

**Approval Date:** March 28, 2008

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**Parent Policy:** [Space Management Policy](#)

## Space Management Procedure

<b>Office of Administrative Responsibility:</b>	Office of the Associate Vice-President (Planning & Project Delivery)
<b>Approver:</b>	Vice-President (Facilities and Operations)
<b>Scope:</b>	Compliance with this University procedure extends to all academic staff, administrators, colleagues, and support staff as outlined and defined in the <a href="#">Recruitment Policy (Appendix A and Appendix B: Definitions and Categories)</a> ; undergraduate, graduate and Faculty of Extension students; postdoctoral fellows; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.

### Purpose

To outline the processes and methods through which **space** is **managed** at the University of Alberta.

### **PROCEDURE**

Effective, efficient space management is a collaborative, ongoing process requiring the University to optimize the use of all facilities, and to efficiently address physical space needs.

As directed by the Board of Governors, the Vice-President (Facilities and Operations) is responsible for the administration of University space. The Vice-President (Facilities and Operations) consults with **units** as part of the space management process. This collaborative approach ensures:

- Accurate assessment of current and future space needs
- Efficient use of space through cross-campus consultation
- Improved planning capabilities for space, furnishings, **equipment** and growth
- Official, accurate record-keeping of all University space, leased or owned
- **Repurposing** of space where deemed necessary and appropriate
- Access to technologies, and accommodation of special needs

The Vice-President (Facilities and Operations) divides the process of administering University space into four primary categories: Management, **Allocation**, **Allotment**, and **Assignment**. As part of its comprehensive approach to space management, the Vice-President (Facilities and Operations) is also concerned with the leasing and purchasing of **real property**, and with the operation of **base building systems**.

## MANAGEMENT

As part of the **central management** of University space, and on behalf of the Vice-President (Facilities and Operations), the Space Management Office engages units in planning exercises to determine and assess current and future needs. This consultation enables accurate tracking of University space usage, which is a benefit to individual units, as well as to the whole campus community. Planning exercises include general and functional programming, as well as other specific studies that determine effective accommodation for all campus users.

Together with cooperative planning exercises, the Vice-President (Facilities and Operations) adheres to the University's strategic documents when facilitating the management of space.

## ALLOCATION

On behalf of the Vice-President (Facilities and Operations), the Space Management Office allocates space to units based on **Facilities Development Committee** (FDC) approved **general space programs**.

Under the direction of the Vice-President (Facilities and Operations), the Space Management Office reviews total faculty space allocations, as well as administrative allocations on a regular basis.

## ALLOTMENT

**Unit heads** allot space within the units under their administration. Space allotment is based on demonstrable need as identified by the individual department or unit. Faculty administrators are encouraged to work closely with Space Management planners to ensure fair and effective allotment of University space.

## ASSIGNMENT

Unit heads assign allocated space to faculty members, staff, or to other individuals and groups at their discretion, and may re-assign space to meet their needs. The department or unit retains responsibility for the use of assigned space.

Units should review their space usage on a regular basis with an Accommodations Planner. Any Unit requiring the repurposing of space must consult with the Space Management Office.

Facilities and Operations uses a computer-aided Facilities Management (CAFM) system to track space. Units can obtain access to the system through the CAFM Team Lead, Facilities and Operations. Units choosing to employ this tool are able to track their allocated or assigned space. They are also able to use the system to track additional information (i.e. furniture or staff locations), but would be responsible for updating and maintaining this information for their own use.

## SPACE TRACKING

The Computer Aided Facilities Management (CAFM) system maintains and provides information on floor plans, property data, space utilization and other critical infrastructure details.

Units may obtain access to the CAFM system to track additional information, including furniture or staff locations. Once access is granted, via their CAFM Team Lead, faculties and administrative units are responsible for updating and maintaining the additional information for their own use.

## REPURPOSING

In accordance with the Planning and Renovation of Existing Facilities Policy.

**LEASING and REAL ESTATE**

Real Estate Services is responsible for leasing, acquiring and disposing of real property. Faculties and administrative units wishing to acquire, lease, repurpose or dispose of space must contact their Accommodation Planner in the Space Management Office.

**BASE BUILDING SYSTEMS**

Effective space management requires not only the interdependent processes of allocation, allotment, assignment, leasing and purchasing, but also the efficient maintenance of University buildings and equipment. Facilities and Operations is responsible for managing the maintenance of base building systems.

**DEFINITIONS**

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [[▲Top](#)]

<b>University Facilities</b>	All lands, buildings and space owned, operated, or leased by or from the University of Alberta.
<b>Central Management / Manage</b>	Refers to the central space management of all University space under the administration of the Vice-President (Facilities and Operations).
<b>Unit</b>	Administrative and/or organizational groups including faculties, departments, centres, institutes, administrative units, and non-departmental units.
<b>Space</b>	All real property, base building systems and equipment owned and/or leased by the University of Alberta.
<b>Equipment</b>	Affixed machines, tools and furnishings necessary to the facility for the completion of University business.
<b>Repurposing</b>	Redevelopment of space for another purpose and or functional use (e.g., modernization or the addition of equipment that impacts building systems).
<b>Allocation /Allocated</b>	The distribution of University space by the Space Management Office in accordance with prioritized need to support the ongoing growth and development of the University.
<b>Allotment/Allotted</b>	The redistribution of space by a Faculty to a Department, Unit or Centre.
<b>Assignment /Assigned</b>	Distribution of space by a Department for the placement of individuals, purposes and functions for a period of time.
<b>Real Property</b>	Refers to land, and anything permanently placed on or under it, which may include above surface structures such as buildings and below surface items such as minerals.
<b>Base Building Systems</b>	Those elements of a building including exiting systems, mechanical, electrical, fire alarm and public circulation required and necessary for the functioning of the building for its intended purpose.
<b>General Space Programs</b>	A General Space Program describes the current state of an Academic, Research, and/or Administrative Unit's activities in terms of their space needs, including student, staffing and support requirements. A space program includes a space budget that outlines how much space the unit has currently, how much it will require in the near future, and predicts what amount of space may be required over a long-term planning period.
<b>Unit Heads</b>	Deans, chairs, directors and others who are administrative leads or those who manage units
<b>Space Representative</b>	The space representative varies in each faculty, department and administrative unit. For example, in a faculty, the space representative could include the Dean, Director, Chair, Assistant Dean/Chair of

	Administration, whereas, in a central administrative office, the space representative would include the Senior Administrative Officer.
<b>Accommodation Planner</b>	Accommodation Planners from the Space Management Office in Facilities and Operations work alongside faculties, departments and administrative units in a collaborative planning process to assess and determine current and future space needs.
<b>Facilities Development Committee (FDC)</b>	Responsible for making recommendations to the GFC Academic Planning Committee (APC) or the Board Finance and Property Committee (BFPC) concerning policy matters with respect to: planning (comprehensive facilities development plans); and facilities (planning and use of physical facilities, land owned or leased by the University, parking facilities and transportation standards, systems, and procedures for planning and designing physical facilities).

## **FORMS**

There are no forms for this Procedure. [[▲Top](#)]

## **RELATED LINKS**

Should a link fail, please contact [uappol@ualberta.ca](mailto:uappol@ualberta.ca). [[▲Top](#)]

[Filming on Campus](#) (University of Alberta)

[Institutional Strategic Plan, For the Public Good](#) (University of Alberta)

[Long Range Development Plan](#) (University of Alberta)

[Planning and Renovation of Existing Facilities Policy](#) (UAPPOL)

[Post-Secondary Learning Act](#) (Government of Alberta)

[Renovation Procedure](#) (UAPPOL)

[Space Management Office](#) (University of Alberta)

[University Business Plan](#) (University of Alberta)