

This procedure was reviewed by the University Resources Policy Committee and approved by unanimous consent on Thursday March 18th.

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Purdue Fort Wayne Space Management Policies and Procedures Policies

I. Introduction

This document delineates policies and procedures that guide utilization decisions of physical facilities of the Purdue University Fort Wayne campus. The goal of these policies and procedures is to promote the most effective use of the University's physical facilities. All physical facilities belong to the University and are assigned to a college/school, unit or academic or administrative department. Current users or occupants of the facilities do not own the space but may have control as delegated by the Purdue Fort Wayne Space Committee and the Vice Chancellor for Financial and Administrative Affairs (VCFAA). The assignment of space overseen by the University to a particular college/school or department is subject to change. A space request with justification must be submitted on the specified form before any change of use or modification to the space is performed, except for reassignment of space within a unit. The PFW Space Committee, in conjunction with the VCFAA, will evaluate space requests and provide analysis and recommendation to address programmatic space needs. Space is to be used for the highest priority needs of the University as a whole. When large scale changes are planned, URPC will be consulted in the early stages of such planning.

A. Policy

The Purdue University Fort Wayne space management policies and procedures have been developed by the University to ensure the best use of space. The policies and -procedures are consistent with space guidelines established by peer institutions of PFW.

B. Procedures

Procedures described herein have been approved by the Chancellor and URPC to establish a standard process for evaluating and requesting space at PFW for academic and support functions and for the advancement of the University as a whole.

II. Space Assessment

Documenting utilization of campus space is necessary to ensure accurate data for the purpose of reporting to the Purdue University JLL Purdue Occupancy Planning team and the Indiana Commission for Higher Education (ICHE), as well as for the planning and programming needs of the units, departments, or colleges/schools in conformance with the overall strategic plan of PFW.

A. Space Use Annual Inventory Survey

The Space Use Inventory Survey has been established for the University by Facilities

Management (FM) and shall be updated annually by each department to gather space use data for the Indiana Commission for Higher Education (ICHE). Presenting accurate space utilization data in this process is imperative, in that funding for repair and rehabilitation of PFW facilities is based on the reported square footage and use of space by the University. Space utilization information is maintained by Purdue University in a database, updated by PFW Facilities Management, and recorded in floorplans for every building on campus.

C. Other Periodic Space Review

PFW Facilities Management will perform space reviews throughout the year; during and after major renovations; after new construction; or when administrative, academic or research programs shift allowing opportunities to reassign space.

D. Space Data and Floor Plan Archives

PFW Facilities Management maintains an archive of existing space information, including original building plans, operation and maintenance manuals and specification guides, and existing space assignments.

III. Space Use and Assignment Policy

The intent of the space policy is to provide a systematic approach for evaluating space acquisition

based on current and projected space utilization needs and assessments.

Factors to be considered in assignment of space are:

1. The interest of the University and the University's strategic plan.
2. The suitability of the space and the possible future uses in light of anticipated or ongoing construction, renovation, and planning of major space reallocations.
3. The costs incurred by granting the space and the bearer of those costs.
4. The effects on people who must be relocated if the space request is granted.

A. Classroom Utilization Guideline

The University has established a goal of 85% utilization of general classroom space. The intent of this guideline is to achieve maximum efficiency and space utilization of instructional facilities including those instructional facilities in the general classroom pool, as well as those renovated or maintained by utilizing general operating funds. Classroom utilization rates will be monitored by the Registrar's Office to ensure accommodation of future enrollment growth while maintaining a comfortable learning environment and improving student retention. PFW Facilities Management will coordinate with the Office of the Registrar on an on-going basis to fulfill this guideline.

B. Vacated Space Guidelines

The University wishes to maximize space utilization by managing the release and re-allocation of space vacated by tenants in any school/college, department, unit or program with a change in space use status.

When a college/school, department, unit or program vacates its assigned space within a University facility, the vacated space will revert to a bank of vacant rooms or areas on campus hereafter called the university space reserve. The PFW Space Committee will make recommendations for re-assignment. If the space vacated is located in non-university leased space or occupied under an agreement, the renewal and continuance of the lease or agreement must be recommended by the PFW Space Committee and approved by the VCFAA before any occupancy or new negotiations take place.

A department or unit must send notification that the space is no longer being used by the department or unit to the PFW Space Committee. No unit, department or college/school will offer space to another unit, department or college/school without the knowledge and/or consent of the PFW Space Committee and approval of the VCFAA.

C. Office Space Guidelines

It is the intent of PFW to provide full time faculty and staff a single solitary or shared office space. Every tenure track faculty member is allowed an office and it is assumed that a faculty member's primary office is provided within the faculty member's home department. Multiple offices are only to be provided to faculty and staff when their duties or programmatic needs clearly require office space in more than one location. It is the responsibility of the department requesting the additional office to provide the justification for additional use space.

Procedures

I. Roles of Constituents

Department or Unit Role

Chairs; Directors; and unit leaders within a department or unit may investigate and prepare a request for space. Details of the space needs must be documented using the Space Requests and Assessment Form (SRAF, see Appendix A) in collaboration with the college/school, or department. The form and documentation is then routed to the appropriate office of the dean/director for approval to proceed.

Dean/Director

The dean (academic units) or director (administrative units) of the respective department/s or unit/s can either support or deny the SRAF and may request additional space studies or may provide an alternative solution. If supported, the dean or director signs and submits the SRAF to PFW Facilities Management. Requests not completed or lacking appropriate signatures will be returned. Requests are reviewed by PFW Facilities Management and forwarded to the PFW Space Committee before final recommendations are submitted to the Vice Chancellor for Financial and Administrative Affairs. In the event the request is denied, the persons responsible for initial submittal of the space request may resubmit the request in a time frame communicated by the dean or director.

PFW Facilities Management Role

At the request of a dean/director, a space needs analysis may be prepared by the PFW Facilities Management office. An onsite consultation with the requesting unit's staff may be necessary to better understand the space use and needs requested. The site visit will include a walk-through of the department's or unit's existing space and will compare the observed activities to the annual survey. Such a comparison study will help the space management staff better understand the needs and identify options not apparent to the requestor/s. The space

needs analysis along with the SRAF is then submitted to the PFW Space Committee (PFWSC) with recommendations. The PFW Space Committee will review the requests before submitting the final recommendation to the VCFAA.

PFW Space Committee Roles

The Associate Vice Chancellor of Facilities Management (or equivalent) will chair the PFW Space Committee as the appointee of the VCFAA. The committee will also include a member appointed by the VCAA; a member appointed by the VCSA; a member appointed by the registrar; an elected faculty member; a member appointed by the Student Government Association; the Director of Campus Credentials This committee will meet on a monthly basis to review submitted space requests. The committee will provide a forum for discussions and deliberation and will then make recommendations to the VCFAA for new and existing spaces, campus master planning, utilization evaluations, and capital priorities and necessities of the University. In the case of large academic projects, the URPC will be consulted before making recommendations to the VCFAA.

Office of the Vice Chancellor for Financial and Administrative Affairs Role

The VCFAA is responsible for final approval or denial of the request. Under no circumstance is any other officer of the University permitted to allocate space on a permanent basis to any person(s) or program(s) other than reallocation within ones own unit.

Appeal

If the request for space has been denied, the Dean or Director of the respective unit may submit an appeal in writing to the VCFAA within 6 months of the date of the denial. The original request plus any additional information must be submitted with the written appeal to the PFW Space Committee for final review before the PFW Space Committee resubmits to the Office of the VCFAA for a final decision.

II. Space Assessment

A. Physical Facilities Inventory

The office of PFW Facilities Management will distribute an annual space utilization self-survey. Space utilization surveys will be delegated by the deans/directors to an individual or individuals for physical evaluation, documentation, and final submittal. Individuals completing the physical space utilization surveys must be full time staff or faculty and must ascertain the facts of the intended and primary function of the space. The data associated with this survey process must be accurate at the time of the survey and must be approved and signed by the individual/s conducting the utilization survey and the dean/director before final submittal to PFW Facilities Management.

B. Space Assignment and Reassignment

SRAF forms will be submitted by the department, unit or individuals when the space is to be substantially changed. Substantial changes include, but are not limited to, move and relocation, new construction, and renovation of existing space. The form must be filled out completely and must be signed by the individual requesting the change. The dean (academic) or director (administrative) must approve the request before submitting the request to the

Associate Vice Chancellor of Facilities Management for review by the PFW Space Committee.

Requests for space should normally be made at least three months in advance of the expected need.

1. New Construction, Renovation of existing space, or additional space change:

Additional advance notice is required for major renovations and/or construction. Involvement of PFW Facilities Management is required in order to properly evaluate the existing space for appropriate recommendations.

2. Space Function Change or Employee Changes:

If an employee change has taken place within a department or unit, no SRAF form is needed; however, individuals should make sure the space utilization survey reflects this change or is noted within the survey.

3. Unassigned Space:

Unassigned space will automatically revert back to University Reserve. Any unassigned space will remain under the purview of PFW Space Committee until the space has been reassigned. If any department unit or college desires acquisition of this space, the SRAF form should be filled out notating the building, floor and room number of the space being requested.

4. Space Standards:

The office of PFW Facilities Management will perform space analysis and prepare evaluation reports. Space standards will adhere to national benchmarks identified by the PFW Facilities Management Space Planner/Analyst, PFW Space Committee and approved by the VCFAA to ensure the campus space is consistent with national norms and other cohort institutions. See Appendix C, Postsecondary Education Facilities Inventory and Classification Manual (FICM): 2006 Edition.

III. Classrooms

All general purpose classrooms are controlled and scheduled by the Office of the Registrar. Change in classroom use requires the approval as stated above in the Space Assignment and Reassignment section. Requests for assignment or reassignment of classroom space should be submitted to the Office of the Registrar by the department having priority scheduling, if such exists, and requesting the change. The Registrar will review the impact of such a change and approve before submittal to the PFW Space Committee.

IV. Process for Requesting Campus Controlled Space

A dean/director requiring additional space may request assistance in locating additional space through the following process. Prior to submitting a request for space, a dean/director should first determine whether internal re-allocation can occur to resolve a space need. If it has been determined by the dean/director that they are fully utilizing their existing space, then a request for additional space should be made.

For large scale projects, submit the SRAF form to the Associate Vice Chancellor of Facilities Management, Ginsberg Hall, for analysis. The SRAF form can be found on the Facilities Management web page. All space request forms must be filled out completely to be considered; this includes all appropriate signatures as well as fiscal and program qualifications. A full evaluation of the space assigned to and requested by the requesting unit will be compared to the space need by the Space Committee using the designated University standard, the FICM, 2006 Edition (see Appendix C).

If the request passes analysis by the PFW Space Committee, which will draft a recommendation to the VCFAA. The request shall then be evaluated by the Office of the VCFAA, taking into consideration the recommendation of the PFW Space Committee. If the request includes a space request greater than 10,000 square feet, then the request shall also be evaluated by the URPC.

Appendix: Space Request Procedure

Space Request Procedures

The VCFAA has charged the PFW Space Committee with developing a systematic process for considering all campus requests for new or additional academic and administrative space. The following set of guidelines and procedures shall govern that process.

General Guidelines

Requests for significant space changes will proceed through the following steps:

Step 1:

Department, unit, or individual must complete the SRAF and fill out the Space Needs Assessment Worksheet in collaboration with college/school or department.

Step 2:

After the SRAF has been completed, it should be forwarded to PFW Facilities Management, 101 Ginsberg Hall, to the attention of the AVC of Facilities Management and the Space Committee.

Step 3:

PFW Facilities Management and the Space Committee will evaluate the space request and compare to the FICM standards, as well as review the space reserve held in the University Reserve and will work with the requestor to determine a possible solution to the request.

Step 4:

The completed SRAF will be brought to the PFW Space Committee by the chair of the committee with the PFW Facilities Management Project Management staff recommendations.

Step 5:

The following criteria will be used by the PFW Space Committee in determining whether or not to recommend and approve the space request.

Optimal Utilization of Space: The department's current space is efficiently utilized as assessed by Facility Management Project Management comparison to University adopted standards of FICM.

Justification: The clarity and reasonableness of the justification for space will be assessed.

Mission-Fit: The space is needed for a department or college/school to grow in directions that are consistent with stated goals of the University and unit strategic planning.

Special Needs: A change in circumstances exists which warrants special consideration.

Economic Feasibility: The cost of the space is consistent with the benefit served and department funds are available or can be drawn from other sources without jeopardizing critical functions.

Step 6:

The Chair of the PFW Space Committee will discuss with the Vice Chancellor of Financial and Administrative Affairs the Committee's recommendation along with a justification.

Step 7:

The Chair of the PFW Space Committee will notify the appropriate dean or director of the final decision.