APPENDIX B - Space Management Recommendations & Related Documents

GIVING FLIGHT TO IMAGINATION
University of North Carolina – Wilmington
Space Management Recommendations

November 13, 2017

As part of Paulien & Associates’ work on the master plan space needs, UNCW requested that the consultant provide some perspective regarding space management issues. The University arranged for the consultant to meet onsite with key administrators and technical individuals involved with space management procedures and software. This meeting was organized and chaired by Woody Sutton (Space Planner, Academic Affairs). A follow-up telephone conference call was held so that multiple members of the Paulien & Associates staff in Denver could participate in a discussion about the use of the new space management software.

This paper is divided into four sections, the first of which discusses the space allocation process. The second discusses the UNCW office space guidelines, and the third discusses the space planning guiding principles proposed by UNCW. The last section talks about data elements that might be useful to have in the room-by-room facilities inventory data.

Space Allocation Process

In September of 2017, UNCW shared memoranda which described the space planning and allocation procedures. This is still a working draft that was provided to the consultant for review and comment. This material is attached as an appendix for reference.

The paper describes a process which establishes a Space Planning and Allocation Committee (SPAC), and also an Executive Committee on Space (ECS).
The consultant has worked with some 750 campuses across the country on issues relating to space needs, space utilization, and in some cases, space allocation. The consultant believes the process outlined at UNCW is quite well thought through. The consultant notes that at some campuses a space allocation committee has representatives from many of the interests represented on the campus (faculty, staff, students), but does not represent key decisionmakers. In some instances, such committees develop quite a bit of clout on campus. The Boulder Campus Planning Commission was such a vehicle at the University of Colorado’s flagship campus. However, over time, it came to be dominated by a few long-time members who had specific agendas. The committee knew its recommendations were only advisory and therefore, pushed recommendations that were not realistic. The Boulder Campus administration recently abolished that committee.

In a recent best practices study for the University of Houston, the consultant compiled information received from five benchmark universities:

- Space decisions on three of the campuses are made by a University Committee. The Administration (Provost/VP) makes decisions on two of the campuses.
- Maintaining the space inventory is staffed with 1-2 full time employees on two campuses, 1-2 part-time employees on one campus, and 3 or more full time employees on one campus.
- The space inventory is typically updated by the department or space management every 1-3 years, with an outside audit/review every 3-6 years.
- Instructional space utilization is typically tracked and is a deciding factor in allocating and scheduling space.
- Research space on three of the campuses is allocated “as-needed” with one campus allocating based on productivity.

The consultant believes UNCW has wisely organized the Committee to have representatives of all the key space entities so that the schools and colleges are represented, and at least as the membership is currently envisioned, these representatives will be individuals who know and deal with space allocation issues within their units and therefore, can help resolve issues with allocations. Recommendations of this Committee are reviewed by the Executive Committee on Space which can refer a matter back to the Committee or reject a finding. That Executive Committee will be at the vice chancellor level. They also have the option of referring a matter to the chancellor for final decision
and implementation. The consultant encourages the Campus to continue with the implementation it envisions and monitor the success of that approach over a several-year period.

**Office Space Guidelines**

The consultant has reviewed the space-per-person recommendations in the office space guidelines. They seem to be quite well thought out and are generally within the range of accepted guidelines. The consultant notes that the private offices for tenure-track faculty in the range of 100-120 is at the low end of what most research-intensive universities are doing. The consultant has seen quite a few that are in the 120-140 range. A few are as high as 160, but these tend to be elite private universities. The consultant should note that a number of universities are experimenting with more open office concepts for administrative units. The UNCW guidelines show figures for shared offices or cubicles which should allow those type of experiments to take place. In some instances, circulation within the larger spaces needs to be accounted for effectively and might need to be added to individual cubicle amounts to make a space work effectively.

A colleague who recently joined Paulien & Associates from a space management position at Georgia Institute of Technology noted that newer, younger faculty are wanting more flexible office arrangements and are often working more intensively with their graduate students in open settings than in their closed offices. This is a trend worth noting as it is possible that the traditional faculty desire for a private office may be less important to young faculty than their desire to work flexibly with their teams.

A young faculty member in the Physics Department at the University of Colorado mentioned that he rarely used his office, but also indicated that the office was a symbol that acknowledged his credentials as a faculty member and he would not consider giving up the room that has his name outside the door even if he rarely uses it.

Office space allocations typically include a space allowance for conference and service space. In a recent office space renovation at the University of Washington Bothell, this total area per employee
was maintained but reapportioned to increase collaboration space and reduce individual office size significantly, at the request of the faculty.

The consultant believes the campus has appropriately addressed the issue of faculty that have instructional responsibilities on the main campus and research responsibilities at Myrtle Grove by indicating that they may be allocated a place to work at both campuses, and it also acknowledges the need for some units that provide part-time services at Myrtle Grove to have a space to conduct their work during times when they are based there.

The consultant believes the campus is wise to indicate that unoccupied offices may need to have a temporary use when they will be vacant for an entire term or longer. The emeritus faculty office provisions are largely on a space available basis and relatively generous. Some universities have had to limit the space available to emeritus faculty, and in one case the consultant is familiar with, centralized them in a location that was not in the same place as their departmental colleagues, and more in line with graduate assistant allocations than faculty allocations at that institution.

**Space Planning Guiding Principles**

The consultant has reviewed Appendix C, the Space Planning Guiding Principles. These seem well thought out. The consultant provides comments on several of the specific principles below.

**Principle A** - Having an exception process for the Chancellor seems a realistic and desirable option.

**Principle C** – Recognizing that no unit can operate independently is a highly desirable principle. It is key to having strong campus-wide allocation processes in place.

**Principles D and E** – The equitability is very important. Having the membership of the groups involved seem fair is important to the acceptance of the process.

**Principle F** – Having unit strategic plans identify future space needs is a desirable element. Unit strategic plans often are not specific about space. Processes described below may evaluate those needs.
Principles I and J – This can be the cause of quite a bit of work for the centralized process. Principle J notes that a replacement person taking over a space would not require any action outside of the department. If a position is being abolished, the reallocation process might kick in.

Principle K – Efficiency evaluations will need to be carefully thought out. This can be an area of significant dispute.

Principle L – This is an important concept that instructional spaces need special protections. The consultant has often seen units with growing research wanting to remove instructional spaces within their general area. A centralized voice that protects those spaces is highly desirable.

Principle O – The calculation and analysis of space usage patterns and scheduled practices is important to provide a sense of fairness across the campus and to show when additional instructional space may be needed.

Principle P – Like Principle K above, these proactivity studies will be best accepted if the method is understood and the measuring criteria are clear.

Principle Q – Functional design requirements will in some cases dictate deviation from space guidelines to reflect specific building issues such as columns and other physical impacts.

Principle R – The consultant strongly supports the approaches outlined in this principle. Having sufficient analysis is important to good decisions.

Principle S – The sharing of common use space is an important principle. These should not be viewed as uses by right for each department.

Principle T – Time limited allocations often stretch out indefinitely. Having a clear process that acts on these when they have expired is important.

Principles U through X seem well thought out for the UNCW situation relating to these personnel types.

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Principle Y – Centralized long-term storage is highly desirable. Certain items may have a date beyond which they are not needed. In those cases, they should be clearly marked and it understood whether warehousing needs to check back with the unit or is authorized to dispose of the items after the expiration date.

**Facilities Room Data Elements**

The consultant was asked to comment on the approaches to updating facilities data elements and to comment on whether it is advisable to add a large number of additional elements.

The key purpose is identifying the size, location, assignment, and space type for each of the spaces. Additional elements such as floor covering, lighting type, fenestration, and specialized utilities can all be added and therefore, give a much better indicator of the character of the space. For spaces used in instruction, this can be useful information if it is included in an online room scheduling platform.

Other elements being considered at some campuses are (1) including in the classroom data the pedagogy the space is designed to best support and/or the flexibility of the space for reconfiguration, and (2) maintenance information with respect to the last time the materials/finishes and/or IT was upgraded.

A key element is understanding who will maintain that information, and particularly when there are changes that affect the answers, how will the inventory be updated. Universities are best served by one office having centralized responsibility and being able to raise questions if particular units are coding space in a way that seems at variance with what the Space Planning and Allocation Committee and other key campus administrators advocate. The issue can be particularly critical regarding what spaces are classrooms, which are teaching labs, and which are research labs. To the extent that system agencies are looking at the level of utilization, it is highly desirable to not code spaces classrooms or teaching labs unless they can be used extensively for scheduled credit instruction. If the updating of the facilities inventory is delegated to unit representatives, having associate deans or associate vice chancellors who have responsibility for those units supervising that process is very desirable. This will increase the level of participation and allow questions of common definition to be addressed within
each key campus sector. Having that information reported to the central office so they can follow up appropriately with the representatives for each area is key to keeping a facilities inventory in good condition.

The consultant has seen many campuses which let five years or more go without updating the facilities inventory. It then becomes a major task. UNCW is to be commended for having commissioned a consultant to update the facilities inventory prior to the most recent master planning effort.

The consultant has not seen a clear pattern that indicates collecting a lot more room characteristic information as being particularly desirable. The question that UNCW needs to answer is to what extent will this information be useful in managing the facilities and will facilities management be engaged sufficiently to advocate continually updating this information, as they may be the primary source of information regarding changes to those data elements.
UNCW Materials Reviewed

The Materials which follow were provided by UNCW in September 2017 and served as the materials reviewed in developing the Space Management Recommendations paper dated November 13, 2017.
I. INTRODUCTION AND PURPOSE

A. The purpose of space allocation at the University of North Carolina Wilmington is to support the educational mission and strategic goals of the university in a manner that aids equity, adequacy and productivity. As an asset owned by the State of North Carolina at large, space use is allocated to academic and administrative units under the authority of the Chancellor and is subject to change. Spaces are available for programs offered by and intended for the campus community and strategic partnerships. University space is a fixed, highly visible but generally scarce resource.

B. The purpose of the space allocation policy is to establish the roles, responsibilities, authorities and operational guidelines for the Space Planning and Allocation Committee (SPAC) and the Executive Committee on Space (ECOS) in addition to establishing priorities for space use, allocation and utilization for new construction and leased facilities. The reallocation and augmentation of existing spaces; and generating space allocation recommendations will be managed by the Office of Space Planning and Management. The SPAC, chaired by the Office of Space Planning and Management, will be comprised of appointed representatives from across campus representing each division and will
be responsible for addressing changing and unmet space needs by developing operational procedures for space use, allocation and utilization and making recommendations to the ECOS, which will solicit the Chancellor for final endorsement.

II. SCOPE

This policy applies to all university and university partners' assigned space in university owned or leased properties.

III. DEFINITIONS

A. Property
   1. Number: A unique four digital numeric code assigned to each building which relates to the State Property Office asset number.
   2. Building Name: A unique name assigned to each property.
   3. Alpha Code: A unique two to three digital alpha sequence assigned to each property.

B. Space and Classifications
   1. Location: Any room (space) that has an identifying number on a building floor plan.
   2. Room Use Code: A numeric code assigned to each space based on the U.S. Department of Education's Institute of Education Sciences' National Center for Education Statistics' Postsecondary Facilities Inventory and Classification Manual's (FICM) hierarchy that categorizes how each space is being used.
   3. Program Use: A numeric code assigned to each space based on the UNC General Administration's Higher Education Comprehensive Planning Program Facilities Inventory and Utilization Study that categorizes how space is being used to support operations.
   4. Organizational Occupancy: A three tier classification system that identifies which UNCW department/unit/program has been assigned stewardship of each space with the exception of non-assignable spaces such as circulation, restroom and mechanical spaces.
   5. Organizational Occupant: The individual(s) who has been assigned to work or conduct research in each space.

C. Related Terms
   1. Space Planning and Allocation Committee (SPAC) is the committee that reviews space requests and considers the recommendations from the Office of Space Planning and Management.
   2. Executive Committee on Space (ECOS), comprised of the vice chancellors and chief of staff, reviews the recommendations from the
SPAC to either approve, deny or return the space request to the SPAC for further review. The ECOS reserves the right to forward space requests to the Chancellor for final approval; otherwise the decision from the ECOS is final.

IV. CONDITIONS FOR ALL SPACE REQUESTS

A. Any academic or administrative unit may request new space, the reallocation of existing space, permission to augment the physical composition of space and/or a change in use. The space request form must be completed and signed by the requestor, the department chair/head and appropriate vice chancellor for that unit. For units reporting directly to the Chancellor, the Chancellor or his designee must sign the request. Signatures from the appropriate Vice Chancellor and/or Chancellor on the space request do not guarantee approval of the request. It authorizes the Office of Space Planning and Management to begin a feasibility study and present those findings of the SPAC for review and consideration.

B. The completed space request form must be forwarded to the Office of Space Planning and Management, which will conduct an initial feasibility assessment including, but not limited to the following:
   1. current space assignment
   2. utilization of current space
   3. number of FTE
   4. type of activity
   5. business operations model

C. The Office of Space Planning and Management will develop recommendations based on the feasibility study and present those finding to the SPAC. All parties potentially affected will be invited to attend and participate at the SPAC meeting to represent their position related to the recommendation(s) under consideration.

D. The SPAC will make one of the following recommendations:
   1. approve – which will move the request to the ECOS;
   2. refer – which will return the request to the Office of Space Planning and Management for further review and preparation of alternative recommendations;
   3. deny – which will stop the request from moving forward.

E. The ECOS will review the following recommendation from the SPAC and will:
1. approve – which will allocate new space, reallocate existing space, augment existing space and/or change the use of existing space
2. refer – which will return the request to the SPAC for further consideration or send the request to the Chancellor for final review
3. deny – which will stop the request from moving forward.

V. SPACE ALLOCATION PRIORITIES
The following priorities will guide the SPAC regarding space allocation.

A. Safe and accessible teaching and learning spaces specific to meeting course offerings and related curricular needs will be given highest space allocation priority.

B. When conflicting or competing needs arise, the highest and best use of space specific to the University's Strategic Plan and Campus Facilities Master Plan will govern the space allocation decision-making process. As a general rule, campus facilities and associated spaces funded by auxiliary sources – most notably student fees and residence halls – shall be given space allocation priority by those designated funding sources and constituents.

C. The quality and functionality of the assigned space is given higher priority than overall square footage of the space.

D. Programs that are funded will be given higher space request priority than those that are unfunded or funding-uncertain.

E. UNC General Administration space planning standards as outlined in the most current version of the Facilities Inventory and Utilization Guide will be used as a benchmark for assessing type and quantity of space allocations.

VI. COMMITMENT OF SPACE
Any commitments obligating the university for space should be discussed with Space Planning and Management. Space Planning and Management will conduct an expedited review of any immediate-need space commitment as requested, and will advise the SPAC and ECOS accordingly. Examples include, but are not limited to the following:

A. Hiring Commitments: Hiring contracts that require space assignments outside of the hiring department's stewardship should resolve the space assignment before issuing the contract.

B. Grants and Contracts: All proposals for external funding must consider space needs prior to the execution of an award.
C. New Academic Programs and Administrative Units: No unit shall transact a new program (permanently funded or financed with limited term funds) without first consulting Space Planning and Management.

VII. ALTERATION, RENOVATION AND REPURPOSING OF SPACE
All alterations, renovations and repurposing must follow existing procedures established by the Office of Facilities.

Definitions
1. Alteration is defined as any construction in a space that involves a change in its configuration; the fabrication of space; modification of space; or the erection, relocation, or removal of walls, partitions, doors, locks, and windows.
2. Renovation is defined as any work that is required to restore, upgrade, or otherwise improve the condition of space.
3. Repurposing is defined as any change in use of a space.

A. Alterations, renovations and repurposing of space that meet the following standards may be approved by the SPAC without needing approval from the ECOS and Chancellor.
   1. Alterations, renovations and repurposing space affecting use classification and/or modifications to the building floor plan, which includes a project budget equal to or less than $50,000. These changes could alter the configuration, modification, installation or removal of case goods and equipment having an impact on the facility’s infrastructure and work required to restore, upgrade, or otherwise improve the condition of the facility.
   2. Material repurposing of assigned space to support a unit’s operational function with the exception of classrooms and laboratories.

B. Alterations, renovations and repurposing space that meet the following standard must be approved by the SPAC, ECOS and Chancellor.
   1. Classrooms, laboratories or other facilities dedicated to instruction and/or research may not be converted to non-instructional/non-research use without approval by the SPAC and ECOS.

C. Repurposing space under an academic department or administrative unit’s stewardship meeting the following standards may occur without approval by the SPAC, but requires consultation with the Office of Space Planning and Management.
1. Change in use that does not require construction.
2. Minor infrastructure improvements with a project budget equal to or less than $15,000.

VIII. LEASING OF EXTERNAL SPACE
All requests for the acquisition of space by lease for routine or strategic purposes must be submitted to the Real Estate Office and are subject to state guidelines and UNC policy 600.1.3.1[R]. Requesting departments should contact the Real Estate Office to begin the process.

IX. EXECUTING LEASES/SPACE USE AGREEMENTS FOR STRATEGIC PARTNERS
The Real Estate Office shall oversee and coordinate the leasing process, including without limitation, the negotiation and execution of any use agreements or leases of university property to external entities. Academic and/or Administrative Units shall work with the Real Estate Office and the Office of the General Counsel regarding an external entity’s use or lease of university space. Space Planning and Management must be consulted to ensure availability of space and properly classify both use and organizational occupancy.
APPENDIX A

SPACE PLANNING AND ALLOCATION OPERATIONAL PROCEDURES

1. REQUEST FOR SPACE ALLOCATION
   All academic and administrative units must complete a [Space Request form](#) to request additional or new space, renovate or repurpose existing space unless it meets the standards set forth in section VII of the Space Allocation Policy. The unit’s appropriate vice chancellor must sign the space request form. For the units that report directly to the Chancellor, the request must be signed by the Chancellor or designee. The vice chancellor's and/or chancellor or designee’s signature does not guarantee approval; it authorizes Space Planning and Management to explore the feasibility of the request. Where possible, it is recommended that projects involving multiple academic departments and/or administrative units pre-negotiate to facilitate requests.

2. REQUIRED INFORMATION
   The requestor will submit a narrative to support the information requested on the [Space Request form](#), which shall include:
   a. Description: Provide a succinct description of your space request. What space is being requested and why? Indicate whether this is being driven by a new program, a research grant, inadequate space to provide current program and/or other reasons.
   b. Strategic Plan: How does this request relate to the UNCW Strategic Plan?
   c. Proximity: Indicate other department, organizations, programs, or functions which should be in proximity to the requested space and why.
   d. Location: Indicate any location(s) you want considered in filling this space request.
   e. Options explored: Describe all avenues explored to solve this space request within existing space. For example, has the academic/administrative unit considered maximizing underutilized space to solve this need? Has the academic/administrative unit re-evaluated the space assigned to lower priority initiatives? What possibilities for shared space have been explored?
   f. Timing: Describe any programmatic issues affecting the timing of your move such as the need to move during a class break, at the end of semester, during the summer months, coincident with other activity.
   g. Parking/Transportation: Describe any special parking and transportation access needs.
   h. Funding: Provide budget and funding details for any request that requires the expenditure of funds. Rental space requests must indicate: lease duration, square footage, annual costs, and financial account information.
   i. Other: Provide any other information or special requirements for space (wiring, AC, telephone, computers, and other related equipment, etc.) that will support or define this space request.

3. COMMITTEE OPERATIONS
   All business addressed by the SPAC shall be conducted in an open and transparent manner unless otherwise restricted by law. The committee will have a published agenda for each meeting.
APPENDIX A

a. Membership - The SPAC shall be comprised of voting and non-voting members to ensure equity and transparency in review and recommended actions.
b. Meetings - All meetings will be open to the campus community unless otherwise noted as closed in order to address privileged or discussion or disclosure of privileged or confidential pursuant to the law of the State of North Carolina (G.S. 143-318.11(a)). Minutes will be recorded by an appointee of the chair.
c. Voting - A simple majority of voting committee members present shall constitute a quorum for transacting business on the meeting agenda. The chair shall only vote to break a tie. At a meeting where no quorum exists, any space allocation request and/or other committee business may be submitted to the entire committee member for a vote by e-mail at the discretion of the chair. The chair shall document committee member’s votes. Agenda items involving issues of legal rights or responsibilities will require review at a meeting with a quorum. Any voting member has the right to refer an agenda item sent via e-mail back to the committee for an in-person meeting.
d. The SPAC will follow the established space allocation priorities (section V of the Space Allocation Policy) and space principles (Appendix A) as outlined in the accompanying procedure.

4. MEMBERSHIP
   a. Voting Members
      i. The Space Planner will serve as chair
      ii. Appointed representatives of each Division
         1. Academic Affairs
         2. Business Affairs
         3. Chancellor
         4. Student Affairs
         5. University Advancement
      iii. Chair of the Faculty Senate Buildings and Grounds Committee
   iv. Associate Vice Chancellor for Facilities
   v. Associate/Assistant Dean from one of the Colleges/School to be recommended by the chair with approval from the Provost and rotated every two years

b. Ex-officio Members
   i. Associate Legal Counsel
   ii. Associate Provost, Institutional Research and Planning
   iii. Director of Real Estate Management
   iv. President, Faculty Senate or designee
   v. President, Staff Senate or designee
   vi. President, Student Government Association or designee

5. MEETINGS
   a. Open Meetings
      i. All SPAC meetings shall be open to all members of the campus community to ensure transparency.
ii. The committee chair may invite representatives from other areas of campus to participate in meetings at their discretion.

iii. All agendas, minutes, space requests or other materials from SPAC meetings shall be published to the Space Planning and Management website.

iv. The SPAC shall meet every two weeks with a scheduled published by the first of August of each year.

b. Closed Meetings

i. Any agenda items requiring the discussion or disclosure of privileged or confidential pursuant to the law of the State of North Carolina (G.S. 143-318.11(a)).

ii. The Office of General Counsel will advise the chair when a meeting needs to move into a closed session.

6. OPERATIONS

a. Review

i. The Space Planner shall present one or more recommendations for space allocation for each request to the SPAC for review. During the presentation, information will be shared disclosing the methodology and type of analysis conducted.

ii. All parties affected by the assignment of new space and/or reallocation of existing space will be invited to answer any questions and present cause in support or opposition to the space request.

b. The SPAC will discuss the request in a framework that addresses alignment with university strategic goals and vote on a recommendation.

c. The Space Planner will schedule a meeting with the ECOS to review the request and recommendation.

7. ATTENDANCE

Committee members accept the responsibility for carrying out the goals of the SPAC when appointed, and meeting attendance is part of that responsibility. If a committee member will be absent from a meeting, a delegate may attend when written notice is received by the committee chair before the meeting date (email suffices as a written notice).

8. COMMUNICATIONS

All agenda items and documents for review should be distributed to committee members via email and posting to the shared network drive at least 24-hours before a called meeting. Only in exceptional circumstances shall last-minute meetings (in-person or electronic) shall be called.
OFFICE SPACE GUIDELINES

OVERVIEW
Optimizing our current and future office space ensures that, as an institution, we use these important physical resources effectively. The following guidelines were developed to help academic and administrative units allocate office space and align these decisions with benchmarks of existing and future buildings.

Units should refer to these guidelines when planning new construction or renovations to ensure greater consistency with campus norms for office space. The Office of Space Planning and Management, Office of Facilities – Project Management and Office of Architecture and Construction will refer to this document when working with units and architects during the design phase of all new construction or renovations. Exceptions to the guidelines require approval of the Executive Committee on Space.

NOTE: Academic and administrative units with internal space policies or guidelines should ensure that their guidelines align with the information provided in this document.

SPACE-PER-PERSON RECOMMENDATIONS
The following tables show the recommended assignable square footage for a person by position type. These guidelines are not a guarantee that an employee or affiliate of the University will receive a specific office type or amount of square feet, but rather defines the maximum net assignable square feet (NASF) a person in a specific role should occupy. Net assignable square feet is defined as the area of a building suitable for occupancy measured from the interior walls, including closets and secondary corridors within assignable space. This excludes main corridors, restrooms, and other non-assignable space.

Square Footage Ranges
The square footage ranges are provided to accommodate the varying programmatic needs of these positions across the University. For example, a unit may assign an office on the smaller end of the square footage range to a person who is more likely to spend time working in a research lab than in an office. Conversely, a person may be assigned an office on the upper end of the range to accommodate frequent meetings with multiple individuals.

Applying the Guidelines in Shared Spaces
The recommended square footages of shared spaces specify the total amount of office space that should be dedicated to any one person. They do not necessarily indicate the actual size of the office or workspace. For example, a department should designate a cumulative 120 – 256 square feet for four temporary employees (30 – 64 square feet per person); this space may or may not accommodate all four persons simultaneously.
The following space-per-person recommendations are based on recent construction projects at the University and on space guidelines from other higher education institutional and the private sector. They were developed in collaboration with the Office of Space Planning and Management; Office of Architecture and Construction; and various administrative and academic units.

**NOTE:** The types of room occupants listed below do not reflect official University job titles or classifications. They are listed strictly for the purpose of showing the relationship between role, space type, and net assignable square feet (NASF). The information is only to be used when making office space related decisions.

<table>
<thead>
<tr>
<th>Types of Room Occupants</th>
<th>Space Type</th>
<th>Recommended NASF</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Executive</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chancellor</td>
<td>Private Office</td>
<td>400</td>
</tr>
<tr>
<td>Provost/Vice Chancellor</td>
<td>Private Office</td>
<td>300</td>
</tr>
<tr>
<td><strong>Academic Units</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dean/Associate Provost</td>
<td>Private Office</td>
<td>240</td>
</tr>
<tr>
<td>Assistant/Associate Dean</td>
<td>Private Office</td>
<td>160</td>
</tr>
<tr>
<td>Assistant/Associate Vice Chancellor</td>
<td>Private Office</td>
<td>160-240</td>
</tr>
<tr>
<td>Department Chair</td>
<td>Private Office</td>
<td>160</td>
</tr>
<tr>
<td>Faculty, Tenure Track</td>
<td>Private Office</td>
<td>100-120</td>
</tr>
<tr>
<td>Faculty, Research</td>
<td>Private Office</td>
<td>100-120</td>
</tr>
<tr>
<td>Faculty, Non-Tenure Track</td>
<td>Private Office, Shared Office, Cubicle</td>
<td>80-100</td>
</tr>
<tr>
<td>Faculty, Part-time or Temporary</td>
<td>Shared Office or Cubicle</td>
<td>80</td>
</tr>
<tr>
<td>Faculty, Visiting or Consulting</td>
<td>Shared Office or Cubicle</td>
<td>80</td>
</tr>
<tr>
<td>Fellow, Lecturer or Visiting Scholar</td>
<td>Shared Office or Cubicle</td>
<td>80</td>
</tr>
<tr>
<td>Unit Administrative Manager</td>
<td>Private Office</td>
<td>100-120</td>
</tr>
<tr>
<td>Technician or Specialist (Research)</td>
<td>Private Office, Shared Office or Cubicle</td>
<td>64-100</td>
</tr>
<tr>
<td>Staff, Professional (FT)</td>
<td>Private Office, Shared Office or Cubicle</td>
<td>64-100</td>
</tr>
<tr>
<td>Staff, Professional (PT)</td>
<td>Shared Office or Cubicle</td>
<td>80</td>
</tr>
<tr>
<td>Staff, Administrative Support (FT)</td>
<td>Shared Office or Cubicle</td>
<td>64-100</td>
</tr>
<tr>
<td>Staff, Administrative Support (PT)</td>
<td>Shared Office or Cubicle</td>
<td>64-80</td>
</tr>
<tr>
<td>Graduate Student/Research Assistant</td>
<td>Shared Office or Cubicle</td>
<td>30-64</td>
</tr>
<tr>
<td>Temporary or Student Staff</td>
<td>Shared Office or Cubicle</td>
<td>30-64</td>
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<th>Administrative Units</th>
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<td>Private Office</td>
<td>160-240</td>
</tr>
<tr>
<td>Director</td>
<td>Private Office</td>
<td>100-120</td>
</tr>
<tr>
<td>Assistant/Associate Director</td>
<td>Private Office</td>
<td>100-120</td>
</tr>
<tr>
<td>Manager</td>
<td>Private Office, Shared Office or Cubicle</td>
<td>80-100</td>
</tr>
<tr>
<td>Staff, Professional (FT)</td>
<td>Private Office, Shared Office or Cubicle</td>
<td>64-100</td>
</tr>
<tr>
<td>Staff, Professional (PT)</td>
<td>Shared Office or Cubicle</td>
<td>64-80</td>
</tr>
<tr>
<td>Staff, Administrative Support (FT)</td>
<td>Shared Office or Cubicle</td>
<td>64-100</td>
</tr>
<tr>
<td>Staff, Administrative Support (PT)</td>
<td>Shared Office or Cubicle</td>
<td>64-80</td>
</tr>
<tr>
<td>Temporary or Student Staff</td>
<td>Shared Office or Cubicle</td>
<td>30-64</td>
</tr>
</tbody>
</table>

1 Staff, Professional (Full-time) include but is not limited to academic advisors and student health professional and practitioners.
2 Part-time denotes the room occupant is 50% FTE or less. If the occupant is more than 50% FTE, it is recommended to follow the guidelines for full-time room occupant.
PRIVATE OFFICES, SHARED OFFICES AND CUBICLES

Private offices are necessary for many positions at the University. The size of the office varies depending on the type of work and the need to meet with individuals or groups frequently and in a private setting. These spaces should be able to accommodate a desk, files, bookshelves, and a space to meet with an additional one to six people.

The following positions would in most cases, require private offices:

<table>
<thead>
<tr>
<th>Executive</th>
<th>Academic</th>
<th>Administrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chancellor</td>
<td>Dean</td>
<td>Associate/Assistant Vice Chancellor</td>
</tr>
<tr>
<td>Provost</td>
<td>Associate/Assistant Provost</td>
<td>Director</td>
</tr>
<tr>
<td>Vice Chancellor</td>
<td>Department Chair</td>
<td></td>
</tr>
</tbody>
</table>

Some positions in a unit or department may require private office space, while a person with similar duties in another unit or department may not. The following positions should be allocated private office space on a case-by-case basis based on confidentiality and be approved by the Executive Committee on Space:

<table>
<thead>
<tr>
<th>Academic</th>
<th>Administrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty, Lecture – Tenure Track</td>
<td>Manager</td>
</tr>
<tr>
<td>Staff, Professional (FT)</td>
<td>Staff, Professional (FT)</td>
</tr>
<tr>
<td>Technician, Associate or Specialist (Research)</td>
<td>Student Health Professionals/Practitioners</td>
</tr>
<tr>
<td>Academic Advisors</td>
<td></td>
</tr>
</tbody>
</table>

Shared offices, cubicles, and open workspaces are an efficient use of office space. Shared offices should not be assigned to individuals who require a certain amount of privacy or reduced noise levels. Cubicles and open workspaces are particularly space-efficient, flexible, and can accommodate additional guests as needed. Where possible, a space for private meetings should be provided. The following positions would, in most cases be assigned a shared office, cubicle or open workspace:

<table>
<thead>
<tr>
<th>Academic</th>
<th>Administrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty, Part-time, Temporary or Visiting</td>
<td>Staff, Administrative Support (FT)</td>
</tr>
<tr>
<td>Research Fellow</td>
<td>Staff, Professional (PT)</td>
</tr>
<tr>
<td>Fellow, Lecturer or Visiting Scholar</td>
<td>Staff, Administrative Support (PT)</td>
</tr>
<tr>
<td>Staff, Administrative Support (FT)</td>
<td>Temporary or Student Employees</td>
</tr>
<tr>
<td>Staff, Administrative Support (PT)</td>
<td></td>
</tr>
<tr>
<td>Staff, Professional (Part-time)</td>
<td></td>
</tr>
<tr>
<td>Graduate Students/Research Assistants</td>
<td></td>
</tr>
<tr>
<td>Temporary or Student Staff</td>
<td></td>
</tr>
</tbody>
</table>
SPECIAL CIRCUMSTANCES

Multiple Offices
Assignment of multiple offices for faculty and staff is strongly discouraged, unless there is a true demonstrated need. Faculty with instructional responsibilities on main campus and research laboratory assignment at Myrtle Grove may have a private office on main campus and a shared or private office at Myrtle Grove. Additionally, units based on main campus who serve faculty/staff at Myrtle Grove may have a shared workspace at Myrtle Grove.

Use of Unoccupied Offices
One significant way to reduce the shortage of office space is to ensure that all offices are occupied throughout the year. When offices are left unoccupied for significant periods of time, such as sabbaticals or other leave, units and departments should use these spaces to alleviate any pressing space needs. If an office is unoccupied due to attrition or other forms of employee separation and the unit will not replace that position, the office will revert back to the Office of Space Planning and Management for reallocation.

Emeritus Faculty Offices
Emeritus faculty may be provided shared office space, if space is available within a unit, as long as they remain engaged in unit activities. These shared offices are intended to allow an individual to maintain contact with their unit, discipline and colleagues. An emeritus faculty member actively engaged in teaching or research retain a private office at the discretion of the unit, if space is available.

Questions about these guidelines should be directed to space@uncw.edu.
APPENDIX C

R. Whenever entire buildings or sections of buildings are vacated or new buildings or additions to existing buildings are constructed or entirely refurbished, unless otherwise prescribed by external gifts:
   1. studies should be conducted to determine reuse capacity, alternation/retrofit costs, and possible best uses
   2. the campus space planner and the SPAC will articulate methods by which reallocation plans for said space can be proposed, reviewed, and allocated
   3. corresponding SPAC-generated space allocation, assignment, and repurposing recommendations may include endorsements for resource allocation necessary to conduct associated modification and renovations.

S. Maximized efficiencies will be achieved whenever possible by sharing common use space (e.g. conference rooms, meeting rooms, shops, storage areas, breakrooms) between departments and considered shared spaces.

T. Space that is specifically allocated to a unit on a time-limited basis shall be vacated and returned to the University as unassigned space at the end of any such term. Extensions on time-limited space assignments may be made in advance through the SPAC.

U. As a general rule, individual faculty members and administrators should have a private office and will not be assigned more than one private office unless as required by multiple unit supervisory responsibilities or in conjunction with remote field operations or off-campus research activity. Privacy is more important than size of office space.

V. Faculty in Phased Retirement will be provided space whenever possible and at the discretion of the academic department.

W. Emeriti faculty will be provided office space whenever possible on the basis of availability.

X. Graduate students with research, teaching, or grant assistantships should be provided workspace in a shared office on the basis of availability and, where appropriate, utilize strategies such as workspace “hoteling.” Hoteling workspaces are not assigned and are available on a first-come-first-served basis.

Y. Long term storage (items not requiring regular access) should be stored at the Central Receiving Warehouse or at an off-campus location.
SPACE PLANNING AND ALLOCATION GUIDING PRINCIPLES

The following principles shall guide the SPAC in its decision-making:

A. Exceptions to any common understanding(s) may be granted by the Chancellor on advice from the ECOS.
B. Space decisions will be consistent with UNCW’s Strategic Plan and Campus Facilities Master Plan in support of the University’s academic and research programs and support services.
C. Space will be managed under the philosophy of “no unit can operate as an independent domain or division.”
D. Every effort will be made to allocate University space equitably.
E. All affected parties should have equal input to space management requests/decisions.
F. Each unit’s strategic plan should identify future space needs.
G. Space allocations are made to academic and administrative units, not specific individuals.
H. New program space analysis must be coordinated with all affected parties and must address logistics, availability, infrastructure, cost, programmatic needs, efficiency and effectiveness.
I. Space that becomes vacant within a unit or college generally should be reallocated by the unit head for that unit, but all such reallocation plans must first be reviewed by Space Planning and Management.
J. As a general operating practice, a unit does not have to submit a space allocation request in cases where new employees are being assigned to the same space(s) as their predecessors. All space change transaction must be communicated to the Space Planning and Management.
K. All space is subject to annual efficiency evaluation with a possible outcome to a different use being prescribed.
L. Depletion of classrooms and/or other teaching facilities as a consequence of space reallocation action is discouraged and generally should occur on a last-option only basis.
M. All requests for space allocation, reallocation, or change in use must be made in writing to the SPAC using forms and procedures as presented on the Space Planning and Management website.
N. Whenever possible, programmatic similar or supporting units should be located in a proximate or contiguous fashion as to optimize shared resources and synergies. Similarly, proximity of a unit head to his/her supervised staff should be attained whenever possible.
O. Space allocation requests are evaluated, in part, on the basis of the usage patterns and efficiencies of existing space assignments. Space scheduling practices, along with general space usage patterns, will be reviewed periodically by Space Planning and Management.
P. At the appropriate time and circumstance, some units and/or individuals may be subjected to a “space-lease-productivity” model. This model is based on a minimum square foot assignment using standards for each academic discipline.
Q. Whenever possible, space allocation should meet functional design requirements with the goal of minimizing renovations, alterations and associated expenditures.