

# Space Management Policy and Standard Operating Procedure (SOP)

## Space Management

### A. Introduction

Space is a University-owned resource and is subject to allocation and evaluation to meet the overall needs and priorities of the institution. Stewardship of these resources is a joint effort between all University staff, faculty and students and relies upon everyone to ensure that space is used to support student success, foster research, and promote positive work environments.

### B. Purpose

The Space Management Policy and Standard Operating Procedure (SOP) establishes a framework for the efficient use, and periodic review of the physical resources to support the University's mission. Transparent space decisions should maintain a proper balance between teaching, research, student success, engagement and outreach, and administrative functions on campus.

### C. Scope

Facilities and space are an institutional asset and critical resource, which must be developed and managed in response to the institution's programs, goals and objectives.

Departments are to follow the processes below regarding assignment, reassignment, reconfiguration of currently occupied spaces, and the acquisition of new facilities by lease, purchase, or construction.

This SOP standardizes the process for conducting an annual space inventory report required by the Texas Higher Education Coordinating Board Reporting. In addition to this report, an annual space utilization report will be created, which can be used for a variety of purposes. Both practices will improve the campus-wide space management (inventory and use of space) and facilitate strategic decisions regarding space.

### D. Background

Although space is allocated to users, space is a key University asset – owned and managed by the University. Space is neither owned by, nor permanently allocated to, occupants, users, programs or units. It is incumbent upon the University to allocate space in accordance with the University's strategic priorities. All space including academic, research, office, auxiliary, athletic and others is subject to assignment or reassignment to meet the overall needs and best interests of the University. Space decisions across campus should be transparent and applied equitably across all colleges and departments.

Increasing the efficient use of existing space to accommodate current and/or expanding program needs is essential for the University. The Texas Higher Education Coordinating Board Reporting and Procedures Manual for Texas Public Universities and its Appendices current edition are the basis for room classifications. This manual is incorporated by reference and can be accessed at the link below.

<http://www.txhighereddata.org/index.cfm?objectId=96F8EE70-D880-11E8-BB650050560100A9>

## E. Responsibilities

### 1. Space Management Committee:

- The Space Management Committee is composed of members from various campus constituents that embody a holistic view of University space resources. The committee resolves all items regarding space planning and management decisions.
- The Space Management Committee serves in an advisory role to the President:
  - Oversees the production of the annual space utilization report.
  - Approves guidelines for University units based on national best practices for space allocation.
  - Recommends annual allocation of University space for approval of the President.
  - Advises on the utilization and effective management of space across the University.
  - Evaluates requests for space re-allocation that cannot otherwise be resolved between managers.
  - Promulgates procedures, standards, and guidance for management of space based on national best practices.
  - Ensures the availability of information about space allocation and management is available on appropriate University web sites.
- Space Committee Membership  
The President appoints members to the Committee. The committee is co-chaired by the Provost/Vice President for Academic Affairs and the Vice President for Business Affairs. The Space Committee includes the following members:
  - Vice President for Business Affairs (Co-Chair)
  - Provost & Vice President for Academic Affairs (Co-Chair)
  - Vice President for Information Resources
  - Vice President for Research
  - Vice President for Enrollment Management
  - Vice President for Institutional Advancement
- If individuals are not able to attend a meeting, they may provide input via email or send a representative to the meeting on their behalf.
- Reviews and makes recommendations regarding requests that involve significant alterations, major re-assignments, or functional changes in space(s).
- Reviews requests for major assignment and re-assignment of physical space(s).
- Uses Appendix A for evaluating requests.
- Periodically reviews overall facility utilization, transfers between assigned units, major changes in space usage, modifications that involve major capital investment and space vacated to ascertain program needs and efficiency of current utilization.
- Makes recommendations to the Budget Committee for major capital projects from a space management perspective.
- Identifies opportunities to increase utilization of current space.
- Develops specific procedures regarding scheduling, assignment, and utilization of instructional space.
- Reviews the Classroom and Laboratory Utilization Report.
- Reviews and approves the annual space inventory submission to the THECB.

### 2. Vice President for Business Affairs (VPBA) or his/her designee:

- Functions as the Cabinet champion for Space Management issues.
- Determines funding for space requests by either validating the funding recommendations or identifying another funding source.

3. Vice President of Enrollment Management or her/his designee:

- Ensures room assignments for academic courses are updated in the student information system and academic scheduling platform by the term's reporting deadline (usually Census Day).
- Complies with the University's [Academic Scheduling Guidelines](#).

4. Space Steward:

- A Space Steward is a University Vice President or member of the Deans' Council.
- Manages space within their area(s) of responsibility and ensures that it is used optimally.
- Identifies space requirements and changes to support current and future initiatives and programs.
- Reviews, approves, and recommends funding for reconfigurations/renovations in the facilities assigned to their departments.
- Reviews, approves, and submits Space Request Form(s) (Appendix A) for their area(s).
- Identifies any major equipment procurement that may require facilities modifications (additional space, mechanical, electrical, or plumbing connections, etc.).
- Informs Space Management Department of any moves or changes in room usage.
- Informs Space Management Department of any spaces vacated and/or underutilized.
- Completes the Annual Space Inventory form to report any changes to space that occurred over the last reporting cycle.
  - Refer to Appendix B for further instructions on conducting the space inventory.

5. Space Management Office:

- Reviews, maintains, and analyzes spaces to assist the Space Management Committee, Administration, and others on how best to utilize space resources in an efficient and flexible manner.
- Serves as a professional resource regarding space assets on and off campus.
- Manages the space inventory database.
- Manages the space request process.
- Facilitates an annual space survey and conduct space audits.
- Supports campus moves.
- Provides accurate and timely space inventory and utilization reports to inform decisionmakers about short- and long-term space needs.
- Provides historical data and analyses as requested/needed.
- Identifies available space resources.
- Provides conceptual layout options.
- Ensures alignment with the University Strategic Plan, Campus Master Plan, and other pertinent plans, studies, reports, and initiatives.
- Support the implementation of approved and funded space requests.
- Monitors the University's inventory of classrooms to ensure sufficient academic spaces are available to meet the instructional mission of the University.
- Prepares the Classroom and Laboratory Utilization Report.

6. Building Manager:

- Completes the Space Request Form to request additional space.
- Ensures all available information is forwarded so an informed decision can be made.
- Be open to potential options that the Space Management Committee may present.
- Identifies any major equipment procurement that may require facilities' modifications (additional space, mechanical, electrical, or plumbing connections, etc.).
- Informs Space Management Department of any moves or changes in room usage.
- Informs Space Management Department of any spaces vacated and/or underutilized.

- The Building Manager does not have the authority to allocate space within their assigned buildings.
- Processes key requests for approved space requests.
- Assists with compiling the Annual Space Inventory worksheet.
- Assists with submitting Work Orders to Facilities Management Department.

7. Building Representative:

- Monitors general building conditions and occupancy and works with space users and Facilities Management to ensure that work orders are submitted as appropriate for common spaces.
- Serves as building point of contact for emergency management response. Will work with building Space Steward(s), Environmental Health and Safety, University Police, other first responders, and Information Resources.

**F. Space Request Process**

1. The following process shall be followed to request additional space allocation.
2. Appendix A is the Space Request Form which needs to be fully completed.
  - Requestor's contact information.
  - Justification for the additional space (program growth, staffing increase, new pedagogy, new technology, new equipment).
  - Potential location(s) for additional space.
  - Description of any special needs.
  - Available funding for any improvements.
  - Safety and health requirements.
  - Specialty space needs for programs.
  - Adjacency or unity of programs.
  - Accessibility of space.
  - Cost/benefit.
  - Faculty recruitment/retention.
  - Urgency of need.
3. The Space Management Department will evaluate all requests, including an audit of currently assigned space, to verify that available space cannot be identified within the existing assignment.
  - The requesting department/individual may need to provide clarifying information during this evaluation process.
  - If potential space(s) has/have been identified, Space Management Department will contact the affected department(s) about reallocation of space. A meeting may be scheduled with the requester and affected department(s) to better understand the request and impacts.
  - This notification process is critical for transparency in space management.
  - These meetings are not meant to imply a decision has been made. A meeting is needed to identify the pros and cons of the request so the Space Management Committee can make an informed decision.
4. If a decision cannot be made, the request will be sent to the Space Management Committee for review and resolution.
5. All space requests and transitions of space between space stewards must be approved by the Space Management Committee.