps (showing location and proposed reserve boundaries)
 - B. Species lists
 - C. Other material

Attachment B

Recommended Criteria For Three-Campus Committee Reserve Evaluation

- I. Date of evaluation
- II. List of participants in evaluation
- III. Other background information (as appropriate)
- IV. Site evaluation
 - A. Scientific criteria
 1. Habitat significance
 2. Representativeness
 3. Uniqueness
 4. Species and habitat diversity
 5. Level of disturbance
 6. Ecosystem viability
 - B. Academic criteria
 1. Research value
 - a. Suitability for research
 - b. Range of research opportunities
 - c. Research value of site (e.g., faculty research needs)
 2. Teaching value
 - a. Suitability for teaching
 - i. Proximity to campus(es)
 - b. Range of teaching opportunities
 - c. Teaching value of site (e.g., faculty teaching needs)
 3. Facilities
 - a. Potential research facilities
 - b. Potential instructional support facilities
 4. Database
 - a. Availability of baseline data, environmental monitoring records, etc.

C. Administrative criteria

1. Management factors

- a. Accessibility of site for research and teaching uses
- b. Protectability of site
- c. Adjacent land ownership and land-use patterns
- d. Adequacy of proposed reserve size, boundaries, buffers
- e. Proximity to other University and non-University reserves and facilities
- f. Other management concerns specific to site

2. Costs

- a. Acquisition cost (capital outlay required)
- b. Operational and maintenance costs

3. Funding

- a. Campus funding commitment
- b. Systemwide funding commitment
- c. Other long-term funding sources

V. Recommendation

VI. Appendices

- A. Individual and joint letters of recommendation
- B. Maps
- C. Photographs or slides