

## UC Davis Policy and Procedure Manual

### Chapter 360, Physical Facilities

#### Section 21, Space Resources Allocation and Usage

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**Responsible Department:** Space Management

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#### I. Purpose

This section provides policy regarding space allocations, space usage, criteria, and priorities for the evaluation of space needs; procedures for space requests; and guidelines for space assignments by academic and administrative units.

#### II. Policy

- A. The Provost and Executive Vice Chancellor (Provost) is responsible for the assignment and allocation of campus space. All space is considered an allocable resource subject to continual evaluation in order to achieve optimal campus-wide utilization.
- B. Building space is allocated by the Provost through Space Management to Deans, Vice Provosts, Vice Chancellors and the Registrar for the conduct of official University business. Deans, Vice Provosts, Vice Chancellors and the Registrar have the responsibility and discretion to assign allocated space as they deem appropriate to maximize effectiveness in meeting the University's mission of teaching, research and public service. The Provost maintains the ability to re-allocate space when necessary.
- C. Space utilization evaluations are conducted by Space Management in order to ensure appropriate distribution among major campus units and to assist Deans, Vice Provosts, Vice Chancellors, and the Registrar in fulfilling their responsibilities for assignment and effective utilization of allocated space.
- D. Except for student governments, formal space allocations are not made to student organizations. Deans and Department Chairs may authorize incidental use of college/school or departmental facilities by student organizations if, in the judgment of the Dean or Department Chair, that use of space contributes to the goals of the college/school or department.
- E. Any campus space considered for assignment to non-university entities must be approved in advance by Space Management.
- F. Deans, Vice Provosts, Vice Chancellors and the Registrar may loan space between college/divisions but must coordinate the loan with Space Management and document the loan in the space database.
- G. Space for emeriti professors, postdoctoral or visiting scholars in non-pay status, or graduate students in non-pay status should only be accommodated in shared space. That consideration should be based upon:
  1. The individual is actively involved in official activities of the campus; and
  2. Space is available that is not necessary to support the University's strategic plan, departmental growth or new faculty hires.
- H. When a School/College, Department, Unit or Program relocates to newly acquired or constructed facilities or is no longer using a space due to lack of funding or need:

1. The unit must clear the space of all of all records, equipment, furniture, materials and debris.
2. The vacated space will revert to the Provost. Space Management will make recommendations to the Provost for reallocation.

### **III. Allocation of Space to Deans, Vice Provosts, Vice Chancellors and the Registrar.**

- A. Space allocations made by the Provost are based on academic and strategic plans using the following criteria. Each criteria will be part of the consideration, but will not be the sole determining factor for allocation of space:
  1. Funding sources for the original capital construction and any subsequent improvements and modifications.
  2. Original functional intent of the space including any special amenities, equipment or furnishings.
  3. Workload factors, including present and projected numbers of students, faculty, and staff. Both FTE and headcount are considered.
  4. Program requirements, including funding, uniqueness of program and stage of program development.
  5. Adequacy of existing space, including type, quality, and quantity of space in terms of efficiency and safety.
  6. Changing space needs resulting from new technologies and/or methodologies needed to support academic, instructional and public service programs.
  7. Environmental and geographic considerations based on program needs, adjacency to related programs, and promotion of interaction among students, faculty, and staff.
  8. State approved guidelines and standards developed for higher education.
- B. Leased space may be allocated to support program activities that cannot feasibly be conducted in on-campus locations or in situations where no functionally adequate space can be provided on campus. Leases are originated and managed by Real Estate Services only.
- C. Storage space is limited and shall be allocated to Deans, Vice Provosts, Vice Chancellors and the Registrar based on demonstrated need and availability.
  1. Storage space should be utilized only for documents, equipment and other material that must be retained by law or policy and is used regularly.
  2. Storage space shall be designed for that purpose, and items shall not be stored in space that is designated as office, research, classroom or other non-storage uses.
  3. Building corridors are not assignable space and shall not be used for storage.

### **IV. Assignments of Space by Deans, Vice Provosts, Vice Chancellors and the Registrar**

- A. In order to achieve the most effective utilization of space and other resources, departments should share space and facilities whenever it is functionally possible (e.g., conference rooms, teaching laboratories, developing research cores, support space).
- B. Academic Units
  1. Deans, Vice Provosts, Vice Chancellors and the Registrar have discretion to assign space as they deem appropriate for program support within the following parameters:
    - a. Full-time faculty, assistant professor and above, and equivalent titles; full-time lecturers and instructors; and Cooperative Extension specialists should be provided with private office space whenever possible.

- b. Faculty and staff should be assigned only one office space. Faculty and staff with multiple appointments shall not be assigned permanent space at the location where they spend fewer hours per week. Hoteling space can be provided if available.
- c. Telecommuting faculty and staff who spend more than 50% of their time working off-site shall not be assigned permanent space. Hoteling space can be provided if available.
- d. Generally, faculty conducting research should be assigned the appropriate lab, office and service space necessary based on staff levels (FTE, part-time and student) and the needs of research equipment. To allow for the efficient re-assignment of research office and laboratory space as research programs ebb and flow, whenever possible:
  - 1) Assignment of research office space should be assigned by workstation and not by room, and should support staff actively engaged in research activities who do not have office space elsewhere.
  - 2) Assignment of research lab space shall be by bench or equipment area and not by room for generally compatible laboratory types or functions and where the building configuration permits.
  - 3) Assignment of space may be informed by research funding levels.
  - 4) Lab space for emeriti faculty shall follow the provision in section II.G. above.

C. Administrative and service departments

1. Space assignments are based on operational requirements of administrative units.
2. When possible, administrative and student service units shall be housed in locations that accommodate the needs of their clientele.
3. Staff shall not be assigned more than one office space. Telecommuting staff who spend more than 50% of their time working off-site shall not be assigned permanent space. Hoteling space can be provided if available.

**V. Roles and Responsibilities**

A. Provost and Executive Vice Chancellor

1. Retains final responsibility for the appropriate allocation, assignment and use of campus space.
2. Approves requests for the assignment of space to non-campus entities.

B. Space Management

1. Conducts campus-wide facilities utilization studies and building audits to support appropriate space allocations and distribution among major campus units.
2. Assists Deans, Vice Provosts, Vice Chancellors and the Registrar in fulfilling their responsibilities for appropriate assignment and effective utilization of allocated space.
3. Acts as the single point of contact for all requests for the allocation of additional space and any agreements associated with space.
4. Evaluates and responds to requests for additional space allocations; documents new or revised allocations of space.
5. Maintains and makes available to academic and administrative units, the campus space inventory application as the official system of record for campus

space assignments.

6. Receives and records in the campus space inventory, Memoranda of Understanding (MOU) and other agreements between departments or units regarding space.
7. Coordinates requests for new capital asset account numbers (CAAN), zones and addresses, new or revised room numbers, retiring buildings and renaming buildings.
8. Determines when leased space is appropriate based on the space request. Seeks approval to proceed with the lease from the Provost and coordinates approvals for leased space as required by policy.

**C. Real Estate Services**

1. Acts as the single point of contact with landlords and real estate brokers for University leased space transactions.
2. Coordinates approvals for University leased space transactions with Space Management.

**D. Deans, Vice Provosts, Vice Chancellors and the Registrar**

1. Assign allocated space in ways that further the University's mission of teaching, research and public service.
2. Serve as the primary point of contact with Space Management for all requests for the allocation of additional space.
3. Ensure the campus space inventory system is regularly updated and complete for allocated space; and identify a departmental space coordinator who will:
  - a. Administer space according to policy and guidelines;
  - b. Maintain current departmental space assignments and room use classifications in the campus space database;
  - c. Participate in the annual space inventory process, ensuring all facets of departmental space are captured correctly; and
  - d. Notify Space Management when there is a renovation that results in changes to room numbers, square footage adjustments, and addition or removal of walls, rooms and doors.
4. Create, with consultation from Space Management, MOU or other agreements between departments documenting space loans or other space sharing arrangements. Provide copies of MOU or agreements to Space Management for recording in the campus space inventory.

**VI. Procedures**

- A. Requests for space or project initiation shall be made by completing a Space and Project Needs Request form and submitting it to Space Management ([spacehelp@ucdavis.edu](mailto:spacehelp@ucdavis.edu)). Project initiation forms can be found on the Design and Construction Management website (<https://dcm.ucdavis.edu/>); click "Project Initiation" button.
- B. To coordinate space inventory adjustments, contact Space Management for access to the database and other instructions.

**VII. Further Information**

- A. For more information on space management, space inventory and campus space guidelines visit: <https://dcm.ucdavis.edu/operating-units>; scroll to Space Management and Project Development.
- B. Contact Space Management by visiting: <https://dcm.ucdavis.edu/contact-us>.

**VIII. References and Related Policies**

- A. Coordinating Council for Higher Education; Space and Utilization Standards, California Public Higher Education. (<https://eric.ed.gov/?id=ED013079>)
- B. UCD Policy and Procedure Manual (<http://manuals.ucdavis.edu/PPM/about.htm>):
  - 1. Section 360-30, Operation and Maintenance of Plant.
  - 2. Section 390-40, Fire Safety.