POLICY INFORMATION
Major Functional Area (MFA): Academic Affairs
Policy Title: Space Policy
Responsible Executive (RE): Executive Vice President and Provost
Sponsoring Organization (SO): Facilities Services, Planning, Design and Construction
Dates: Effective Date:
Revised:
Annual Review:

I. INTRODUCTION:

This policy establishes the decision-making authority and coordination process for use of University-owned space. Space is a limited resource of the university and allocation of space requires a consistent and strategic approach to optimize the productive use of this resource to advance the mission and strategic priorities of the campus.

II. POLICY STATEMENT

ISU Facilities Services will implement and manage space allocation processes for all campus occupants by performing quantifiable analysis to ensure that new construction is planned realistically and efficiently, to promote optimum use and conservation of space and to advance the strategic goals of the University.

III. AUTHORITY AND RESPONSIBILITY

The Facilities Services Department, through the authority of the Executive Vice President and Provost’s office, is responsible for the maintenance, allocation (assignment), evaluation of use, and tracking of University-owned space. The Provost may delegate similar authority to other institutional officers as it relates to specific University operations and specifically assigned University-owned space. In such cases, those institutional officers are responsible for providing current information on the use and allocation of that space to the Facilities Services Department. For example, the Office of the Registrar has delegated authority to schedule academic classrooms.

IV. DEFINITIONS

- University-owned space – Land and/or buildings owned or leased directly by Idaho State University (ISU) or the Idaho State Board of Education assigned to ISU.
- Unit – a department, division or functional area.
V. PRINCIPLES OF SPACE PLANNING

A. Space is a University property that will be allocated in a manner that best advances the University mission and priorities. University space resources will be deployed in the most efficient and effective manner to best serve programmatic and strategic goals. No unit, department, or division “owns” the space that has been allocated to it. In any space assignment, ownership is not implied by occupancy nor should it be inferred.

B. Instruction and research are the main functions of the University. Space will be allocated to instructional and research functions of the University optimally by making space decisions within the context of serving these primary functions.

C. The responsibility and authority to manage academic, research and administrative space is reserved to the Facilities Services Department, through the authority of the Executive Vice President and Provost’s office.

D. The University values flexibility and recognizes changing curricula, programs, and technologies. Accordingly, space assignments will change to achieve optimal utilization and respond to current and emerging needs. Space is allocated, and space can be reassigned.

E. The process and regulation of space allocation will be transparent, open, and consistent, utilizing practices that are easily identifiable and fair to all parties.

F. Space assignments and other operational decisions will foster interaction either within a discipline or across disciplines and accommodate differing research, teaching and learning styles, and space expectations. Certain uses of space require specialized building systems. For example; computers and labs have special air conditioning requirements. Building occupants may have similar needs. It may be more cost-effective and make future reassignment of space easier if contiguous blocks of space are for the same purpose or programs. (e.g., a group of faculty offices with support staff space).

G. Program space needs vary, and space allocation decision-making cannot be reduced to a mechanical “one size fits all” process. Different allocations may be appropriate to different disciplines, research programs, and other functions. Allocations will be made based on the appropriate amount and kind of space required to carry out research, teaching, learning, administration and support functions. For example, course enrollments, contact hours, staffing levels, etc. are some of the factors used in space need assessments. General space standards exist for various types of space, and these will be used to inform space allocation decisions.

H. On-campus space is a finite and relatively fixed resource, periodic reviews of space will be made to ensure the best possible use of space. Leasing off-campus facilities should be a last resort. Leases are subject to University and State policies.
I. Space allocation in any facility is subject to periodic review by the Facilities Services Department to assess whether space is well-utilized by the current assigned units and to determine whether reassignment is warranted. Units should not stockpile unused or underutilized space, nor may they unilaterally lease or loan it to another department. Units found to be possessing space which is not assigned, will be asked to vacate the space(s) immediately (within 10 business days).

J. The University has a fiduciary responsibility to respect a donor’s wishes with regard to land and facilities acquired by gifts. General classrooms and donor-restricted facilities will be considered separately, but are not exempted from the space review process.

K. Beyond the expectation of a (single) private office for active, full-time, faculty in association to their respective department, allocation of space resources to faculty is not specified on a campus-wide basis.

L. Insofar as retired faculty (Emeriti) should need space on campus, as per Part 4. Personnel Policies, Section III. Academic Rank and Other Appointments, D. Emerita/Emeritus Status (Updated 9/06): “Once Emeritus Status has been conferred, such faculty members will be eligible to continue scholarly pursuits in the name of Idaho State University.”
   a. Activity that requires laboratory, studio, or other research space is approved by the authority of the department chair and dean.
   b. All private office space is reserved for active, full-time, faculty and there is no guarantee that retired faculty will receive a private dedicated office or research space.
   c. Space for retired faculty must be provided within the space assignments of the affiliated academic unit conferring Emeriti status.
   d. Once the project or collaborative association relationship is concluded, retired faculty will give up space for re-allocation. By no means does the use of space for any amount of time imply the retired faculty may use space for continued storage, or continue to maintain any portion of the space following the conclusion of the approved activities. The space usage is for the limited duration of the approved collaborative activity.

M. Common space, e.g., conference rooms and outdoor space, will be available to all occupants and to other campus users where appropriate. Space will be allocated to individual research groups or other programs based on need and in consideration of the impact on other occupants of a facility. In the event that a research, academic, or administrative group leaves the building or campus, authority for reallocation of that space reverts to the Facilities Services Department, through the authority of the Executive Vice President and Provost’s office.
VI. PROCEDURES TO IMPLEMENT

Current Assignments, Requests for or Allocation of Space:

All requests for adjustments to space, or allocation of space needs will be made in writing to the department of Facilities Services using the Project Space Request (PSR) form. Requests must include an internal space review as outlined below and be acknowledged and approved by the appropriate Department Head/Director and Dean’s/VP’s office prior to submission. The department of Facilities Services will review each request. During the review process, Facilities Services may submit PSR requests to the Institutional Effectiveness Assessment Council (IEAC) for further in-depth review. All requests will be considered within the context of the Space Planning and Management policy and its outlined principles.

Elements of the review may include meetings with the requesting department to further define the need, consultation with Facilities Services design staff to determine suitability of available space, and evaluation of current utilization of requesting departments’ space. Common evaluation of space utilization methods includes:

- Comparison of projected space to current standards/guidelines.
- The department or division should perform a physical walk through of its space to make sure all current space is being fully utilized. If the requesting department or division needs assistance in performing the space audit, contact Facilities Services who will arrange for a physical review of the space by the Space Planning Team. A detailed inventory of the department or division space may be requested from Facilities Services and is generally provided in a report format via the University space inventory tracking system. This will include room use, room category and standard, the type of activity associated with the room, reported occupants and square footage totals.
- Forward the results of the space audit with a detailed description of the department/division’s space needs to the department/division dean or vice president for approval prior to the request being forwarded to Facilities Services. Neglecting to include the audit in the PSR process may cause a delay in the processing of PSRs until the audit is provided.

Requests for adjustments to space, or allocation of space must include an internal audit that verifies that adequate space does not exist within the resources already available to the school, program or department. This audit must be rigorous and include all assigned space, shared space, storage space, access to common space, etc. When a new building or vacated space comes on-line, justification needs to include release or reallocation of existing space.

Due to the shortage of space on campus and as an alternative to the allocation of new spaces, Facilities Services may suggest the sharing of facilities, the reallocation of (single) private offices which are not assigned to active, full-time faculty, or storage solutions which often include recommendations to coordinate with surplus or records management personnel, or to dispose of unused or outdated materials. The first step toward improving a departments’ efficient and effective use of space often involves discarding unneeded, obsolete or surplus materials. Requests for space
often require the demonstration that existing space is well utilized. For departments wishing to improve space utilization through this manner, campus service providers are available to assist departments in utilizing space more efficiently.

Decisions on the reallocation of occupied space at all administrative levels will be based on campus and program priorities, strategic plans, the Campus Master Plan, and overall need. The Executive Vice President and Provost may reallocate space that is underutilized or required to address an important campus priority or strategic need. In such cases, Facilities Services will develop a 1-year plan for the reallocation of the space which shall be reviewed by the IEAC and approved by the Executive Vice President and Provost.

Space vacated by a physical move, renovation, or new construction is allocated back to the University and managed by Facilities Services under space inventory. Likewise, space vacated due to a reduction in program size, reduction in workforce, program elimination or reduction in grant funded research is also allocated back to the University. It is the responsibility of Facility Services to evaluate the type and condition of vacated space, and to update the official space database accordingly. Facilities Services will review potential uses of the space consistent with the strategic and physical master plans, existing outstanding space requests and proposals, current campus space utilization of classroom and laboratory spaces, and to recommend future assignments to the Executive Vice President and Provost. The Dean or V.P. of the college or unit vacating the space can request continued possession provided a strategic justification is provided.

Management of space allocated to an academic, research or administrative unit is generally the responsibility of the Dean/V.P. of that unit. In most cases, responsibility for managing departmental or unit space is delegated to the unit chair. It is the responsibility of the unit to ensure space assignments are optimized for the best and most effective use. Units are encouraged to assign and configure assigned space to maximize utilization and align use with strategic goals. Unit managers may allocate or reallocate general space within their assigned category (e.g. offices, labs or storage) however the academic scheduling of classrooms or teaching labs are the responsibility of the Registrar and notification to Facilities Services regarding changes in departmental office assignments is essential to ensure the official space database remains current. All space reassignments between units must be reported by submitting a PSR Facilities Services be reported to the official campus inventory system for record-keeping and for a determination whether further review is needed by Facilities Services. All changes must be reported within 10 business days, if not prior to assignment.

Assignment of space is a resource allocation process which is the responsibility of Facilities Services under the authority of the Executive Vice President and Provost. Adverse impacts on units and any need to compensate for the loss of space are expected to be considered as part of the normal deliberative process carried out by the decision-making authority. Compensation is not required by campus policy. If a unit under a Dean or V.P. objects to a space reassignment, it may appeal to its department unit Dean or V.P. and ultimately to the Executive Vice President and Provost, who is the final decision-making authority for the campus. It is expected that individual faculty members will be informed of planned changes in space specifically allocated to them or their program by their unit supervisors and will have the opportunity to comment on and influence
such decisions. As a matter of procedure, faculty members have the option to appeal to a higher level (Dean/V.P. and ultimately, the Executive Vice President and Provost), or they may take a complaint the IEAC. The determination of space assignments is not based entirely on the application of quantitative criteria but also includes measure of value. The fundamental criterion for determining space assignments to individual faculty is expected to be the provision of adequate space to enable a faculty member to carry out his or her teaching and research responsibilities.

For questions or comments concerning this Space Planning and Management policy and its outlined principles, please contact Facilities Services. Refer to our website for space standards and guidelines.