Section 2 Subject 2.7 Policy 2.7.2	General Administrative Policies and Services Buildings and Grounds Space Management	07/23/12 -Originated 06/16/14 -Reviewed w/ changes -Reviewed w/o changes 07/15/14 -Effective Facilities Management -Author

Space Management

Definitions

Assignable square feet (ASF) – space assigned to a department 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.

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

Construction Cost- cost of construction of the project only. This excludes professional design fees, equipment costs, furniture costs, make-ready costs, move costs, and any miscellaneous cost directly associated with the project.

General Teaching Space- general, non-specialized space used for teaching and related activity.

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

Hoteling Space –space that is not assigned to any one department, but used by UTMB employees when there is a business need to work remotely from their primary office location. Hoteling space will have workspace, access to internet and electrical service.

Intended Use – 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.

Major Modification – 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)

Minor Modifications – 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 or any cosmetic improvements.

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

Definitions, continued

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

Shelled Space – space that is vacant and maintained to minimum life safety and environmental conditions.

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.

Standard 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, modification of space to suit the new use, changeover of computer and telephone connections, and physical movement of room contents.

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 use. 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 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.

Unassigned Space- space not assigned to a specific division. All unassigned space belongs to UTMB and any assignment of the space must be approved by the AVP of Facilities Portfolio Management.

Definitions, continued

Vacant (vacated) space – space that is not occupied. It can be assigned or unassigned. All vacant space shall be reported in the annual space survey by the department to which the space is assigned.

Policy

UTMB will provide a safe environment for students, faculty, staff, patients, and visitors. Effective planning, management and control of space are vital to UTMB's strategic planning and operational effectiveness. This policy establishes and sets forth guidelines procedures for the assignment, allocation, and effective use of UTMB owned and leased space. UTMB, its employees, and faculty will promote and enforce efficient space utilization in accordance with this policy. This policy applies to all UTMB facilities, including space used for the health system, research, academic, and administrative support.

As an institution supported by public funds, UTMB will responsibly use the 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 its facilities for the delivery of healthcare, teaching, research, and other activities.

UTMB is the sole owner of its physical assets. No group or individual within UTMB has ownership rights to physical assets owned by the institution. UTMB's space is temporarily assigned to a particular division or department. All assigned space 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.

Long-term planning will be prepared in accordance with the Strategic Plan and the UTMB Mission and Vision. The UTMB Facilities and Infrastructure Steering Committee will guide the order in which these long term planning studies are completed. The Office of Facilities Portfolio Management will be responsible for all submittals regarding space and space allocation to the UT System, the UT System Board of Regents, and The Texas Higher Education Coordinating Board.

Guidelines

Space Allowances

Space allowances shall be based on approved *UTMB Space Guidelines (2009)*. Layout of assigned space will be in alignment with the space allowances provided in the Guidelines. However, currently occupied space will not be modified solely to meet the criteria outlined in the Guidelines.

Modification of 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. Any modifications to be code-compliant or to comply with other agencies will be at the expense of the requesting department.

Loaning Space

"Loaning" of space from one department to another is prohibited. Any excess space shall be returned to UTMB, AVP of Facilities Portfolio Management for

Guidelines, continued

consideration for other uses and will be prioritized based on campus needs and executive direction.

Ground Floor Space
Space on the ground floor in existing buildings and all space less than 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 and Infrastructure Steering Committee.

Research Space
To manage research space in the Academic Enterprise, an all faculty committee, known as the Academic Enterprise Space Advisory Committee, consisting of faculty from all schools will be established to make recommendations to the EVP and Provost, Dean-School of Medicine using the guidelines in the *"Academic Enterprise Research Space Management Policy."*

Requests for Ground Floor Space, Additional Space or Change in Use

1. Requests for ground floor space, additional space outside division or change in use of space will be submitted to the appropriate departmental leadership including Departmental Chair, Vice-President and Executive Vice-President for approval using the Space Request Form. The form *must* be signed by all of those individuals listed above.

2. If in agreement with the request, the appropriate Executive Vice-President or their appointee will forward to Office of Facilities Portfolio Management.

3. 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.

4. 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.

5. 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.

Requests to Lease Space
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 independently seek space for lease. Requests for lease space should be sent to the department's financial

Guidelines, continued

officer for approval. If approved, the financial officers will forward the request to Facilities Portfolio Management for implementation and to seek space. Leases require an approved business plan before signatures will be granted.

Hoteling Requests

Request for the use of hoteling space along with business justification shall be submitted to Facilities Portfolio Management with the list of employees that need access to the space. Employee names and date of birth is required.

Annual Space Survey and Assessment

To be in compliance with State and Federal reporting regulations, all departments are required to complete an accurate and timely space survey each year.

In addition, each year a space assessment will be completed by the Office of Facilities Portfolio Management and submitted to the UTMB Facilities and

Infrastructure Steering Committee in comparison with the space standards. Deviations over 10% will be considered for growth or reduction of space.

Responsibilities

President	Chair of the UTMB Facilities and Infrastructure 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
Academic Enterprise Space Advisory Committee	Serves as a permanent committee to the Provost who will make recommendations to the President.

References

Regents' Rule 40602, *Organized Research Units*
Regents' Rule 20201, *Presidents*
Space Request Form
Guidelines for Using the Space Request Form
Academic Enterprise Research Space Management Policy
UTMB Space Guidelines (2009)