


University of California, Santa Cruz

SPACE MANAGEMENT PRINCIPLES

November 10, 2011

12/1/11
Date


George Blumenthal, Chancellor
University of California, Santa Cruz

University of California, Santa Cruz

Space Management Principles

Section	Page
Space Management Principles	
1. Introduction	1
2. Purpose of Principles	1
3. Space Management Principles	1
Space Management Processes	
4. Criteria for Establishing Space Needs.....	2
Criteria for All Spaces	2
Criteria for Instruction and Research Space.....	3
Criteria for Academic Office Space.....	3
Criteria for Library Space	4
Criteria for Administrative Space	4
Criteria for Physical Education, Sports, & Recreational Facilities/Space	4
Criteria for Student and Academic Support Services	4
Criteria for Housing	5
5. Space Allocation, Assignment, and Reassignment.....	5
Authority for Space Allocation, Assignment, and Reassignment.....	5
Assignment of New Building Space and Released Space	6
Reassignment of Existing Space	7
Temporary Transfer of Space.....	8
6. Utilization and Assessment of Space Use.....	9
Classroom and Teaching Laboratory Utilization	9
Classroom Utilization	9
Class Laboratory Utilization	9
Space Use Audit and Assessment	10
7. Facility Inventory	10
8. Space Maintenance.....	11
Funding for Space Maintenance and Repairs.....	11
Space Maintenance Responsibilities.....	11
9. Space Committees.....	12
Relationship of Space Committees	12
Advisory Committee on Campus Planning and Stewardship (CPS)	12
Classroom Subcommittee	13
Space Evaluation Teams (SET)	13
Other Subcommittees.....	13
Appendix	
A. Space Assignment Diagram	14
B. Making Decisions on Space Management	15
C. Academic Office Guidelines According to CPEC	16

Space Management Principles

1 Introduction

These *Space Management Principles at UC Santa Cruz* were recommended by the Advisory Committee for Facilities (ACF) and approved by the Chancellor and the Campus Provost and Executive Vice Chancellor (CP/EVC) in 1995. These principles and processes were established to provide a comprehensive framework for assignment of space in order to facilitate more effective management of space resources. The ACF recommended amendments that were incorporated into the principles in 2002.

The campus must manage its space resources with the utmost care. This is particularly true as the State of California continues to limit financial resources for capital improvements. In addition, the campus currently does not have sufficient space (both in terms of quantity and programmatic suitability) to meet the needs of all academic programs, student services, and administrative services.¹

As a result, current space assignments may need to change, and when new buildings are completed, the disposition of space in the new buildings and the released space in existing buildings may change from what was originally planned.

Included in this document are *Space Management Principles (Section 3)* and *Criteria for Establishing Space Needs (Section 4)*, all of which should be considered when planning space or when assigning or reassigning space. Also included is information about who is responsible for space, how space is assigned and reassigned, transfers of space (temporary/long term/permanent), maintenance, space utilization, space use assessments, and space committees.

2 Purpose of Principles

The purpose of the *Space Management Principles* is to establish a comprehensive framework for the assignment and management of campus space so that all space is used efficiently and effectively to meet the campus' mission of instruction, research, and public service.

Within the planning process, space is considered as much a campus resource as faculty, staff, or support dollars. Accordingly, campus space resources should be used in the best possible manner, keeping in mind that the campus, in approving a campus program, pledges itself to commit resources to sustaining that campus program.

3 Space Management Principles

All units (academic, administrative, Student Affairs, UCO Lick, Silicon Valley Initiatives, etc.) should refer to the *Space Management Principles* when managing existing space and planning for new space. The principles apply to all campus space,

¹ For example, for fall 2009 the campus' space for instruction and research programs (about 23% of total campus space) totals only about 80% of the space generated by enrollment workload factors according to California Postsecondary Education Commission (CPEC) guidelines (see Section 4.2 and Appendix C for more information on CPEC space guidelines).

whether located on or off-campus and whether owned by UC or leased.

- 3.1.0 The Chancellor has overall responsibility for the equitable and optimum use of space resources and has final decision authority for the planning, allocation, assignment, and reassignment of all spaces. The Chancellor has delegated this authority to the Campus Provost and Executive Vice Chancellor (CP/EVC).
- 3.2.0 The CP/EVC is responsible for analyzing and determining appropriate space assignments and planning for future space (e.g., projected future enrollments and room utilization) through appropriate bodies as designated and charged by the CP/EVC.
- 3.3.0 The CP/EVC has allocated space to individuals designated as Space Control Officers. In the academic divisions, the deans are the designated Space Control Officers responsible for assigning space to departments and Organized Research Units (ORUs) within the division. For administrative units, this responsibility has been assigned to the vice provosts, vice chancellors, and the university librarian. Section 5 of this document provides additional information about the Space Control Officers' authority for space allocation, assignment, and reassignment.
- 3.4.0 Unless specifically prohibited by contract, funding requirements, policy, or statute, any campus space may be reassigned. For space that has an outstanding debt or potential future liability (e.g., the future cost associated with disposing of a temporary trailer or other campus property), a reassignment of space also involves a proportionate assumption of the outstanding debt or liability. Reassignment of space will follow the process described later in this document.
- 3.5.0 Units desiring to consolidate their space assignments for reasons of academic interaction and/or administrative efficiency will be accommodated when possible.
- 3.6.0 Among the considerations for use of any building space will be the original intent, function, and source of funds for that space, and any subsequently occurring formal processes that resulted in changes to the original purpose of that space (e.g., renovations funded from a different source). These considerations may not be the sole considerations in evaluating space assignments or reassignments.
- 3.7.0 Campus space should not be assigned to unaffiliated organizations for other than fee-based use for a specified lease or license term or for occasional use.

Space Management Processes

4 Criteria for Establishing Space Needs

4.1.0 Criteria for All Spaces

- 4.1.1 Traditional quantitative and technical considerations are used to evaluate space needs.
- 4.1.2 Specific programmatic needs may modify the quantitative considerations used to evaluate space needs.

- 4.1.3 Even though a space is quantitatively adequate, the location, functional layout, and attributes of certain spaces (especially interim space arrangements) may modify the space considerations for individual programs.
- 4.1.4 The establishment of new programs may require an allocation of new space or reallocation of existing space. Sharing of existing resources must be considered when adding new programs.
- 4.1.5 Existing programs may be disbanded, combined, or reorganized thereby requiring a reallocation of space.
- 4.1.6 Building and fire codes governing safety, seismic design, handicap accessibility, energy conservation, environmental concerns, etc. must be considered when allocating space and may affect existing space allocations.

4.2.0 Criteria for Instruction and Research Space

- 4.2.1 Workload factors for instruction and research space are based on the Full Time Equivalent (FTE) students, faculty, and staff needing space for each activity. These factors include student course enrollments, weekly student contact hours in facilities, and numbers of faculty, graduate students, postdoctoral scholars, teaching assistants, staff, and other personnel.
- 4.2.2 The California Postsecondary Education Commission (CPEC) space standards are used to calculate a broad envelope of space need for instruction and research activities. CPEC standards are intended to be used as overall planning and budgeting tools. They should not be applied to individual programs without a thorough review of the program and necessary adjustments to the standards. Roughly, CPEC standards quantitatively calculate:

$$(\text{Workload Factors}) \times (\text{CPEC Standards}) = \text{Activity Space Need}$$

Campus practice has been to balance instruction and research space between the divisions when adding new buildings and considering the disposition of associated release space.

- 4.2.3 Changing instructional methodology and changing curriculum may increase or decrease the space needs for classrooms and teaching labs.
- 4.2.4 The level and nature of research activity and the different and changing state-of-the-art instrumentation required to support research may call for more or less space than specified in the CPEC standards.
- 4.2.5 Unique programs may need special space considerations. For example, the use of some biological and radiological materials results in specific facility requirements.

4.3.0 Criteria for Academic Office Space

- 4.3.1 Campus office space is reviewed periodically through office adequacy analyses prepared by Capital Planning and Space Management (CPSM) and distributed to the Advisory Committee for Planning and Stewardship members. There may always be

insufficient academic offices to meet the needs of the divisions' instruction and research programs, the colleges' core courses, and special programs. (See *Appendix C* for a discussion of CPEC guidelines relating to academic offices.)

- 4.3.2 A formula to determine the allocation of academic office space for each college will be based on a percentage of college instructional load to the total campus instructional load and applied to the number of offices available overall. As core courses are taught in most colleges only during fall quarter, reciprocal agreements for the other academic quarters may be made between the colleges and divisions.
- 4.3.3 A unit director allocates academic offices in accordance with the needs of the unit. In many instances, the following priorities are used to assign academic offices:
1. Ladder-rank faculty
 2. Full-time teaching faculty (including security-of-employment lecturers and recalled VERIP faculty and emeriti)
 3. Teaching visitors (e.g., teaching fellows, associates, or lecturers)
 4. Postdoctoral scholars
 5. Teaching assistants
 6. Visiting scholars (if visiting scholars bring funding to the campus, they receive a higher priority)
- 4.3.4 In general, individuals should not be assigned more than one academic office. If an individual has teaching responsibilities at remote locations such as the Silicon Valley Center, then shared office space at the remote location should be utilized.

4.4.0 Criteria for Library Space

- 4.4.1 Library space needs are based on numbers of users, collection size, and library staffing.

4.5.0 Criteria for Administrative Space

- 4.5.1 Office adequacy analyses conducted by the CP/EVC, or by her or his delegates, will be used for establishing the office space required to house people and equipment for all administrative activities across the campus and in off-campus locations.
- 4.5.2 Shared administrative space is encouraged to maximize the availability of space for academic purposes.

4.6.0 Criteria for Physical Education, Sports, and Recreational Facilities/Space

- 4.6.1 Guidelines for establishing adequacy for physical education, sports, wellness/fitness, and recreational facilities are derived from: 1) expressed student interests and 2) health goals articulated by the American College Health Association and the American Association of Health, Physical Education, and Recreation.

4.7.0 Criteria for Student and Academic Support Services

- 4.7.1 Guidelines for establishing adequacy for facilities for the delivery of student services

and academic support programs are derived from: 1) expressed student interests and 2) standards and guidelines established by the Council for the Advancement of Standards (CAS) in Higher Education.

4.8.0 Criteria for Housing

4.8.1 Guidelines for establishing the supply of housing for students, faculty, and staff shall be based on the demand for additional housing, financial feasibility, and the housing goals articulated in the most recent campus Long Range Development Plan.

5 Space Allocation, Assignment, and Reassignment

5.1.0 Authority for Space Allocation, Assignment, and Reassignment

5.1.1 The CP/EVC may allocate space to individuals designated as campus Space Control Officers. The Space Control Officers are defined as the deans, vice provosts, vice chancellors, and the university librarian.

5.1.2 Space allocations in the academic divisions shall support teaching, learning, and research aligned with the strategic objectives of the University and the academic plans for the divisions. The objectives include:

- Recruiting and retaining the faculty, staff, and students that characterize the campus;
- Building on academic strengths to implement the campus' academic plan;
- Expanding graduate programs and enrollments;
- Maintaining the campus' distinction and achievements as an outstanding undergraduate institution.

The CP/EVC has charged the deans with building a strong academic program: recruiting and retaining faculty, meeting and increasing graduate enrollment targets, sustaining undergraduate enrollments, and expanding summer course offerings. The CP/EVC also includes increasing contract and grant activity and private giving among other priorities for the divisions.

5.1.3 The Space Control Officer is responsible for the allocation of space to departments, units, and sub-units within the division in alignment with divisional and campus goals and objectives.

5.1.4 The Space Control Officer may further delegate the authority to allocate space to others within the division.

5.1.5 The allocation or re-allocation of space between the departments and units within the division is at the discretion of the Space Control Officer.

See: Appendix A Space Assignment Diagram and Appendix B Making Decisions on Space Management.

5.2.0 Assignment of New Building Space and Released Space

- 5.2.1 Capital improvement projects are those that add new space or infrastructure, or alter the programmed design or function of existing space, building systems, or infrastructure. Capital improvements do not include repair or replacement projects that continue the usability of a facility at its designed level of service. All capital improvements costing \$35,000 or more require approval from the CP/EVC, Chancellor, or the Regents as appropriate.
- 5.2.2 When alterations, renovations, or other improvements are needed to meet space requirements, the division should contact Capital Planning and Space Management (CPSM) to determine whether the proposed project would be considered a capital improvement and to identify the review and approval process.
- 5.2.3 When a new building is planned, space in existing buildings generally will be used for growth within the division or released for use by other divisions. As part of the justification for additional campus space, plans for the disposition of released space are identified in somewhat broad terms and included in documents (e.g., a Project Planning Guide) that are submitted to the Office of the President and to the State.
- 5.2.4 During the approximately five to seven years it takes to plan and complete a new building, and release space in existing buildings, the programmatic needs and space requirements of the campus can change. Approximately two years prior to the completion of a new building, a review should occur of:
- The original assumptions on which the planned assignment of space in the new building was based, and
 - Detailed plans for disposition of individual rooms located in the spaces that will be released.

This review may indicate potential revisions to the planned assignment of space in the new building and to the planned disposition of released space. Any revisions would need to be consistent with criteria described in Section 3.4.0 of this document.

- 5.2.5 Any proposal to install a trailer, modular unit, cargo storage container, or other temporary unit that may be necessary to relieve space shortages, requires review by the Advisory Committee for Planning and Stewardship and approval of the Chancellor or CP/EVC. All such proposals are processed through Capital Planning and Space Management (CPSM) and/or the Real Estate Office. The division responsible for installing a temporary unit is also responsible for all costs associated with maintenance (see Section 8 – Space Maintenance) and disposal when the unit is removed.
- 5.2.6 Space Control Officers do not have the authority to negotiate the use, lease, or purchase of off-campus space on behalf of the University. All such proposals, including the lease of temporary storage facilities, must be processed through the campus Real Estate Office with the approval of the Space Control Officer.
- 5.2.7 Space Control Officers also do not have the authority to negotiate the use of campus space by an outside agency or other third party. All proposals to provide campus space

(office, cubicle, storage, equipment space, or other) to a non-campus entity or consultant must be processed through either Purchasing or the Real Estate Office with the approval of the Space Control Officer.

5.3.0 Reassignment of Existing Space

- 5.3.1 The campus space management philosophy assumes a flexible allocation of space, with the capability to increase or decrease the space resources available to any campus unit (including academic units, administrative units, housing, and student services) as needs change.
- 5.3.2 The CP/EVC may consider and initiate space reassignments based on campus space priorities, the intended use of the space, space amenities (water, gas, ventilation, fume hoods, etc.), and the source of funds previously used to improve the existing space or to be used to make future improvements.
- 5.3.3 Whenever a reorganization or consolidation occurs across divisions, the space occupied by the individuals/positions moving from one division to another is deemed to be re-allocated to the division receiving the position. If alternate space is to be provided, then the space transfer would need to be approved and documented via a Temporary Transfer Agreement or a Memo of Understanding. See Section 5.4.0 below.
- 5.3.4 Because the campus has limited space options, the units and divisions need to be proactive in identifying space requirements and must accommodate some growth within existing space before requesting additional space from the campus. The Space Control Officer or designee is responsible for managing space requests and reassignments within the division.
 - 5.3.4.1 The units and departments within a division are responsible for identifying and communicating space requirements to the Space Control Officer before adding new personnel, new programs, or applying for extramural funding.
 - 5.3.4.2 Each unit/department should analyze existing space, consider alternatives for internal space reassignments, and identify why those alternatives cannot meet the space requirements, before elevating a request for additional space to the Space Control Officer.
 - 5.3.4.3 If the Space Control Officer concludes the unit/department does not have sufficient space to meet the need, other alternatives within the division should be considered.
 - 5.3.4.4 When space requirements cannot be met within the division, the Space Control Officer should submit a formal space request to CPSM explaining the need for additional space. The request should identify the space requirements (type of space, square footage, utilities, amenities, etc.), alternatives considered, and time constraints for occupancy.
 - 5.3.4.5 On behalf of the CP/EVC, CPSM will work with the units, departments, and/or various Space Control Officers to identify new alternatives and, if necessary, negotiate a space trade, reallocation, Temporary Transfer Agreement, or initiate

a lease transaction through the Real Estate Office.

- 5.3.4.6 If CPSM is unable to identify space or otherwise meet the needs of all involved parties, alternatives for the reallocation of space and/or the associated Temporary Transfer Agreement may be elevated and reviewed by the Advisory Committee for Planning and Stewardship and approved by the CP/EVC as needed.
- 5.3.5 Space vacated by eliminated programs, departments, or positions within the division technically reverts back to the Chancellor's Office for reallocation; however, Section 5.3.4 of these principles allows the Division to retain the space to meet existing needs. After meeting these needs, the Space Control Officer should notify CPSM of excess space and update the Facility Inventory to identify inactive areas available for reallocation.
- 5.3.6 When a trailer, modular unit, storage container, or other temporary unit is permanently transferred to another division, the division giving up the temporary unit is responsible for documenting the transfer agreement in a Memorandum of Understanding (MOU). The MOU should identify any compensation given and responsibilities for the cost of maintenance and disposal.
- 5.4.0 Temporary Transfer of Space**
- 5.4.1 A temporary transfer of space occurs when one division provides space to another division to meet programmatic space requirements for a limited period of time.
- 5.4.2 A voluntary temporary transfer of space does not require review by the Advisory Committee for Planning and Stewardship or approval by the CP/EVC.
- 5.4.3 When two divisions are able to come to an agreement for the temporary transfer of space, the division loaning the space will create a Temporary Transfer Agreement to document the terms of the agreement (including the purpose, the time period, and any funds to be spent on alterations). The Temporary Transfer Agreement is signed by the Space Control Officer from each division.
- 5.4.4 Original signed Temporary Transfer Agreements are forwarded to CPSM for processing. CPSM will document the terms of the agreement in the campus facility inventory system.
- 5.4.5 At the expiration of the Temporary Transfer Agreement, the parties either agree to extend the agreement or the space reverts back to the original occupant.
- 5.4.6 If a temporary transfer of space is in dispute (i.e., not all terms are documented in a Temporary Transfer Agreement or no Temporary Transfer Agreement exists) and a resolution cannot be reached, the issue should be submitted to CPSM for resolution on behalf of the CP/EVC. If CPSM cannot resolve the dispute, the issue will be elevated to the Advisory Committee for Campus Planning and Stewardship, which will make a recommendation to the CP/EVC to determine the final disposition of the space.
- 5.4.7 A division may use the Temporary Transfer Agreement form to document a temporary

transfer of space between departments within the division. CPSM will document the terms of the agreement in the campus facility inventory system.

5.4.8 If both divisions agree to a permanent transfer of space, either a Temporary Transfer Agreement form or a Memo of Understanding (MOU) may be used to document the transfer. The Temporary Transfer Agreement or MOU is signed by the Space Control Officer from each division. CPSM will document the terms of the agreement in the campus facility inventory system.

5.4.9 Unless otherwise noted in the Temporary Transfer Agreement, the unit borrowing the space is responsible for cleaning and maintenance during occupancy and at the end of the temporary transfer. The unit vacating the space will return the space to the same condition as when it was borrowed.

6 Utilization and Assessment of Space Use

6.1.0 Classroom and Teaching Laboratory Utilization

6.1.1 The Office of the President (OP) and the State require campuses to submit utilization reports for classrooms and class laboratories. OP and the State look very closely at these reports to determine whether existing classrooms and class labs are effectively utilized. Requests for new classrooms and class labs are carefully scrutinized based on existing utilization.

6.2.0 Classroom Utilization

6.2.1 General Assignment Classrooms (classrooms) are scheduled by the Registrar and should be used in accordance with the *Academic Scheduling of Classes and Classrooms* policy approved by the CP/EVC in February 1999.

6.2.2 All lecture and discussion section classes are to be held in general assignment classrooms and in standard time blocks unless an exception is granted by the division Space Control Officer for extenuating circumstances.

6.2.3 The divisions are responsible for granting exceptions to their departments for holding classes in space other than general assignment classrooms and in other than standard time blocks. Where possible, exception reports should be provided to CPSM to document department space classroom utilization.

6.2.4 Class time blocks may need periodic revisions in order to fully utilize classrooms.

6.3.0 Class Laboratory Utilization

6.3.1 Class laboratories are assigned and scheduled by individual departments. The expectation is that class laboratories will be utilized 20 weekly station hours (a combination of 25 room hours a week at 80% occupancy) - the CPEC standard.

6.3.2 Justification for future teaching laboratories is based on the current utilization of *all* campus class labs, as well as a projected curriculum plan for each department that is included in a proposed project. Utilization of class labs must be creatively and cooperatively shared.

6.3.3 If class labs are not utilized sufficiently, an evaluation of the reasons should be undertaken, and if necessary, the class lab reassigned to better serve the space needs of the campus.

6.4.0 Space Use Audit and Assessments

6.4.1 An assessment of the use and utilization of spaces may be done at any time, at the request of a Space Control Officer, the CP/EVC, or Capital Planning and Space Management.

6.4.2 The purposes of a space assessment may include:

- To obtain verification of utilization.
- To develop sufficient information to address space concerns as expressed by campus entities.
- To identify specific rooms (or groups of rooms) for Capital Planning and Space Management staff to focus on for addressing room utilization issues.
- To develop a database of room utilization information (additional to the utilization information obtained through the facilities space inventory process) for use in planning and managing spaces.

6.4.3 Space assessments may be conducted by Capital Planning and Space Management or by EVC appointed delegates (the Advisory Committee on Campus Planning and Stewardship, members of the faculty, administration, and/or staff).

6.4.4 Notification of a planned space assessment will be provided to the Space Control Officers whose spaces are to be assessed.

6.4.5 At times, the UC Office of the President may audit a random sample of rooms to ensure they are properly reported in the annual inventory. Prior notice to the Space Control Officers may not be possible.

7 Facility Inventory

7.1.0 The campus facility inventory is the source record that documents all campus buildings, space within each building, and how space is used. The inventory is used by the campus and the UC Office of the President to provide planning and management data about the existing physical plant.

7.2.0 The campus continues to utilize an online data management system called FacilitiesLink to update the facility inventory. This web-based user interface allows easy updates and access to building, department, and room information.

7.3.0 All FacilitiesLink users are required to complete a training course before accessing the system. CPSM conducts training sessions.

7.4.0 The Space Control Officer or designee is responsible for keeping FacilitiesLink

accurate and up to date at all times. Updates to FacilitiesLink should occur as soon as possible after a unit occupies or vacates a space.

- 7.5.0 The Space Control Officer or designee is responsible for reviewing quarterly and annual reports to confirm the facility inventory is accurate and for making adjusting entries in FacilitiesLink.

8 Space Maintenance

8.1.0 Funding for Space Maintenance and Repairs

- 8.1.1 Regular maintenance and repairs (painting, carpet cleaning, carpentry, plumbing, electrical, heating and ventilation, and other repairs as required to keep space habitable and in good working condition), are funded by the funding source of the unit occupying the space (i.e., space occupied by State-funded units will be maintained by State Operations and Maintenance of Plant (OMP) funds. Non-state funded units are directly or indirectly responsible for the cost of maintaining the space they occupy).
- 8.1.2 Off-campus leased facilities are maintained either via arrangements with the building landlord, or through contracted services funded by the unit occupying the leased space.

8.2.0 Space Maintenance Responsibilities

- 8.2.1 Space maintenance issues should be reported to the Work Order Desk at ext. 9-4444 or WODesk@ucsc.edu.
- 8.2.2 The unit occupying a space is responsible for immediately reporting maintenance issues and for creating the work orders necessary to keep campus space properly maintained.
- 8.2.3 Before vacating a campus space, the division occupying the space is responsible for scheduling a Physical Plant maintenance assessment. Based on the assessment, the division will create the work orders necessary to return the space to the same condition as when the space was occupied. This includes repairs to patch and paint walls, clean carpets or wax floors, clean window coverings, and other work that may be considered regular maintenance when the space is vacated. A space assessment and work orders are not required when space is vacated for the purpose of being renovated.
- 8.2.4 The unit vacating a space is responsible for creating the work orders necessary to reverse space modifications unless those modifications are desired by the new occupant or are permanent in nature. Examples include modifications to data/telephone wiring, lighting, paint color (other than the campus standard), carpet installations, installation of security systems, installation or removal of temporary walls, etc. When existing modifications are desired by the new occupant, the new occupant then assumes the responsibility for reversing the modifications upon vacating the space.
- 8.2.5 Space repairs and maintenance should be scheduled to begin as soon as possible after a unit vacates a space.
- 8.2.6 Before vacating an off-campus leased space, the division occupying a space is responsible for coordinating with the Real Estate Office to ensure that all lease terms

are fulfilled.

- 8.2.7 The division responsible for acquiring and installing a temporary trailer, cargo storage container, or other temporary unit is also responsible for all maintenance costs while the temporary unit is in use and for the cost of disposal when the unit is removed.
- 8.2.8 When a temporary trailer, cargo storage container, or other temporary unit is transferred to another division, the new division using the space is responsible for the cost of maintenance. The cost of disposal is not transferred to the new division.
- 8.2.9 Deviations of these space maintenance responsibilities or other agreements may be negotiated when space is transferred from one division to another or when the campus elects to move a unit for the purpose of allocating the space to another division. All such agreements will be documented and signed by the Space Control Officer for each division or the CP/EVC and will be forwarded to CPSM to be noted in the facility inventory.

9 Space Committees

9.1.0 Relationship of Space Committees

- 9.1.1 The main committee that deals with campus space is the Advisory Committee on Campus Planning and Stewardship (CPS).
- 9.1.2 Two types of committees report to the CPS: standing subcommittees (such as the Classroom Subcommittee and the Committee on Sustainability and Stewardship) and ad hoc committees (Space Evaluation Teams and other groups as deemed necessary).

9.2.0 Advisory Committee on Campus Planning and Stewardship (CPS)

- 9.2.1 The CPS advises and makes recommendations to the CP/EVC and to the Chancellor on matters of capital planning and space management. The CPS focuses on:
- Distilling campus concerns and questions regarding policies that affect capital planning and space management.
 - Recommending priorities and evaluating impacts for the campus' Major Capital Improvement Programs (both State and Non-State), space planning, and physical planning for facilities.
 - Providing a forum for the review of capital improvement project proposals that are approved by the campus CP/EVC or Chancellor.
 - Providing a forum for review of proposals and negotiation of issues such as space reassignments, space disputes, room utilization, and/or leasing off-campus spaces.
- 9.2.2 Committee membership consists of individuals from a broad range of campus units and includes faculty representatives, undergraduate and graduate students and academic and administrative staff. The exact composition of committee membership may change as the space management and facilities needs of the campus evolve.

9.3.0 Classroom Subcommittee

- 9.3.1 The Classroom Subcommittee considers the need for future classrooms, utilization of classrooms, classroom design, and other classroom space issues. The Classroom Subcommittee meets periodically throughout the year and reports back to the CPS on an annual basis.
- 9.3.2 Subcommittee membership consists of staff from the academic and administrative units that are particularly involved with issues of classroom planning, scheduling, usage, design, and support.

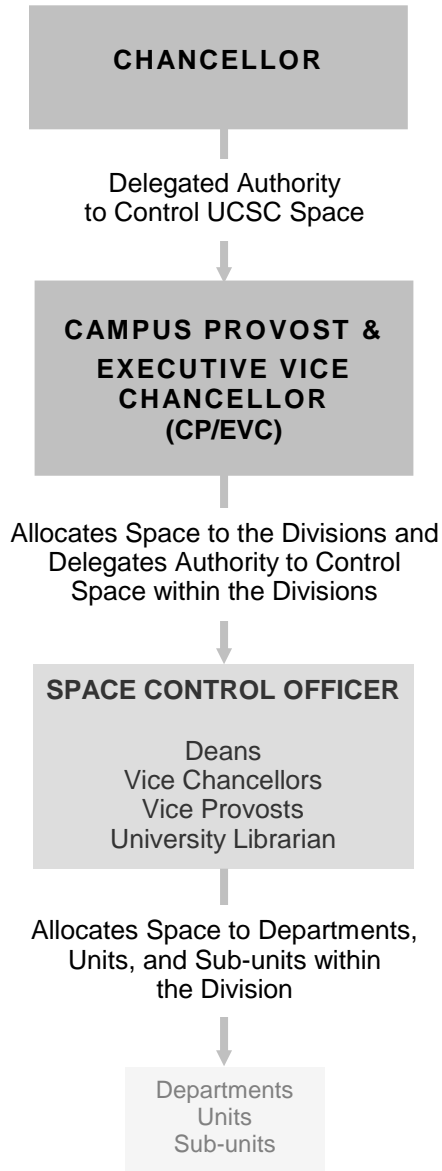
9.4.0 Space Evaluation Teams (SET)

- 9.4.1 Each SET evaluates a space assignment dispute or specific spaces that may not be fully or properly utilized. Each SET is convened as needed by the CPS, meets and considers the issue they are charged with evaluating, and reports back to the CPS with comments and recommendations on the issue.
- 9.4.2 Committee membership consists of CPS members, and/or other individuals, appointed by the CPS. Appointments to a specific SET will exclude any CPS member that might have a conflict of interest with the charge of that SET.

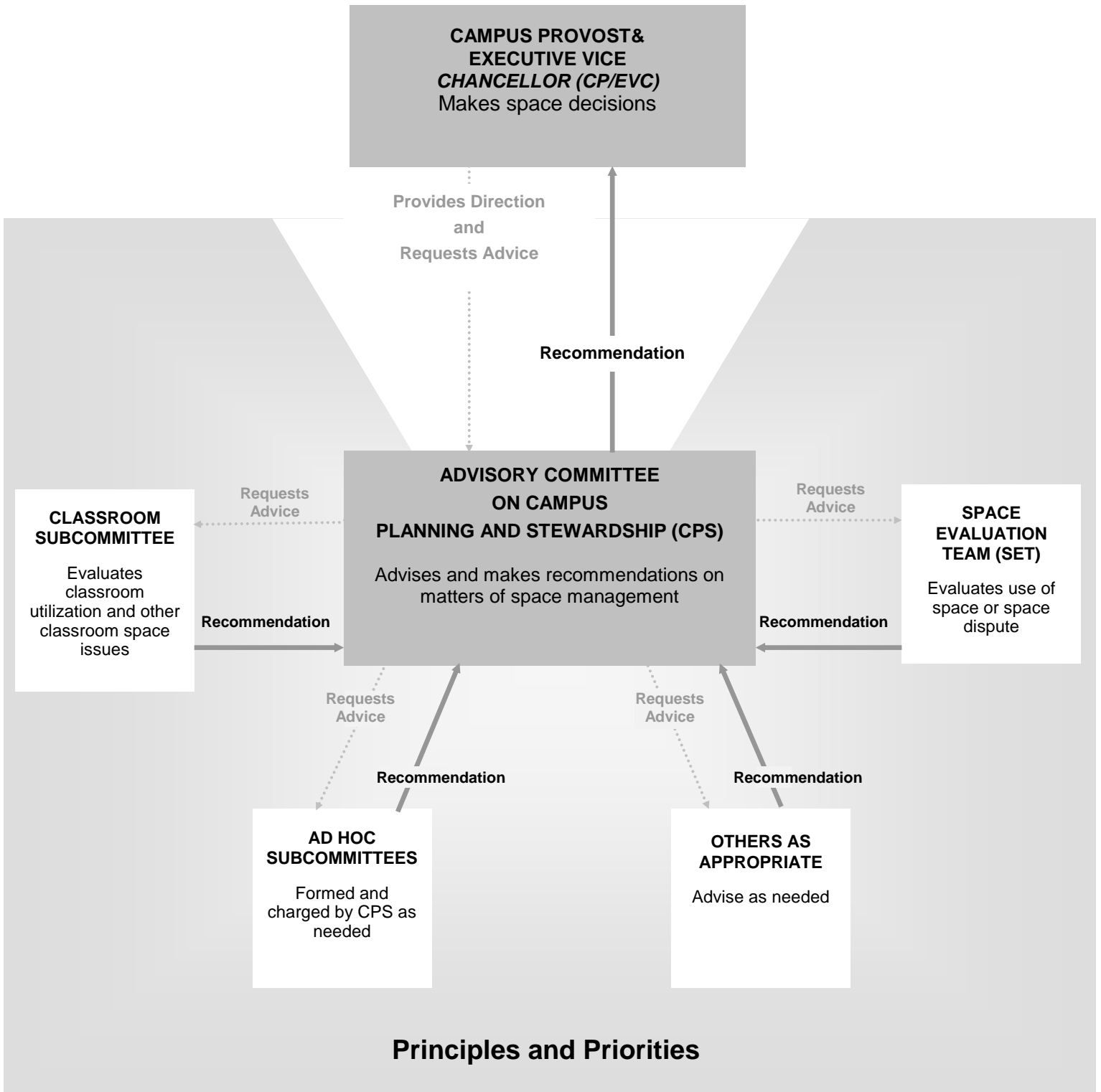
9.5.0 Other Subcommittees

- 9.5.1 The CPS may create, charge, and dissolve subcommittees and working groups as needed to assist the CPS on matters of capital planning and space management.
- 9.5.2 Membership of any subcommittee or working group will consist of CPS members, and/or other individuals, appointed by the CPS.

Appendix A Space Assignment Diagram



Appendix B Making Decisions on Space Management



Appendix C

Academic Office Guidelines According to CPEC

CPEC Space Guidelines Relating to Academic Offices

State CPEC (California Postsecondary Education Commission) guidelines specify workload factors that generate a need for space.

CPEC guidelines for academic offices are:

- one academic office for each budgeted faculty FTE (based on 100% of the positions being filled);
- one academic office for each postdoctoral headcount; and
- one academic office for each budgeted teaching assistant FTE.

CPEC guidelines do not provide offices for emeriti faculty.

CPEC guidelines allow academic office space only for budgeted faculty FTE, not actual FTE nor actual headcount. This may create a shortage of academic offices.

The State funds construction of academic offices only up to the number of offices allowed under CPEC guidelines. The campus generally does not have sufficient offices available to meet the full 100% of CPEC guidelines.

Definition of Academic Office

A room used by faculty, department chairs, other academic instructional appointees (e.g., lecturers, instructors, specialists), teaching assistants, emeriti, or postdoctoral scholars working at one or more desks, tables, or work stations for their desk-based academic work.

Excluded from this definition are offices for graduate students, other professional and staff researchers, deans, division heads, and directors.