

# **Space Allocation and Change Policy**

## **INTRODUCTION**

All space within state-owned facilities of California State University, Fresno is the property of the State, and is provided to deliver the programmatic services for which the space was designed, approved, and funded. Our facilities are resources that must be managed, maintained, and controlled in a manner that continually contributes toward the University's mission.

Thoughtful space planning – consistent with the Chancellor's Office space policies and procedures – is a critical element in the allocation of University space which must address not only growth, but also the changing needs of the University and those to whom it serves. The University values flexibility and recognizes changing curricula, programs, and technologies. Accordingly, space assignments can and will change to achieve optimal utilization and respond to current and emerging needs.

The University is required to maintain a detailed inventory of all space on campus, including reassignments of space, changes in room function, physical alterations which cause a change in the square footage of a room, station count, or capacity. Any projects on university property resulting in modifications to existing space, regardless of funding source or degree of complexity must be submitted to the Facilities Planning office for tracking purposes.

University space needs will be evaluated on the basis of programmatic need, academic priority, and operational/business plans. Space standards will be used to gauge space needs. 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 space types

## **ROLES AND RESPONSIBILITIES**

### **Facilities Planning**

Facilities Planning will be the central receiving unit for all space requests. The space management responsibilities of Facilities Planning include:

- Provide maintenance, oversight, updates, and improvements to the Space and Facilities Database (SFDB)
- Conduct routine audits of selected buildings and divisions/units to verify accuracy of space inventory
- Receive and analyze requests for new space, alterations of space, or change in space use
- Forward requests for space modifications to the appropriate Vice President, as needed, for approval
- Report space changes and alterations to the Campus Planning and Facilities & Campus Environment Liaison (FACEL) Committees

- Conduct routine analysis and reports of campus space needs at the department and division level and for selected space types such as classrooms, laboratories, research space, and faculty offices

## CRITERIA FOR SPACE ALLOCATIONS

### **Space Requests**

1. Requests for additional space:

One or more of the following criteria must be met in order to be considered for new space.

- a. Academic master planning – Space needs resulting from curricular and program development
  - b. Faculty and staff recruitment plans – Faculty office, laboratory, and research space needs resulting from approved faculty and staff recruitments
  - c. Administrative – Space needs to support the administrative functions of the University
  - d. University Strategic Plan – Space needs resulting from approved strategic initiatives in the university’s annual budget process
  - e. Other space as needed and recommended by the appropriate Vice President
2. Reassignment of existing space:

#### Academic Affairs

With the written approval of the Provost and Vice President for Academic Affairs (or designee) and appropriate notification to Facilities Planning, School and College Deans may reassign space within their school, college or administrative unit. All changes or reassignments shall be reported to Facilities Planning within 30 days of approval to ensure accuracy of the Space and Facilities Database (SFDB).

The following requests require review and consultation with the Associate Director of Planning and Administration for Facilities Planning and the Provost and Vice President for Academic Affairs (or designee):

- a. Temporary space assignments made for a specified period of time, e.g., space allocated for 6 months or more for special project usage, e.g., research including, but not limited to uses requiring retrofits for specialized equipment and/or technology
- b. Changes in the primary function or seating capacity of the space, e.g., request to change a faculty office into a conference room
- c. Renovations changing the assignable square footage of a room

### Administrative Services

With the written approval of the Vice President for Administration and appropriate notification to Facilities Planning, Directors may reassign space within their units. All changes or reassignments shall be reported to Facilities Planning within 30 days of approval to ensure accuracy of the Space and Facilities Database (SFDB).

The following requests require review and consultation with the Associate Director of Planning and Administration for Facilities Planning and the Vice President for Administration:

- a. Temporary space assignments made for a specified period of time, e.g., space allocated for 6 months or more for special project usage
- b. Changes in the primary function or seating capacity of the space, e.g., request to change a conference room into a private office
- c. Renovations changing the assignable square footage of a room

### Division of Student Affairs

With the written approval of the Vice President for Student Affairs and appropriate notification to Facilities Planning, Directors may reassign space within their unit. All changes or reassignments shall be reported to Facilities Planning within 30 days of approval to ensure accuracy of the Space and Facilities Database (SFDB).

The following requests require review and consultation with the Associate Director of Planning and Administration for Facilities Planning and the Vice President for Student Affairs:

- a. Temporary space assignments made for a specified period of time, e.g., space allocated for 6 months or more for special project usage
- b. Changes in the primary function or seating capacity of the space, e.g., request to change a faculty office into a conference room
- c. Renovations changing the assignable square footage of a room

### University Advancement

With the written approval of the Vice President for University Advancement and appropriate notification to Facilities Planning, Director's may reassign space within their unit. All changes or reassignments shall be reported to Facilities Planning within 30 days of approval to ensure accuracy of the Space and Facilities Database (SFDB).

The following requests require review and consultation with the Associate Director of Planning and Administration for Facilities Planning and the Vice President for University Advancement:

- a. Temporary space assignments made for a specified period of time, e.g., space allocated for 6 months or more for special project usage
- b. Changes in the primary function or seating capacity of the space, e.g., request to change a faculty office into a conference room
- c. Renovations changing the assignable square footage of a room

### Office of the President

With the written approval of the President and appropriate notification to Facilities Planning, Director's may reassign space within their unit. All changes or reassignments shall be reported to Facilities Planning within 30 days of approval to ensure accuracy of the Space and Facilities Database (SFDB).

The following requests require review and consultation with the Associate Director of Planning and Administration for Facilities Planning and the President:

- a. Temporary space assignments made for a specified period of time, e.g., space allocated for 6 months or more for special project usage
- b. Changes in the primary function or seating capacity of the space, e.g., request to change a faculty office into a conference room
- c. Renovations changing the assignable square footage of a room

### 3. Reporting Space Changes

The Chancellor's Office requires the campus to maintain accurate records of space inventory, space reassignments, changes in room function or seating capacity, and physical alterations which cause a change in the square footage of a room. All space reassignments must be reported to Facilities Planning within 30 days of approval to ensure timely updates and accuracy of the Space and Facilities Database (SFDB).

The SFDB serves as the sole official record of campus facilities and space which is used in determining our annual support budget and in the analysis of the capital outlay budget change proposals, space needs, space utilization, and other space and facility related issues and reports.

### 4. Funding

- a. Funding must be identified in advance for costs associated with space moves or renovations and included in the Space Allocation/Change Request Form. Space requests that are dependent upon unconfirmed funding sources should clearly indicate that contingency
- b. Facilities Planning will provide cost estimates, if necessary
- c. Renovation costs will generally be paid for by the requesting department

- d. Requests for minor capital outlay funds for space renovations may be made in accordance with the minor capital outlay policy and procedure and will be subject to availability of funds and approval by the Provost and Vice President for Academic Affairs and the Vice President for Administration

#### 5. Approval of Space Requests

- a. The Space Allocation/Change Request Form must be submitted to the appropriate Vice President (or designee) for review and approval prior to being forwarded to Facilities Planning
- b. Facilities Planning analyzes the proposal and prepares a recommendation to the appropriate Vice President (or designee), if required, within 60 days of receiving the request
- c. The decisions of appropriate Vice President (or designee) are communicated in writing to the requesting department and Facilities Planning

#### 6. Periodic Space Inventory

Periodically, Facilities Planning will evaluate and report space assignment and utilization to the Vice President for Administration and the Provost and Vice President for Academic Affairs

### **Space Standards**

California State University, Fresno adheres to standard office and academic space calculations and standards as set forth by the State University Administrative Manual, Sections V – Measurement Devices for Physical Planning, and VI – Standards for Campus Development Programs (<http://www.calstate.edu/CPDC/SUAM/>).

## SPACE ALLOCATION/CHANGE REQUEST FORM

### **INSTRUCTIONS:**

Use this form to request department or program space assignments, alterations, or changes for review, recommendation and approval. *Completed forms, along with attached justification, must be approved by your Vice President prior to submission to Facilities Planning.*

**Date:** \_\_\_\_\_

**Requesting Unit/Department:** \_\_\_\_\_

**Requestor's Name:** \_\_\_\_\_

**Campus Phone:** \_\_\_\_\_ **Campus E-Mail:** \_\_\_\_\_

- Request for New Space
- Request for Change in Space Type
- Request for Alteration of Current Space
- Notification of Reassignment of Current Space

In your justification for the request for space, please address the following:

### **PROGRAM INFORMATION**

- a. Describe the program that will use the space and why the space is needed.
- b. Is this a new or existing program?
- c. Has the new program or expansion been approved?
- d. How does the program relate to the University's strategic, academic and/or master plans?

### **SPACE REQUIREMENTS**

- a. What type of space are you requesting?
- b. If requesting instructional space, what size do you have the greatest need for?
- c. When do you need the space?
- d. How many faculty/staff/students will be assigned? Full-time, part-time, students, etc.
- e. Are there special requirements of the new space? (e.g., location, adjacencies, etc.)
- f. Describe briefly why your existing space is inadequate
- g. What other programs might be affected by this space change?

### **FUNDING SOURCE**

- University Funded: \_\_\_\_\_
- Non-State: \_\_\_\_\_
- Capital Outlay: \_\_\_\_\_
- Other Funding: \_\_\_\_\_
- Cost Recovery Chartstring: \_\_\_\_\_

**SPACE ALLOCATION/CHANGE  
REQUEST FORM**

**AUTHORIZATIONS**

Requesting Department Head

Name: \_\_\_\_\_

Title: \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

Vice President

Name: \_\_\_\_\_

Title: \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

**SPACE ALLOCATION/CHANGE  
REQUEST FORM**

Facilities Planning Use Only



Date of Review: \_\_\_\_\_

Recommendations Made:

Action Taken:

Approved by Facilities Planning

Name: \_\_\_\_\_

Title: \_\_\_\_\_

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)