



UNIVERSITY OPERATING PROCEDURE

Title: Space Management and Space Requests

Overview

The University of Vermont's facilities are valuable resources that represent a significant financial commitment by the University and are utilized and shared by many individuals and groups. The space that exists today must be managed carefully to effectively support the mission of the University and planning for the necessary levels of future capital project development. The purpose of space management is to maximize the value of existing space for the University's programs, while minimizing the need for new space. The primary objectives of space management are to:

- Set the parameters for objective evaluation of space utilizing established guidelines and methodologies for equitable distribution of space.
- Track and analyze current uses and future space needs to recommend changes in quantity and quality of space.
- Improve interdepartmental and intradepartmental adjacencies; and
- Provide flexibility to respond to growth or shifts in enrollment and programming

Space management for the institution and requests by units for assignment or release of space will be in accordance with this University Operating Procedure, the University's Incentive-based Budgeting (IBB) Manual, and the University's [Campus Plan](#), which defines the guiding principles and premises used to guide development and assess all projects to ensure alignment with the [University's Mission, Goals, Vision and Identity](#). Procedures, Policies and UOPs related to University space use by external parties are also identified and referenced in this UOP.

Applicability of the Procedure

This Operating Procedure applies to all members of the University community, including, without limitation, individuals who are faculty, staff, students, contractors, consultants, temporary employees, and affiliates of the University.

Definitions

Affiliated Organization: Any organization that fits the definition specified in UVM's [Affiliated Organizations Policy](#).

External Party: Any non-UVM entity, including affiliated organizations who may request use of or be party to any agreement or arrangement for use of University real property (including space and/or land).

Space Allocation Guidelines: Includes guidelines recognized nationally or that reflect standards established through space benchmarks that provides a mechanism for equitable and effective planning for space requirements. Any deviations from the guidelines may be justified and are examined on a case-by-case basis.

Space Request: Space requests associated with this UOP include requests by University units for space outside of that which is currently assigned to the college or administrative unit. Exchanges of space between University units, assignment of new space to a college or administrative unit, or use by any External Party, requires approval by the Provost and Vice President for Finance and Administration as identified in this UOP.

Unit: A University college, school, or major Administrative Unit

Procedures

The President, Provost and Vice President for Finance and Administration (VPFA) have ultimate responsibility for the allocation of space to academic and administrative units. The department of Planning, Design and Construction (PDC) is responsible for developing and maintaining operating procedures and providing 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.** PDC is responsible for the central management of space for the institution, incorporating the guidance of the Provost, VPFA, the [Campus Plan](#), the [IBB Manual](#), and this University Operating Procedure. PDC is also responsible for managing and maintaining the University's Space Inventory which is the database of record for all space owned or occupied by the University (includes space leased for University use). In addition, PDC is responsible for the coordination, review, and development of recommendations related to requests for space 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.** University Event Services is responsible for the day-to-day management of centrally scheduled event space, including outdoor areas designated for event use. University Event Services is also responsible for all short-term rental of event space to external 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 (contact space.management@uvm.edu) to maximize use and facilitate changes in program needs. Reallocation of space from one college or major administrative unit to another to college or major administrative unit, or requests release space, requires submitting a [Space Request Form](#) to the Campus Space Manager who will facilitate review and final approval by the Provost and VPFA.
- **Use of University Research Facilities, Land and Equipment by External Parties.** Deans and the Vice President for Research may, when appropriate, make the University's research facilities, land and equipment available for use by external entities or persons as long as the use does not disrupt regular academic, laboratory, or research programs of the University and the facility, land or equipment is not needed by the University faculty, students, or employees at the requested time. Please see [Use of University Research Facilities and Equipment by External Parties Policy](#).

- ***Request to Lease, License or Use External Party-Owned Space.*** Lease of space from external parties for UVM use is managed centrally by Real Estate Operations.

Annual Space Inventory

The Space Inventory, co-managed by PDC and Financial & Cost Accounting Services, is updated annually by each unit. All space reallocations within a unit (college or major administrative division) should be recorded during the annual Space Inventory. The Inventory includes identification of department occupancy, functional use, room type, occupants, square footage, and key funding sources of each room. The Space Inventory serves to maintain an updated space database of record for space use reporting, planning, and management. The data collected is used for the calculation of the University's Facilities and Administrative cost rate, and allocation of facilities costs to Responsibility Centers under UVM's incentive-based budgeting model. The space data is used for other purposes, including but not limited to providing details to inform the tracking of private business use for bond financed buildings.

Reallocation of Space within an Academic or Administrative Unit

Academic and administrative units maintain responsibility for the space assigned to them, including reallocation of space within the unit to departments or programs as needed. The University's [Space Allocation Guidelines](#) must be considered for any reconfiguration of space. Building diagrams or other details of current space use within the unit are available by contacting the Campus Space Manager (Space.management@uvm.edu). If renovations, including feasibility study, design or furniture reconfiguration, are anticipated, the unit should complete and submit a [Renovation/Construction Project Request Form](#) to the Director of Planning, Design and Construction.

Reallocations that involve space outside the responsibility of the college or major administrative unit, and prior to space being added to or removed from a unit's inventory, require approval by the Provost and Vice President for Finance and Administration through the Space Request process, detailed 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 are submitted for two purposes: (1) assignment of new space to a unit, and (2) release of space that a unit determines it no longer requires. Both requests require completion of a [Space Request Form](#) that is reviewed and signed by the unit Dean, Director, or Vice President and submitted to the Campus Space Manager. A request to release existing space and assign the space to another unit, should be completed on one form.

3. Assessment, Recommendation, and Decision

The Campus Space Manager will assess space requests based on the Space Allocation Guidelines and other active space requests and will provide an analysis and recommendations for identified space to the Offices of the Provost and VPFA for review.

The Campus Space Manager will notify the requestor and the Dean, Director or Vice President of the unit of the Provost's and VPFA's final decision.

Space Renovation, Construction, or Feasibility Study

Departments must complete a [Renovation/Construction Project Request Form](#), and submit to the Director of Planning, Design and Construction, to request the following:

- 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 and/or expansion of existing facilities
- Physical 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 Planning, Design and Construction (PDC). PDC will coordinate review of the request and provide recommendations to the Provost and Vice President for Finance and Administration, as appropriate, for a final decision. Project Request Forms submitted with no funding source will need the approval of the VPFA prior to any work.

If approved, the work will be managed by PDC or Physical Plant, as appropriate. All renovation and construction projects that will affect land use are subject to municipal, state and federal regulations and the Campus Plan Site Planning & Design Review process.

Lease of Space to External 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 when approved in writing by the Provost and Vice President for Finance and Administration, and in accordance with the following policies and university operating procedures as appropriate, the University will not rent its space for the long-term use by unaffiliated external parties.

1. Temporary use for Events and Activities see [Facilities and Grounds Use for Events and Activities Policy](#) - University Event Services manages use of UVM space/outdoor areas, for events, including events involving external parties.
2. Request by External Parties to use University Research space, land or equipment. See [Use of University Research Facilities and Equipment by External Parties](#) – This policy is managed by the Vice President for Research and is specific to research space, land and equipment owned by the University and used by external parties.
3. Lease/License and Use of Real Property UOP – This UOP outlines the procedures for external party requests to use University space for non-research and non-event type uses, which are managed by Real Estate Operations, in close coordination with Planning, Design and Construction.

Lease of Space from External Parties

Leasing of space by the University from external parties is managed centrally by Real Estate Operations, in close coordination with PDC, and the procedures are outlined in the Lease, License and Use of Real Property UOP. 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 from external parties should conform to the Space Allocation Guidelines when feasible. Leased space will be considered temporary until on campus suitable space is identified unless a unit requires an off campus leased location for programmatic reasons.

Contacts

Questions concerning the daily operational interpretation of this UOP should be directed to the following:	
Title(s)/Department(s):	Contact Information:
Planning, Design and Construction – Campus Space Manager (For requests by UVM departments for acquisition or release of space, space reporting, development of space needs estimates, information about space guidelines or inquiries related to the annual space inventory)	31 Spear Street, Marsh Hall Suite 10 (802) 656-1449 Space.Management@uvm.edu
Office of the Provost and Senior Vice President (For questions regarding assignment of academic and administrative space)	85 South Prospect Street, 304 Waterman Building (802) 656-4400 Provost.Office@uvm.edu
Office of the Vice President for Research (For questions regarding use of University laboratories, or use of facilities and equipment for research purposes)	85 South Prospect Street, 330 Waterman Building (802) 656-2918
University Event Services (For requests for temporary use of all or part of a University building, facility or outdoor space, and for replacement of a temporary structure.	The Villa, 220 Colchester Avenue (802) 656-5665 eventservices@uvm.edu www.uvm.edu/eventservices
Real Estate Operations (For questions related to the Lease/License of space or land to or from third parties)	109 South Prospect Street, 3rd floor (802) 656-3872

Forms/Flowcharts/Diagrams

- [Space Request Form](#)
- [Renovation/Construction Project Request Form](#)

Related Documents/Policies

- [Campus Plan](#)
- [Facilities and Grounds Use for Events and Activities Policy](#)
- [Incentive-Based Budgeting Manual](#)
- [Lease, License and Use of Real Property operating procedure](#)
- [Post-Issuance Compliance Policy for Tax-Exempt and Tax-Credit Bonds](#)
- [Use of University Research Facilities and Equipment by External Parties Users](#)

Training/Education

Training will be provided on an as-needed basis as determined by the Approval Authority or the Responsible Official.

About This Procedure

Responsible Official:	Vice President for Finance and Administration	Approval Authority:	Vice President for Finance and Administration
Affiliated Policy Number(s):		Effective Date:	December 2, 2022
Revision History:	<ul style="list-style-type: none">• Approved by the Vice President for University Relations and Administration July 18, 2016• Responsible official officially changed from the Vice President for University Relations and Administration to the Vice President for Finance and Administration on October 1, 2019.• Title of UOP changed from Space Management to Space Management and Space Requests December 2, 2022		

University of Vermont Policies and Operating Procedures are subject to amendment. For the official, approved, and most recent version, please visit UVM's [Institutional Policies Website](#).