



Workspace Allocation & Management Guidelines

Long Title: UBCO Guidance on the Allocation & Management of Academic and Administrative Offices and Related Workspaces

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Space is a finite resource that must be effectively and efficiently managed. Best practice in space planning and management is founded on developing and implementing a set of coordinated and interrelated space planning principles and policies, allocation standards and practices.

UBC Okanagan (UBCO) will maximize and efficiently utilize all resources to achieve the goals established in UBC and Faculty strategic plans. Effective and efficient space management is a collaborative, ongoing process requiring UBCO to optimize the use of all facilities and to efficiently address physical space needs.

This guidance governs the allocation and management of all academic and administrative offices and related workspaces within UBCO, including academic and administrative offices and related workspaces in academic and research units, centres, institutes and administrative units. Guidance provided in this document is aligned with and subservient to UBC Board-approved Space Management Policy UP13.

This academic and administrative office and related workspace guidance is intended to institute a consistent and transparent framework for making strategic decisions regarding offices and related workspace allocations. It is recognized that space requirements vary depending on function and activities, and allocation may be limited by facility layout and space availability.

This guidance is intended to address only academic and administrative office and related workspace allocations at UBCO. Research space allocations, graduate student space allocations and teaching space allocations each have discipline-specific requirements that will be addressed at the Faculty and Unit level.

THE PURPOSE OF THIS GUIDANCE IS TO:

- Ensure efficient and effective planning and management of space to achieve the goals established in UBC and Faculty strategic plans.
- Establish roles and responsibilities for the allocation, management of, and issues resolution related to academic and administrative offices and related workspaces.
- Establish transparent, agreed-upon principles and guidelines for the organization and allocation of academic and administrative offices and related workspaces.
- Establish the fundamental terms of use of allocated academic and administrative offices and related workspaces.
- Provide guidance on how to maximize efficiency and facilitate optimal utilization of physical resources while supporting a rigorous teaching and research mandate.
- Maximize the use of limited university resources.

1.0 GUIDING PRINCIPLES

The following principles promote accountability, equity, transparency, flexibility and effectiveness in the planning, allocation, and management of academic and administrative offices and related workspaces at UBCO.

1.1 OWNERSHIP

Academic and administrative offices and related workspaces are an institutional asset and their use must support the goals established in both the UBC and Faculty strategic plans. This space is owned and operated by the University of British Columbia. Space is a shared resource; it does not belong to an individual or unit.

1.2. SPACE ALLOCATION CRITERIA

Space allocations are not permanent and are subject to change in support of the academic and strategic priorities. The following criteria must be used in the allocation of all UBCO offices and related workspace types:

- Alignment with overall mission and strategic goals.
- Conforms to specific department, school, faculty and administrative unit goals.
- Demonstration that offices and related workspaces are utilized optimally for their stated purpose.
- Demonstration that existing offices and related workspaces are optimally used in instances where additional space is requested.

1.3. SPACE UTILIZATION

It is expected that any allocated academic or administrative offices or related workspaces are properly utilized: this is defined as being occupied 60% of the typical work week or 3.0 days minimum. Any offices and related workspaces deemed underutilized will be reviewed, reclaimed, reallocated or repurposed.

Academic and administrative offices must not be used for storage of obsolete equipment, waste, archives or personal belongings. Sharing of academic and administrative offices and related workspaces is expected to optimize utilization. Optimal use of offices and related workspaces requires alignment of existing infrastructure with functional use. Recognizing that work functions are constantly changing and evolving, workspaces will support scalability, flexibility and technological integration.

1.4. EQUITY

Decisions regarding offices and related workspace allocations must be made openly and transparently following the principles and guidelines of this guidance. Faculty and staff will be treated with equity; they will be provided with healthy, safe and accessible workplaces.

2.0 SPACE ALLOCATION GUIDELINES

Academic and administrative space allocations are not permanent and are subject to change in support of UBCO's academic mission and strategic priorities. At any particular site/location, allocations may be limited by the existing infrastructure, building configuration, and type of offices and related workspaces that are available. The following table describes the various types of offices and related workspaces and identifies allocation criteria for each:

Type	Description	Criteria for Allocation
Dedicated workspace	<ul style="list-style-type: none">Intended for the dedicated use of specific users.	Faculty and staff that spend at least 60% of a typical work week (or 3.0 days/week) on-site.
Shared workspace	<ul style="list-style-type: none">Workspaces shared by 2 or more allocated users.Schedules are coordinated to maximize utilization.Workspaces that are shared between multiple users and/or groups and are intended for use by the allocated users/groups.Schedules are coordinated to maximize utilization.	Faculty and staff that spend at least 40% of a typical work week (or 2 days/week) on-site.

Swing Space	<ul style="list-style-type: none"> Workspaces that are shared between multiple users and/or groups and are intended for use by the allocated users/groups. Schedules are coordinated to maximize utilization. 	Faculty and staff that spend at least 20% of a typical work week (or 1 day/week) on-site.
Touchdown Desk	<ul style="list-style-type: none"> Typically smaller workspaces not allocated to any particular user(s). Space not intended for long-term or repetitive use. 	Visitors or faculty/staff requiring interim space during a short visit, layover or temporary transition.

Additional notes on allocation criteria:

- Work areas can include space within single, dual or multi-occupancy offices and open office layouts.
- For faculty and staff that are allocated space in multi-occupancy areas, access to meeting rooms and other spaces to support private conversations must be provided.
- Faculty and staff with a demonstrated requirement for a space to conduct unscheduled, confidential meetings several times per week may require a private office.

2.1. WORKING AT MULTIPLE LOCATIONS

Academic and administrative offices and related workspaces are an institutional asset and their use must support the goals established in both the UBC and Faculty strategic plans. This space is owned and operated by the University of British Columbia. Space is a shared resource; it does not belong to an individual or unit.

2.2. FULL-TIME ACADEMIC FACULTY/STAFF

Full-time academic faculty/staff should be allocated one dedicated workspace, provided that the individual spends at least 60% of a typical work week (or 3.0 days) of their time at a particular site/location.

2.3. PART-TIME ACADEMIC FACULTY/STAFF

Part-time academic faculty/staff should be allocated one dedicated workspace, provided that the individual spends at least 60% of a typical work week (or 3.0 days/week) at a particular site/location. Part-time academic faculty/staff who spend less than 3.0 days/week at a particular site are provide a workspace that is allocated to 2 or more users and shared based on pre-determined days/times. Schedules are coordinated to maximize space utilization.

2.4. FACULTY WITH ADMINISTRATIVE APPOINTMENTS

Associate Deans, Assistant Deans and faculty members with additional administrative appointments should be provided with dedicated, shared or swing workspace. Allocations are based on functional requirements and frequency of use.

2.5. SENIOR ADMINISTRATIVE ROLES

Some roles may require that a particular office be allocated to that role. Individuals may have an existing faculty office or related workspace before taking on the new role. Efforts must be made to make the faculty office available for temporary reallocation.

2.6. PROFESSOR EMERITUS

Professor emeriti active in teaching and/or research may be allocated a shared workspace within respective unit space allocations. Allocations must be reviewed annually by the dean in consultation with respective department heads, school directors, and centre/institute directors and based on the level of academic activity.

2.7. ADJUNCT PROFESSORS/ASSOCIATE MEMBERS

No space is allocated to adjunct professors.

2.8. VISITING PROFESSORS

Visiting professors may be provided with access to shared workspace or touchdown desks within respective units if it is available.

2.9. PERIODS OF LEAVE

If a faculty or staff member will be away for more than four months, their office or workspace will be made available for alternative use. For shorter periods, a faculty member on leave must make their office or workspace available for temporary use.

2.10. VACATING SPACE

When an allocated workspace is being vacated, the former occupant is responsible for ensuring that the space is cleared of any equipment, files and other materials in adherence to any applicable university policies, procedures and guidelines. All costs associated with the removal and disposal of remaining items shall be borne by the respective unit.

3.0 PROCEDURES

3.1. FURNITURE

The procurement of furniture on UBC campuses must comply with http://www.technicalguidelines.ubc.ca/technical/divisional_specs.html#Div12.

3.2. STORAGE (DIGITAL, PAPER RECORDS, EQUIPMENT)

Units are encouraged to use <https://recordsmanagement.ubc.ca> processes and procedures for the disposition of records and guidelines on document storage. Equipment that is unlikely to be used shortly is expected to be decommissioned and disposed of per relevant processes and procedures.

3.3. REQUESTS FOR ADDITIONAL SPACE

All requests for additional space must be submitted in writing to the respective department head, school director, centre/institute director, or dean. Requests to increase the Faculty space envelope must be submitted to the UBCO Strategic Space Committee by the dean. Requests must be submitted well in advance of the anticipated time of need and must define the kind of space required, the funding to support the new activities, the period during which the space is required and a rationale for the request.

3.4. REVIEW OF SPACE GUIDANCE.

This guidance will be informed by campus-wide offices and related workspace space audits that will occur annually and will be reviewed by the UBC Strategic Space Committee every 3 years. The guidance may be revised at any time to reflect changes in institutional needs and priorities.

APPENDIX A – DEFINITIONS

The following is provided to establish a common understanding of office and related workspace types and terminology related to space.

Change-of-use: Changes to the primary use of any space (i.e. lab into office; office into storage).

Dedicated workspace: Intended for dedicated use by specific users. A dedicated workspace can be an enclosed office, a portion of an enclosed office, a cubicle or another space form that is dedicated to a single specific user.

Office: Enclosed space offering both visual and acoustic privacy. A typical office is 9 m²/100 g², single occupancy and can be shared depending on job role/function and schedules. Offices greater than 14 m²/150 g² can accommodate more than two (2) people concurrently. Offices should be made available for use as meeting space when not occupied.

Program/Unit: Administrative and/or organizational groups, including departments, schools, centres, institutes, programs and administrative units.

Shared workspace: Space shared by two (2) or more allocated users. Schedules are coordinated to maximize utilization.

Swing space: Workspace shared between multiple users and/or groups and intended for use by the allocated users/groups. Schedules are coordinated to maximize utilization.

Touchdown space: Typically smaller workspaces, sometimes equipped with basic equipment (computer, phone) and not allocated to any particular user(s). Touchdown space cannot be claimed for long-term or repetitive use.

APPENDIX B – EFFECTIVE SPACE MANAGEMENT

The following factors are provided to facilitate transparent and equitable decision-making in the prioritization and allocation of academic administrative space. These are listed in no particular order.

- Availability of suitable space.
- Demand for space.
- FTE status of individual(s) that space is allocated to.
- Human resource designation of individual(s) that space is allocated to.
- Job function(s).
- Location of current space allocated to individual(s) or Unit(s).
- Office size/space/layout.
- Office size vs. time spent on site.
- Privacy/confidentiality requirements and considerations.

As noted in 1.2 above, office and related workspace allocations are not permanent and are subject to change in support of the academic and strategic priorities. The following criteria must be used in the allocation of all UBCO offices and related workspace types:

- Alignment with overall mission and strategic goals.
- Conforming to specific department, school, faculty and administrative unit goals.
- Demonstration that space is being utilized optimally for its stated purpose.
- Demonstration that existing space is being optimally used in instances where additional space is requested.

APPENDIX C – ROLES AND RESPONSIBILITIES

DEANS AND AVPS

- Ensure overall equitable and optimal use of their faculty or administrative space resources.
- Allocates space to departments, schools, centres, programs and units.
- Exercise final authority over all academic and administrative offices and related workspace allocations and designations.
- Will open strike an ad hoc and impartial committee to advise on space issues and disputes as required.
- Will open delegate day-to-day operational management of academic and administrative space on behalf of the dean or AVP to heads, directors etc. These individuals will:
 - Review and approve requests for additional space within their respective allocated space footprints.
 - Ensure space reviews are conducted annually or as required by the dean and the managing director.

STRATEGIC SPACE COMMITTEE

- Assesses requests for changes in overall Faculty or administrative unit space envelopes.
- Assesses changes in the use of Faculty or administrative unit space.
- Ensure overall equitable and optimal use of Faculty or administrative spaces.
- Ensure overall equitable and optimal use of Faculty or administrative spaces not addressed in this guidance.