

**Institutional Handbook of Operating Procedures**  
**Policy 02.07.02**

Section: General Administration	Responsible Vice President: Vice President of Operations and Facilities
Subject: Space Management	Responsible Entity: Portfolio Management

**I. Title**  
*Space Management*

**II. Policy**  
The University of Texas Medical Branch’s (UTMB) goal is to 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 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 business support functions.

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 health sciences education, research, patient care and other activities that support and are consistent with the university’s mission.

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. Space is assigned to specific departments or business units, based on business need, current business volumes and staffing needs. Space assignments are subject to ongoing review and redistribution to maximize the benefit to UTMB as a whole. As a limited asset, space is to be shared and used in a flexible and collaborative way to achieve the best outcome for UTMB and its mission.

Long-term planning studies will be prepared in accordance with the UTMB Strategic Plan and the UTMB Mission and Vision. The Real Estate, Space and Capital Committee will guide the order in which these long-term planning studies are completed and formulate actions and space reassignments as guided by studies.

The Office of Facilities Portfolio Management will be responsible for all submissions regarding space and space allocation to the +UT System, the UT System Board of Regents, and The Texas Higher Education Coordinating Board.

Space Management Policies drafted by other institutional entities will be recognized as included in this policy as long as they are coordinated with this policy and directly approved by the Real Estate, Space and Capital Committee and Executive Committee.

**III. Requirements**  
**Authority**

Assignment of space or requests made through the Real Estate, Space and Capital Committee requires final approval of the President and Executive Vice Presidents.

### **Space Assignment**

Space assignment shall be based on approved [UTMB Space Planning Modules](#). However, currently occupied space will not be modified solely to meet the criteria outlined in the Guidelines.

### **Request for Space**

Requests for UTMB-owned space or for new or existing leased space shall be made by the submittal of a completed [Real Estate, Space and Capital Request Form](#) to Facilities Portfolio Management per the process instructions attached to the form.

### **Change in use of Space**

Change in the assigned use of space shall be approved by the Executive Vice President of the requesting department, Real Estate, Space and Capital Committee and the Associate Vice President (AVP) of Facilities Portfolio Management through the submittal of a completed [Real Estate, Space and Capital Request Form](#) and per the process instructions attached to the form.

### **Modification of Space**

Physical alteration of a space shall be approved by the Executive Vice President of the requesting department, Real Estate, Space and Capital Committee and the AVP of Facilities Portfolio Management through the submittal of a completed [Real Estate, Space and Capital Request Form](#) per the process instructions attached to the form.

### **Delegated Authority**

Authority has been delegated by the Real Estate, Space, and Capital Committee to Facilities Portfolio Management to approve certain types of space and construction requests meeting certain thresholds found in the [RESCC Overview, Timeline, Delegated Authority](#).

### **Loaning Space**

Space is to be occupied by the department or business unit to which it is assigned. Except for the purpose of research collaboration in cores and institutes in space coded to research, “Loaning” of space from one department to another is prohibited. Departments that wish to reassign their space to another department must request approval from the Real Estate, Space and Capital Committee. Any excess space shall be returned to the control of UTMB for consideration of other uses.

Facilities Portfolio Management is responsible for all unassigned or shell space on behalf of the institution. Alternative uses will be prioritized based on institutional business needs, Real Estate, Space and Capital Committee and executive direction.

### **Vacating Space**

When vacating space, it is the responsibility of the department assigned to that space to leave it clean, free of all items (other than furniture if it is not part of a move) and have all locks to the space re-keyed to the Office of Facilities Portfolio Management. This must be done in a timely manner and is a condition of any related space re-assignment. Once vacated and re-assigned to the Office of Facilities Portfolio Management, the space is no longer accessible to the vacating department. If the space being vacated is part of a construction project, this responsibility becomes that of the project manager in charge of that project.

### **Emergency Space Management**

In emergency situations, UTMB Executive Leadership may make the decision to continue operations. Under these situations, space management functions will be moved into the emergency management process for allocation of space to support operations with the President or the incident Commander being responsible for approving use of space. In these situations, the space allocations will be temporary until the original space is deemed safe and can be occupied or an alternative use is approved.

If it is found during this process, that spaces are occupied by groups who do not have authority to occupy the space, the groups will be relocated at their own expense. In a space that is occupied without knowledge of Facilities Portfolio Management or space identified on the annual space survey, it will not be UTMB’s responsibility to protect any property, nor will UTMB be responsible for finding another location for that group/use.

If space that should be locked is found to be unlocked or missing the key core, UTMB Police will install a new core and key the space to Facilities Portfolio Management until the correct department can be determined, or the situation is otherwise resolved.

**Ground Floor Space**

Space on the ground floor in existing buildings and all space less than 20’ above mean sea level in elevation, must meet the *Disaster Preparedness Guidelines* included in the 2015 Master Plan document. Any function to be located on the ground floor below 20’ mean sea level will be considered non-essential for operations of the campus and will not be considered a priority for being returned to service after an emergency event. Use of ground floor space must be approved by the Executive Vice Presidents and the Real Estate, Space and Capital Committee.

**Annual Space Survey and Assessment**

State and Federal law requires UTMB to complete an annual space survey. To assist with this requirement, all departments are required to complete an accurate survey of assigned space. If employees are found occupying space not recorded as being assigned to their department, they will be moved from that space at their department’s expense.

**Annual Space Gap Analysis**

To measure use-of-space efficiency, Facilities Portfolio Management conducts a Space Gap Analysis for specific departments or business units each year that compares assigned space to established benchmarks and Guidelines. The Space Gap Analysis is a tool used to assist with identifying departments that have been assigned too much or too little space compared to benchmarks and Guidelines. The Space Gap analysis data will be provided to the Real Estate, Space and Capital Committee for their review and direction.

**IV. Responsibilities**

President and Executive Vice-Presidents	Provide final approval of “Real Estate, Space and Capital” requests
VP of Business Operations and Facilities	Oversees Facilities Portfolio Management
AVP, Facilities Portfolio Management	Administers Facilities Portfolio Space Management program
Real Estate, Space and Capital Committee	Reviews all “Real Estate, Space and Capital Requests” and makes recommendations to the President and Executive Vice Presidents

AVP, Facilities Design and Construction	Implements funded and approved projects
---	---

**V. Definitions**

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

***Intended Use*** – the function for which a room is designed and constructed.

***Leased Space*** - Space temporarily occupied but not owned by UTMB, under agreement with a landlord for a specified period in consideration of rent

***Shelled Space*** – space that is vacant and maintained to minimum required environmental conditions and life safety standards

***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.

**VI. Relevant Federal and State Statutes**

This section includes hyperlinks to any related federal or state laws.

**VII. Relevant System Policies and Procedures**

[Regents’ Rule 20201, Presidents](#)

**VIII. Additional References**

[Real Estate, Space and Capital Request Form](#)

[UTMB Space Planning Modules](#)

[RESCC Charter](#)

[RESCC Overview, Timeline, Delegated Authority](#)

[RESCC FAQ](#)

**IX. Dates Approved or Amended**

<i>Originated: 07/23/2021</i>	
<i>Reviewed with Changes</i>	<i>Reviewed without Changes</i>
06/16/2014	
03/31/2016	
02/03/2020	

**X. Contact Information**

Facilities Operations and Management  
(409) 772-3500