



<b>Title:</b>	ALLOCATION & MANAGEMENT OF ACADEMIC ADMINISTRATIVE SPACE POLICY
<b>Approved:</b>	January 15 <sup>th</sup> , 2020
<b>Approved by:</b>	DEAN’S EXECUTIVE ADVISORY COUNCIL
<b>Audience:</b>	FACULTY-WIDE
<b>Purpose:</b>	TO ESTABLISH THE EFFICIENT AND EFFECTIVE ALLOCATION OF ACADEMIC ADMINISTRATIVE SPACE
<b>Contact:</b>	FACILITIES COORDINATOR – 604 822 8584

**1.0. PURPOSE**

Space is a finite resource that must be effectively and efficiently managed. Furthermore, best practice in space planning and management is founded on developing and implementing a set of coordinated and interrelated space planning principles and policies, allocation standards and practices.

Working together with our health authority and university partners across the province, the UBC Faculty of Medicine (FoM) will maximize and efficiently utilize all resources to achieve the goals established in both the UBC and the FoM strategic plans. Effective and efficient space management is a collaborative, ongoing process requiring the FoM to optimize the use of all facilities and to efficiently address physical space needs.

This policy governs the allocation and management of all academic administrative space allocated to the FoM, including academic administrative space in Research Centres and Institutes. (A separate [policy](#) governs the allocation and management of all academic research space allocated to the FoM.) This academic space policy is intended to institute a consistent and transparent framework for making strategic decisions regarding space allocations. It is recognized that space requirements vary depending on function and activities, and allocation may be limited by facility layout as well as space availability.

The purpose of this policy is to:

- Ensure efficient and effective planning and management of space to achieve the goals established in both the UBC and the FoM strategic plans.
- Establish roles and responsibilities for the allocation, management of, and issues resolution related to academic administrative space.
- Establish transparent, agreed-upon principles and guidelines for the organization and allocation of academic administrative space.
- Establish the fundamental terms of use of allocated academic administrative space.
- Provide guidance on how to maximize efficiency and facilitate optimal utilization of physical resources while supporting a rigorous teaching and research mandate.
- Maximize use of limited university and health authority space resources.

## 2.0. ROLES & RESPONSIBILITIES

### 2.1. CONTROL & ALLOCATION OF SPACE

#### 2.1.1. The Dean

- Ensure overall equitable and optimal use of FoM space resources.
- Allocate space to Departments, Schools, Centres/Institutes, Programs and Units.
- Exercise final authority over all FoM academic administrative space allocations, designations and changes in use of space.
- Strike an *ad hoc* and impartial committee to advise on space issues and disputes as required.

### 2.2. EFFECTIVE MANAGEMENT AND ALLOCATION OF SPACE

#### 2.2.1. Department Heads, School Directors, Centre/Institute Directors and Regional Associate Deans

- Provide day-to-day operational management of academic administrative space on behalf of the **Dean**.
- Review and approve requests for additional space within their respective allocated space footprints.
- Ensure space reviews are conducted annually or as required by the **Dean** and the **Managing Director**.

#### 2.2.2. Administrative Leaders (Division Heads, Associate Deans and Administrative Directors)

- Provide day-to-day operational oversight of the allocation, utilization and management of academic administrative space on behalf of **Department Heads, School Directors, Centre/Institute Directors and Regional Associate Deans**.
- Provide the **FoM Space Planning and Facilities Management Unit** with annual updates on the allocation of space in the FoM Academic Space Inventory.

#### 2.2.3. FoM Space Planning and Facilities Management Unit

- On behalf of the **Dean**, review and approve:
  - Requests for additional space.
  - Proposals for construction or renovations in academic administrative space.
  - Allocation of academic administrative space for new faculty recruits identified on the [FoM Recruitment Planner](#).
- Develop and manage processes and procedures for space reviews; ensure space reviews are conducted annually and/or as required by the **Dean** and the **Executive Director, Finance and Operations**.
- Provide support, guidance and recommendations to **Department Heads, School Directors, Centre/Institute Directors, Regional Associate Deans and Administrative Leaders (Division Heads, Associate Deans and Administrative Directors)** on the implementation of this policy.
- Maintain the FoM Academic Space Inventory.

### 2.3. RESOLVING SPACE ISSUES

#### 2.3.1. Department Heads, School Directors, Centre/Institute Directors and Regional Associate Deans

- Resolve space issues and appeals at a local/site level, with support from the **FoM Space Planning and Facilities Management Unit**.

#### 2.3.2. Facilities and Capital Planning Committee

- Resolve space issues and appeals that are complex, or cannot be resolved at the local/site level, with support from the **FoM Space Planning and Facilities Management Unit**.

## 2.4. SPACE PLANNING FOR NEW HIRES AND/OR PROGRAM/UNIT EXPANSION

### 2.4.1. Department Heads, School Directors, Centre/Institute Directors and Regional Associate Deans

- Determine academic administrative space allocation for new faculty and staff in consultation with **FoM Space Planning and Facilities Management Unit**.
- Identify proposed space allocation for new faculty recruits on the [FoM Recruitment Planner](#).
- Engage the **FoM Space Planning and Facilities Management Unit** prior to the commencement of any proposed construction or renovations in academic administrative space to ensure compliance with applicable regulatory, health authority and university standards.

### 2.4.2. Facilities and Capital Planning Committee

- Plan for future FoM space needs, including development of new facilities and measures to ensure sustainability of space.
- Ensure that the FoM's facilities strategically support its mission and priorities.

### 2.4.3. FoM Space Planning and Facilities Management Unit

- Lead projects related to the planning and utilization of academic administrative space on behalf of the Dean, the **Facilities and Capital Planning Committee** and the **Managing Director**.

## 3.0. GUIDING PRINCIPLES

The following principles promote accountability, equity, transparency, flexibility and effectiveness in the planning, allocation and management of academic administrative space across the FoM. The FoM operates in the context of a partnership between UBC, health authorities and partner universities and the **FoM Space Planning and Facilities Management Unit supports FoM** Departments, Schools, Centres/Institutes, Programs and Units to operationalize these principles.

### 3.1. OWNERSHIP

Academic administrative space allocated to the FoM is an institutional asset and its use must support the goals established in both the UBC and the FoM strategic plans. This space is owned and operated by the University of British Columbia or our health authority and other university partners. The allocation and utilization of academic administrative space must comply with university space policies and align with any site-specific and/or health authority guidelines, including the [Academic Space Protocol](#). Space is a shared resource; it does not belong to an individual or Unit.

### 3.2. SPACE ALLOCATION CRITERIA

Space allocations are not considered permanent and are subject to change in support of the academic and strategic priorities of the FoM. The following criteria must be used in the allocation of all FoM space types:

- Alignment with overall FoM mission and strategic goals.
- Conforming to specific Department, School, Centre/Institute and Program/Unit goals.
- Providing appropriate spatial resources required for program accreditation.
- Demonstration that space is being utilized optimally for its stated purpose.
- Demonstration that existing space is being optimally used in instances where additional space is requested.

### 3.3. SPACE UTILIZATION

It is expected that any allocated academic administrative space is properly utilized: defined as being occupied 70% of the typical work week or 3.5 days minimum. Any space deemed vacant or underutilized will be reviewed, reclaimed and reallocated or repurposed under the authority of the **FoM Space Planning and Facilities Management Unit**, following appropriate notice and consultation.

Academic administrative space and offices must not be used for storage of obsolete equipment, waste, archives or personal belongings. Intra-departmental sharing of academic administrative space and facilities is expected to optimize utilization (i.e. support spaces, equipment rooms, conference rooms, touchdown space). Optimal use of space includes alignment of existing infrastructure and design construction with functional use, i.e. office space must not be used for storage of files. Recognizing that work functions are constantly changing and evolving, workspace will support scalability, flexibility and technological integration.

**3.4. EQUITY**

Decisions regarding space allocations must be made in an open and transparent manner in accordance with the principles and guidelines of this policy. Any change needed to conform to this policy must be discussed in advance with the appropriate **Department Heads, School Directors, Centre/Institute Directors, Regional Associate Deans, Administrative Leaders** and the affected faculty or staff member. Faculty and staff will be treated with equity; they will be provided with healthy, safe and accessible workplaces.

**4.0. SPACE ALLOCATION GUIDELINES**

Academic administrative space allocations are not considered permanent and are subject to change in support of the academic and strategic priorities of UBC and the FoM. At any particular site/location, allocations may be limited by the existing infrastructure, building configuration and type of space that is available. Space allocations are based on a number of criteria including operational activities and requirements, utilization and position functions. These guidelines are a reference for space planning and management and are not intended as entitlements.

It is recommended that Units incorporate a variety of workspace types at sites/locations where possible to support flexibility and daily operations. The following table describes the various workspace functions and identifies allocation criteria for each:

Type	Description	Criteria for Allocation
<b>Dedicated Workspace</b>	<ul style="list-style-type: none"> <li>Intended for the dedicated use of specific users.</li> </ul>	Faculty and staff that spend at least 70% of a typical work week (or 3.5 days/week) on-site.
<b>Shared Workspace</b>	<ul style="list-style-type: none"> <li>Workspaces shared by 2 or more allocated users.</li> <li>Schedules are coordinated to maximize utilization.</li> </ul>	Faculty and staff that spend at least 40% of a typical work week (or 2 days/week) on-site.
<b>Swing Space</b>	<ul style="list-style-type: none"> <li>Workspaces that are shared between multiple users and/or groups and are intended for use by the allocated users/groups.</li> <li>Schedules are coordinated to maximize utilization.</li> </ul>	Faculty and staff that spend at least 20% of a typical work week (or 1 day/week) on-site.
<b>Touchdown Space</b>	<ul style="list-style-type: none"> <li>Typically smaller workspaces not allocated to any particular user/s.</li> <li>Space cannot be claimed for long-term or repetitive use.</li> </ul>	Visitors or faculty/staff requiring interim space during a short visit, layover or temporary transition.

**ADDITIONAL NOTES**

- Work areas can include space within single, dual or multi-occupancy offices and open office layouts.
- **Single occupancy** offices must **only** be allocated to faculty and staff with a demonstrated requirement for private space to conduct unscheduled, confidential meetings for a minimum of 4 hours/day.
- For faculty and staff that are allocated space in multi-occupancy areas, access must be provided to meeting rooms and other spaces to support private conversations.
- Any changes to current work environments or workstations/locations of CUPE 2950 staff must be made within the Collective Agreement (CUPE 2950) Articles 19 and 24.

#### **4.1. Working at Multiple Locations**

An individual requiring a dedicated workspace must only be allocated one dedicated workspace. Should a job function require work at more than one location, access to shared or swing space will be provided, depending on availability. The need for multiple workspaces must be addressed on a case-by-case basis and in consultation with the respective **Department Heads, School Directors, Centre/Institute Directors and Regional Associate Deans**. Refer to **3.3 Space Utilization** for utilized space expectations.

#### **4.2. Full-time Academic Faculty/Staff**

Full-time academic faculty/staff should be allocated one dedicated workspace, provided that the individual spends at least 70% of a typical work week (or 3.5 days) of their time at a particular site/location.

#### **4.3. Part-time Academic Faculty/Staff**

Part-time academic faculty/staff should be allocated one dedicated workspace, provided that the individual spends at least 70% of a typical work week (or 3.5 days/week) at a particular site/location. Part-time academic faculty/staff who spend less than 3.5 days/week at a particular site are provided with a workspace that is allocated to 2 or more users and shared based on pre-determined days/times. Schedules are coordinated to maximize space utilization.

#### **4.4. Faculty with Administrative Appointments**

Associate Deans, Assistant Deans and faculty members with additional administrative appointments (i.e. Site/Program Directors) should be provided with dedicated, shared or swing workspace. Allocations are based on functional requirements and frequency of use.

#### **4.5. Senior Administrative Roles**

Some roles may require that a particular office be allocated to that role. Individuals may have an existing faculty office prior to taking on the new role. Efforts must be made to make the faculty office available for temporary reallocation, as needed.

#### **4.6. Clinical Faculty**

Clinical faculty may be provided access to shared workspace within respective Unit space allocations, if academic administrative time is required and space is available. Some clinical faculty may hold an academic administrative role that requires more regular access to workspace. These needs must be determined on a case-by-case basis in consultation with the respective **Department Head and School Director**.

#### **4.7. Professor Emeritus**

Professors emeriti active in teaching and/or research may be allocated shared workspace within respective Unit space allocations. Allocation must be reviewed annually by the **FoM Space Planning and Facilities Management Unit**, on behalf of the **Dean**, and in consultation with respective **Department Heads, School Directors, Centre/Institute Directors** and **Regional Associate Deans** based on level of academic activity.

#### **4.8. Adjunct Professors/Associate Members**

No space is allocated to adjunct professors or associate members unless they also hold an administrative appointment.

#### **4.9. Visiting Professors**

Visiting professors may be provided with access to shared work space within respective Unit space allocations if available.

#### **4.10. Periods of Leave**

If a faculty or staff member will be away for more than four months, their office or work space will be made available for temporary use. Although a faculty member may not be asked to release their office, a faculty member on leave must make their office or workspace available for temporary use.

#### **4.11. Vacating Space**

When an allocated workspace is being vacated, the former occupant is responsible for ensuring that the space is cleared of any equipment, files and other materials in adherence to any applicable university and health authority policies, procedures and guidelines. All costs associated with the removal and disposal of remaining items shall be borne by the departing Unit.

### **5.0. PROCEDURES**

#### **5.1. Construction or Renovation Work**

Any proposed construction or major renovation work in academic administrative space requires the notification and involvement of **FoM Space Planning and Facilities Management Unit** to ensure compliance with applicable regulatory, health authority and university standards. Any proposed renovations on UBC campus require the notification and involvement of **UBC Facilities Planning**. All costs associated with discretionary alterations/renovations to a space shall be borne by the requesting Unit. Refer to **Appendix A Definitions** for major and minor renovations.

#### **5.2. Furniture**

The procurement of furniture:

- on UBC campuses, must comply with [UBC Technical Guidelines](#).
- on health authority and partner university sites, must comply with their respective standards.

#### **5.3. Storage (digital, paper records, equipment)**

Units are encouraged to use [UBC Records Management Office](#) processes and procedures for disposition of records and guidelines on document storage. Equipment that is unlikely to be used in the near future is expected to be decommissioned and disposed of per relevant processes and procedures.

#### **5.5. Requests for Additional Space**

All requests for additional space must be submitted in writing to the respective **Department Head, School Director, Centre/Institute Director, and Regional Associate Dean** and relevant **Centre/Institute Space Committee** in consultation with the **FoM Space Planning and Facilities Management Unit**. Requests must be submitted well in advance of anticipated time of need and must include the kind of space required, the funding to support the new activities, the period during which the space is required and a brief rationale for the request.

### **6.0. REVIEW OF ADMINISTRATIVE SPACE POLICY**

This policy will be reviewed by the UBC FoM Facility and Capital Planning Committee every 5 years and may be revised at any time to reflect changes in institutional needs and priorities.

## APPENDIX A - DEFINITIONS

The following is provided to establish a common understanding of workspace types and terminology related to space.

**Change-of-use:** Changes to the primary use of any space (i.e. lab into office; office into storage).

**Daily administration/day-to-day operational administration:** Allocation of space; resolution of space issues; verification that space is being used for the purposes specified; and prompt reporting of changes in allocation, use or configuration of space.

**Dedicated workspace:** Intended for dedicated use by specific users.

**Major renovation:** Construction to modify or upgrade the existing facility. A major renovation involves activities that cause a service disruption, require demolition or require removal of a fixed facility component (i.e. sink) or assembly (i.e. countertop). Examples include but are not limited to:

- A space, room or area that is undergoing a change of use
- Removal of floor coverings, ceiling tiles and cabinetry
- Replacement of windows
- New wall construction
- Heating, ventilation and air-conditioning upgrades
- Plumbing work that requires disruption of the water supply for more than 30 minutes

**Minor renovation:** Small-scale improvement work, usually cosmetic in nature. Examples include but are not limited to painting and redecorating. A minor renovation does not involve activities that require demolition or require removal of a fixed facility component.

**Office:** Enclosed space offering both visual and acoustic privacy. A typical office is 9m<sup>2</sup>/100 sq. ft., single occupancy and can be shared depending on job role/function and schedules. Offices greater than 14m<sup>2</sup>/150 sq. ft. can accommodate more than two (2) people concurrently. Offices must be made available for use as meeting space when not occupied.

**Program/Unit:** Administrative and/or organizational groups, including departments, schools, centres, institutes, programs and administrative units.

**Shared workspace:** Space shared by two (2) or more allocated users. Schedules are coordinated to maximize utilization.

**Space allocation:** Global distribution of space by the **Dean** to Departments, Schools and Research Centres/Institutes, and Programs to be managed primarily by **Department Head, School Directors, Centre/Institute Directors and Regional Associate Deans**.

Local distribution of space by Departments, Schools and Research Centres/Institutes, and Programs for the placement of individuals, purposes and functions for a period of time.

**Space manager:** Individual delegated the authority to provide the day-to-day operational administration and oversight of space allocated to their respective program/Unit.

**Swing space:** Workspace shared between multiple users and/or groups and intended for use by the allocated users/groups. Schedules are coordinated to maximize utilization.

**Touchdown space:** Typically smaller workspaces, sometimes equipped with basic equipment (computer, phone) and not allocated to any particular user(s). Touchdown space cannot be claimed for long-term or repetitive use.



## APPENDIX B – EFFECTIVE SPACE MANAGEMENT

These following factors are provided to facilitate transparent and equitable decision making in the prioritization and allocation of academic administrative space. These are listed in no particular order.

- Availability of suitable space
- Demand for space
- FTE status of individual(s) that space is allocated to
- Human resource designation of individual(s) that space is allocated to
- Job function(s)
- Location of current space allocated to individual(s) or Unit(s)
- Office size/space/layout
- Office size vs. time spent on site
- Privacy/confidentiality requirements and considerations