

UCOP Space Management

Space Assignment Exception Request Form Instructions

This document provides the process and background for UCOP space assignment decisions, defines business rationales for exception requests, and includes instructions for completing and routing the *Space Assignment Exception Request Form*.

Space Assignment Rubric: In planning for the UCOP Office Consolidation, the rubric below was created to define space assignments for employees across UCOP at all locations. This rubric applies regardless of current space assignment. For existing locations where no renovations are planned, UCOP may grandfather office assignments based on space type availability and use.

The space assignment rubric has been designed to align with UC Career Tracks job categories and operational needs for private office space.

UC Career Track Job Categories: (see [Job Classifications](#) for additional information on which jobs fall into each category)

Individual Contributor Series		Leadership Series				Key
Operational & Technical	Professional	Supervisors & Managers				
Level 1	Entry	Supervisor 1		Assigned Open Workstation		
Level 2	Intermediate	Supervisor 2		Possible office assignment – see Office Assignment Criteria*		
Level 3	Experienced	Manager 1	Manager 2	Manager 3	Manager 4	Assigned Office
	Advanced					
	Expert					

* Office Assignment Criteria:

1. Chiefs of Staff positions
2. Supervisors with 3+ direct reports where sensitive work requires a private office
3. Supervisors with 5+ indirect reports

Exception Requests: There may be business rationale for requesting exceptions to space assignments based on rubric decisions. Exceptions may be requested on the basis listed below, and will not be considered based solely on the employee's office assignment before the move. If the exception request does not meet the criteria, contact Steve Murray at steven.murray@ucop.edu or 510-587-6428 to discuss the request.

1. *ADA Accommodation*: Reasonable accommodations adjudicated and approved via the PPSM-81 policy. Supporting documentation from HR is required.
2. *Sensitive Employee or external stakeholder Data and Discussions*: Position whose *primary* function (75%+ of job duties) requires (a) daily, ongoing sensitive employee or external stakeholder (e.g. Regents, legislators) discussions; (b) use of sensitive employee or external stakeholder data; and (c) workstation is not already located in a secure area where surrounding employees are also doing sensitive work, such as UCPath or RASC.

3. *HIPPA Confidentiality*: Position whose *primary* function (75%+ of job duties) requires (a) ongoing verbal discussions; and (b) management of documents and on-screen transactions that could not be secured in an open or shared environment, and could therefore violate HIPPA confidentiality policies. Requests should define position duties, frequency, and justification why a dedicated and restricted open workstation and privacy screens could not accommodate these needs.

Form Instructions: The Supervisor of the Requestor/Employee completes the *Space Assignment Exception Request Form* and follows the process below for routing.

Requestor Name: Enter employee's name.

Division / Department: Enter employee's division and department.

Assigned Space: Select rubric-defined space assignment from dropdown menu.

Requested Space: Select requested space assignment from dropdown menu.

Business Rationale: Select one rationale which best describes the business need for this space assignment exception. If more than one rationale exists include that information in the description field below.

Describe Business Rationale: Provide details on position responsibilities and needs, and explain why the exception is an essential divisional need. If more than one rationale applies to this request, include the additional rationale here.

Can this business need be satisfied in any other way? Provide rationale on why these needs could not be accommodated in another way, and include cost implications.

Exception Request Routing: Requests for exceptions are initiated by the Supervisor of the Requestor/Employee and routed via email, or uploaded to DocuSign for routing by the Department.

1. Supervisor of the Requestor/Employee completes *the Space Assignment Exception Request Form* and routes to Department Head for consideration and approval signature. Department approval is required to move forward.
2. Department routes form to Division Chief of Staff for consideration and approval signature. Division approval is required to move forward.
3. Department or Division routes form to BASC Director for review and recommendation for approval or denial.
4. BASC Director routes form with recommendation to UCOP Operations Executive Director for decision and signature.