



Memorandum

To: Mohammad H. Qayoumi
President

From: Shawn Bibb *SB*
Vice President, Administration & Finance, CFO

Date: November 12, 2009

Subject: Space Policy

I recommend that you approve the Planning, Design & Construction Space Management and Assignment Policy which was reviewed and agreed upon by members of the Space Policy Committee on November 9, 2009.

Attachment

Approved

Shawn Bibb

11/19/09

RECEIVED

NOV 12 2009

California State University, East Bay
Office of the President



Planning, Design & Construction Space Management and Assignment Policy

I. OVERVIEW

Space is a central resource to the campus. The assignment of space is conducted in a consistent manner designed to optimize the use of this resource and to advance the mission and strategic priorities of the campus.

Space management at CSUEB is driven by the following principles:

- Space is a University resource. The physical facilities of the University, including General Fund and non-General Fund facilities, are an enormous asset crucial to the operations of the campus. The number, type, and condition of University facilities help shape all aspects of campus programs and activities.
- Space is a University property that is assigned in a manner that best advances University priorities. No unit, department, or division "owns" the space that has been assigned to it. University space resources should be deployed in the most efficient and effective manner to best serve programmatic and strategic goals.
- Space assigned can be reassigned. 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.
- University space needs are evaluated in the context of traditional quantitative and functional considerations. 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 types of space.
- With the exception of instructional capacity space (defined in Attachment 1, page 6), responsibility for assignment and reassignment of space will generally follow policies

established by the Space Policy Committee, as well as divisional, college and departmental organizational hierarchies. While any and all space assignments are subject to change based on the authority of the President, the ability to assign and reassign space to the division, will generally follow the policy set by the Space Policy Committee, and is delegated to the head of the division¹. This authority, which is contingent on compliance with applicable space guidelines and standards, provides flexibility to the Divisions, Deans and other managers to address the space needs of their respective units.

SPACE POLICY COMMITTEE (SPC)

The University Space Policy Committee shall create the space management and assignment principles. Members include representatives from each division and the Academic Senate:

Vice-President for Administration and Finance (Chair)

Vice-President for Planning, Enrollment Management and Student Affairs

Vice-President for University Advancement

Associate Provost

Academic Senate Chair

Chief Information officer

ROLE OF THE SPACE POLICY COMMITTEE

- Create the space management and assignment principles.
- Develop space policy and guidelines.
- Provide general policy recommendation on matters of space resource management.
- Render a decision on those space requests that cannot be resolved by the Space Advisory Committee.
- Convene periodically (not less than 2 times per calendar year) to review space principles and guidelines, and make any changes, as necessary

¹ Division Heads include the Vice-President for Administration and Finance, the Vice-President for Planning, Enrollment Management, and Student Affairs, the Vice-President for Academic Affairs/Provost, the Vice-President for University Advancement, and the Chief Information Officer.

SPACE ADVISORY COMMITTEE (SAC)

The Space Advisory Committee shall review specific requests and proposals for space assignments:

Members of the SAC are:

Director of Planning, Design and Construction (Chair)²

Representative from the Division of Administration and Finance

Representative from the Division of Academic Affairs

Representative from the Division of Planning, Enrollment Management, and Student Affairs

Representative from the Division of Information Technology Services

Representative from Academic Senate

Associate Planner (staff to and non-voting member)

Campus Scheduler (non-voting member)

Representative from University Advancement

ROLE OF THE SPACE ADVISORY COMMITTEE

- Implement space management policy
- Review, analyze, prioritize and render a decision on individual requests for space submitted to the Office of Planning, Design and Construction (PDC)
- Prepare and present ad hoc studies to improve space efficiencies and maximum space utilization, as necessary
- Review and approve PDC procedures and forms to implement the space management policies.
- Implement policies and procedures for naming physical features. (Please see Attachment 3, page 10)

² The Director of Planning, Design and Construction shall serve as a non-voting member to the Space Advisory Committee, unless the committee needs to break a tie.

ROLE OF PLANNING, DESIGN & CONSTRUCTION

Planning, Design & Construction provides technical and staff support to both the SPC and the SAC. The Director of PDC shall serve as Chair of the SAC. Other duties include:

- Receive and analyze requests for additional space.
- Maintain and update the University's space inventory (Space & Facilities Database, also known as "SFDB"), the central database of space assignments.
- Conduct routine audits of selected buildings and divisions/units to verify the accuracy of the space inventory.
- Conduct routine analysis and reports of campus space needs at the department and divisional level and for selected space types such as classrooms, laboratories, and office space.
- Collaborate with the Office of University Scheduling for inventory, analysis and reports on campus instructional space.
- Prepare space entitlement reports.
- Provide input and analysis regarding space needs in new building construction and major renovations, as guided by the campus master plan.
- Provide space planning and budgeting related to Capital Outlay project phasing and departmental relocations.
- Provide ad hoc studies and space management recommendations to the Space Advisory Committee and the Space Policy Committee

II. GUIDELINES

- A. Cal State East Bay's space planning and management guiding principle is based on the understanding that the University owns the space. The space is assigned to a division/department. However, space that is deemed to be underutilized and/or required to address a campus priority or strategic need may be reassigned. In such cases, the Space Advisory Committee will develop a plan for the reassignment of the space.
- B. Vice-Presidents are accountable for utilization of spaces assigned to them and may reassign occupancy of space within the division, with the exception of academic space, which includes lecture, laboratory, and faculty office. Vice-Presidents may not change the use of any university space, unless the change in use is temporary, without review and approval by the Space Advisory Committee. For purposes of this document, "temporary" is defined as six months or less.

- C. Departmental space requests shall be directed to the Vice-Presidents or their designees. Such requests shall be forwarded to PDC for analysis and recommendation to SAC. Departments shall utilize the “Request for Change in Space Assignment Form”, referenced in this document as Attachment 2.
 - 1. Change in the use of academic space that is designated as lecture, laboratory or faculty office is normally not permitted unless an equivalent space that replaces it is identified. Requests related to academic space shall go thru Academic Affairs/Provost’s Office via Deans, and shall require analysis from PDC, and subsequent approval by SAC. The change in academic space designation is not final until approved by the Chancellor’s Office.
- D. Academic Office assignments shall be delegated to the Deans or their designee.
- E. Reassignment of space should conform to the designated space use and applicable utilization standard.
- F. Prior to their occurrence, PDC shall be consulted and advised of all proposed changes in the use of space which require reclassification.
- G. All approved space reassignments and space requests that necessitate a physical move shall be initiated and coordinated by the requesting department. The requesting department shall be responsible for initiating work orders and coordinating with the support departments such as Facilities Management, User Support Services, and Telephone Services. PDC is responsible for documenting such space approvals but not the activities associated with move coordination.
- H. Each request for space reclassification or space reassignment with concomitant reclassification which cannot be resolved between a division vice president and PDC will be presented to the Space Advisory Committee.
- I. Units may propose space trades for review and approval by the SAC.
- J. Vacated space returns to the University’s central pool for new assignment consideration. It is the responsibility of the Vice-President to report to PDC any vacated space using the “Request for Space Assignment/Reporting Vacant Space” form, referenced in this document as Attachment 2.
- K. Programs displaced by demolition of old space may or may not occupy the new space which replaces it. Among options to be considered are: assignment to other new space, assignment to existing space vacated by other programs, or assignment to the replacement space.
- L. The addition of space to an existing facility or the design of new space for a particular purpose does not mean that such space remains indefinitely under control of the program center for which the addition or design was made. Space use is a subject of continuing review to ensure optimum utilization.

- M. Spaces that are primarily used for very short periods of time, usually less than a full day, are referred to as “hotelling” space or time-shared space. Such space may be assigned to a particular organizational unit to handle reservations and scheduling, but time shared spaces can be reserved and used for particular purposes by any organizational unit. Examples include time-shared offices; almost all large conference rooms; and small, fully enclosed conference rooms when privacy/confidentiality is required for meetings of two or three people.
- N. Leasing of University space to non-General Fund units, including grant/research space, or to outside groups requires approval under the guidelines referenced in this document as Attachment 4.

Attachment 1**Instructional Space Definitions and Descriptions**

In the California State University, instructional space is defined as lecture (or classrooms) and teaching laboratories. The following instructional spaces are defined and described per the CSU space standards:

1. Lecture

Definition: *“A room used and scheduled for classes that do not require special purpose equipment for student use.”*

Description: *“A lecture room may be equipped with tablet arm chairs (fixed to floor, joined together in groups, or flexible in arrangement), tables and chairs, or similar types of seating. This space is regarded as shared classroom space and is therefore not assigned to a specific discipline. Space designated as lecture is scheduled exclusively thru the Office of University Scheduling.”*

“This category does NOT include conference rooms or auditoriums”.

2. Teaching Laboratory

Definition: *“A room primarily used by regularly scheduled classes which require special-purpose equipment or treatment for student participation, experimentation, observation or practice in a field of study.”*

Description: *“A teaching laboratory is designed and/or furnished with specialized equipment to serve the needs of a specific discipline for group instruction in regularly scheduled classes. The design and/or equipment in such a room normally preclude its use for other areas of study. Space designated as teaching lab is assigned to and scheduled by individual departments. CSUEB further interprets the definition of teaching laboratory to be an instructional space that houses **equipment** unique to instruction in a particular discipline. Such equipment may include specialized computing equipment, **if** it is unique to the discipline, and applications, **only if** they cannot be virtualized.”*

“This category does NOT include laboratory rooms that serve as individual (or independent) study rooms. It does NOT include laboratories used for group instruction that are informally or irregularly scheduled. This category does NOT include rooms generally referred to as research laboratories. It does NOT include gymnasiums, pools, or drill halls.”

Non-Instructional Space Definitions and Descriptions

Non-instructional space includes all other spaces with the exception of those that are classified as lecture or teaching laboratory. The following non-instructional spaces are defined and described per the CSU space standards:

1. Research Space

Definition: "A room used primarily by informally scheduled classes or for special or independent study by faculty, graduate or advanced undergraduate students. Research space contains special purpose equipment for student participation, experimentation, observation or practice in a field of study."

Description: "Research space is designed for and/or furnished with equipment to serve the needs of a particular area of study that normally limits or precludes its use for other areas of study. Note that the criteria for differentiating a teaching laboratory and research space are the nature of its scheduling and usage. "

2. Computer Lab

Definition: "Space used to house student access workstations that are used for self-instruction purposes."

Description: "Such space provides students access to the computing resources necessary for completion of their academic program requirements. This includes study activities, drills, exercises, research, analysis and development projects, individual and team assignments, case studies, written reports, and other assignments that can be performed at computer-based workstations.

*Computer labs are scheduled centrally as they are generally not discipline specific in that the **hardware** conforms with a campus standard (e.g. for PC's or Macs). Instruction that requires specialized **software** can be accommodated through centralized servers, web-based access, or other virtual technology. Similarly, specialized **auxiliary equipment**, such as large scale plotters or specialized printers can be accommodated via networks in space ancillary to general purposed computer labs. "*

Limitations: "This category does NOT include rooms used primarily as teaching laboratories even though such rooms house computer based workstations which are an integral part of the instructional program, i.e., computer science classes. It does NOT include space where computers are used for specialized purposes, such as measurement, monitoring, and control systems, or student support systems, such as career guidance computer applications. It does NOT include library workstations (Library Telecommunication Computer Workstations) that are used primarily to provide interactive access to local and remote on-line catalogs and to perform search and retrieval functions on a variety of databases."

3. Special Instruction

Definition: "Spaces required as the normal part of any college's instructional program, but not readily classifiable under other categories of instructional capacity space."

Description: *"Such space supports instruction but is not scheduled for classes. This category does NOT include spaces such as auditoriums, theaters, and music halls inventoried as instructional-support."*

4. Office

This space can fall under one of the three categories: a) Faculty Office; b) Faculty/Administration Office; c) Administrative Office.

a. Faculty Office

Definition: "A space for desks, office stations, etc., of faculty members. "

Description: "One office space consists of an office station within a single academic discipline. A faculty office space is not inherently limited to one station, and an office with several stations in the same discipline will require only a single space description. This category includes not only the offices of full-time regular faculty, but also those of part-time faculty, teaching assistants, and graduate students with teaching responsibilities. A room shared by faculty members from different disciplines can be described as a single interdisciplinary office space. "

b. Faculty/Administration Office

Definition: "An office assigned to faculty members with administrative responsibilities. Also space assigned to administrative officers with responsibilities related to the instructional program. "

Description: "This category includes the offices of deans, department and division chairs."

c. Administration Office

Definition: "An office space which serves as the primary work area of any person assigned as an administrative position including organized activities, student services and staff benefits, maintenance and operation of plant, and general administration."

Description: "This category includes non-academic, non-faculty administrative and clerical functions."

Attachment 2

**REQUEST FOR CHANGE IN SPACE ASSIGNMENT
CALIFORNIA STATE UNIVERSITY, EAST BAY**

To be forwarded by the President or Vice President in charge of the area requesting space to: Associate Planner,
Department of Planning, Design & Construction

Date: _____

Unit requesting space or reporting space vacancy: _____

Contact person: _____

Phone number: _____ Fax: _____ Ext. Zip: _____

SPACE VACANCY

IF THIS IS TO REPORT VACATED SPACE, PLEASE FILL-OUT THE REQUESTED INFORMATION FOUND IN THIS BOX ONLY.

- A. Building and Room Number:
- B. Reason for vacating the space:
- C. How long will the space be vacated (either permanent or if temporary, number of months):

SPACE REQUEST**REQUESTED SPACE:**

Please provide the following information:

- A. What functions or staff are not accommodated?
- B. In what way is the space now assigned (if any) for those functions or staff inadequate?
- C. What space requirements are there for the new space? (e.g. location, visibility, access, adjacencies?)
- D. What amount of increased FTEs will the space generate?
- E. Must the additional space be on campus?
- F. What is the funding source and budget to renovate or restructure the space requested?

PRESENT USE OF SPACE:

1. Attach a copy of the most recent space database printout, or identify room numbers you presently use for your program, for your area.
 - A) Review the space "use" column and note any changes.
 - B) Highlight the rooms that are being impacted by your request for space.
 - C) On a separate sheet, list each impacted room and provide the following information.
 1. Room Number
 2. Occupant(s) of the room and job category (for space assignment purposes)
 - a) Administrative Head (e.g. director, program coordinator, supervisor)
 - b) Professional Administration (e.g. analyst, counselor, special assistant)
 - c) Administrative support (e.g. administrative specialist)
 - d) Student Assistant
 - e) Other
 3. Special equipment or functions other than those implied by the standard space needed by employees listed above (e.g. student work stations, greater-than-normal need for storage space, waiting areas for students, conference rooms)

Signature of dean or manager: _____
(signature of manager having space management responsibilities indicates accuracy of information and concurrence with request)

Signature of President or Vice President: _____

- Forwarded without comment - Space Advisory Committee please review and recommend.
- Comments attached.

Attachment 3**NAMING PHYSICAL FEATURES****AT CALIFORNIA STATE UNIVERSITY, EAST BAY (CSUEB)**

The Trustees of The California State University have established a system-wide policy governing the naming of physical facilities, issued in PPD 84-21 (or an updated version thereof). In addition to its provisions, the following guidelines apply at CSUEB:

1) GENERAL INFORMATION

- a) All proposals for memorials and naming/renaming of facilities will be submitted to the Space Advisory Committee (SAC).
- b) If a proposal pertains to a student or an Associated Students, Inc. (ASI) building it will be referred to ASI for review and recommendation, and returned to SAC.

2) SUBMITTING A PROPOSAL

A proposal shall be submitted to the SAC and must include the following information:

- a) The name of the nominator and submission, the name and relationship to CSUEB of the person to be memorialized or recognized.
- b) A description of the proposed memorial or recognition. (This need not include architect's drawings.)
- c) Source(s) of necessary funds.
- d) Rationale for the memorial or recognition.
- e) Provision for maintenance.

3) EVALUATION OF A PROPOSAL

The SAC, in reviewing a proposal, will consider the following issues:

- a) Buildings, Building Spaces, and Other Major Facilities - Criteria to be used in considering the naming or renaming of campus buildings, spaces within buildings, and other major facilities include those specified in the CSU policy, PP&D 84-21, Sections 4.1 and 4.2. In accordance with that policy, individuals may be honored for outstanding service, exceptional achievement, or substantial financial contributions to CSUEB.
 - (1) When no financial gift is involved, the following criteria will apply:
 - (a) outstanding contributions in an academic or administrative capacity beyond the normal expectations of the positions(s) held;
 - (b) performed in such an exemplary manner as to provide inspiration to members of the CSUEB community;
 - (c) significant and widely recognized contributions to the local community;
 - (d) recognition by professional peers for significant contributions to his or her academic discipline;
 - (e) a proposal will not be made until the individual has been retired or deceased at

least two years.

- (2) When a gift is involved, the Committee will take into consideration the significance and amount of the proposed gift as they relate to the realization or completion of a facility or to the enhancement of the facility's usefulness to CSUEB. For an amount to be considered significant, it will be at least 50% of the total private support required to construct a new facility or 30% of the replacement cost of an existing facility to be named, but no less than \$50,000.
- b) Memorials, such as trees, plaques, small architectural structures, and landscaped areas shall be considered under the following guidelines.
- (1) Trees shall be selected with respect to species and site only after consultation with the Director of Plant Operations and the Manager of Grounds and Landscaping thereby assuring that these will conform to the landscape plan of CSUEB. The Director of Plant Operations will facilitate this approval process. Sponsors of trees as memorials must recognize that new buildings may require those trees and other plantings be relocated, replaced or eliminated if relocation is not feasible.
 - (2) Plaques shall be discouraged, except in the most extraordinary and compelling circumstances, and shall not exceed 2" x 4" in any case.
 - (3) All architectural structures, landscaped areas, and other requests for memorials shall be considered only after being approved by the University Architect and the University Landscape Architect and only with the assurance that funds to maintain any on-going expenses are included in the memorial. The Vice President for Administration and Finance and the Vice President of University Advancement will be consulted.
 - (4) Factors to be used in considering the person to be memorialized:
 - (a) Nature of the person's contribution to CSUEB
 - (b) Length of the person's contribution to CSUEB
 - (c) Reputation in the wider community beyond CSUEB
 - (d) Reputation in the person's academic discipline

4) GENERAL PRINCIPLES

- a) The memorial or recognition should reflect the personality of the honoree.
- b) The proposed memorial or recognition should be aesthetically suitable, harmonious with the master plan of the campus, and capable of proper maintenance.
- c) Given the limited opportunity of naming/renaming of major facilities, consideration will be given to determining whether the person/institution to be honored is the most appropriate person/institution at the time.
- d) Special attention should be given to the desirability of achieving over the long run a pattern of names that will reflect the ethnic and gender diversity of the California society CSUEB serves.
- e) The SAC will review for adequacy of the proposed funding. The cost of a plaque or marker should be included in the proposal.

5) ROUTING

- a) The SAC will submit the original proposal (with ASI recommendation, if applicable) for the memorial or recognition with its recommendation to the Vice President, Administration and Finance. If an exception to this policy is proposed, the SAC shall submit first to the Space Policy Committee for its approval.
- b) The Vice President, Administration and Finance will forward approved memorial or recognition

proposals to the President for review and action.

For naming of all CSU facilities and properties; i.e., all buildings; major portions of buildings; university or college streets or roads; stadium and baseball fields and other areas of major assembly or activity; plazas, malls, and other large areas of campus circulation; and all other highly visible facilities and properties, the President will consult with the Executive Committee of the Academic Senate prior to forwarding to the Chancellor's Office.

Attachment 4

INSERT GUIDELINES ON LEASE AGREEMENTS FOR USE OF STATE SPACE BY NON-GENERALLY FUNDED PROGRAMS.