

Space planning & allocation at tru

**Process & guidelines Handbook**

**Matching your plan with the overall space on campus is a process that starts here: www.tru.ca/avphrp/space-planning.html**

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# The Process

**Space Ownership**

All space is University space.  
Although space is allocated to faculties, departments and specific users, all space is owned by the University, represented by the Vice President, Administration and Finance and the Provost and Vice–President Academic.

**Allocating Space**

The University has the responsibility to allocate blocks of space to faculties or service units for their use. The University has an obligation to provide space for academic staff, administrative staff and students that is appropriate and sufficient to support activities that are part of the University’s mandate, according to the University’s space standards.

The University can reallocate space, at its discretion, to meet changing needs and priorities.

Space is allocated to users for certain lengths of time with the allocations to be reviewed periodically. For example, classrooms are allocated for one to three-hour time slots in contrast to offices and research spaces which are allocated for longer periods of time. Space use will be reviewed periodically and space assignments reconfirmed accordingly.

**Needs-Based Allocations and Space Standards**

For all users and all categories of space, space standards will be used to allocate space based on assessed need. These space standards may be adjusted in accordance with the total amount of space available. In this way, an overall space shortage or surplus can be resolved fairly. In many cases, existing uses and space assignments may not meet the standards and will not face an unfair imposition of these standards. However, any reallocation, renovation, or provision of new building space shall conform to the University space standards as closely as possible.

**Suitable Space**

Space provided shall be suitable in terms of size, quality, and location. Where space is to be renovated, the University will ensure that the designated space is adequate and appropriate for the intended use.

Uses of a similar nature, or uses which are functionally related, will be allocated in proximity to one another wherever possible. In particular, University departments, whenever practical, will have their special facilities (such as laboratories), offices and support spaces located contiguously.

**Access to Appropriate Space**

Users will be provided with the space required to support their activities.

**Using Space Effectively**

All space allocated to a department or service unit must be used efficiently. It is the responsibility of the user to seek opportunities to introduce compatible, approved University uses to maintain utilization at a level which is consistent with University standards.

**Resolving Space Issues**

It is the responsibility of the user to address changing and emerging needs for space by optimizing the utilization of the space they currently occupy. The first response to a perceived need is to identify space resources already available to the user that can meet the need.

**Identifying Opportunities**

It is an obligation of users to identify underutilized space and provide for improved space use.

**Sharing Space and Functions**

To avoid duplication of space, equipment, and staff services, and to avoid unnecessary costs, as much space as possible should be shared among departments. This applies especially to meeting rooms, office work rooms, staff lounge areas, technical support work areas, and storage areas. Where there are multiple users, protocols shall be developed to establish responsibilities and priorities for use and management of the space.

**Consultation**

It is the right of users of space to be consulted on matters of space allocation and utilization.

# Guidelines

1. All offices shall be allocated on the basis of optimum occupancy (e.g. double or multiple space offices shall be assigned multiple personnel).
2. Where appropriate, faculty/administrative staff/support staff may be assigned office space in a general office area, for example: administrative staff having direct interaction with the public like Human Resource Clerks and Executive Assistants.
3. The assignment of office space to individual faculty, administrative, and support staff shall be the responsibility of the dean/director or designate, or the appropriate vice president.
4. Expansion/renovation of office space shall be achieved through the optimum utilization of existing space in accordance with these guidelines and the conversion of existing office/other space.
5. All proposed office space expansions/renovations shall be referred for approval in accordance with the Administrative Policy (ADM 18-0) on Space Renovation.
6. Only as a last resort shall existing instructional and student study space be converted into office use.
7. Priority for allocation of office space:
8. Tenured & tenure-track faculty/ full-time ongoing administrative staff
9. Limited term faculty/Specified term administrative staff
10. Sessional faculty/ Temporary administrative staff
11. Tenured & tenure-track faculty /full time ongoing administrative staff will normally be allocated work space in a single office.
12. Limited term faculty/Specified term administrative staff will normally be allocated work space in a double office.
13. Sessional faculty/temporary administrative staff will normally be allocated work space in a multiple office. Offices vacated by faculty/administrative staff on leave (sabbatical, assisted leave, etc.) will be assigned to the relief faculty/administrative staff member. Should the faculty/administrative staff member on leave require continued use of office space during the period of leave, written permission to do so must be approved by the faculty/administrative staff’s dean/director or vice president at the time of application.
14. When an office is vacated by an outgoing faculty/administrative staff member (e.g. retirement), the office availability shall be reported to the dean/director/vice president or designate so that its future allocation can be determined by the relevant dean/director/vice president or designate.
15. All office moves must be approved by the dean/director or designate or appropriate vice president in order to minimize the number of moves (the domino effect) and movement of furniture.
16. Additional office space to accommodate new programs or increased instructional capacity must be identified in the “Three Year Academic Plan” and for new programs in the EPPR documents. These requirements will then be forwarded to the Provost and Vice President Academic, Director of Facilities Services and the Space Committee.
17. Office size: *(note that existing offices may be less than the indicated planning size)*

**Suggested** planning guidelines

* + single office – 100 sq.ft. (9.3 sq.m.)
  + double office – greater than 135 sq.ft. (12.5 sq.m.)
  + multiple office – greater than 170 sq.ft. (15.8 sq.m.)
  + general office space is a common workplace that is normally larger than a multiple office
  + where possible and required, offices for department chairpersons/coordinators/managers and deans/directors, associate vice presidents and vice presidents may be larger to accommodate small group meetings

1. Work stations shall be fitted with the following:
   * office desk/work station (with runoff where possible)
   * one 6’ bookshelf unit
   * one standard legal file cabinet
   * office chair (similar to Model Standard 4101)
   * side chair(s)
   * computer
   * keyboard tray
   * telephone
   * tack board
   * room number/name plate
   * paper waste container
   * recycle box

# Space Request Form

The information provided in this document will be used to evaluate space requirements for divisions, departments and faculties at Thompson Rivers University needing new work space or preparing for renovations to existing work space.

For all new space requests, an analysis will be conducted to ensure that your current space is being used as efficiently and effectively as possible. Space allocations will be made in accordance with the Guidelines for Office, Classroom and Research Space Allocation Policy. Please note that allocations may be limited by existing facility configuration and availability.

Please complete the following information and submit the completed form to Denis Powers, Chair of the Space Committee on the Kamloops Campus ([dpowers@tru.ca](mailto:dpowers@tru.ca)).

|  |
| --- |
| **REQUEST FOR SPACE** |

Date: Select date.

|  |  |  |
| --- | --- | --- |
| Name of Requestor | First Name | LastName |
| Department | Your Department | |
| Division | Division | |
| Current Location | Location | |

|  |
| --- |
| **Background: Please provide an outline of why extra space is needed.** |
| **Begin with background – why extra space is needed** |
| **Please list any infrastructure or equipment requirements.** |
| **List of infrastructure or equipment needs**. |
| **Description of Functions & Activities: Please outline the nature of work being performed by your unit. Please provide any relevant program schedules, hours of operation, information about # of visitors/day etc.** |
| **Description of the nature of work performed by Unit**  **Relevant Program Schedule** |
| **Preferred Adjacencies: Please provide information about critical or preferred adjacencies with other units or services. Indicate whether individuals or groups can function in alternate locations.** |
| **List critical adjacencies; followed by preferred** |
| **Other Considerations: Are there any relevant strategic planning parameters that we should be taken into consideration?** |
| **Other considerations (strategic planning)?** |
| **Additional Relevant Information** |
| **Additional Info** |

Please complete the Space Inventory Requirements spreadsheet and include as an attachment to this request form.

|  |
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| **Signature of the Requestor** |
| Enter signature here |
| Signature of the Department Dean or Director |
| Signature of Dean or Director |

# Space Renovation Request Form

Date: Select date of request

*This request is being originated by:*

|  |  |
| --- | --- |
| Your First Name | Your Last Name |
| Email: Click here to enter text. | |
| Originating Department | |
|  | |
| **Scope of renovation requested** *(describe work required and identify options, if applicable)* | |
| Describe renovation being requested | |
|  | |
| **Rationale for proposed space renovation** *(provide justification for project e.g. benefits to program or instruction, departmental efficiencies and administrative practices, as well as impact in not implementing the proposed renovation)* | |
| Describe rationale for the renovation being requested | |
|  | |
| **Impact on Classroom Space Utilization** *(statement on utility of the affected classroom space before and after the proposed renovation, if applicable)* | |
| Describe (if applicable) the impact on classroom space utilization. | |
|  | |
| **Suggested timing for implementation** *(identify any factors impacting the programming of this request)* | |
| Suggested timing for renovation | |
| Signature of Department Chair: | |
|  | Date: Click here to enter a date. |
|  | |
| Signature of Dean/Director: | |
|  | Date: Click here to enter a date. |

# Space Inventory Spreadsheet

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| --- | --- |
| **Current Space Inventory for: Dept or Unit Name** | |
| **Date** | |
| *Please complete the following worksheet, listing all spaces currently occupied by your Unit.  Please contact Facilities Services for space inventory data* *and to make updates as required.* | |
|
| **Building and Room #** | **Space Type – Select from Drop down menu**  ***(Office-temp/permanent, Storage, Meeting space etc.)*** |
| Building & Room Number | Drop Down Menu |
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| **Workspace Requirements for: Dept or Unit Name** |

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| **Date** |

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| **Last Name, Full Name** | | **Position Title** | **Department/ Unit** | **Division** | **Current Location** | **Room # Requested** | **Space Type (Office, Storage, Meeting Room etc.)** | **Dates required** | **Space Utilization (# hours, days/week on site)** | **Furniture/ Equipment Requirements** | **Comments** |
|  |  |  |  |  |  |  |  |  |  |  |  |
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| **Support Space Requirements for: Dept or Unit Name** | | | | | |
| |  | | --- | | **Date** | | | | | | | |
| Please complete the following worksheet for all required **support spaces** (meeting rooms, storage space, etc.).  Contact Facilities Services for space inventory data. | | | | | |
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| **Room #** | **Space Type** | **Users** | **Dates Required** | **Frequency of Use** | **Special Requirements, Comments** |
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# ADM 18-0 Space Renovations

**SPACE RENOVATIONS**

**POLICY NUMBER ADM 18-0**

**APPROVAL DATE FEBRUARY 25, 2004**

**LAST AMENDMENT MARCH 22, 2000**

**REVIEW DATE SEPTEMBER, 2010**

**AUTHORITY PRESIDENT’S COUNCIL**

**PRIMARY CONTACT VICE-PRESIDENT, FINANCE & ADMINISTRATION AND/OR FACILITIES SERVICES**

**POLICY**

**RENOVATIONS *OVER* $25,000**

Renovations over $25,000 need to be identified and built into the normal Five Year Capital Planning cycle. Renovation projects in excess of $25,000 will not normally be implemented for at least 15 months after approval.

**Process**

1. Renovation projects expected to be over $25,000 in value should be forwarded by the relevant Dean or Director to the appropriate Vice-President no later than January 15 annually. Proposals should be written on the standard "Five Year Capital Plan Project Submission Form."

2. The Vice-President will forward submissions to the Director, Capital Projects and Construction by January 21.

3. The Director, Capital Projects and Construction will assemble the submissions for review by Facilities and discussion by the Executive and Administrative Council by February 28.

4. The draft Five Year Capital Plan will be circulated for comment by the University community and Senate during the month of April.

5. Following input from the internal community, the final draft of the Plan will be developed by the Director, Capital Projects and Construction by May 7 for review by the Executive and President’s Council.

6. The Plan will be presented to the Board of Governors for approval at the Board's June meeting.

7. The approved Plan will be submitted to the Ministry of Advanced Education on or about September 1.

**RENOVATIONS *UNDER* $25,000**

Renovations under $25,000 in value will be considered for inclusion in the annual renovations budget for the upcoming fiscal year. Normally, the available resources in this budget will not exceed $50,000 annually. Examples of renovations falling in this category include: moving a microcomputer laboratory; developing new storage space; increasing or decreasing the size of classrooms; construction of new office space; and installation of surveillance systems

**REGULATIONS**

1. Renovation requests should be forwarded to, and discussed with, the relevant Dean or Director no later than October 15 annually. Proposals should be written on the standard "Renovations Request" form.

2. The Dean/Director will forward and discuss the request with their respective Vice-President by November 1.

3. The Vice-Presidents will identify and forward to Director of Facilities Services those renovation requests which will be considered for implementation and will inform the Deans/Directors by November 15.

4. All requests will be ranked by the Minor Space Renovation Committee comprised of two Deans, the Director of Information Technology, and the Director of Facilities Services who will chair this Committee. The originator(s) and/or the relevant Dean/Director will be invited to make presentations to the Committee on the renovations proposed.

5. The Director of Facilities Services, assisted by the Director of Information Technology, will develop the budget for the ranked projects likely to fall within the available renovations budget. The project budget will include ALL associated costs including: construction costs; IT network changes; telephone system rewiring; and associated capital requirements including computing equipment and furniture. The costing will be completed by December 15 and will be forwarded to the originator(s) of the request and to the relevant Dean/Director.

6. The Minor Space Renovation Committee will review project budgets and any further information required and confirm the ranking of renovation projects under consideration by December 1.

7. The proposed Renovation Program, in ranked order, will be forwarded to the Vice-Presidents for consideration on or before January 15.

8. The Vice-Presidents will examine the implications of the renovations under consideration before reaching a decision on which renovations are to be carried out in the coming fiscal year.

9. The Vice-Presidents will advise the approved Renovation Program no later than January 31.

10. The approved Renovation Program will be implemented during the following fiscal year, primarily during the summer semester.

# The Space Committee

**Reporting to:**

Matt Milovick Vice -President, Finance & Administration

Christine Bovis-Cnossen Provost and Vice-President Academic

**Committee Members:**

**Name Title/Department Local**

Denis Powers AVP HR & Planning (Chair) 5458

Will Garrett-Petts AVP Research & Graduate Studies 5410

Tom Dickinson Dean of Science 7137

Warren Asuchak Director of Facilities Services 5872

Dillon Alexandre Facilities Services 7174

Linda McAbee Room Bookings 5032

Kristen Hamilton Integrated Planning & Effectiveness 5195

Karen Wiens Information Technology 6325

David Burkholder Information Technology 5324

Student Representatives (2) TRU Student Union 5289

# Terms of Reference

**The Vice-Presidents’ (Admin & Academic) Space Committee**

**Authority**

The Vice-Presidents’ Space Committee is established under the authority of the Vice-Presidents to deal with forward planning and operational issues concerning space management. The Committee will discuss policy matters and major space management issues with Deans and Directors as required.

**Mandate and Responsibilities**

The Committee has overall responsibility for reviewing all space proposals submitted to it and for deciding on an appropriate course of action. It also serves in an advisory capacity to the Vice-Presidents and the Director of Facilities Services as it addresses the facilities and space implications of planning targets in the University Academic and Strategic Plan.

**Its mandate is**

* To make recommendations on strategic space allocation and reallocation;
* To make decisions on routine space matters or delegate as appropriate;
* To be involved in the operational aspects of space allocation and management, including resolution of competition for space;
* To develop criterion-based indicators for the recording, measurement and allocation of space to achieve the objectives of efficiency, effectiveness and equity. This includes overseeing the maintenance of an accurate, up-to-date space and space use database;
* To undertake periodic reviews of existing allocations of space to meet the changing needs of the University and to ensure alignment with the University's academic and operational plans and compliance with any legal requirements;
* To plan strategically for the maintenance of space through refurbishment and renovation proposals. This includes annual review and revision of the Master Plan/Infrastructure Plan and recommendations resulting from revisions;
* To develop or endorse policy on the management of space, in liaison with Deans and Directors, and to communicate such policy to the wider University community.

**The Committee is guided by**

* The TRU University Act
* The University’s Academic and Strategic Plan
* Guidelines For Office Space Allocation
* Admin and Board Policies
* Any legal requirements