Facilities Management

University Administrative Standard: Space Management Policy Implementation

Overview

Space is a central and critical University resource. It is our collective responsibility to manage and steward it well. The allocation and use of space shall be conducted in a consistent manner designed to optimize the use of this resource and advance the mission and strategic priorities of the University. To ensure such, the University has implemented P15-03 Space Management Policy. The procedures established herein are intended to guide the campus toward successfully achieving implementation of said policy.

Procedures for Implementation of the Campus Space Management Policy

1. Jurisdiction & Authority

Oversight for development and implementation of P15-03 Space Management Policy and the procedures established herein is provided by Facilities Management in collaboration with University Division lead administrators and based upon the review and approval of the University Space & Facilities Advisory Committee (USFAC - formerly the Facilities Working Group) which serves as the space and facilities advisory body to the University Resource & Planning Committee. Divisions are responsible to comply with the overarching policy and regulations established herein but may further develop internal divisional processes.

Divisions recognized within the campus include the President's Office, Academic Affairs, Administrative Affairs, Student Affairs, and Advancement.

2. Space Assignments

Per P15-03 Space Management Policy, the preservation of departmental or operating unit integrity is a high priority and the nature of the occupant's work shall influence whether an individual is assigned a private office. The assignment of more than one office to a specific individual is highly discouraged and requires approval of the individual's Division lead administrator. Part-time faculty, graduate teaching assistants, research assistants and support staff should expect to share space unless specific needs require otherwise. Space assignments are managed per the processes established herein.

3. Assignment of Existing Space Allocations

Space is allocated for use by departments and operating units. Day-to-day responsibility for the assignment of spaces to specific occupants and uses within a department rests with the Director or Chair of that department with the understanding all such assignments must be approved by the Dean of the College or lead administrator for the Major Budget Unit (MBU) in which the department is located. Space assignments will be updated by the Department Key Advisor via the Space Change Webform. Occupancy change information will be routed to TNS and Facilities Management for action.

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Should space assignment conflicts exist which cannot be resolved within the Department, the respective Dean or Lead Administrator for the MBU shall finalize the decisions associated with the assignment of space. Should the department or operating unit have a need to change a space type within their existing space allocation, refer to "Requests for Changes in Existing Space Type" below.

4. Requests for Reallocation of Existing Division Space

All requests for reallocation of existing space within a Division may be initiated by the requesting Department or Division and shall be submitted by the respective Key Advisor via the Space Change Webform. Such form will be routed to the MBU lead administrator and Division lead administrator for approval. The lead administrators are encouraged to obtain a space utilization analysis and recommendation from Facilities Management to assist with ensuring all University space is used efficiently and optimally. MBU and Division lead administrators may not reallocate space across divisions without USFAC review and approval. Once space changes have been approved, the form is routed to TNS and Facilities for action. Based on data collected by the Space Change Webform, all space reallocations will be reported to USFAC by Facilities Management on a regular basis.

5. Requests for Additional Division Space

All requests for additional space shall first follow the procedure outlined in the section above titled "Request for Reallocation of Existing Division Space". Should the division be unable to meet department space needs, a request for additional space may be submitted to the USFAC by the division lead through the Key Advisor via the Space Change Webform. The USFAC will review such requests in accordance with the following:

- University Strategic Plan - Space needs resulting from approved strategic initiatives in alignment with the University's priorities.
- University Budget Plan - Space needs resulting from inclusion in the University's budget.
- Academic & Student Support Program Planning - Space needs resulting from curricular and program development as well as enrollment management plans and student support program development.
- Personnel Recruitment Planning - Space needs resulting from approved faculty and staff recruitments.
- Administrative Planning - Space needs to support the administrative functions of the University.

Facilities Management will provide a space needs analysis, when appropriate, to address whether the request is in compliance with University and California State University requirements. A recommended action will accompany the space needs analysis for the USFAC's review. Possible outcomes of this review may be a cross divisional reallocation, reallocation of University held space, or no available space identified. A summary of space change requests/approvals will be provided to URPC annually, or upon request.

6. Temporary Space Reallocation

Temporary space reallocation beyond a duration of six months or which require space modifications will be managed at the division level and will require the completion of the Space Change Webform. A temporary space reallocation **across divisions** beyond a duration of six months or which require space modifications may not proceed without USFAC review and approval.

7. Allocation of Vacated Space

Space vacated by a physical move or made available due to renovation or new construction is allocated back to the University for reallocation. Likewise, space vacated due to a reduction in program size, reduction in workforce or program elimination is also allocated back to the University for reallocation. The Key Advisor of the department to which the space was originally allocated will submit such information in the Space Change Webform. Vacated space shall be reallocated in accordance with other sections of this process.

8. Requests for Changes in Existing Space Type, Square Footage, or Capacity

All requests for changes in space type, square footage, and/or capacity shall be endorsed and supported by the Division lead administrator on the Space Change Webform. Applicable changes in space include those associated with the primary function, assignable square footage, or seating capacity of a room. For instance, if a space was initially classified as self-instruction computer lab, and a division wished to convert it to a teaching space for scheduled classes, the Space Change webform would be used to request approval of such space type change by the USFAC.

Facilities Management shall review space change requests and provide a space utilization analysis and associated recommended action to the USFAC, where appropriate. This analysis will highlight whether the space change request is in compliance with HSU and California State University space classification and utilization standards. The USFAC shall consider all such requests and render a final decision.

9. Facility & Space Data

Facilities Management shall be responsible to maintain detailed records for all facilities including an inventory of all space utilized by the University. This includes maintaining an inventory of space assignments (AKA Occupancy), tracking changes in room function, physical alterations, and station count or capacity as well as conducting periodic space audits for all buildings owned or leased by the University to ensure accuracy of the data.

As the University's facility and space data reporting authority with the Chancellor's Office, Facilities Management shall be responsible to maintain the University's data in the California State University system-wide Space & Facilities Database. Facilities Management will coordinate with and work collaboratively with Academic Scheduling and the Office of Institutional Effectiveness so as to ensure space information aligns with academic scheduling programs and the Academic Planning Database.

10. Effective Space Utilization

Per 15-03 Space Management Policy, all University space shall be managed to ensure effective and efficient utilization of space over time.

Facilities Management shall conduct space utilization analyses for the purpose of summarizing existing University space utilization in consideration of strategic and programmatic goals as well as operational needs. Such studies also include recommendations for improvements and/or changes ensure the most effective utilization of University space. Space utilization analyses shall be conducted in consultation and partnership with the associated Division, College, Department or Unit. Studies are generated in response to requests for new space, reallocation of existing space, alterations of space, and changes in space use.

Lecture and teaching laboratory space utilization is of utmost importance. As such, priority for assignment or allocation of existing or new space shall be made in a manner designed to ensure space utilization is maximized. Requests for allocation of existing or new space for lecture or teaching laboratories shall be prioritized where California State University space utilization standards are exceeded.

Research space shall be assigned in a manner aligned with California State University space standards. Priority for use of research space shall be granted to those faculty currently conducting funded research. Requests for assignment or allocation of existing or new research space shall follow those guidelines set forth herein.

Administrative, office and other defined space types shall be assigned in a manner aligned with California State University space standards.

References
- 15-03 Space Management Policy California State University Administrative Manual, Section V, Measurement Devices for Campus Physical Planning (9045- 9050)
- California State University Administrative Manual, Section VI, Standards for Campus Development Programs (9060- 9079)
- California State University Space Standards Chart, SUAM Appendix B

Glossary
Allocation: Designation of space to a particular department, organization, or program for use and stewardship

Assignment: Designation of occupancy within a space (i.e. faculty/staff/student assigned to occupy that space for University business)

Campus Space Analyst: Individual responsible for maintaining campus the space database. The database is used for reporting requirements to the Office of the Chancellor as well as in data-driven decision making both at the campus and system-wide levels. This analyst currently works in Facilities Management and uses FacilitiesLink (MetaBIM, Inc.) to track space use, allocation,

and assignment at Humboldt State University. Individual will administer the Space Change Webform and produce Space Utilization Analyses & Recommendations.

Division: Business branches of Humboldt State University, including Academic Affairs, Administrative Affairs, President's Office, Student Affairs, University Advancement

FM: Facilities Management and all of its individual units.

Key Advisor: Contact person regarding department requests to campus service providers, including TNS and FM. The Key Advisor is assigned to this role by the Lead Administrator of the Department, Organization, College, or MBU. This person has knowledge of department budgets or works closely with the department account manager for service cost approvals. This person will review billing information frequently enough to resolve any problems - if a budget analyst reviews the data, they must go through the KA for changes. This person is responsible for ordering services, budget approval, and passing on training information from TNS and FM. Potential service orders include: Occupancy updates for space, phone, and computer jack assignments; Directory updates; Phone services; Asset location updates for S-tagged equipment; Key and access requests; Moving support and boxes.

Lead Administrator: Individual possessing signature authority for the Organization, Department, MBU, or Division. Examples include: Directors; Department Chairpersons; Deans; VPs; President.

MBU: Major Budget Unit

Space Change Webform: Webform used by Key Advisors to request any change in space assignment (occupancy), allocation, type/use, capacity, or size. This webform includes fields necessary for FM, ITS, TNS, and Asset Management services associated with a move requests. It is administered by Campus Space Analyst.

Space Capacity: The number of occupants that may occupy a space at one time. Space capacities are calculated using the square footage of the space and the Office of the Chancellor's standards for the associated space type or derived from California building code. Where conflicts exists, the more restrictive will be applied.

Space Utilization: A measure of use of a room or indoor space with respect to capacity standards specific to that room's assigned Space Type. Space Utilization is benchmarked against CSU standards.

Space Type: Functional category for a room or indoor space based on the design and use of that space. Space types are defined by the Office of the Chancellor of the California State Universities. Examples include: Lecture; Research; Conference room. All indoor University rooms/spaces are associated with a single space type by the Campus Space Analyst. Various space types are associated with different space capacity standards, also set by the Chancellor's Office.

Temporary Space Allocation: Designation of space to a department, organization, or program for a duration of no more than two years

TNS: Telecommunication & Network Services

URPC: University Resources & Planning Committee, standing committee of the University Senate and defined by the Senate Bylaws and Rules of Procedure

USFAC: University Space & Facilities Advisory Committee, subcommittee to the URPC