



## University Operating Procedure

---

# Space Management

---

## Overview

The University of Vermont's facilities are valuable resources that represent a significant financial commitment by the University and are shared by a large number of individuals and groups. The space that exists today must be managed carefully to support the mission of the University effectively and provide for the appropriate and necessary levels of capital project development in the future.

The purpose of space management is to maximize the value of existing space and minimize the need for new space. The primary objectives of space management are to:

- Set the parameters for objective evaluation of space use through the establishment of guidelines and methodologies for equitable distribution of space;
- Track current space and needs;
- Analyze current uses and future needs to recommend changes;
- Accommodate growth or shifts in enrollment and instructional programs that ultimately improve interdepartmental and intradepartmental adjacencies; and
- Provide flexibility to respond to changes and accommodate future growth needs.

Space management for the institution and requests by units for assignment or release of space will be in accordance with this University Operating Procedure, as well as the University's Campus Master Plan (<http://www.uvm.edu/~plan/>), which defines the overarching principles and premises that are used to effectively and equitably determine best space uses that align with the University's Strategic Action Plan (<http://www.uvm.edu/president/?Page=strategicplan.html>). University academic and administrative units may, with the support of their Dean, Director, or Vice President, request new space to support their needs as well as request to release space that is no longer used or required by their unit.

# Procedures

## Roles and Responsibilities

The President and Provost have ultimate responsibility for the allocation of space to academic and administrative units. The Department of Campus Planning Services (CPS) is responsible for developing policies, procedures, and recommendations concerning the use and allocation of existing space, planning for future space needs, and responding to unit requests for new assignments or release of space. Roles and responsibilities for the day-to-day administration of specific categories of space are as follows:

- ***Overall space management.*** Campus Planning Services (CPS) is responsible for the central management of space for the institution, incorporating the guidance of the Vice President for University Relations and Administration, the Provost, the Campus Master Plan, and this University Operating Procedure. CPS is also responsible for maintaining the University's annual Space Inventory that is the database of record for space allocation and reporting. In addition, CPS is responsible for the coordination, review, and development of recommendations related to requests for unit space allocation (assignment or release).
- ***General Purpose Classrooms.*** The Registrar's Office is responsible for the day-to-day management of the centrally scheduled instructional spaces known as "general purpose classrooms."
- ***Centrally Scheduled Event Spaces.*** Conference and Event Services is responsible for the day-to-day management of centrally scheduled event space. Conference and Event Services is also responsible for all short-term rental of event space to third parties regardless of the unit that controls the scheduling of that event space.
- ***Unit or Departmental Spaces.*** The Provost, Vice Presidents, and Deans retain the authority and flexibility to allocate their assigned space to the departments and programs within their scope of responsibility using the Space Allocation Guidelines ([http://www.uvm.edu/policies/general\\_html/related\\_docs/SpaceAllocationGuidelines.pdf](http://www.uvm.edu/policies/general_html/related_docs/SpaceAllocationGuidelines.pdf)) to maximize use and facilitate changes in program needs. Reallocation of space from one area of responsibility to another (e.g., from one Vice President or Dean to another Vice President or Dean) requires submitting a Space Request Form and obtaining final approval from the Provost's Office.

## Annual Space Inventory

The Space Inventory (<http://www.uvm.edu/~cntrllrs/a21inventory/>) maintained by CPS in the Facilities Administrative Management Information System (FAMIS) is the database of record for space use, planning, and management. The Inventory includes the departments, functional use, room type, occupants, square footage, and key funding sources of each room on campus. The Inventory is also used for the calculation of the University's Facilities and Administrative cost

rate and the allocation of Facilities costs to Responsibility Centers under UVM's incentive-based budgeting model (IBB).

The Space Inventory is updated annually by each University department to reflect actual space use at the academic or administrative unit level for the fiscal year being inventoried. If a space is shared by two or more units, the Inventory should be updated by the units to reflect the shared use. Space occupied by personnel paid by more than one unit should be assigned to the unit primarily responsible for and assigned to the space. All relocations or space reallocations within a unit (college or administrative division) should also be recorded during the Space Inventory. Relocations that involve space outside the responsibility of the unit require Provost's Office approval through the Space Request process (detailed below).

The annual Space Inventory is started in March and completed by June 30 of each year. The certification form signed by each department's Space Inventory administrator confirms the department's space use for that fiscal year. Deans, Directors, and Vice Presidents have until August 31 to report any errors in the data. No changes to the annual Space Inventory will be accepted after the dataset has been closed and archived for the fiscal year.

## **Reallocation of Space within an Academic or Administrative Unit**

Academic and administrative units maintain responsibility for the space assigned to them and may reallocate that space to departments or programs within that unit as needed. The University's Space Allocation Guidelines ([http://www.uvm.edu/policies/general\\_html/related\\_docs/SpaceAllocationGuidelines.pdf](http://www.uvm.edu/policies/general_html/related_docs/SpaceAllocationGuidelines.pdf)) must be considered for any reconfiguration of space. Building diagrams or other details of current space use within the unit are available from the CPS Campus Space Manager (802-656-1449). If renovations, including design or furniture reconfiguration, are anticipated, the unit should complete and submit a Renovation/Construction Project Request Form ([https://www.uvm.edu/~arch/proj\\_req\\_form4.pdf](https://www.uvm.edu/~arch/proj_req_form4.pdf)) to the Director of Capital Planning and Management (see "Space Renovation or Construction," below).

## **Assignment of New Space or Release of Existing Space**

### **1. Identification of Space Needs**

All academic and administrative units should identify space needs as part of the annual planning process. Space need is based on numbers of faculty, staff, and students; programmatic needs; and projected future expansion or contraction. Units may also request a feasibility study at the unit, department, or program level to determine the extent of the space need and explore potential opportunities to provide appropriate and sufficient space, including conceptual design options (see "Space Renovation, Construction, or Feasibility Study" below).

### **2. Space Request Form**

Space requests may be submitted for two purposes: (1) assignment of new space that does not require a feasibility study, renovations, or new construction, and (2) release of space that a unit determines it no longer requires. Both requests require completion of a Space Request Form ([http://www.uvm.edu/policies/general\\_html/related\\_docs/SpaceRequestForm.pdf](http://www.uvm.edu/policies/general_html/related_docs/SpaceRequestForm.pdf)) that is

reviewed and signed by the unit Dean, Director, or Vice President and submitted to CPS. A request to release existing space and assign the space to a unit willing to take the space can be completed on one form.

Units requesting the release of assigned space should identify another unit that is willing to use the space, if possible. Responsibility Center requests to relinquish space that do not identify another Responsibility Center willing to assume the space will not ordinarily be approved. Space release requests submitted without another unit agreeing to take the space will not ordinarily be granted unless the space meets a strategic purpose. Units that will always require off-campus leased space, such as UVM Extension, should contact the CPS Real Estate Manager, who will assist and identify leased space options (see “Lease of Space from Third Parties,” below).

### **3. Assessment, Recommendation, and Decision**

CPS will assess the space request based on the Space Allocation Guidelines; the location, size, condition, availability, and type of space; and the strategic space needs of the requesting unit, and will provide an analysis and recommendations to the Office of the Provost. The unit submitting the space request will be consulted as appropriate.

CPS will compare requests for space release against requests for new space assignments, and will consult with relevant campus offices as appropriate. CPS will submit a final recommendation to the Provost. The Provost will, as appropriate, review the request and CPS’s recommendations with the Vice President for University Relations and Administration or other senior leaders. Campus Planning Services will notify the requestor or the Dean, Director, or Vice President of the unit of the Provost’s final decision.

At the discretion of the Provost, the space request may be denied based on factors such as:

- Location of space
- Size of space
- Type of space
- Condition of space
- Availability of space
- Strategic space needs of requesting unit

## **Space Renovation, Construction, or Feasibility Study**

Departments must complete a Renovation/Construction Project Request Form ([https://www.uvm.edu/~arch/proj\\_req\\_form4.pdf](https://www.uvm.edu/~arch/proj_req_form4.pdf)) to request the following types of facilities changes:

- A feasibility study at the unit or program level to determine the extent of the space need or potential opportunities to provide appropriate and sufficient space, including conceptual design options
- Renovation of existing facilities
- Expansion of existing facilities

- Relocation to other facilities
- Construction of new facilities

Deans, Directors, and Vice Presidents are responsible for reviewing and prioritizing project requests within their unit and, in turn, submitting Project Request Forms to **Capital Planning and Management (CPM)**. CPM will coordinate review of the request by CPS and other relevant offices and provide recommendations to the Provost and Vice President University Relations and Administration for final decision.

If approved, and if the work involves a feasibility study, the study will be managed by CPS or Facilities Design and Construction dependent upon the scope of the project. If the approved work involves renovation or construction, the project will be managed by Facilities Design and Construction. All projects that will impact land use are subject to the Campus Master Plan Site Planning & Design Review process that includes an assessment and recommendations by the University's Campus Master Planning Advisory Committee.

## Lease of Space to Third Parties

Use and occupancy of University space is reserved for the University's academic and administrative units and for organizations whose presence on campus immediately and directly serves the University's academic mission. Except in extraordinary circumstances approved in writing by the Provost, the University will not rent its space for the long-term use of unaffiliated third parties.

Short-term rental of event space to third parties is managed centrally by Conference and Event Services (<http://www.uvm.edu/~ues/>).

## Lease of Space from Third Parties

Leasing of space by the University from non-University third parties is managed centrally by CPS. Leasing space should be arranged only when on-campus space is not available or when the unit requires an off-campus location for programmatic reasons. The amount of space leased for a unit or units should conform to the Space Allocation Guidelines. Leased space will be considered temporary until suitable space is identified unless a unit requires an off-campus leased location for programmatic reasons. Leased space will be selected based on a combination of factors including:

- Viable transportation links to campus to promote accessibility
- Opportunities to consolidate units under one lease
- Negotiation of optimal lease rates and conditions for the University

## Definitions

*Space Allocation Guidelines*: Guidelines that are recognized nationally or reflect standards established through space benchmarks. Utilization of space allocation guidelines provides the University community with a mechanism for equitable and efficient planning for space

requirements. Any deviations from the guidelines may be justified and are examined on a case by case basis.

*Space Management:* Effective space management maximizes the value of existing space and minimizes the need for new space and helps to ensure the efficient use of space. Space management involves setting parameters for the objective evaluation of space use through the use of guidelines and methodologies established to help ensure the equitable distribution of space based on need. Space management involves maintaining information on current use of space and assessing the distribution of existing space. It involves analyzing space needs and recommending changes to accommodate growth or shifts in enrollment and instructional programs, improving adjacencies and providing flexibility for changes to occur.

## **Contacts/Responsible Official**

Questions related to the daily operational interpretation of this procedure should be directed to:

Campus Space Manager  
Campus Planning Services  
(802) 656-1449

The Vice President for University Relations & Administration is the official responsible for the interpretation and administration of this procedure.

## **Forms**

Renovation/Construction Project Request Form

[http://www.uvm.edu/~cpm/proj\\_req\\_form4.pdf](http://www.uvm.edu/~cpm/proj_req_form4.pdf)

Space Request Form

[http://www.uvm.edu/policies/general\\_html/related\\_docs/SpaceRequestForm.pdf](http://www.uvm.edu/policies/general_html/related_docs/SpaceRequestForm.pdf)

## **Related Documents/Policies**

Campus Master Plan

<http://www.uvm.edu/~plan/>

Facilities and Grounds Use Policy

<http://www.uvm.edu/policies/facil/facsched.pdf>

Movable Equipment Policy

[http://www.uvm.edu/policies/grants/movable\\_equipment.pdf](http://www.uvm.edu/policies/grants/movable_equipment.pdf)

Real Property Interest Transfer or Development

[www.uvm.edu/policies/general\\_html/realpropertybidding.pdf](http://www.uvm.edu/policies/general_html/realpropertybidding.pdf)

Space Allocation Guidelines

[http://www.uvm.edu/policies/general\\_html/related\\_docs/SpaceAllocationGuidelines.pdf](http://www.uvm.edu/policies/general_html/related_docs/SpaceAllocationGuidelines.pdf)

## **Effective Date**

Approved by the Vice President for University Relations and Administration July 18, 2016