

Campus Space Management Principles

The process by which campus space is planned, prioritized, allocated and reallocated, assigned and reassigned by the Chancellor, Provost, Space Control Officers and the Space Planning and Allocation (SPA) Board will be transparent, timely, equitable, consistent and data-informed.

I. Overarching Principles

- 1.1 Space is a financial resource that should be used to serve the University's highest-level programmatic, academic and strategic goals in alignment with the University vision and priorities.
- 1.2 Space needs that directly support the pursuit of research excellence, academic distinction, and student success will receive priority in the space allocation process, and shall usually be awarded first consideration for on campus space.
- 1.3 Space needs that directly support research excellence, academic distinction and student success are defined as those that:
 - facilitate faculty and student research
 - facilitate first class, technology-enabled instruction
 - facilitate student learning and personal growth
 - enable significant interpersonal interactions among faculty, students and/or staff
- 1.4 In alignment with the campus priority around diversity & inclusion, the Campus Space Management Principles should be applied to the space needs of all elements of the organization and emerging needs and priorities.
- 1.5 All space planning, allocations and reallocations, assignments and reassignments will adhere to the Space Planning Guidelines. These guidelines will be reviewed and updated by the SPA board annually.

II. Space Allocation & Assignment Authority & Delegation

- 2.1 Space is not owned by divisions, departments or current occupants. University space is owned by the Regents of the University of California.
- 2.2 The UCM Chancellor has ultimate responsibility over the use of UC Merced's space resources and has final decision-making authority for the planning, allocation, reallocation, assignment and reassignment of all spaces.
- 2.3 The Chancellor may (and has at the writing of this document) delegated all aspects of this authority to the Provost and EVC.
- 2.4 The Provost and EVC may (and has at the writing of this document) allocate space to individuals designated as Space Control Officers, including: the Deans, Vice Provosts, Vice Chancellors, the University Librarian, the CIO, the AVC's and their designees.

- 2.5** Space Control Officers should engage in a consultative and transparent process with their constituent groups to inform space planning decisions, and space assignments and reassignments.
- 2.6** The Space Planning and Allocation (SPA) Board has been created by the Chancellor's Office to provide general oversight and guidance over the allocation and assignment of campus and leased space at the University of Merced. It is composed of the Provost, the Vice Chancellors, Vice Provosts, Deans, CIO, University Librarian, the Chairs of CAPRA and the Division Council, and the AVC of PPOD. The SPA Board is responsible to create its own by laws based on the charter provided by the Chancellor's Office.
- 2.7** Unless specifically prohibited by contract, funding requirements, policy or statute, any campus space may be allocated or reallocated, assigned or reassigned per the following space management principles and the concomitant processes. (See Section IV for additional information)
- 2.8** Among the considerations for use of any space will be the original intent, function and source of funds for that space, as well as any subsequently occurring formal process that resulted in changes to the original purpose of that space (e.g. renovations funded from a different source). There may be other considerations when evaluating specific space allocations or assignments.
- 2.9** Where the above priorities come into conflict and/or the parties involved cannot agree, the path of appeal is through the Office of Space Planning and Analysis with the Provost making the final determination.
- 2.10** An individual or program, once assigned a space(s), has responsibility to define and manage the priorities for use of that space in alignment with the principles of Campus Space Management and the vision and priorities of the institution.
- 2.11** Further the individual or program that is assigned a space(s) has the responsibility, with the support of their School or Division, to maintain the space(s) and the equipment therein.
- 2.12** University space should not be assigned to unaffiliated organizations for other than fee-based use for a specified lease or license term or for occasional use.
- 2.13** The principles and guidelines in this document apply to both University owned and leased spaces.

III. Functionality & Flexibility

- 3.1** Space devoted to instruction, research and student success shall not be re-purposed for another use without prior approval of the Provost Office.

- 3.2** Multiuse and multipurpose space shall not be allocated to a specific individual, program or function, or be repurposed without approval of the Provost.
- 3.3** Individuals, programs and departments should be assigned contiguous space appropriate for the intended use whenever possible.
- 3.4** Programs and departments serving students and faculty should be located for the convenience of their constituents in on campus space as much as is possible.
- 3.5** Formal space allocations may be made to student government organizations and students groups that are officially recognized and sponsored by the ASUCM and the Office of Student Affairs
- 3.6** Buildings, their public areas, and multiuse spaces will remain accessible to all students, faculty and staff during posted business hours. Each building shall post its business hours in a publically viewable location.
- 3.7** Renovations that change the designed use of a space must be approved in advance.

IV. Efficiency & Effectiveness

- 4.1** Due to the finite quantity of space, all control points in the space allocation and assignment process are expected to insure that space is efficiently and effectively utilized in support of the institution's highest priorities.
- 4.2** The Office of Space Planning & Analysis will evaluate the utilization of facilities, against a set of metrics and standards that are created in consultation with the SPA Board and approved by the Chancellor. Facilities evaluations will occur on a regular basis, based on a schedule defined by the SPA Board and negotiated with the individual Schools and Divisions. A space identified as not efficiently and/or effectively utilized as an outcome of the evaluation process may be reassigned by the Space Control Officer or reallocated by the Provost.
- 4.3** The Registrar's Office will independently monitor the utilization of classrooms against the UCOP classroom utilization benchmarks.

V. Long Term Planning

- 5.1** Space allocations or assignments that enable the institution to maintain an inventory of swing space to meet emerging are an institutional priority.
- 5.2** Space allocations that satisfy long-range plans take precedence over more temporary accommodations.

VI. Fiduciary Responsibility

- 6.1** Space proposals that reduce the reliance on outside leases will receive priority consideration.
- 6.2** Requests for space that include renovations will not usually be considered unless there is evidence of full funding.
- 6.3** Space needs and funding for space requests should be considered prior to making commitments to new hires and/or outside entities such as funding institutions.
- 6.4** For space that has an outstanding debt or potential future liability, a reallocation or reassignment of space also involves a proportionate assumption of the outstanding debt or liability.
- 6.5** Where space is reallocated or reassigned to benefit a second party, the original space owner should not be disadvantaged (e.g any functionality possible in the original space should be provided at the expense of the second party in the space to which the original party is relocated).
- 6.6** All proposals to lease outside properties must be approved by the SPA Board and complete the UCOP process to lease property.

Finalized November 2018

Space Allocation and Assignment: Definitions, Process and Standards

Space is **allocated** to Schools, Divisions, Departments, and Programs by the Office of the Provost via the Office of Space Planning & Analysis and Analysis. Space is **assigned** by the Department Chair or Program Director in consultation with the appropriate Division or Dean's

Space allocation and assignment requires five steps:

1. Space allocation requests signed by an appropriate Dean or Vice Chancellor are submitted to the Office of Space Planning & Analysis & Analysis (OSPA) by a Department Chair or Program Director. Note that in some cases, such requests are part of a comprehensive campus plan, for instance, the 2020 Project and Backfill Space Allocation Plan.
2. OSPA assesses the requirements in the space request submitted by each department or program and generates a proposal intended to best meet the needs of that group.
3. The Provost Office approves the proposal OR asks OSPA to generate an alternative.
4. The Department Chair (or Program Director), in consultation with the Dean or Vice Chancellor, assigns specific areas within the allocated space to particular individuals (e.g., faculty, post-docs) and functions.
5. The Department Chair or Program Director returns to OSPA if modifications to furniture and space are needed. Costs for such modifications are borne by the group making the request, including costs for modifications and moves of other groups required by the request. Note: The 2020 Project and Backfill Space Allocation Plan is an exception (modifications will be centrally funded for these efforts).

<u>Academic & Research Space Types</u>	
Provost	private office & faculty office
Vice Provost	private office & faculty office
Academic Dean	dean's office & faculty office
University Librarian	private office
Ladder Ranked Faculty	faculty office (& research lab is appropriate)
LPSOE & LSOE	faculty office (no research lab)
Emeritus Ladder Ranked Faculty	one shared faculty office per department (no research lab)
Unit 18 Lecturer (Continuing Status)	shared faculty office (two to an office)
Unit 18 Lecturer	shared faculty office (two or three to an office) or open
Post Doc	shared faculty office (two to an office) or open workstation
Research Scientist /Research Technician	shared faculty office (two to an office) or open workstation
Graduate Student	open workstation or shared multiple to an office
Undergraduate Student	shared workstation
Deputy, Associate or Assistant Librarian	private office, shared office or open workstation*
Academic Advisor	private office or open workstation w/sliding partition

Administrative Space Types	
Chancellor	private office
Vice Chancellor	private office or open workstation*
Associate or Assistant Vice Chancellor	private office or open workstation*
Executive Director or Director	private office or open workstation*
Supervisor	open workstation or shared office (two to an office)*
Project Manager, Analyst, Planner, Student Service officer, Admissions, Financial Aid, Procurement, Finance, Library & IT staff	open workstation or shared office (two or three to an office)
Administrative Assistant	open workstation or shared office (two or more per office)
Deputized Police Officer	open workstation or share office (two or more per office)
Physician or Counselor	private office
*Assignment of office or workstation is dependent on the ready availability of huddle/focus rooms for private discussions.	