A. **Introduction**

Physical space is a critical resource in the development, advancement and improvement of the University’s mission and strategic plan; therefore, effective utilization of this valuable resource is essential. Space is an **University-owned** resource and is subject to allocation, evaluation and reallocation to meet the overall needs and priorities of the institution. Stewardship of space 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 collaborative research and promote positive work environments.

B. **Purpose**

The Space Management Policy and Standard Operating Procedure (SOP) establish a framework for the efficient use, equitable allocation 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 below processes 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 the annual space inventory report required by PASSHE. In addition to this report, a classroom and lab space utilization report will be completed on a recurring basis that can be used for a variety of purposes. Both practices will improve the campus-wide space management (inventory and use of spaces) and allow strategic decisions regarding space.

D. **Background**

Although space is allocated to specific 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, athletics 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 in order to accommodate current and/or expanding program needs is essential for the University.
Standards related to space sizes, occupancy and programmatic needs can be found in Pennsylvania State System of Higher Education Facilities Manual Volume VI-B Space Guidelines.

The Institute of Education Sciences (IES) Postsecondary Education Facilities Inventory and Classification Manual (FICM) current edition will be the basis for room classifications. This manual is incorporated by reference and can be accessed at the link below.


In assessing the current space utilization, several themes emerged that impact and effect the University’s ability to fully optimize space use.
- Informal practices for space allocation
- Responding to urgent demands without thorough planning
- Scheduling without accountability to meet certain utilization thresholds (e.g., classroom utilization and seat usage)

Challenges arise in four areas due to the misalignment of responsibility and accountability:
- The lack of “price” leads to a perception that space is a free commodity which tends to lead to overconsumption of space (stated differently, weak incentives to optimize the use of space).
- The lack of policy and procedures to allocate space often results in units believing that they retain “ownership” of space that is no longer needed just in case it’s future need arises.
- The lack of a collaborative committee that reviews and recommends the highest and best use for University spaces.
- A culture of ownership of “departmental” space rather than one of “departmental” stewardship of University space.

E. Responsibilities

1. **Vice Presidents:**
   a. Manage and allocate space within their area of responsibility
   b. Identify space requirements and changes to support current and future initiatives and programs
   c. Review, approve, and recommend funding for reconfigurations/renovations in the facilities assigned to their departments
   d. Review and submit the Space Request Form (Appendix A) to the Facilities Management Department (FMD)

2. **Vice President for Finance and Administration (VPFA) or his/her designee:**
   a. Act as the Cabinet champion for the Space Management issues
   b. Determine funding for space requests by either validating the funding recommendations or identifying another fund source
   c. Resolve complaints or waivers from this procedure

3. **Provost and Vice President for Academic Affairs or his/her designee:**
   a. Allocate the priority assignment rights to classrooms to ensure consistency with the individual academic departmental needs for instructional space

4. **Registrar:**
   a. Ensure classroom registration information is updated in classroom scheduling application (currently AdAstra) by the end of Add/Drop period.
6. **Space Management Committee:**
   a. The Space Management Committee (SMC) is comprised of members from various campus constituents that embody a holistic view of University space resources and advices the President regarding space planning and management decisions.
   b. SMC serves as an advisory to the President and is responsible for:
      i. Developing plans that promote stewardship of all University space resources including academic, athletic, auxiliary, administrative and research spaces;
      ii. Ensuring that such plans align with the University Strategic Plan, Academic plans and initiatives, Campus Facilities Master Plan and other pertinent plans;
      iii. Prioritizing space resources for institutional needs;
      iv. Reporting on various space studies and provides recommendations to the President regarding University spaces
   c. To have integrative and collaborative space management practices on campus, the Space Management Committee members are as follows:
      i. Assistant Vice President for Facilities – Chair
      ii. Associate Provost for Academic Administration
      iii. Dean of College of Arts, Humanities and Social Sciences
      iv. Dean of College of Business
      v. Dean of Education and Human Services
      vi. Dean of Science and Technology
      vii. Associate Vice President for Finance and Administration
      viii. Associate Vice President for Student Affairs and & Enrollment Management
      ix. Assistant Vice President for Advancement
      x. Director of Network & System Services
      xi. Director of Athletics
      xii. Directors of Safety and Environmental Health
      xiii. Student Government Representative
      xiv. Staff Support – Facilities Management Department
   d. If individuals are not able to attend a meeting, they could provide input via email or send a representative to the meeting on their behalf.
   e. Review and make recommendations regarding requests that involve significant alterations, major re-assignments or functional changes in space(s)
   f. Review requests for major assignment and re-assignment of physical space(s)
   g. Use Appendix D for evaluating requests
   h. Periodically review 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
   i. Make recommendations to the Capital Planning Committee for major capital projects from a space management perspective
   j. Identify opportunities to increase utilization of current space
   k. Develop specific procedures regarding scheduling, assignment and utilization of instructional space
   l. Review the Classroom and Laboratory Utilization Report
   m. Review and approve the annual space inventory submission to PASSHE

7. **Assistant Vice President for Facilities:**
   a. Charged with the stewardship of all campus spaces
   b. Review, maintain and analyze spaces to assist the President, SMC and others on how best to utilize space resources in an efficient yet flexible manner
   c. Serve as a professional resource regarding space assets on and off campus
   d. Manage the space inventory database
e. Manage the space request process
f. Facilitate an annual space survey and conduct space audits
g. Support campus moves
h. Provide accurate and timely space inventory and utilization reports to inform decision
   makers about short- and long-term space needs
i. Provide historical data and analyses as requested/needed
j. Identify available space resources
k. Provide conceptual layout options
l. Ensure alignment with Strategic Plan, Campus Facilities Master Plan and other
   pertinent plans, studies, reports and initiatives
m. Support the implementation of approved and funded space requests
n. Monitor the University’s inventory of classrooms to ensure sufficient academic spaces
   are available to meet the instructional mission of the University
o. Prepare the Classroom and Laboratory Utilization Report

8. **Dean/Director/Department Head:**
   a. Use the Space Request Form (Appendix A) for requesting additional space
   b. Ensure all available information is forwarded so an informed decision can be made
   c. Be open to potential options that the SMC may present
d. Identify any major equipment procurement that may require facilities modifications
   (additional space, mechanical, electrical or plumbing connections, etc.)
e. Inform FMD of any moves or changes in room usage
f. Inform FMD of any spaces vacated and/or underutilized
g. Complete the Annual Space Inventory form any changes to space that occurred over
   the last reporting cycle
   i. Refer to Appendix B for further instructions on conducting the space
      inventory.

9. **Building Monitors:**
   a. Identify possible open spaces or underutilized spaces within a building
   b. Provide recommendations on potential space solutions
c. Do not have the authority to allocate space within their assigned buildings
d. Process key requests for approved space requests
e. Assist with compiling the Annual Space Inventory worksheet

10. **Purchasing Department:**
    a. Review purchase requests that may have a facility and/or IT component
    b. Forward these requests to FMD and/or IT for review and approval

11. **Sponsored Programs & Research Administration:**
    a. Review grant proposal to ensure that grants incorporate facilities and IT component
       costs
    b. Request assistance from FMD and IT for assistance and comment as needed

**F. Space Request Process**

1. The following process shall be used to request additional space allocation or make
   modifications to an existing allocated space.

2. **Appendix A** is the Space Request Form which needs to be fully completed.
   a. Requester contact information
   b. Justification for the additional space (program growth, staffing increase, new
pedagogy, new technology, new equipment, etc.)
c. Potential location(s) for additional space
d. Description of any special needs
e. Available funding for any improvements
f. Safety and health requirements
g. Specialty spaces needs for programs
h. Adjacency or unity of programs
i. Accessibility of space
j. Cost/benefit
k. Faculty recruitment/retention
l. Urgency of need

3. Appendix C is a flow chart for the space request process as defined below.
   a. Step 1: The user completes and submits a Space Request Form to their Director/Department Head.
   b. Step 2: The Director/Department Head reviews and forwards approved requests to the Facilities Management Department (FMD) for further processing.
   c. Step 3: FMD will determine if the request is a Space Change, Minor or Major Renovation Request.
   d. Step 3a: If the request is a Space Change, FMD will consider the request approved and move forward with the project.
   e. Step 3b: If the request requires a Minor Renovation, the request will be further developed and added to the SMC meeting agenda.
   f. Step 3c: If the request requires a Major Renovation, additional information will be needed. Upon receipt of this information, the request will be added to the SMC meeting agenda.
      i. Major renovations may require Capital Planning Committee review to ensure it aligns with other University initiatives.
* The different space request classifications are further defined in paragraph 4 below.
   g. Step 4: FMD will upload the request and supporting documents to the SMC Team Site which will be reviewed and prioritized during the SMC meeting.
   h. Step 5: SMC reviews all space requests and provides recommendations for the President’s decision. Below are some guiding principles.
      i. Campus departments and programs should be allocated spaces that are designed and constructed to be consistent with the intended use.
      ii. The objective is to match appropriate users to existing space attributes (e.g. researchers to research labs instead of instructional labs; or offices to be used as offices instead of storage).
      iii. Conference rooms may be used for instructional use when required by ADA requests or in severe instances such as a shortage of instructional classroom spaces.
      iv. The goal is to optimize campus resources and reduce the need to continually renovating spaces into other uses.
      v. Conversion of existing space to other uses/occupancies requires review and approval.
      vi. Review requests from a campus-wide perspective for the most appropriate solutions, which may be outside the traditional space use of the unit.
      vii. Entertain proposals to repurpose existing space to address a new need.
      viii. Consider the impacts of space requests such as significant alteration/construction, change of occupancy, FICM code change (change of use), or change in shared spaces.
      i. Step 6: Recommendation are forwarded to President for final decision.
j. Step 7: Funding for approved projects will be coordinated with appropriate parties.
k. Step 8: Projects will be designed and/or constructed.

4. Categories of space requests are as follows:
   a. **Space Change**: Request is processed as a Space Change if all the following criteria apply:
      i. The amount of space allocated remains constant.
      ii. The space remains allocated to the same department or office.
      iii. The space request does not change the space classification.
      iv. The department or office will fund any and all costs associated with the space change request provided it was an unplanned/unfunded renovation.
      v. The cost estimate for the renovations is less than $50,000 and does not require any design or permit.
      vi. The classification is intended to expedite Space Changes requests and be more responsive to the campus community.
      vii. Example: An individual retires and the next senior tenured individual relocates to the vacated office.
      viii. Example: Department has surplus operating funds and wants to upgrade space aesthetics (painting and flooring) prior to scheduled renovation.
      ix. Example: Office is converting space with furniture – transition from traditional stand-alone desk systems to cubicle system.

   b. **Minor Space Renovation**: Request is processed as a Minor Space Renovation if all the following criteria apply:
      i. The change in allocated space does not exceed 1,000 sf to include common areas and circulation.
      ii. The space request does not change the space classification.
      iii. The cost of renovation is funded from department, division or other University fund source. In other words, funding is not needed for this space request.
      iv. The cost estimate for the renovations is less than $100,000 and does not require design or permit.
      v. No capacity change of an instructional space. For example a project that removes seats from an classroom for storage units or display cabinets.

   c. **Major Space Renovation**: Request is processed as a Major Space Request if any one of the following apply:
      i. The change in allocated space exceeds 1,000 sf to include common areas and circulation.
      ii. The space request changes the space classification.
      iii. The cost of renovation is unfunded. In other words, funding is needed for this space request.
      iv. The cost estimate for the renovations is more than $100,000 or requires a design or permit.
      v. The capacity of an instructional space is changed.

5. Appendix D is the criteria used to evaluate space requests.

6. FMD will refine the scope of the space request and obtain a rough construction estimate (minor, major and capital costs). Funding of the space request may be:
   a. Submitted on the annual Repair and Renovation project request
   b. Funded by department carry over or other operating funds
   c. Approved for plant funding outside the normal cycle if determined to be a University strategic initiative or correct a major safety issue
   d. Funded via other sources (donor, grant, etc.)
7. FMD will evaluate all requests including an audit of currently assigned space to verify that space cannot be identified within the existing assignment.
   a. The requesting department/individual may need to provide clarifying information during this evaluation process.

8. If potential space(s) have been identified, FMD will contact the affected department(s) about possible reallocation of space. A meeting may be scheduled with requester and affected department(s) to better understand the request and impacts.
   a. This notification process is critical for the transparency in space management.
   b. These meetings are not meant to imply a decision has been made. The meeting is needed to identify the pros and cons of the request so the SMC can make an informed recommendation to the President.

9. If the request cannot be satisfied with existing space on campus, the request will be placed on hold until an acceptable space becomes available. This hold will not exceed two years. After two years, the request must be resubmitted to validate the continual need for the additional space.

10. When a space is vacated, FMD will contact all parties that have expressed interest in the specific space or have an need for additional space. If two competing needs exists for the same space, the SMC will convene to prioritize the requests and submit the recommendation to the President for final decision.
    a. The requesting department will be afforded the opportunity to submit additional information to support their request if this case is encountered.

11. If no renovation or construction funding is required for the space request, any new directional and office signage will be the responsibility of the requesting department. The requesting department will also be responsible for any contracted moving costs.

12. If renovation or construction funds are required, the signage and moving costs will be included in the project budget.

13. Requesters and affected individual(s) may appeal FMD’s recommendation at the SMC meeting and present their case to the committee for why a space should/shouldn’t be allocated.
    a. The VPFA will review and decide on all appeals.
    b. This process will be completed prior to submitting proposals to the President for final approval.

14. SMC makes a formal recommendation to the President, who then makes the final decision regarding the space allocation.

15. Once the President’s decision is made, FMD will post the decision on the SMC Team Site and send an email to the requesting department copying the appropriate dean, director or department head.

G. Exemptions and Expedited Reviews

1. Minor alterations such as installing partitions, setting up cubicles or aesthetic upgrades (painting and flooring) to improve spaces without changing the space classification are exempt from SMC review as discussed above. Similarly, minor occupancy changes including office allocations may be exempt from SMC review. Such changes shall first be reported to FMD to
determine whether such a request meets the criteria for an exemption and expedited implementation.

2. FMD – when delegated or directed by the President – may approve minor alternations and minor occupancy changes. Such exemptions include office allocations and lab assignments when all parties including deans representing the affected departments have been informed of the changes in space allocation. FMD will report the exemptions and expedited reviews to SMC at the next regularly scheduled meeting for the record.
   a. The intent of this section is to streamline projects that impact staffing assignments, recruitment actions or urgent/time sensitive initiatives. If multiple requests are made for the same space, the SMC will review the request and forward recommendation(s) to the President.

3. In the event of an emergency or; when the health, safety or welfare of individuals are jeopardized; or when an ADA request is made that requires immediate attention, FMD in conjunction with the Vice President for Finance and Administration may allocate space on a temporary basis to alleviate the emergency and relocate individuals to remedy the hazardous issues caused to the respective space.
   a. SMC will make recommendations for a permanent solution at the next regularly scheduled SMC meeting if warranted or if the hazard or emergency has not been resolved.

H. Periodic Review and Evaluation

1. Periodic Review: A complete and accurate space inventory is foremost to effective space planning and management. Space inventory includes a periodic review of space allocations, actual space use, and occupancies reconciled with institutional priorities. Building audits may be performed as necessary to ensure space is being used as it was intended and in the most efficient manner.

2. Space Utilization: The recurring assessment of classroom and lab space is essential to understand how efficient or inefficient that the University academic spaces are used. This report allows an institution to minimize space operating costs by maximizing the use of existing space. For example, sophisticated research space is costly to construct and operate. Accordingly, use of such space for more mundane uses is not cost-effective. If laboratory space is being used for storage, and more instructional or research laboratories are needed, clearly it would be less costly to construct storage space and use the expensive laboratory space for its original purpose as long as other factors – such as proximity, access, and control of space – make it practical. Similarly, most other space could be evaluated for suitability of use and fit.

3. Space Allocation Guidelines: PASSHE Space Guidelines identify targeted utilization rates for classroom/lab usage and seat occupancy. These rates are listed in the table below.

<table>
<thead>
<tr>
<th>Room Category</th>
<th>Time Use Target</th>
<th>Seat Use Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom</td>
<td>75% (37.5 hours/week)</td>
<td>67%</td>
</tr>
<tr>
<td>Laboratory</td>
<td>46% (23 hours/week)</td>
<td>70%</td>
</tr>
</tbody>
</table>

4. Room Size Calculations: PASSHE Space Guidelines identify specific calculations for different types of rooms based on the FICM. Office room sizes are specifically identified in the table below based on the person assigned to the room.
5. Unoccupied or underutilized areas: Spaces allocated to a department may be unoccupied or underutilized.
   a. These spaces may be held by the department for a period of 90 days when a hiring request has been submitted.
   b. Instructional labs and classrooms shall be deemed underutilized if they do not meet target utilization rates in two consecutive semesters or a total of two semesters within a four-semester period.
   c. Research labs shall be deemed underutilized if they do not meet target utilization rates in one semester.
   d. Conference Rooms shall be deemed underutilized if the space is not used at least 20 hours/week. If deemed underutilized, the conference could be converted to a meeting space which opens the room to the entire campus to include student clubs and organizations.
   e. Spaces that are deemed underutilized may be reallocated, redesigned and/or reclassified to increase utilization; to promote stewardship of the space; and to address other University needs.
   f. Units will be notified when a space is deemed underutilized to develop a plan to improve utilization. If utilization rates do not improve within one year after the plan has been implemented, the space may revert to the University space pool and may be classified as vacant upon SMC review. Appendix E provides some general guidelines for scheduling classrooms and laboratories.
   g. Winter and Summer sessions are not considered in the above assessments.

6. Vacant Space: When a space request results in vacating a space, those spaces shall be entered the University space pool 30 days after it becomes vacant. This period allows FMD to inspect the area and make mandatory repairs. The process outlined in paragraph F will be followed when a vacant space is identified. SMC will forward the recommendation on the vacant space to the President.

7. Shared space is defined as sharing a room(s)/suite on the same floor within the same building between different departments/groups. Shared space may be split between floors or buildings but must contain staff from each different department within those spaces. When allocating or reallocating shared space by two or more departments or groups, all units sharing the space will be consulted prior to a final recommendation by the SMC. Space requests involving shared spaces will be given priority.

8. Lab spaces - including both research and instructional - shall be shared and do not belong to a specific principal investigator, faculty member or college/department. The goal is to help account for the ebb and flow of grant awards and funding cycles to improve collaboration as well as respond to shifting needs as funding changes.

9. When an ADA space request is made, FMD shall coordinate with the Office of Learning Services and the Director of Safety and Environmental Health to find spaces that meet ADA
requirements within 30 days of the official request. FMD shall identify buildings that are ADA compliant and designate alternative space to be used for reasonable accommodations.

a. If an ADA office request will exceed six months, a long-term solution shall be identified to create compliant spaces.

I. Facilities Inventory Process

1. The space inventory is the official record of space assignments for the University. The inventory is maintained and updated annually by FMD. All department and offices are required to provide complete and accurate information regarding space occupancy and utilization.

2. The space inventory database will be used to obtain space utilization (space occupied by a school or department and utilization statistics) and how well individual departments needs are being met.

3. The University’s room inventory is updated and submitted to PASSHE every February 1st. This inventory compiles square footage of all spaces categorized by the FICM classification.

4. In addition to this report, FMD also maintains a detailed room-by-room inventory of all spaces throughout campus.

   a. The room inventory describes each space on campus including departmental assignment, size, location, room type, room classification, etc.

5. Each fall the Facilities Management Department will distribute a departmental room inventory to all academic and administrative departments, along with instructions indicating the procedures to use in updating the report. December 1st is the last day to submit completed inventories and submittal to FMD for data entry, analysis and inclusion into the draft Fall Report. Appendix B provides details on the completion of this report.

   a. It is imperative that the departments complete and report all scheduled academic activity in a classroom or a class laboratory. The departments should also record all informal class activities related to their courses.

6. Facilities Inventory Schedule

   a. October 15: FMD disseminates complete departmental room inventory forms and instructions to the College Deans for distribution to their departments.

   b. December 1: Departmental room inventory updates due back to the FMD.

   c. December 15: Data input is completed, and a draft report is prepared.

   d. January 15: Final update is approved by the Space Management Committee.

   e. February 1: The Room Inventory Report is transmitted to PASSHE.

J. Classroom and Laboratory Utilization Report

1. The class scheduling software (currently AdAstra) will be used to generate a detailed space utilization data on classrooms and laboratories on annual basis.

2. This report identifies the classroom usage data and seat occupancy rates for the Fall and Spring semesters.

3. This analysis provides critical information so the University can use its space in the most efficient, effective manner.
4. The Classroom and Laboratory Utilization Report helps identify space requirements for the University and is used to:
   a. Justify capital investment in construction projects
   b. Indicate space needs for departmental programs/curriculum
   c. Support budgetary presentations and project requests
   d. Identify the most popular size of classroom so future projects may consider creating more of these high use spaces
   e. Ensure that the high use spaces are renovated more often (aesthetics, furniture, IT, etc.) to provide the best learning environment for our students
   f. Reallocate underutilized classrooms and lab space to accommodate growing programs
   g. Recommend consolidating evening classes to fewer buildings while placing the other buildings in an unoccupied mode.
      i. The unoccupied mode is also referred to nighttime setbacks. The mechanical systems are programed to reduce the heating or cooling of a building during evening hours. This sustainable initiative conserves energy; saves energy costs; and ultimately reduces the cost to our students.

5. The following benchmarks will be used for initiating the process for creating additional classroom assets.
   a. If the weekly use of a room is 42 hours/week for a classroom (28 hours/week for labs), FMD will assess the need for one or more additional classrooms or recommend alternate locations or class scheduling changes.
   b. If the weekly use of a room is 46 hours/week for a classroom (32 hours/week for labs), FMD will begin planning/design for additional classrooms. This planning and design process will address the size, seating capacity, style, furniture, configuration, and location based on input from faculty and compared with the industry trends and instructional pedagogies.
   c. If the weekly use of a room is 50 hours/week for a classroom (36 hours/week for labs) of a specific size or style of classroom or lab, FMD will recommend converting other underutilized spaces to accommodate this demand.

6. For reference purposes, the PASSHE utilization rates for classrooms and laboratories are copied below.

<table>
<thead>
<tr>
<th>Room Category</th>
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</tr>
</thead>
<tbody>
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<td>70%</td>
</tr>
</tbody>
</table>

K. Campus Moves

1. All campus moves shall be coordinated with FMD to ensure accuracy of the space inventory database to include the occupancy and use of all spaces.
   a. Refer to the FMD website for accessing the Campus Move Request Form.
   b. Any contracted moves must also be coordinated through FMD by submitting the Campus Move Request Form.
2. Once a campus move has been coordinated, the Building Monitor can submit the appropriate key requests for the new spaces.
3. If the space request is considered a minor or major renovation or part of a capital construction project, the moving and signage costs will be included in the project budget. For space change requests, the requesting department or office is responsible to fund the moving and signage costs.
L. Misuse of Space Resources

1. The goal is to optimize University space to improve the student experience. Spaces which do not comply with the approved usage may be subject to reallocation. Colleges and departments that do not follow the approved uses may be subject to reallocation.
   a. For example, if a space is approved for offices but is then used for conference space or storage, the result may be reallocation to a different department that needs office space.
   b. PASSHE Space Standards and Target Utilization Rates will be used to ensure spaces meet the intended and approved uses.

2. Office Space Misuse: Shuffling or moving temporary staff into and out of office spaces to make spaces appear as if they are occupied may result in future space decisions being delayed or suspended.
   a. Additionally, unauthorized construction such as building floor-to-ceiling cubicles, constructing or removing a wall (including fence/cages), or other similar construction practices may result in delayed or suspended space decisions.
   b. In severe instances, reallocation of space may be deemed appropriate.

3. Conference Space Misuse: Units and individuals including student groups that do not properly clean up and restore conference spaces may lose conference room privileges.
   a. Similarly, if patterns of non-compliance (failure to utilize the central scheduling software) emerge, units or individuals may lose reservation privileges.

4. Research Space Misuse: Research spaces that do not comply with safety standards or are in violation of compliance issues and/or the Office of Safety and Environment Health or Risk Management will have 60 days to correct all safety and compliance violations from date of notice.
   a. Research spaces may be reallocated if items have not been corrected within 60 days.
   b. Immediate action may be required for severe safety issues.

M. Appendices

Appendix:
   A. Space Request Form
   B. Space Inventory Guidance and Worksheet
   C. Space Request Flow Chart
   D. Space Request Evaluation Criteria
   E. Classroom and Laboratory Scheduling Guidelines
APPENDIX A: SPACE REQUEST FORM
# Space Request and Renovation Request

**Space Request Form 1 of 2 Appendix A**

<table>
<thead>
<tr>
<th>I. CONTACT INFORMATION:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting Department:</td>
<td>Date:</td>
</tr>
<tr>
<td>Name:</td>
<td>Phone:</td>
</tr>
<tr>
<td></td>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>II. DESCRIPTION OF DEPARTMENT:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A. What best describes your space need? (Check all that apply.)</td>
<td></td>
</tr>
<tr>
<td>☐ Change of Space Function</td>
<td>☐ Department Level Change</td>
</tr>
<tr>
<td>☐ College Level Change</td>
<td>☐ Improvement of Space</td>
</tr>
<tr>
<td>☐ Request for Space in New Construction</td>
<td>☐ Request for Additional Space</td>
</tr>
<tr>
<td>☐ Discrepancies in Current Space Data</td>
<td>☐ Vacate/Depart Space (Please provide building/room #’s)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B. What will you use the space for (check all that apply)?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Instruction</td>
<td>☐ Research</td>
</tr>
<tr>
<td>☐ Storage</td>
<td>☐ Athletics</td>
</tr>
</tbody>
</table>

| C. Do you anticipate the number of people in your department increasing within the next two years? | Yes ☐ No ☐ |

<table>
<thead>
<tr>
<th>D. If yes, indicate anticipated growth:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of full-time faculty _____</td>
<td>Number of part-time faculty _____</td>
</tr>
</tbody>
</table>

| E. How much space do you currently have? (total assignable square feet) |             |

## III. REQUEST FOR SPACE:

If you need assistance completing this form call FP&C at 786-4900 or by email at ayfpc@uaa.alaska.edu. If you need copies of floor plans, they are available on our website at [http://fpgis.uaa.alaska.edu/CampusBuildings.htm](http://fpgis.uaa.alaska.edu/CampusBuildings.htm).

| A. Briefly describe why new/additional space is needed. Address the implications to your program/service if additional space is not approved. Continue on separate sheet as needed. |             |

<table>
<thead>
<tr>
<th>B. New space will be used for: Instruction ☐</th>
<th>Research/Grant ☐</th>
<th>Administration ☐</th>
<th>Storage ☐</th>
<th>Support ☐</th>
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<tr>
<td>Other, please specify:</td>
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</table>

| C. What attempts have been made to locate space within your current space allocation? Has underutilized space been assessed to solve this need? Have shared space possibilities been explored? |             |

| D. Have you identified a suitable location for this new space that may be available? | Yes ☐ No ☐ |

| E. If yes, describe and/or identify building/room #’s or attach drawing/floor plans/diagrams: |             |

| F. Have you contacted current holder of the space? | Yes ☐ No ☐ | Do they support the concept? | Yes ☐ No ☐ |

| G. Date needed. |             |
H. Provide information on any time constraints that may affect the timing of allocation of the space.

REQUEST AUTHORIZATION SIGNATURES (The signatures below indicate agreement that the space request should be investigated. Approval to proceed does not indicate a guarantee of space for the purpose outlined in this request.)

<table>
<thead>
<tr>
<th>Department Chair or Director:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments:</td>
<td></td>
</tr>
<tr>
<td>Dean/Department Head:</td>
<td>Date:</td>
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<tr>
<td>Comments:</td>
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<tr>
<td>Vice President:</td>
<td>Date:</td>
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<td>Comments:</td>
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</tbody>
</table>

Forward this completed form with the proper signatures and supporting documents by inter-campus mail to the Facilities Management Department located in the Palmer Building.

FACILITIES MANAGEMENT DEPARTMENT

<table>
<thead>
<tr>
<th>Date Space Request received:</th>
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<tbody>
<tr>
<td>Date plans received:</td>
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<tr>
<td>Date space assessment completed:</td>
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<tr>
<td>Date additional information requested:</td>
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</tbody>
</table>

Less than $50,000, within existing Dept. space & Dept. Funded – forward to Facilities for action

Over $50,000, involving Non-Dept space or Non Funded – forward to SMC for recommendation and then to the President for approval

Date SMC forwards space assessment, completed form and plans to the Capital Planning Committee (as needed):

SPACE MANAGEMENT COMMITTEE (SMC)

| Date reviewed by SMC: |       |
| Action recommended by SMC: |     |
| Date Forwarded to President for decision: |  |
| President’s decision: |       |
| Date of President’s decision: |  |
APPENDIX B: SPACE INVENTORY GUIDANCE AND WORKSHEET
<table>
<thead>
<tr>
<th>BUILDING</th>
<th>FLOOR</th>
<th>ROOM #</th>
<th>SF</th>
<th>CODE</th>
<th>DESCRIPTION / ROOM USE</th>
<th>DIVISION</th>
<th>DEPT ASSIGNED TO SPACE</th>
<th>COMMENT</th>
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1 OF 1

Appendix B
APPENDIX C: SPACE REQUEST FLOWCHART
SPACE REQUEST
FLOW CHART

President
Review /
Approve

SMC
Meeting

Space Change
Request
No change in allocated
space
No transfer of space
No change in
classification
Request is funded
Cost < $50,000
No permit required

Minor Renovation
Request
Allocated space < 1,000 sf
No change in classification
Request is funded
Cost < $100,000
No permit required
No capacity change for
instructional spaces

Major Renovation
Request
Allocated space > 1,000 sf
Classification change
Request is unfunded
Cost > $100,000
Permit and/or design
required
Capacity change of
instructional space

Facilities
Categorize
Request

Facilities
Processing

VP Review /
Approve

Dean /
Director
Approve

Support
Facilities, IT, Registrar, Institutional Research

Space Request
Form
APPENDIX D: SPACE REQUEST EVALUATION CRITERIA
### Criterion A - Alignment with University Plans and Standards

<table>
<thead>
<tr>
<th>Assessment Statement</th>
<th>0 to 3 points Inadequate to Poor</th>
<th>4 to 7 points Average</th>
<th>8 to 10 points Good to Excellent</th>
<th>SCORE</th>
<th>WEIGHT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>The resource supports implementation or aspects of the University’s plans.</td>
<td></td>
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<tr>
<td>• Strategic Plan</td>
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<tr>
<td>• Academic and enrolment plans</td>
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<tr>
<td>• Research plans and activities</td>
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<td>• Business, staffing and service plans</td>
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<tr>
<td>• Campus Master Plan, Facilities Needs and Priority Study and related asset renewal or maintenance plans</td>
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<tr>
<td>• Alignment with standards the University is seeking to achieve</td>
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<tr>
<td>The resource is NOT or only marginally aligned with the University’s plans.</td>
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<tr>
<td>The resource is aligned with some of the University’s plans and contributes to their implementation and achievement.</td>
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<td>The resource is highly aligned with most of the University’s plans and greatly contributes to their implementation and achievement.</td>
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</table>

#### Rationale Statement
In the resource request process, applicants are encouraged to:

Describe how the resource aligns with and / or supports the achievement of University’s plans, standards as listed above as well as its research and outreach mandates. Outline benchmarks, indicators, direct comparison with other institutions, and before-and-after descriptions to demonstrate change and progress in the pursuit of the University’s plans.

### Criterion B - Excellence, Innovation, Creativity and / or Inclusiveness

<table>
<thead>
<tr>
<th>Assessment Statements</th>
<th>0 to 3 points Inadequate to Poor</th>
<th>4 to 7 points Average</th>
<th>8 to 10 points Good to Excellent</th>
<th>SCORE</th>
<th>WEIGHT</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>The resource supports:</td>
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<td>• The leadership, competitive position and differentiation of the Faculty, School or Department within the relevant environment(s) or market(s) it targets or intends to target</td>
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<td>• The fostering of learning excellence / the promotion or demonstration of innovation / the creation of conditions that mirror external best-in-class practices</td>
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<td>• The varied needs (including special needs) and expectations of students, users or partners</td>
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<td>• Compliance with applicable accreditation requirements</td>
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<tr>
<td>The allocation of the resource is poorly aligned with the assessment statements and does NOT or only marginally contributes to excellence, innovation and inclusiveness at the University.</td>
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<tr>
<td>The allocation of the resource aligns with 1 or 2 of the assessment statements and contributes directly and demonstrably to excellence, innovation and inclusiveness at the University.</td>
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<tr>
<td>The allocation of the resource aligns with 3 or 4 of the assessment statements and greatly contributes directly and demonstrably to excellence, innovation and inclusiveness at the University.</td>
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#### Rationale Statement
In the resource request process, applicants are encouraged to:

Describe how the requested resource contributes to the pursuit of Excellence, Innovation, Creativity and Inclusiveness by the Faculty, School or the Department, and in relation to the Assessment Statements listed above. Outline the anticipated impact(s) or risk(s) incurred by the Faculty, School or the Department if the resource is not allocated in relation to the Assessment Statements listed above.

### Criterion C - Benefits

<table>
<thead>
<tr>
<th>Assessment Statements</th>
<th>0 to 3 points Inadequate to Poor</th>
<th>4 to 7 points Average</th>
<th>8 to 10 points Good to Excellent</th>
<th>SCORE</th>
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<th>TOTAL</th>
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<tr>
<td>The resource creates measurable:</td>
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<td>• Exceptional learner success / user experience / stakeholder satisfaction</td>
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<td>• Exceptional or anticipated research outcomes / innovation potential</td>
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<td>• Collaboration and strengthening of pathways, synergies and asset sharing between programs or services</td>
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<td>• Enhancement(s) of industry, alumni, education and/or community partnerships</td>
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<td>• Additional revenue stream(s), saving(s) or efficiencies</td>
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<tr>
<td>The allocation of the resource is poorly aligned with the assessment statements and does NOT or only marginally contributes, directly and demonstrably benefits to the University.</td>
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<tr>
<td>The allocation of the resource aligns with 1 or 2 of the assessment statements and contributes direct and demonstrable benefits to the University.</td>
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<tr>
<td>The allocation of the resource aligns with 3 or 4 of the assessment statements and greatly contributes direct and demonstrable benefits to the University.</td>
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#### Rationale Statement
In the resource request process, applicants are encouraged to:

Describe how the resource aligns with and / or supports the achievement of University’s plans, standards as listed above as well as its research and outreach mandates. Outline benchmarks, indicators, direct and indirect beneficiaries of investment in the resource. Identify the direct and indirect beneficiaries of investment in the resource.
## Criterion D - Stewardship and Sustainability

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Inadequate to Poor</th>
<th>4 to 7 points Average</th>
<th>8 to 10 points Good to Excellent</th>
<th>Score</th>
<th>Weight</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td><strong>Assessment Statements</strong></td>
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<tr>
<td>The resource fosters, demonstrates or addresses:</td>
<td>The allocation of the resource is poorly aligned with the assessment statements and does not contribute to the stewardship and sustainability objectives of the University.</td>
<td>The allocation of the resource aligns with 1 or 2 of the assessment statements and contributes, directly and demonstrably, to the stewardship and sustainability objectives of the University.</td>
<td>The allocation of the resource aligns with 3 or more of the assessment statements and greatly contributes, directly and demonstrably, to the stewardship and sustainability objectives of the University.</td>
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### Rationale Statement

In the resource request process, applicants are encouraged to:

Describe how the requested resource fosters, demonstrates or addresses the University’s Stewardship and Sustainability goals and plans as per the Assessment Statements listed above. Outline the qualitative and quantitative baseline(s) and the measurement method(s) to be used to monitor progress in the pursuit of Stewardship and Sustainability resulting from investment in the resource.

## Criterion E - Investment and Risk

<table>
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<th>Score Range</th>
<th>Inadequate to Poor</th>
<th>4 to 7 points Average</th>
<th>8 to 10 points Good to Excellent</th>
<th>Score</th>
<th>Weight</th>
<th>Total</th>
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<tbody>
<tr>
<td><strong>Assessment Statements</strong></td>
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<tr>
<td>The request for resource allocation considers or recognizes:</td>
<td>The allocation of the resource has low feasibility with respect to the assessment statements and represents a poor investment risk decision for the University.</td>
<td>The allocation of the resource has acceptable feasibility with respect to the assessment statements and represents an acceptable investment / risk decision for the University.</td>
<td>The allocation of the resource has high feasibility with respect to the assessment statements and represents a good investment risk decision for the University.</td>
<td>2</td>
<td>0</td>
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### Rationale Statement

In the resource request process, applicants are encouraged to:

Summarize key aspects of the business case, costs, amortization, payback and/or risks associated with procuring the requested resource in relation to the Assessment Statements listed above. Describe potential future deferred costs and cumulated risk factors related to forgoing the requested investment. Outline known risk factors related to the implementation / installation of the requested resource.

**TOTAL SCORE CRITERIA A to E = 0**
APPENDIX E: CLASSROOM AND LABORATORY SCHEDULING GUIDANCE
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1. General Guidelines:
   a. In the planning and management of campus facilities, all indoor and outdoor spaces are considered allocable resources. The Vice Presidents will manage space allocations with Deans, Department Chairs, or Directors.
   b. Minor changes defined in paragraph F.4. above is managed by the Vice President or his/her designee. Emphasis needs to maximum utilization. All space allocation and reallocation are to be reported to FMD at the time of reassignment.
      i. If a change is not identified when it occurs, the change must be identified in the annual PASSHE space inventory submission.
   c. Classrooms, laboratories, conference/seminar rooms or other facilities dedicated to instruction may not be converted to non-instructional use without approval by the SMC.
   d. The use of all existing facilities will be evaluated before new space is constructed, acquired or leased.
   e. Grant and contract proposals that require additional space, remodeling or relocation must be reviewed by the SMC prior to submission.
   f. Facilities are allocated to units for a specific purpose. When that purpose is no longer required, that space is identified for potential future reassignment by the SMC.
   g. The allocation of campus facilities shall be flexible in order to allow shared/multi-use of space and must accommodate changes in building users and technology.
   h. Whenever possible, clustering programs with common research or teaching interests should be considered.
   i. Employees are not to be assigned more than one office on campus unless reviewed by the SMC and approved by the President.
   j. General support space (copy rooms, lounge, etc.) will be assigned based on need and space availability.
   k. Except for student government, formal space requests are not intended for student organizations and clubs. Incidental use of facilities for student organizations and clubs may be authorized if that use of space contributes to the goals of the University.

2. Instructional Space: In the interest of achieving maximum efficiency in the use of space, the following practices and procedures apply to the assignment and use of classrooms and other instructional spaces.
   a. All instructional space and the designated usage of that space in areas classified as classrooms and instructional labs will be under the control and scheduling of the University Registrar. All instructional space including instructional laboratories and conference rooms shall be scheduled through the University’s scheduling software.
   b. All instructional space in the academic buildings is coordinated through academic scheduling software for assignment of regularly scheduled classes and is available for meetings and study purposes only on a temporary basis and only after being properly coordinated.
   c. For changes to any instructional space, the appropriate dean must submit a Space Request Form to begin the review process.
   d. Courses will be assigned to available space considering room size, technology needs, proximity to faculty member’s program area, and priority space identified by each program area.
   e. Highly specialized instructional rooms, which are suitable for use by other courses, may be made available as instructional space when not in use by the designated college or program area.
   f. To ensure the greatest likelihood of being able to meet student needs to take specific
courses, it is important to assure that course offerings are spread throughout the entire teaching day (7:00 a.m. through 10:00 p.m.).
g. Fall and Spring courses must follow the university’s standard scheduling blocks.
h. Considerations that may change the initial classroom assignments are as follows:
   i. Upon request from the Office of Learning Services, courses may be moved to another location to accommodate students with disabilities. The department offering this course is responsible for informing all enrolled students.
   ii. Courses where enrollment is under classroom capacity may be relocated to a classroom with a more appropriate capacity. Class size should match classroom capacity as close as possible.
   iii. Additional sections will be assigned only to available classrooms.
   iv. Courses moved to new time or day will be assigned only to available classrooms.
   v. Course sections not meeting at standard scheduling times causing conflicts with other sections may be requested to change course time to resolve the conflict.

3. **Faculty and Staff Office Space:** The University recognizes the need for suitable office space for faculty and staff members. The following general procedures apply:
   a. To the extent space is available, all full-time faculty members and other faculty or staff whose duties create a need for privacy will be assigned private offices.
   b. Multiple offices for faculty or staff are to be provided only when their duties clearly require office space in multiple locations. Requests for multiple offices are to be reviewed by the SMC and approved by the President.
   c. Office size shall be in accordance with PASSHE space standards and guidelines.

4. **Laboratory and Research Space:**
   a. Each faculty member engaged in research should have access to appropriate space for conducting his/her research.
   b. Faculty, in collaboration with their Chair/Director and Dean, applying for grants that require laboratory and/or research space should consult FMD prior to grant submission to ensure adequate facilities are available.
   c. Research space for faculty should be assigned as close to the faculty members office as possible.
   d. Research space for graduate students should be near the research space of the supervising faculty member if possible.
   e. Individual study laboratories such as student art studios, music practice rooms and science laboratories will be scheduled or assigned by the appropriate college and reviewed by the SMC.

5. **Sports Facilities:** The sports facilities are constructed and maintained primarily for intercollegiate athletic events, academic instruction and recreational sports. These facilities may be utilized by unaffiliated groups as time and space permit.
   a. Intercollegiate athletics, academic classes, recreational sports and University sanctioned activities have priority over other programs in the use of sports facilities.
   b. Use and scheduling of all sports facilities shall be in accordance with the current policies.
   c. Guidelines for use of sports and recreation facilities:
      i. Possession and/or consumption of alcoholic beverages is prohibited unless approved in advance by the VPFA.
      ii. Sports facilities may only be used during scheduled hours and only with adequate on-site supervision by a responsible party.
iii. No private transportation equipment of any kind is permitted on sports fields.
iv. No holes, ditches or pits may be dug without approval from FMD.
v. No tents shall be staked at any sports venues or surrounding parking lots.
vi. Street shoes, bikes, rollerblades and skateboards are not permitted on any outdoor tennis court or wood gym floors.
vii. Gum, sunflower seeds, smoking and open flames are prohibited especially on the synthetic fields.
viii. Dogs and other animals (except service animals) are not permitted in any sports facility.
ix. Field lighting systems are to be scheduled through the Event Scheduling office.
x. Tobacco use is permitted only in designated areas.

6. **Conference Rooms**: All conferences rooms shall be entered and scheduled in the room scheduling application (currently AdAstra) to track usage.
   a. The SMC will make recommendations on the business practices with reserving conference rooms throughout campus. For instance, some conference rooms will be controlled by the building occupants such as the Anderson Presentation Room in Lombardo Welcome Center. Other conference rooms are free to the campus community to schedule.
   b. The SMC will review the current inventory of conference rooms and determine the business rules for reserving the rooms.
   c. The SMC will coordinate with the building occupants to make sure that any concerns are addressed.
   d. The conference room list will be reviewed annually and updated accordingly.