Space Management Policy

Subject: Governance and Organization
Policy: Space Planning & Management
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100.00 Introduction and Purpose
Montana State University’s (MSU) Bozeman campus is comprised of more than 200 various academic, research and auxiliary services buildings. As of 2017, 47 state-funded and maintained academic buildings encompass nearly two million gross square feet excluding leased facilities.

Physical space can be a limiting resource in the development, advancement, and improvement of MSU’s academic and research programs; therefore, effective utilization of this valuable resource is essential to the success of the University, its faculty, and its students. Space is a critical university-owned resource and is subject to allocation, evaluation, and reallocation to meet the overall needs and priorities of the institution. Stewardship of space resources is a joint effort between all University staff, faculty, and students and relies upon everyone to ensure that space is used to support student success, foster collaborative research, and promote positive work environments.

The Space Management Policy establishes a framework for the efficient use, equitable allocation, and periodic review of MSU’s physical resources to support the University’s mission. Space allocation and reallocation cannot be handled in an ad-hoc manner on a long-term basis without subsequent space issues arising. As such, this policy is intended to provide a basis for transparent space decisions that maintain a proper balance between teaching, research, student success, engagement and outreach, and administrative functions on campus.

101.00 Space Management Committee
The Space Management Committee (SMC) is comprised of members from various campus constituents that embody a holistic view of University space resources and advise the University President regarding space planning and management decisions.

101.10 Space Management Committee Charge
The SMC serves as an advisory to the President and is responsible for developing policies and plans that promote stewardship of all University space resources including academic, athletic, auxiliary and research spaces; ensuring that such policies and plans align with the University Strategic Plan; and prioritizing institutional needs for equitable and efficient allocations of space resources. Additionally, the SMC reports on various space studies and provides recommendations to the President regarding University spaces.

102.00 Research Space Committee
The Vice President for Research and Economic Development (VPRED) will convene and chair a Research Space Committee (RSC) consisting of the Director of Sponsored Programs, a representative from the Office of Research Compliance, two (2) faculty members conducting active research at the university or who have done so within the last three (3) years, and the managing director of the Office of Space Planning and Management (SPM).

102.10 Research Space Sub-Committee Charge
RSC serves as a sub-committee to the SMC and specifically reviews research space requests. In conjunction with VPREDGE, RSC will prioritize the assignment of research space in the best interests of MSU research and creative activities consistent with the University’s Space Management Policy and research space priorities listed in Guidelines for Allocation & Management of Research Space. The Sub-Committee is responsible for recommending – subject to the President’s approval – the allocation of research space within buildings. RSC will make recommendations to SMC for research spaces regardless of whether the uses result in a Facilities Inventory and Classification Manual (FICM) code change. SMC will then forward or modify the request to the President for approval.

103.00 Office of Space Planning and Management
The Office of Space Planning and Management (SPM) serves as a professional resource regarding space assets on and off campus; provides effective stewardship of the space inventory database; manages space requests; facilitates an annual space survey and conducts space audits; supports campus moves; and provides accurate and timely space inventory and utilization reports to inform decision-makers about short-term and long-term space needs.

103.10 Office of Space Planning and Management Mission
SPM is charged with the stewardship of all campus spaces; reviews, maintains and analyzes spaces to assist University leadership on how best to utilize space resources in an efficient yet flexible manner to support the University Mission; provides data and analyses as requested; and assists SMC in making transparent recommendations on space that align with the University Strategic Plan³.

200.00 Policy

201.00 General

1. The University, and not any academic unit (college, department, office, center, group, or individual) within the University, is the owner of its physical space resources.

2. All buildings on campus including leased facilities within or apart from campus are subject to this policy. Instructional or research space within auxiliary, athletic facilities, and student-fee funded buildings are subject to this policy. Remaining spaces within auxiliary, athletic facilities, and student-fee funded buildings are exempt from this policy.

3. Allocation of space will be the President’s decision, with the University’s Space Management Committee (SMC)² providing recommendations for all space to the President.

4. The President may delegate minor space decisions to SMC or SPM depending upon the nature of the request. Such requests are outlined in SMC’s Principles and Procedures⁸.

5. All space is subject to allocation and reallocation to align with the University Strategic Plan³, institutional priorities, and best interests of the University and its programs. Space requests that directly support education and research, including activities that support the student experience, will be prioritized. Short and long-term priorities will be considered to promote fiscal responsibility and equitable space allocations for the University’s need and not for a single department or college.

6. Overflow or flexible space shall be preserved to ensure departments and the University can adequately address moves and changing staffing requirements.

7. Efficiency is balanced with flexibility to ensure proper stewardship of space resources and to achieve utilization rates outlined in the Space Standards and Target Utilization Guidelines⁹.
8. Colleges and departments that create or develop interdisciplinary or interdepartmental projects should be prioritized when making space requests to promote collaboration and foster new pedagogies.

9. Space requests will not be considered on historical grounds such as prior practices, informal discussions, or past use.

10. All units shall adhere to *Space Standards and Target Utilization Guidelines*\(^9\). Changes in room or building configurations shall follow the processes identified in the *Space Management Principles and Procedures*\(^8\). Deans, department chairs, associate or assistant vice presidents, and directors/managers are responsible for ensuring that their allocated space is used efficiently and in accordance with the documents herein referenced and coordinating any changes in use or allocation with SPM.

11. When space becomes vacant and is available for reallocation (e.g. resulting from program elimination, substantial reduction in program size, relocation of a program, etc.) the space reverts to the University space pool per *Space Management Principles and Procedures*\(^8\).

12. All instructional space including classrooms, conference rooms, instructional and computer labs - whether scheduled by the registrar or a department - will be scheduled through the university scheduling software.

13. All space occupancy changes will be reported to SPM per the *Space Management Principles and Procedures*\(^8\) to maintain data integrity.

14. A space request must be submitted and approved in accordance the *Space Management Principles and Procedures* before any change can be made to existing space allocations including research spaces. Conversion of existing space to other functional uses/occupancies (*FICM*\(^6\) code changes) is prohibited except when the *Space Management Committee*\(^2\) provides a recommendation and the President approves the request.

15. All campus moves shall be coordinated with the SPM regardless of if the move is within the same building, department, or college to maintain data integrity and ensure proper stewardship of University space resources. Key requests involving a move shall be coordinated through SPM.

16. When required by the Office of Disability Services and the MSU ADA Coordinator, spaces shall meet the minimum requirements for the Americans with Disability Acts (ADA) specifically Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990 and its amendments of 2008. An alternative
plan shall be made available to students and staff when requesting an ADA space including the use of the following spaces for instructional purposes: classroom, office, lab, conference room, or other space resource.

202.00 Prioritizing Space
1. Space allocations that maintain an inventory of swing space to meet emerging needs will be prioritized.

2. Space requests that include shared spaces including interdisciplinary teams with other colleges, departments, offices, and groups will be given priority to maximize the efficiency of space utilization and to expand opportunities for collaboration.

3. Occupancy of MSU-owned space will be given preference over rental space. When appropriate, space allocation that alleviates third party rents will receive a greater consideration.

4. Reuse of existing space shall be prioritized above new spaces to promote fiscal responsibility and sustainability. Units that provide evidence of space utilization through continuous improvements and efficient layouts, and which demonstrate programmatic need will receive greater consideration for additional space.

5. Space accommodating people will be prioritized and privileged more than other uses such as storage or supply/copy rooms.

6. Units adhering to Space Standards and Target Utilization Guidelines will receive preference when submitting space requests.

203.00 Office Space
1. Office space is prioritized for MSU employees including faculty or staff on a classified, temporary fixed-term appointment and temporary employees as defined in the Personnel Policy and Procedures Manual, 300.00 Employment Categories and Conditions. Employees will be allocated space for conducting work per the Space Occupant Classification and recommended office type in the Space Standards and Target Utilization Guidelines.

2. All non-employee appointments as defined by the Non-Employee Appointment policy including contract workers may be granted office space only through a space management agreement and when space is adequately available. Specific dates for occupancy, square footage allotted, and value provided to the University shall be included in the agreement along with other conditions of approval that may be deemed appropriate by SMC.
3. Allocation of multiple offices shall only be approved by SMC. Faculty or staff with multiple appointments and persons with staff in multiple buildings may be allocated a secondary office space, provided it is not located within the same building as the primary office. A secondary space must be a shared office or workstation in a building other than the primary office and must follow utilization rates for such space. For individuals in multiple roles, the office space is related to the primary role and function for the total FTE. No employee will be assigned more than one office and may be assigned an additional workstation if space permits such a use and a need is approved by SMC. If employees currently have two private offices, they should work with their supervisor to notify SPM and decide which office they will keep as their primary office. All secondary offices regardless of function shall be vacated within 90 days once identified by SPM. Non-employee personnel will not be allocated a second office.

4. Requests for additional office space requires written justification that includes an audit of the department/group/center’s current space. Exceptional cases may be presented to SMC for consideration when a primary office is located off the main campus as defined by SMC.

5. Units occupying office space exceeding standards (i.e. through staff and/or program reduction or redirection) should notify SPM for an audit to determine a possible reallocation of space.

6. Units and individuals are subject to the Misuse of Space Resources found in Principles and Procedures regarding office spaces.

7. Emeritus professors may be allocated a private office for one year after retirement. Thereafter, emeritus professors will be allocated a shared office on campus when they are actively engaged in substantial ongoing work that serves the University. Eligible work may include teaching, research, publication, and service when serving on a university committee. Emeritus professors not engaged in eligible work will not be allocated space. Emeritus professors that are directly employed apart from or in conjunction with eligible activities may be allocated an office per the Space Standards and Target Utilization Guidelines and with a recommendation from SMC and approval from the President.

8. ADA office spaces shall be provided at reasonable locations for faculty and staff that require such accommodations. At a minimum, three offices dispersed across campus and near ADA parking spaces shall be provided for use on a temporary basis; up to six continuous months. If a long-term solution is required, the managing director of SPM will collaborate with the MSU ADA Coordinator to find alternative solutions.
9. Auxiliary and athletic facilities shall follow the space standards referenced in this policy for office use and allocation.

204.00 Conference Room Space

1. Conference rooms are a university-wide resource and do not belong to individual colleges, departments, programs, centers, groups, or individuals. Conference rooms may be used as instructional space and follow similar scheduling and use guidelines as classrooms and instructional laboratories.

2. Conference rooms shall be scheduled through the University scheduling software and shall be used in a way to optimize utilization across campus including use by multiple departments.

3. Priority and distributive scheduling practices may be utilized to facilitate efficiencies and minimize disruptions. Departments within buildings that contain conference rooms will be given priority scheduling at the beginning of each semester.

4. SMC may delegate certain conference rooms as receiving priority scheduling for the President or other pertinent offices as identified by SMC. In such instances, existing reservations may be cancelled prior to a meeting as defined in the Principles and Procedures.

5. Conference rooms are subject to periodic audits to ensure they are being used as scheduled and maintained appropriately.

6. Units and individuals including student groups are subject to the Misuse of Space Resources found in Principles and Procedures regarding conference rooms.

7. Conference rooms shall be scheduled to accommodate emergencies, ADA requests, or similar instances when other instructional spaces such as classrooms are not available.

8. Auditorium spaces shall be scheduled through the University scheduling software and can be used for instructional purposes when not in use. However, departments will have priority scheduling for these spaces to ensure adequate meeting space is available.

9. Student groups, which are registered with the Office of Student Engagement, may reserve conference rooms during normal building operating hours.

10. Non-MSU persons or groups may only reserve conference rooms that are managed by Conference and Event Services.

205.00 Research Space

1. Research space encompasses all space that is primarily intended and used for conducting research and creative activities; graduate training of individuals in research or creative activities; functions that support research or creative activities; and spaces that directly serve one or more research or creative activities labs as an extension of the activities in those labs.
2. Faculty serving in a research role may be allocated a research office and/or a research laboratory to conduct research activities. If allocated a research office, faculty must either choose to retain their teaching office or research office. Faculty and staff shall abide by section 203.00-3, which pertains to the allocation of second offices.

3. Research space is allocated based on programmatic needs and priorities as determined by the Vice President of Research, Economic Development, and Graduate Education (VPREDGE)\(^4\) and shall be subject to the [Guidelines of Allocation and Management of Research Space]\. Space changes that result in a FICM\(^6\) code change shall first be presented to RSC with a formal recommendation coming from SMC.

4. Research space allocations should be based on existing facilities, where possible, to ensure that current facilities are fully utilized before pursuing major construction or renovations. Space renovations must follow University processes to ensure that utilization meets the strategic needs of the University.

5. Research space allocations will be consistent with University policy and the policies and principles set forth by the SMC, internal guidelines, principles and processes developed by VPREDGE including [Guidelines for Allocation & Management of Research Space]\(^5\), and in conjunction with the RSC recommendations.

6. Lab spaces, including both research and instructional, shall be shared and do not belong to a specific principal investigator, faculty member, or college/department. Equipment shall be accounted for when determining allocations to preserve existing space features, foster continuity without undue hardship, and prevent contamination of research from incompatible uses within the same space.

7. Conversion of existing space to any other functional use or occupancy (including a change in personnel with the same function or a change in the function of the person occupying the space) is prohibited except when accomplished through a recommendation of SMC and the approval of the President. All space occupancy changes will be reported through the prescribed process in [Principles and Procedures]\(^8\) to maintain data integrity.

8. Facility Use Agreements for non-MSU persons shall only be approved when research space is available and not currently used by MSU Faculty or for MSU-related research activities.

9. The Office of Research Compliance\(^15\) shall conduct a safety assessment when a lab space is allocated to ensure proper safety measures and compliance practices are
implemented prior to recommendations being made and faculty/staff/students occupying the space.

### 300.00 Procedures

SMC will promulgate principles, procedures and guidelines as necessary to meet this policy and SMC’s charge. SMC reviews all space requests and shall provide recommendations to the President for approval. The President may delegate space decisions to SMC or SPM for minor space requests. The President may also delegate space decisions as necessary to the RSC for all spaces that are funded through research dollars. SPM and SMC may abdicate the decision for non-FICM code changes or office allocations as needed.

### 301.00 Decision Process

1. Office of Space Planning and Management meets with the requester and associated department head(s) deans that may be affected by the space request.

2. SPM makes a recommendation to SMC regarding space requests.

3. Requester(s) or affected stakeholder(s) may appeal SPM’s recommendation to SMC at the SMC meeting.

4. SMC considers the request and any appeals from any affected party and may modify the request before making a formal recommendation to the President.

5. SMC’s chair and vice chair have the authority to consent to holding a deciding vote by email under the following guidelines, should any of these guidelines not be met a normal SMC meeting will be required;

   1. The request is for currently vacant space;
   2. CPDC Staff has identified the request as consistent with all Space Management Policies and all normal space request review procedures have been followed;
   3. The space request has recommended approval by the department head and dean;
   4. The request has recommended approval by the RSC if appropriate;
   5. There are no objections or concerns raised by voting committee members when notification of an email vote is distributed.
6. The President approves, denies, or modifies SMC's space recommendation.

7. The President’s decision regarding space is final.

8. The President may delegate space decisions to SMC or SPM for minor space requests as outlined in the *Space Management Principles and Procedures*.

302.00 **Space Standards and Target Utilization Guidelines; Space Management Principles and Procedures; Guidelines for Allocation & Management of Research Space**

These documents will be used to inform and guide SMC, RSC, and SPM. The documents may be periodically updated to reflect changing standards and best practices for space planning and management across the University campus. Specific principles, procedures and standards identified in the documents referenced in *Space Standards and Target Utilization Guidelines*; *Space Management Principles and Procedures*; and *Guidelines for Allocation and Management of Research Space* are herein incorporated.

303.00 **Subcommittees**

Subcommittees may be established by SMC to analyze or explore specific space issues and policies. Subcommittees shall bring forth recommendations to SMC or RSC for discussion and recommendation. The SMC Chair shall appoint members to various subcommittees as needed.

304.00 **Research Space Recommendations and Inventory**

It is incumbent upon the Research Space Committee, in conjunction with VPREDGE, to prioritize the assignment of research space in the best interests of MSU research and creative activities consistent with the university Space Management Policy and research space priorities listed in *Guidelines for Allocation & Management of Research Space*.

VPREDGE will report the results of the research space inventory and space allocations to the SMC annually along with recommendations as outlined in the process section of *Guidelines for Allocation & Management of Research Space*.

305.00 **Auxiliary, Athletic, and Student-Fee Funded Building Space Allocations**

Only space allocations pertaining to academic, instructional, and research uses within auxiliary, athletic, and student-fee funded buildings are subject to this policy.
Spaces within student-fee funded buildings require input from ASMSU and shall follow internal building policies for space decisions including priority scheduling within those facilities. The SUB Advisory Committee shall provide a recommendation to the SMC when allocations of student spaces are proposed in the SUB. The Wellness Center Oversight Committee shall provide a recommendation to the SMC when allocation of student spaces are proposed in the Wellness Center. Spaces leased to third parties within these buildings are exempt from this policy but are subject to other MSU policies pertaining to use agreements including MOUs. Building oversight committees within these facilities shall help determine how spaces are allocated within the respective buildings that they advise.

306.00 Common Area Reservation and Use

Common spaces such as atriums, lobbies or foyers, grand staircases, great halls, plazas, etc., are a university wide asset. Reservation of these spaces shall be administered by the Building Supervisor, except that Conference and Event Services shall administer the Strand Union Building, Inspiration Hall, and Danforth Chapel, in accordance with the policies as outlined in the space rental section of Strand Union Policy Manual. Conference and Event Services shall coordinate reservations of academic space, common space, outdoor spaces, or others as part of a larger conference reservation, at the discretion of the Building Supervisor, or for stand-alone use by a non-campus entity.

400.00 Internal Controls

University executives, deans and department heads, and directors, are responsible for space stewardship and for accounting and reporting the space allocated to their units in accordance with this policy as well as abiding by the standards, principles, and procedures established by the Space Management Committee. SPM is responsible for managing a central database and handling all space requests.

500.00 Definitions

*Classroom:* A room or space used primarily for instruction of classes and that is not tied to a specific subject or discipline by equipment in the room or the configuration of the space.

*Conference Room:* A space serving an office complex, building, or group of buildings and used primarily for staff meetings and departmental activities including instruction.

*FICM:* Facilities Inventory and Classification Manual; space use codes employed to classify assignable space by use type within campus facilities.
**Fixed-Term Employee:** A classified, temporary fixed-term appointments are positions used to accommodate the need for temporary personnel that will not exceed one calendar year (or less depending upon applicable collective bargaining agreement), or where the position is not intended to become permanent. In no event shall the appointment exceed a period of one year.

**FTE:** Full-Time Equivalent for the hours worked by one employee on a full-time basis or the fraction of hours based on a full-time basis for an employee working part time.

**Instructional Laboratory:** A space used primarily for formally or regularly scheduled instruction that requires special purpose equipment or a specific space configuration for student participation, experimentation, observation, or practice in an academic discipline. A space is considered scheduled if the activities generate weekly student contact hours. A space used for instructing or teaching including conference rooms, instructional laboratories, clinical areas, assemblies, or meeting rooms.

**Meeting Room:** A room that is used for a variety of non-class meetings and available to all students, staff and the public; examples include spaces for study groups, boards, community groups, student groups. Meeting rooms may be for-fee spaces on campus.

**Minor Occupancy Changes:** Changes to a space resulting in impacts to occupancy that either reduce or increase occupancy for two or fewer people.

**Montana State University (MSU) Employee:** Employees classified as faculty, staff, and collective bargaining trades within the University.

**Net Assignable Square Footage (NASF):** The sum of all areas on all floors of a building allocated to, or available for allocation to, an occupant or specific use. Examples include, but are not limited to offices, classrooms, and conference rooms.

**Net Non-Usable Square Footage:** (NNUSF): The sum of all areas on all floors of a building not available for allocation to an occupant or specific use but necessary for the general operation of a building. Examples include, but are not limited to mechanical rooms, bathrooms, janitorial service areas, and storage.

**Net Usable Square Footage (NUSF):** The sum of all areas on all floors of a building allocated to, or available for allocation to, an occupant or specific use, or necessary for the general operation of a building.

**Non-Employee Personnel:** Personnel defined in the University's Non-Employee Appointments policy.

**Off Campus Lease Agreement:** A lease agreement specifically between the University and a third party, overseen by the Real Estate Manager within Campus Planning, Design, and Construction outlining the terms of agreement for space on campus; the lease may include dates of occupancy, square footage allotment, improvements required, value provided to the university and other conditions as deemed appropriate by the SMC.

**Office:** A space housing faculty, staff, or students working at one or more desks, tables, or workstations.
Open Laboratory: A laboratory used primarily for individual or group instruction that is informally scheduled, unscheduled, or open.

Research Laboratory: A space used for laboratory experimentation, research, or training in research methods; professional research and observation; or structured creative activity within a specific program or for sponsored research (sponsored with federal, state, private, or institutional funds).

Shared Space: A space that is shared between two or more departments or groups within the same room(s)/suite on the same floor within the same building. Shared spaces can be split between different floors or buildings but must contain staff from each department or group sharing the space on each floor and building.

Significant Alteration: An alteration to a space resulting in more than ten percent of the gross floor area being altered, renovated, changed, improved or reconfigured.

Temporary Employee: Classified short-term appointments are positions used to fill short-term needs that do not exceed 90 days in a 12-month period.

Underutilized Space: Space that does not meet the requirements for space utilization as outlined in Space Standards and Target Utilization Guidelines.

Unit(s): A college, department, center, office, institution, group or individual either employed or associated with the university.

University Space Pool: A repository of vacant spaces to be allocated or reallocated.

Unoccupied Space: Space that at the time of an inventory, annual space survey or audit is not assigned to any faculty or staff members but is allocated to a department or under renovation.

Vacant Space: Space that has been unoccupied for 90 consecutive days and is then allocated to the University space pool for reallocation.

Space Management Principles and Procedures

Space Management Standards and Utilization Rates

References


