Part 1 – Purpose

1.1. The effective planning, management and control of space are vital to UTSA’s strategic planning and operational effectiveness. The principals and procedures that describe the policy on the management of space are outlined in this document.

1.2. This policy aims to support UTSA’s vision and mission, while meeting our operational requirements and providing flexibility for the development of new facilities. This policy will also provide the framework for the regular review of UTSA’s space needs and form a basis for procedures to be followed in the assignment of space.

1.3. This policy establishes and sets forth procedures for the assignment, design, allocation and effective use of UTSA-owned space, UTSA-leased space, and UTSA-borrowed space.

1.4. This policy applies to all UTSA components, and includes space used by colleges, administrative units and support functions.

Part 2 – Definitions for this Policy

2.1. Assignable Square Feet (ASF) – space measured from the inside face of walls.

2.2. Building Owner – that entity which is responsible for all aspects of the space, including utilities, security, safety, and delegation of the use of the space. UT-System Office of Facilities Planning and Construction (OFPC) is the building owner prior to UTSA occupancy. UTSA is the building owner after occupancy.

2.3. Capital Budget – is a standing budget derived from the annual operating budget to provide for medium and minor capital projects.

2.4. Entities – are any department, office, institute, college, or administrative unit associated with UTSA.

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

2.6. Intended Purpose – 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 probably a laboratory.

2.7. Modification, Major – 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).
2.8. Modification, Minor – 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.

2.9. Occupied Building – that condition where UTSA is using the building, or a portion of the building, for its intended purpose.

2.10. Relocation – is the process whereby a person, unit or activity is moved from one location to another. It includes associated activities such as space reassignment if necessary, modification of space to suit the new use, changeover of computer and telephone connections, and physical movement of room contents.

2.11. Relocation, Minor – are those relocations that have little or no impact outside the requesting entity, place no demand on the capital budget, involves only minor modifications, and does not change the function of any space.

2.12. Relocation, Standard – are those relocations that do not meet the criteria for a minor relocation.

2.13. Space Assignment – is the process whereby custody of a space is formally transferred to a UTSA entity.

2.14. Space Reassignment – is the process whereby custody of a space is formally transferred from one UTSA entity to another.

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

2.16. Space Reassignment, Standard – are those reassignments that do not meet the criteria for a minor space reassignment.

2.17. Space Usage Agreement – is 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 a 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.

2.18. 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 purpose. UTSA requires that all life safety systems be operational and that all spaces can be secured prior to accepting substantial completion.
2.19. Teaching Space, Common – is general, non-specialized space used for teaching and related activity.

2.20. Teaching Space, Computer – is specialized space used for teaching supported by computer stations for each student.

2.21. Teaching Lab – is specialized space used for teaching, supported by discipline-specific stations for each student.

2.22. 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 will usually be amortized and added to the annual rent bill on a prorated basis over the term of the lease contract.

2.23. 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 costs directly associated with the project.

2.24. Vacant (Vacated) Space – any building space which is not being used.

Part 3 – Fundamental Principles

3.1. As a public funded institution, UTSA will meet its obligation to use the public funds with which it has been entrusted to realize its strategic goals.

3.2. UTSA will promote and enforce efficient space utilization on the basis of the policies and standards contained within the UTSA Handbook of Operating Procedures (HOP) and herein, with due consideration for economy, the need for consolidation, and service to the public as a whole.

3.3. As the owner of its physical assets, UTSA aims to ensure the best use of all its facilities for the delivery of its teaching, research and other activities.

3.4. UTSA will support its staff and students in the role as custodians of these assets and with the responsibility to ensure they are developed not just for our immediate needs, but also for future generations.

3.5. UTSA, and not any group or individual within it, is the owner of its physical assets. While UTSA’s space is temporarily assigned to Vice Presidential Divisions, Colleges, Offices and Departments, the duration of such custody is temporary and is subject to ongoing review and redistribution to maximize the benefit to UTSA 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 UTSA.

3.6. UTSA will provide a safe environment for students, faculty, staff and visitors.
3.7. UTSA components conducting essential operations will be provided administrative space in accordance with the space allowance criteria described herein, subject to the availability of space.

3.8. UTSA components will not seek UTSA-leased space when requirements for space can be satisfactorily met in UTSA-owned space.

3.9. Layout of assigned space will be in consonance with the space allowances enclosed herein. However, currently occupied space will not be modified solely to meet the criteria outlined in the policy.

3.10. Space allowances are to be considered maximum allocations. More restrictive space allocations may be imposed and special space allocation guidelines may be established due to the lack of available space.

3.11. The first priority for allocation of space will be areas assigned within Vice Presidential Divisions. When space is not available within the departments vice presidential division, requests for space will be forwarded to the Office of Space Management for consideration.

**Part 4 – Roles and Responsibilities**
The following entities have key roles and responsibilities in the planning, assignment and administration of space at UTSA:

4.1. President – is the top administrative officer, responsible for assignment of space in new buildings to each of the Vice Presidential divisions.

4.2. Executive Vice Provost – is responsible for management of the assignment of existing space at UTSA.

4.3. Vice Presidents – are responsible for assignment of space under their control to Associate Vice Presidents and College Deans within their division.

4.4. Associate Vice Presidents and College Deans – are responsible for:
   a. Distribution of space under their control to Departmental Chairs and Directors within their division
   b. Ensuring the day-to-day management and administration of space within their custody
      i. Delegation of this responsibility can be passed down to departmental chairs.
   c. Ensuring that entities under their control comply with this policy.
4.5. Departmental Chairs and Directors – are responsible for:
   a. Assignment of space under their control to within their department
   b. Preparing and submitting documentation with justifications and certifications for initial, expansion and continuing need space requests
   c. Notifying the Office of Space Management when space is no longer required due to termination of a program, completion of a grant, or consolidation of space

4.6. Vice President for Research – is responsible for evaluating proposals for assignment or major modifications of research laboratory space.

4.7. Office of Space Management (OSM) is responsible for:
   a. Reviewing all requests for space allocations and making recommendations to the Executive Vice Provost
   b. Reviewing all requests for major modifications to space and making recommendations to the Executive Vice Provost
   c. Reviewing all requests for change of use to space and making recommendations to the Executive Vice Provost
   d. Promoting, enforcing and establishing efficient space utilization on the basis of the policies, standards, and space allocations contained herein
   e. Monitoring compliance with this policy to ensure full and efficient use of assigned space
   f. Preparing space planning strategies and policies in support of space management
   g. Researching existing and new space
   h. Formulating long-term space plans
   i. Conducting and coordinating space requirements and utilization surveys
   j. Preparing and submitting space reports and program information, as directed by the Executive Vice Provost
   k. Review of submittal documents during design and construction phases for Capital Improvement Program (CIP) building construction projects and Institutional building construction projects, and providing written
comments to UTSA-Facilities. Review is to answer the following questions:

i. Are building names provided and useable in the UTSA Room Inventory database? (unique, no duplication)

ii. Are room numbers provided for each room, and useable in the UTSA Room Inventory database? (no duplication, 6 characters, 2 decimal places)

iii. Are room titles clear and consistent? (so they can be categorized correctly)

iv. Are room types provided consistent UTSA Space Planning and Use Policy? (with building type and departmental operations)

v. Are room sizes consistent with UTSA Space Planning and Use Policy? (with room type and departmental operations)

vi. Will scope of work impact continued occupancy of existing rooms or buildings? (to plan for making temporary accommodations)

vii. Does space provided comply with documented departmental needs? (compared with existing space and expansion needs)

4.8. Space Use Technical Subcommittee – comprised of 1 member from each of the following entities: Safety, Facilities-Operations, Facilities-Infrastructure, Facilities-Planning & Design, Police, Purchasing, Parking & Transportation, and Information Technology. The subcommittee supports the Office of Space Management, and is charged with:

a. Reviewing all technical aspects of unique space request proposals

b. Providing a written evaluation of the technical feasibility and impacts on the existing campus

4.9. Lab Use Technical Subcommittee – comprised of practicing scientists will review research laboratory space requests and provide recommendations for assignment to the OSM.

4.10. Office of Facilities – Planning and Development Team – is responsible for confirming new or modified facilities names have been approved by the UT-System Board of Regents, and for providing useable floor plan drawings for all buildings.
4.11. Office of Facilities – Engineering and Project Management Team – is responsible for providing design drawings to OSM showing new building plans and revisions to existing building plans.

**Part 5 – Custody and Control of Space**

5.1. The UTSA Room Inventory Database, administered by the Office of Space Management (OSM), is the recognized source of authoritative information on each room and space at UTSA. Space is assigned to various entities while ownership remains with UTSA.

5.2. Building space must be used for its intended purpose. Proposals involving operational, functional or structural change in use to a building space must be approved in advance. Departments must submit a “Request for Change of Use of UTSA Building Space” form.

5.3. When a building space is vacated, the space will return to “unassigned space” in the room inventory database, and will be considered for reassignment.

5.4. All space is to be utilized efficiently. A space that is used infrequently or inappropriately may be reassigned to others.

5.5. To avoid unnecessary duplication and costs, space is to be shared to the maximum extent possible. This principle applies to laboratories, storage areas, meeting rooms, centralized facilities, common areas and other functional areas where sharing is practical.

   a. The assigned department is responsible for scheduling the space.

   b. The assigned department cannot unreasonably prohibit other departments from reserving the space.

   c. Where the space’s only access is through departmental space, scheduled time can be limited to normal business hours.

   d. It is reasonable to expect space to be left in a useable condition, with furniture returned to the original position, trash removed, marker boards cleaned and posters removed.

5.6. The Director of OSM will periodically review the utilization and distribution of available space and may recommend redistribution of space to the Executive Vice Provost.

**Part 6 – Custody and Control of Teaching Space**

6.1. Custody of common teaching space is assigned to the Registrar, and is scheduled for use via the Classroom Scheduling System.
6.2. Custody of computer teaching space is assigned to Academic Technology, and is scheduled for use via the Classroom Scheduling System.

6.3. Custody of teaching labs are assigned to academic departments, and is scheduled for use via the Classroom Scheduling System.

6.4. Any space can be used as teaching space. Where it is in the best interest of UTSA for a department to control the scheduling of a space, the department will be assigned the space.

a. The room type assigned to each space will be based on the predominant use of the space. The method of measurement of use (utilization) shall be based on the most restrictive use. The Texas Higher Education Coordinating Board defines 100% utilization as 38 hours per week of instruction for classrooms and 25 hours per week of instruction for class laboratories.

b. When a room assigned to a department is scheduled for classes at least 19.4 hours per week (51% utilization) for an entire semester, the room type will be changed to a type 110 classroom. When a room assigned to a department is scheduled for class labs at least 12.8 hours per week (51% utilization) for an entire semester, the room type will be changed to a type 210 class laboratory.

c. Departmental space that can be used for classroom teaching shall be scheduled by the department using the Classroom Scheduling System. Sixty-days prior to the start of each semester, the Office of the Registrar can use any remaining hours of availability for each space to schedule other classes.

Part 7 – Custody and Control of Circulation Space

7.1. All circulation space (including corridors, stairs and elevators) is to remain clear of obstruction and available for free access by all authorized users.

7.2. Custody of circulation space is assigned to the Office of Facilities, who regulates to ensure the safety, security and appropriate maintenance of the space.

7.3. It is the responsibility of entities who are the principal users of the circulation space to ensure that it is used in a safe and appropriate manner.
Part 8 – Custody and Control of Hotel Office Space

8.1. When a department has the need for office space for transitional employees, as approved by the Executive Vice Provost, the department will be allowed to allocate space for "hotel office space".

   a. Transitional employees are defined as those persons having to work for extended time periods at locations other than the campus where they have assigned office space, or whose work is conducted in places other than the UTSA campuses.

8.2. Departments with hotel office space shall schedule the use of the space, and when not scheduled for use by the department, will be available for use by other UTSA departments.

8.3. Departments with hotel office space will not unreasonably deny use of the space to other departments. Departments using hotel office space will be responsible for leaving the space in useable condition.

8.4. Departments with hotel office space assigned shall equip the space with standard office furniture, a computer, a telephone and either a free-standing printer or access to a networked printer. Access keys to the hotel office space shall be held and managed by the Department.

8.5. Departments with hotel office space shall advertise and offer the space to other UTSA departments.

8.6. Where possible, hotel office space shall be designed so that the entry to the room is directly from a public corridor. Where access from a public corridor is not reasonable, scheduling of the room can be limited to normal Departmental business hours.

Part 9 – Space Assignment, General

9.1. The size and nature of space assigned to entities will be governed primarily by the availability of existing space.

9.2. When new space is created, either by reconfiguration of existing space or by new construction, it will be configured on the basis of UTSA Space Planning and Use Policy.

9.3. To the greatest extent possible within existing space limitations, space shall be assigned in accordance with UTSA Space Planning and Use Policy. (e.g., Faculty offices shall be 120 square feet.)

9.4. Custodians of space must report any changes in the way a room is used (e.g., from a store room to an office), both to maintain the integrity of UTSA’s room inventory and to ensure the change has no statutory or legal implications.
9.5. Because assignments of existing space are typically made prior to development of detailed construction drawings, the assignment is predicated on the assumption that only reasonable efforts and accommodations will be necessary to make the space useable for its intended purpose. If unforeseen conditions are found that would require extraordinary efforts to make the assigned space useable, this assignment will be re-examined.

Part 10 – Procedures for Investigating Assignment/Reassignment of Space

10.1. As part of the process of assigning and reassigning space, investigations must be conducted to determine the feasibility.

10.2. It is the exception when departments have funding necessary to implement changes to space necessary to make it useable for their operations. Nor do they have funding necessary to execute a move from their existing location to the new location.

10.3. Where costs are a factor in determining if a change should be implemented, the Director of the UTSA Office of Space Management (OSM) will submit a Work Request on the standard form provided by UTSA Office of Facilities. By mutual agreement,

   a. Frivolous requests are prohibited. Requests will only be made for legitimate purposes involving possible changes to space that have a reasonable expectation of being funded.

   b. Work requests involving preparation of a cost estimate only do not require an account number.

10.4. After a cost estimate is received from UTSA Office of Facilities/Work Control, the UTSA Office of Space Management will prepare a memorandum requesting funds to proceed with project.

   c. Memo is routed through the Executive Vice Provost to the Vice President of Business Affairs.

   d. Attach cost estimate.

   e. Attach documentation of departmental concurrence of requested space and modification to space.

Part 11 – Procedures for Implementing Assignment/Reassignment of Space

11.1. Assignment of new building space and the reassignment of existing building space will be consistent with this policy.

11.2. Minor space reassignment requests shall be approved by the divisional Vice President or his/her designee.
11.3. Approvals are required for standard space assignments (space in new buildings) or standard space reassignments (space in existing buildings). Departments shall submit an executed “Request for Assignment of UTSA Building Space” form.

   a. The departmental chair or director, the college dean or associate vice president and the vice president of the affected division must all approve the requested assignment/reassignment of space prior to processing the request.
   
b. The Vice President of Research must approve any requested research space prior to further processing of the request.
   
c. The Office of Space Management (OSM) will review the request, consult with the requestor on any questions, and prepare an estimate of the total area requested, in assignable square feet (ASF). OSM will forward the request with recommendations to the Provost.
   
d. The Executive Vice Provost will review the request and consult with OSM on any questions. The Executive Vice Provost can approve or reject the request.

Part 12 – Procedures for Implementing Modifications to Existing Building Space

12.1. Modifications of existing space will be consistent with this policy and with standard industry layout practices.

12.2. Minor modifications to building space shall be approved by the divisional Vice President or his/her designee.

12.3. Approvals are required prior to making major modifications to existing building space, where the alteration exceeds painting or carpet replacement. Departments shall submit an executed “Request for Major Modification of UTSA Building Space” form.

   a. The departmental chair or director, the college dean or associate vice president and the vice president of the affected division must all approve the requested modification prior to processing the request.
   
b. The Vice President of Research must approve any requested modifications to research space prior to further processing of the request.
   
c. The Office of Space Management (OSM) will review the request, consult with the requestor on any questions, and prepare an estimated total project cost (TPC). OSM will forward the request with recommendations to the Executive Vice Provost.
d. The Executive Vice Provost will review the request and consult with OSM on any questions. The Executive Vice Provost may approve or reject the request.

Part 13 – Space Planning, Design and Construction

13.1. Planning and design of space shall be based on the “UTSA Space Planning and Use Policy”. Customization of space, including size, layout and finishes is prohibited.

13.2. Designs for new building projects and for renovations of existing building space will be consistent with these guidelines concerning the interior treatment of space and standard industry layout practices.

13.3. Standard construction methods and materials will be used throughout UTSA-occupied space, except in special use areas where functional requirements require or justify deviation from the standards. The Office of Space Management is the arbiter of special use areas.

a. OSM will be provided with design documents at each design phase.

b. OSM will review all building designs to ensure they comply with policy, and will provide written comments to the design team.