



San José State
UNIVERSITY

Office of the President

One Washington Square
San José, CA 95192-0002
Voice: 408-924-1177
Fax: 408-924-1199

E-mail: sjsupres@sjsu.edu
<http://www.sjsu.edu>

President:
Don W. Kassing

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MEMO TO: Vice Presidents, Deans, Directors, Chairs and
Administrative Heads

FROM: Don W. Kassing
President

SUBJECT: Presidential Directive 2006-02

Space Management and Allocation

This document provides an overview of the principles governing the management and allocation of space at San José State University. It is intended both to serve as a framework to define University policy and philosophy in the area of facilities utilization and to function as a dynamic work in progress to enable the campus to gain greater efficiency and effectiveness in the utilization of institutional space.

The Space Advisory Committee defined in the document reports directly to the President. It is an outgrowth of a subgroup of the Executive Committee of the Academic Senate. It has a broad range of responsibilities relating to developing strategies and evaluating implementation aspects in the development, management and allocation of both existing and new University space.

Thank you for your cooperation in assisting the University to achieve maximum efficiency in the use of its space.

San José State University
Space Management and Allocation Policy

Overview

Space is a central resource to the campus. The allocation of space is conducted in a consistent manner designed to optimize the use of this resource and to advance the mission and strategic priorities of the campus.

Space management at SJSU is driven by the following principles:

- Space is a University resource. The physical facilities of the University, including General Fund and non-General Fund facilities, are an enormous asset crucial to the operations of the campus. The number, type, and condition of University facilities help shape all aspects of campus programs and activities.
- Space is a University property that is allocated in a manner that best advances University priorities. No unit, department, or division "owns" the space that has been allocated to it. University space resources should be deployed in the most efficient and effective manner to best serve programmatic and strategic goals.
- Space is allocated and can be reassigned. The University values flexibility and recognizes changing curricula, programs, and technologies. Accordingly, space assignments will change to achieve optimal utilization and respond to current and emerging needs.
- University space needs are evaluated in the context of traditional quantitative and functional considerations. Space standards will be used to gauge space needs. For example, course enrollments, contact hours, staffing levels, etc. are some of the factors used in space need assessments. General space standards exist for various types of space.
- Responsibility for assignment and reassignment of space will generally follow divisional, college and departmental organizational hierarchies. While any and all space assignments are subject to change based on the authority of the President, the ability to assign and reassign space is delegated to the Provost, Vice Presidents, and the Director of Athletics for their respective colleges, departments and programs. This authority, which is contingent on compliance with applicable space guidelines and standards, provides flexibility to the Deans and Administrative Heads to address the space needs of their respective units.
- Oversight for development and implementation of space management policies is the joint responsibility of the Space Advisory Committee and Facilities Development & Operations' operational unit, Planning, Design and Construction.

Space Advisory Committee

Review of specific requests and proposals for space assignments is the responsibility of the Space Advisory Committee, an administrative committee reporting to the President.

Committee responsibilities include:

- Development of University space policies and guidelines.
- Review, analysis, and prioritization of individual requests for space submitted to the Office of Planning, Design and Construction (PDC).
- Routine recommendations to President and President's Staff of such space actions.
- Ad hoc studies to improve space efficiencies and maximum space utilization.
- General policy recommendation on matters of space resource management.
- Review and approve PDC procedures and forms to implement the space management policies.

Members of the Space Advisory Committee are:

- Provost or designee
- Vice President for Administration and Finance
- Vice President for Student Affairs
- Executive Assistant to the President (to represent Advancement and Athletics)
- A dean or chair appointed by the President annually to represent university-wide interests
- Associate Vice President for Facilities Development & Operations as non-voting staff liaison

Planning, Design and Construction (PDC), Facilities Development and Operations

PDC is the central receiving unit for all space requests. The Space Advisory Committee will review space requests and provide recommendations to the President, as necessary. PDC's space management responsibilities include:

- Staff support to the Space Advisory Committee.
- Maintenance, oversight, updates, and improvements to the University's space inventory, the central database of space assignments.
- Routine audits of selected buildings and divisions/units to verify the accuracy of the space inventory.
- Receiving and analyzing requests for additional space.
- Routine analysis and reports of campus space needs at the department and divisional level and for selected space types such as classrooms, laboratories, and office space.
- Input and analysis regarding space needs in new building construction and major renovations.
- Space planning and budgeting related to Capital Outlay project phasing and departmental relocations.
- Other ad hoc studies and space management recommendations to the Space Advisory Committee, President and President's Staff.

Operating Policies

1. Decisions on the reallocation of occupied space at all administrative levels will be based on campus and program priorities, the strategic and Physical Master Plan, actual utilization, and overall need. The President may reallocate space that is underutilized or required to address a campus priority or strategic need. In such cases, the Space Advisory Committee

will develop a plan for the reallocation of the space, which shall be reviewed and approved by the President.

2. The President, Vice Presidents, and Director of Athletics are ultimately responsible for allocating and managing space within their divisions. If space needs cannot be met within each divisional area, a request may be submitted to the Office of Planning, Design and Construction (PDC)¹. Management of space allocated to an academic or administrative unit is generally the responsibility of the leading Dean or Administrative Head. The college dean and provost are responsible for providing appropriate research space for faculty members who need such space. In most cases, responsibility for managing departmental or unit space is delegated to the unit chair, or department head. It is the responsibility of the unit to ensure space assignments are optimized for the best and most effective use. Units are encouraged to assign and configure assigned space to maximize utilization and align use with strategic goals. Unit managers may allocate or reallocate general academic space within their assigned category (e.g. offices, classrooms, labs). However, notification to PDC regarding changes in allocations is essential to ensure the official space database remains current. Unit managers are not authorized to allocate or reallocate space that involves a change in category and are not authorized to allocate or reallocate space to other units, departments, or divisions.
3. Space vacated by a physical move, renovation, or new construction is allocated back to the campus. Likewise, space vacated due to a reduction in program size, reduction in workforce, or program elimination is also allocated back to the campus. It is the responsibility of PDC to evaluate the type and the condition of vacated space, and to update the official space database accordingly. PDC will review potential uses of the space consistent with the strategic and physical master plans, existing outstanding space requests and proposals, current campus space utilization of classroom and laboratory space, and to recommend future assignments to the Space Advisory Committee. The Space Advisory Committee will review the recommendation and consult with the President and President's Staff, as necessary.
4. Change in the category of space must be reviewed by PDC and approved by SAC prior to the change. Impact on University-wide plans will be considered.
5. Leasing of University space to non-General Fund units or to outside groups requires approval under guidelines developed by FD&O and University Procurement and approved by SAC. Leasing of space off campus by the University requires approval under guidelines developed by FD&O and University Procurement and approved by SAC.²
6. Allocation and reimbursement policy for grant activities.³

University Space Standards

The San José State University adheres to standard office and academic space calculations and standards as set forth by the State University Administrative Manual, Sections V - Measurement Devices for Physical Planning and VI - Standards for Campus Development Programs. See <http://www.calstate.edu/CPDC/SUAM/>. The University also uses locally developed guidelines for allocation and utilization.

¹ See form at

http://www.sjsu.edu/fdo/docs/REQUEST_FOR_CHANGE_IN_SPACE_ALLOCATION_FORM.doc or click on the link in this policy, at <http://www.sjsu.edu/pdc/space/policy>.

² SAC is developing a brief policy statement and guidelines for leasing.

³ SAC is developing a brief policy statement for grant-related space.