



Office of the President

UCOP Space Management Principles

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Goals, Principles, and Delegations of Authority

Introduction

The following space management goals, principles, and delegations of authority have been developed to provide a consistent framework to (1) **allocate** UCOP space, (2) **plan** for future space needs of the organization, and (3) **manage** UCOP space effectively. All UCOP space requests and planning efforts will be evaluated using these principles and procedures. This document provides the overarching concepts for space management. Although there may occasionally be special situations or the need for exceptions to the space management goals and principles, in most circumstances these criteria will be applied in evaluating all space requests.

Seven Goals for UCOP Space Management

Functionality – provide space that meets defined functional requirements, facilitates productivity, and maintains the quality of the work environment;

Equity – ensure that space is planned, managed, and allocated equitably across all Divisions and Departments of UCOP;

Consistency – ensure that UCOP utilizes practices that are easily identifiable, user-friendly, and fair to all parties;

Efficiency – ensure that space is utilized to the greatest extent possible and that the need for outside leases is minimized;

Flexibility – ensure that UCOP meets its current and anticipates its future space needs, and plans for them accordingly, as well as maintain standards that allow for easy modifications to space and relocation of staff;

Cost-Effectiveness – ensure that UCOP manages space in a manner that is fiscally responsible and consistent with its fiduciary goals and commitment to its stakeholders.

Proximity – maximize the ability of UCOP Departments to facilitate coordination and review of University business matters.

Authority for Space Management Decisions

1. Office space at UCOP is managed by the Senior Vice President – Business and Finance.

2. A UCOP Space Management Oversight Committee will provide advice to the President and make decisions regarding the allocation of space resources. Committee membership will be:

- ❖ The Provost and Senior Vice President – Academic Affairs (or designee);
- ❖ The Senior Vice President – Business and Finance (or designee);
- ❖ The Senior Vice President – University Affairs (or designee);
- ❖ The Associate President.

The Associate President will represent other senior managers who report directly to the President: Agriculture and Natural Resources, Budget, Health Affairs, and Laboratory Management. The Associate President will also consult with and represent the Office of General Counsel and the Secretary of The Regents.

3. The Senior Vice President – Business and Finance has assigned the day-to-day administration and management of UCOP space to the Assistant Vice President – Facilities Administration.

Office of the President Space Management Principles

1. **Management of Space:** All space within the Office of the President is managed by the Senior Vice President – Business and Finance. The Department of Facilities Administration is responsible for implementing the space management guidelines and principles contained in this document. Divisions and/or Departments may redistribute space assigned to them as long as the redistribution complies with the goals, principles, and implementing procedures outlined below. Unused space must be returned to the UCOP central “inventory” for redistribution in order to create efficiencies and save money on leased space.
2. **Development and Enforcement of Space and Furnishings Standards:** Within UCOP, space planning, management, and allocation is subject to specific standards approved by the Senior Vice President – Business and Finance and developed and maintained by the Department of Facilities Administration. These standards include specifications for furniture, surface finishes and proper use of space. Only Facilities Administration may modify, reconfigure, or otherwise rearrange space. Departments are responsible for funding any costs associated with modifications that they request.
3. **Senior Management Support of Space Standards:** UCOP Senior Management facilitates the fulfillment of the space principles and goals contained herein. All space requests are to be routed through the appropriate Division Head (Senior Vice President or Vice President), and then submitted to the Senior Vice President – Business and Finance. Requests are to be forwarded only after appropriate alternatives have been considered within the existing space available

to the Division/Department. In general, a Department should have one workspace for each FTE. For space management purposes, an FTE is defined to include permanently funded, as well as approved contract, temporary, and alternatively funded positions.

4. **Space Planning Concurrent with Budget Planning:** Space planning must take place concurrently with planning for any programmatic growth, and space allocations must be requested, and appropriate space identified, in conjunction with the development of new programs and initiatives. At the same time a proposal is being developed for new funding, new grants, or new initiatives, the proposing department is responsible for forwarding a request for space to UCOP Facilities Administration for coordination. If coordination is not requested, the Department involved must find space within their current allocation or otherwise fund alternate space. The UCOP Space Management Committee must approve in concept any allocation of space for new staff members.
5. **Space Functionality and Productivity:** The goal of long-term space planning will be to create contiguous space for Departments and to house all staff in the fewest possible locations while maintaining the highest possible quality for the work environment. Space management decisions will seek to minimize the number of locations that have to be serviced and supported, thereby reducing expenses and departmental duplication costs for LAN connectivity, mail services, copiers, etc. Consideration will be given to the need for collaboration between Departments/Divisions when considering requests to relocate from a given facility. Space decisions will strive to facilitate maximum functionality and productivity within and among Departments/Divisions.
6. **Balancing Owned Space and Leased Space Costs with Flexibility and Efficiency:** In general, decisions related to space will have as a priority minimizing rental expenses paid for space outside the Franklin Building. Outside lease costs will be weighed against the need for flexibility in managing space. Every effort will be made to reduce overall lease cost liability so as to minimize space occupancy costs for the Office of the President. As an example, if the relocation of staff would result in the “freeing up” of space from a centrally funded lease, then every effort will be made to accommodate the space request/relocation, and notice will be given to reduce the external lease obligation, if the lease permits.
7. **Self-Supporting Operations:** Self-supporting Departments are responsible for their own space-occupancy costs and must manage those costs consistent with their fiduciary responsibility. The terms of a space occupancy agreement are agreed to by all parties in advance of the allocation of space. The occupancy cost/square foot charged to the Department is to include the mortgage or lease cost per square foot, as well as a pro-rata share of operating expenses. Space

allocation and occupancy is to remain consistent with the UCOP Standards set forth in this document.

8. **Relocation Costs:** When UCOP Departments request the relocation of staff to new space, the requesting department pays all costs associated with that move including reconfiguration of the to be occupied space. In addition, the requesting Department shall pay the costs of moving the “displaced” departments involved, unless other arrangements are agreed to in advance of the relocation. Terms for paying costs associated with a relocation or move are to be agreed to in advance by all parties.

Office of the President Space Management Implementing Procedures

Executive Offices

Executive offices are to be allocated to staff within the Senior Management Group or for other approved uses. Executive offices shall not be used for MSP or PSS staff members without approval from the UCOP Space Management Committee.

MSP Offices

MSP offices are to be allocated to staff within the Management and Senior Professional Program or for other approved uses. MSP offices shall not be used for PSS staff members without approval from the UCOP Space Management Committee. MSP offices shall not be converted for use as conference rooms, IT server rooms, filing rooms, libraries, or other uses. Departments may decide how to allocate assigned MSP offices to MSP staff within their organization (factors such as priority, window vs. interior space, etc.).

PSS Workstations

PSS Workstations may be allocated for staff within the Professional and Support Staff Program or for other uses, as approved by the Space Management Committee. Examples of uses which will not be approved include: storage areas, fax centers, mail rooms, filing centers, libraries, and seating areas.

Duplicate Offices and Workstations

In order to reduce costs, no staff member should have an office or workstation in two or more locations without prior approval of the Space Management Committee. Facilities Administration will be responsible for providing suitable “hoteling” space in each desired location, if feasible. A computer, telephone, and small table will be provided in each location for this purpose. For occasional alternate location room use, sign up using the online Facilities Administration iSchedule System.

IT Server Rooms

As necessary, Facilities Administration and IR&C will provide appropriate server space that is accessible to PC Coordinators, with proper air handling systems, increased

security, and state-of-the-art server racks and connections. Unless Departments have made specific arrangements with Facilities Administration, servers should be relocated to such locations.

Facilities Administration iSpace System

Each Division and Department has designated individuals in the role of Space Administrators to have access to the Facilities Administration iSpace System. Departments should update the system upon any change of office or workstation staffing. A formal review of iSpace entries will be performed each Fall (September – October) as part of the mandatory annual state and federal space reporting requirement.

UCOP Leases

All Departments must consult with Facilities Administration before entering into any negotiations for outside office space leases.