Section 2 Subject 2.7 Policy 2.7.2	General Administrative Policies and Services Buildings and Grounds Space Management	07/23/12 -Originated -Reviewed w/ changes -Reviewed w/o changes 07/23/12 -Effective Facilities Management -Author

Space Management

Definitions

Assignable square feet (ASF) – space measured from the inside face of the wall

Building owner – the entity which is responsible for all aspects of the space, including utilities, security, safety, and delegation of the use of space.

Capital budget- a budget approved annually by UTMB's executive leadership to provide capital funding to projects identified and approved at the UTMB Facilities Steering Committee.

Gross Square Feet (GSF) – space measured to the outside face of the building.

Intended Purpose – the function for which a room is designed and constructed. For example, if a room is designed with lab benches, sinks, fume hoods, and emergency showers it is likely a laboratory.

Hotel Space – Space that is not assigned to any one department, but used by variety of individuals when in areas remote from their own office. Hotel space will have data ports and electrical service, but individuals need to bring their own lap top to use the space.

Modification, Major – change to a building space that would affect or alter the use, physical layout or size of a particular space. For example, relocation or addition of walls, doors, openings in walls, built-in cabinets, building equipment, or building utilities (electrical, plumbing, data, telephone, security, etc)

Modification, Minor – change to a building space that does not affect or alter the use, physical layout or size of a particular space. For example, repainting walls or replacement of flooring.)

Relocation – the process by which a person, unit, or activity is moved from one location to another. It includes associated activities such as space reassignment as necessary, modification of space to suit the new use if needed, approved, and funded, changeover of computer and telephone connections, and physical movement of room contents.

Relocation, Minor – those relocations that have little or no impact outside the requesting entity, place no demand on the capital budget, involves only minor modifications, and does not change the function of any space. These are typically internal departmental moves within space already assigned to them.

Relocation, Standard – those relocations that do not meet the criteria for a minor relocation.

Definitions, continued

Space Assignment – the process whereby custody of a space is formally transferred to a UTMB entity.

Space Reassignment – the process whereby custody of a space is formally transferred from one UTMB entity to another.

Space Reassignment, Minor – those reassignments that have little or no impact outside the requesting entity, place no demand on the capital budget, involves only minor modifications, and does not change the function of any space.

Space Reassignment, Standard – those reassignments that do not meet criteria for a minor space reassignment.

Space usage agreement – a general term used in this policy to describe sections of a contract, tenancy agreement, Memorandum of Understanding, or similar document that stipulates the conditions whereby an entity is assigned use of space. Agreements should cover all privileges and costs associated with the space assignment, including identification of dedication and common spaces involved, and any other terms of agreement.

Substantially complete – relative to construction projects, means that point when a building or a portion of a building is sufficiently finished so that the owner can use the space for its intended purpose. UTMB requires that all life safety systems be operational and that all spaces can be secured prior to accepting substantial completion. This is the point in the project where UTMB takes control and responsibility for the space back from the contractor.

Teaching space, Common – general, non-specialized space used for teaching and related activity.

Teaching Space, Computer – specialized space used for teaching supported by computer stations for each student.

Teaching Lab – specialized space used for teaching, supported by discipline-specific stations for each student.

Tenant Improvement Allowance – a funding source that may be provided by the building lessor that is to be used for design and construction of the space to meet customer-specific requirements. This allowance may be, but is not always, amortized and added to the annual rent bill on a prorated basis over the term of the lease.

Total Project Cost (TPC) – the complete cost for a project, including professional design fees, construction costs, equipment costs, furniture costs, make-ready costs, move costs, and any miscellaneous cost directly associated with the project.

Vacant (vacated) space – any building space which is not being used.

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Policy

This policy is in support of UTMB's mission and vision and is used to meet operational requirements while providing flexibility for the development of new or revised facilities. As a public-funded institution, UTMB will meet its obligations to use the public funds with which it has been entrusted to realize its strategic goals. As owner of its physical assets, UTMB aims to ensure the best use of all of its facilities for the delivery of its healthcare, teaching, research, and other activities. This policy applies to all UTMB facilities, and includes space used by health system, clinics, research, academic, and administrative and support space.

UTMB and its employees and faculty will promote and enforce efficient space utilization on the basis of the policies and standards contained within the UTMB Handbook of Operating Procedures (IHOP) and herein, with due consideration for economy, the need for consolidation, and services to the public and to our patients.

The effective planning, management and control of space are vital to UTMB's strategic planning and operational effectiveness. The principals and procedures that describe the policy on the management of space are outlined herein.

UTMB, and not any group or individual within it, is the owner of its physical assets, While UTMB's space is temporarily assigned to Executive Vice-Presidential Divisions, Colleges, Offices, Departments, clinics, etc, the duration of such custody is temporary and is subject to ongoing review and redistribution to maximize the benefit to UTMB as a whole. As a scarce asset, space is to be shared and used in a flexible and cooperative way to achieve the best outcomes for UTMB

UTMB will support its staff and students in the role of custodians of these assets and with the responsibility to ensure they are developed not just for our immediate needs, but also for future generations.

This policy establishes and sets forth procedures for the assignment, allocation, and effective use of UTMB-owned and –leased space. Long-term planning will be prepared in accordance with the Strategic Plan and the UTMB Mission and Vision. The UTMB Facilities Steering Committee will guide the order in which studies are completed. The Office of Facilities Portfolio Management will be responsible for all submittals regarding space and space allocation to the UT System, Board of Regents, and The Texas Higher Education Coordinating Board.

UTMB components will not seek UTMB-lease when requirements for space can be satisfactorily met in UTMB-owned space. Under no circumstances should a departmental representative seek space for lease. Requests for lease space should be sent to the financial officer for the department, who will forward if approved to Facilities Portfolio Management for implementation and to seek space. Leases will require an adopted business plan before signatures will be granted.

Policy, continued

Layout of assigned space will be in alignment with the space allowances enclosed herein. However, currently occupied space will not be modified solely to meet the criteria outlined in the policy.

Space allowances are to be considered maximum allocations. More restrictive space allocations may be imposed and special space allocation guidelines may be established due to lack of available space.

Under no circumstance shall the use of a space be altered or changed without written approval from the appropriate Executive Vice President (EVP) over the area or building AND the AVP of Facilities Portfolio Management.

"Loaning" of space from one department to another shall not take place. Any excess space shall be returned to UTMB for consideration for other uses and will be prioritized based on campus needs and executive direction.

Space on the ground floor and all space <20' in elevation, must meet Mitigation Guidelines developed and included in the 2010 Master Plan document. Any space on the ground floor will be considered Non-Essential for operations of the campus. Approval for all ground floor space requests will be through the Facilities Steering Committee.

Changes in intended use of space will not be allowed without written approval from the appropriate EVP and the Office of Facilities Portfolio Management. Any modifications to be code-compliant or to comply with other agencies will be at the expense of the requesting department.

UTMB will provide a safe environment for students, faculty, staff, patients, and visitors.

Procedures

The requests for assignment of new or additional space will be submitted to the departmental leadership. If in agreement with the request, the appropriate Executive Vice-President or their appointee will forward to Office of Facilities Portfolio Management.

Requests for changes in use of space will be routed through the appropriate EVP. With their approval, the Office of Facilities Portfolio Management will assess the area and make recommendation to the Facilities Steering Committee for review and recommendation to the President.

The Office of Facilities Portfolio Management will review space requests, secure additional information to assist in evaluating it, discuss it with appropriate officials, and provide other information and analysis related to the request. Some requests for smaller immediate planning and space assignments will be sent to the department of Facilities Design and Construction, who will implement small short-term requests when approved, funded, and if space is available.

Procedures, continued

Each year a space assessment will be completed by the Office of Facilities Portfolio Management and submitted to the UTMB Facilities Steering Committee in comparison with the space standards. Deviations over 10% will be considered for growth or reduction of space.

Hotel space will not be assigned to any one individual, but will be available to many for use in remote situations. The use of the hotel space and its condition will be responsibility of all who use the space.

Responsibilities

President	Chair of the UTMB Facilities Steering Committee, approves/revises Facilities Steering Committee recommendations for space utilization
Executive Vice-Presidents	Oversight of space under their jurisdiction
VP of Business Operations and Facilities	Oversight of space program
AVP, Facilities Portfolio Management	Administers the space management program, receives requests from EVP or their designee
Campus population at large	Responsible for oversight of space assigned
UTMB Facilities Steering Committee	Responsible for reviewing changes in use of space and requests for space in those areas <20' elevation, and making recommendations to the President
Office of Facilities Design and Construction	Responsible for implementing funded and approved projects
Utilities and Maintenance Departments	Responsible for utility infrastructure

References

Regents' Rule 40602, *Organized Research Units*
Regents 'Rule 20201, *Presidents*
Space Request Form
Guidelines for Using the Space Request Form