I. Title

Space Management

II. 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 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 Health system, research, academic and institutional 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 UTMB’s Mission, Vision, and Values. The Real Estate and Space Committee will determine the order in which these long-term planning studies are completed, and formulate actions and space reassignments as determined by studies.

The Office of Facilities Portfolio Management is 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.

III. Requirements

A. Space Assignment

Assignment is based on approved UTMB Space Guidelines. However, currently occupied space will not be modified solely to meet the criteria outlined in the Guidelines unless the department’s overall space assignment is in excess of 10% over the established benchmarks.
B. **Request for Space**

Requests for UTMB-owned space or for new or existing leased space will be made by submitting a completed “Space or Real Estate Application” to Facilities Portfolio Management according to the process instructions attached to the form.

C. **Change in Use of Space**

Change in the assigned use of space will be approved by the Real Estate and Space Committee and the Associate Vice President (AVP) of Facilities Portfolio Management through the submittal of a completed “Space or Real Estate Application” according to the process instructions attached to the form.

D. **Modification of Space**

Physical alteration of a space will be approved by the Real Estate and Space Committee and the AVP of Facilities Portfolio Management through the submittal of a completed “Space or Real Estate Application” according to the process instructions attached to the form.

E. **Loaning Space**

The department or business unit to which it is assigned must occupy space. Loaning of space from one department to another is prohibited, even if on a temporary basis. Departments that wish to reassign their space to another department must request approval from the Real Estate and Space Committee. Any excess space will be returned to the control of UTMB for consideration of other uses.

F. 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 and executive direction.

G. **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’ msl will be considered non-essential for campus operations. The Real Estate and Space Committee must approve use of ground floor space.

H. **Annual Space Survey and Assessment**

In addition, 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.

I. **Annual Gap Analysis**

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

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<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
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<tr>
<td>President and designees as appropriate</td>
<td>Provides final approval of “Space or Real Estate Application” requests</td>
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<tr>
<td>Vice President of Business Operations and Facilities</td>
<td>Oversight Oversees Facilities Portfolio Management</td>
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**IV. 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.

**V. Relevant System Policies and Procedures**

Regents’ Rule 40602, *Organized Research Units*

Regents’ Rule 20201, *Presidents*

**VI. Related UTMB Policies and Procedures**

*Space or Real Estate Application*

*UTMB Space Guidelines (2009)*

*Real Estate Task Force Guiding Principles and Charter*

**VII. Dates Approved or Amended**

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<tr>
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<tr>
<td>06/16/2014</td>
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<tr>
<td>03/31/2016</td>
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**VIII. Contact Information**

Facilities Operations and Management
(409) 772-3500