

Guidelines for University Space Requests

Updated January 2022

I. Introduction

President Davies has charged the University Space Committee (USC) to evaluate and make recommendations related to university space requests. Based on the Committee's review and discussion, the USC shall make recommendations to the president and his cabinet (President's Cabinet). The USC shall review requests that have been referred to it by the President's Cabinet, as well as make recommendations that further the university's broader strategic space objectives.

The procedure below provides guidance for allocation of space to campus units. Similar to its personnel, funds, and equipment, CMU's physical facilities are resources that must be managed, maintained, and controlled in accordance with certain rules and regulations and in a manner that contributes most toward fulfilling the university's strategic goals. Space is allocated based on programmatic needs, academic priorities and in concert with the university's Campus Master Plan and may be reallocated if those needs or priorities change.

Ownership of Space

The ownership of space lies solely with CMU, regardless of the original source of construction or acquisition funding. Responsibility for the allocation of space rests ultimately with the President with the advice and counsel of the Cabinet.

II. Space Allocations

1. Criteria

Space requests are reviewed based upon the relevant or operational/business plans, and other criteria to include but not be limited to the following:

- **University Strategic Priorities** – as outlined in the university's Strategic Plan, Campus Master Plan, Strategic Enrollment Management Plan, and Information Technology Plan.
- **Impact** - how space reallocation positively affects multiple space priorities of the university.
- **Student and Faculty/Staff Population Density** - present and projected numbers of students, faculty, and staff. Both full-time equivalent and headcount are considered, as appropriate, based upon the request.
- **Program Requirements** - special program requirements and stage of program development.
- **Grant Support** – grant program requirements, as well as space required to support the required administrative functions.
- **Adequacy of Existing Area** - type, quality, and quantity of existing facilities and comparison with other campus departments.
- **Utilization of Existing Space** - an analysis of how the existing space is being utilized.
- **Technological Improvements** - changed space requirements for fixed and movable equipment, changed instructional methodology, and new fields of research.

- **Environmental and Geographical Considerations** - location requirements based on programmatic needs and access to students, faculty, and staff.
- **Funding Considerations** - the cost of renovations to the space to accommodate the functions of the requesting department, along with available sources for funding new or renovated space.
- **Approved Standards** - consideration of space and design standards.

2. Additional/Alternative Space

Requests for additional or alternative space shall include the following components:

- a) Program Justification
 - List type of space needed, e.g. office space, research space (including laboratory environments), conference/seminar meeting room, etc.
 - Identify the purpose for the space, e.g. to accommodate additional positions, new or changed programs, etc.
- b) Timing Considerations
 - Identify a reasonable deadline for completion and the rationale for that target date.
 - Is the request for permanent or temporary space? If temporary, identify the months and/or years needed.
- c) Potential alterations and modifications
 - Identify the alterations or modifications likely to be needed.
- d) Funding Sources
 - Identify the funding source
 - If the funds will be coming from a grant, the request for additional space should occur prior to or when the grant request is submitted.
 - How long do you believe your grant funding will continue?
- e) Location
 - List any optimal/preferred location. Include rationale.
 - List other on and off-campus locations considered and note why each were unsatisfactory.
- f) Plan for utilizing vacated space
 - If applicable, identify any considerations that are being contemplated for the released space.
 - Identify any individuals involved in the initial discussions.
- g) Other
 - List any other information that might help the President's Cabinet or the USC in its review of the request.

3. Reallocation of Existing Space

The President, Provost/Executive Vice President for the Academic Division, and the Vice Presidents for Finance and Administrative Services, University Advancement, Student Recruitment and Retention, Student Affairs, and Governmental & External Relations may approve reallocations within space already designated for their divisions, except for the following, which shall require review by the President's Cabinet and possible referral to the USC:

- Vacancies due to allocation of new space.
- Changes in the primary function of space, e.g., request to change a faculty office into a conference room, change an office into a storage room, etc.
- Renovations which change the primary function of a room.
- Space allocation plans resulting from new capital construction and/or renovation projects.
- Interdivisional reallocations, i.e., any "trades" or "swaps" of space between divisions as listed above.
- Any move of personnel and/or materials into leased space.

4. Reporting Changes in the Primary Function of Space

The university maintains records of space inventory, space reallocations, changes in room functions, and physical alterations that cause a change in the square footage of a room. To continue to maintain accurate records, space reallocations and other changes must be reported to University Engineering and Planning (UEP), Accounting Services and the USC.

Periodically, UEP and USC will evaluate and report to the President's Cabinet on space allocation and use.

III. Process for Submitting Requests

All requests for new space or a change in how space is used by colleges and/or other administrative units must be first presented to the President's Cabinet by an area's Vice President or the Provost/Executive Vice President. The President's Cabinet will determine whether to submit the request to the USC for review and vetting. The USC will then make recommendations back to the President's Cabinet for their consideration. Allow a lead time of approximately 90 days for the final disposition of the request.

1. Funding

- Whenever possible, funding should be identified in advance for costs associated with space moves or renovations and included in the space request. Space requests that are dependent upon unconfirmed funding sources should clearly indicate that contingency.
- UEP will provide preliminary cost estimates to departments within thirty days of the feasibility request, which is separate from the space request.
- Renovation costs will generally be paid for by the department/division requesting the space.
- If an employee or department is asked to move, the President's Cabinet will identify funding to accommodate the move(s).

2. [Request for Space Form](#)

- A Request for Space form must be completed and sent to the appropriate department Head/Chair and AVP/Dean/Director for authorization.
- Be sure to include/attach any additional documents needed to adequately describe the request. For example, drawings, floor plans, pictures, narratives, etc.
- Once the form is complete with signatures, it must then be submitted by the appropriate senior officer to the President, Executive Vice President/Provost or Vice President for the area. Additionally, for the Academic Division, submit to Director of Academic Space and Remodeling.

3. Approval of Space Requests

- Prior to being forwarded to the USC, space requests must be submitted to the appropriate Vice President for review and approval. The Vice President then brings the request to the President's Cabinet for discussion, and, if approved, the Cabinet refers the request to the USC for review and recommendations.
- If received by the USC, the committee analyzes the proposal and prepares a recommendation for the President's Cabinet within 60 days of receiving the request.
- Recommendations from the USC will include the pros and cons of various options, consensus opinion if reached, and the majority opinions regarding the allocation of space.
- USC recommendations for space requests referred to them will be communicated back to the President's Cabinet through the Chief of Staff to the President (who is also a member of the USC).
- Recommendations will also be shared with the Associate Vice President/Facilities Management and Senior Vice Provost/Academic Administration when they are forwarded to the Cabinet.
- The President's Cabinet will discuss the recommendation either in person at a cabinet meeting or via email, if appropriate.
- The President's Cabinet will reach a consensus regarding the USC recommendation; the final approval of the recommended action(s) rests with the president.
- The president's decision will be communicated back to the USC by the Chief of Staff to the President.
- The President's decision will be communicated to the division(s)/unit(s) involved in the space request (either as the requestor or as a unit otherwise affected by the space request) by the appropriate division head (i.e., President, Executive Vice President/Provost, or Vice Presidents previously named in these guidelines).
- The above communication should make clear that the space request has been approved or denied. However, if approved, the associated project will now enter the feasibility request stage, which is managed by Facilities Management Plant Engineering and Planning, according to existing procedures. Elements of the feasibility request include programming of the space for the new or revised use, developing a cost estimate, and approval of the project by the appropriate authorities (including identifying funding for the project).