chapter three

administration and finance

# Space management policy

## Background

The physical facilities and lands of Cal Poly, as well as the spaces that make up the facilities and lands, are resources that must be managed, maintained, and controlled in a manner that contributes most toward fulfilling the university’s mission.

The California State University Board of Trustees is ultimately responsible for all Cal Poly facilities and lands, regardless of the original source of construction or acquisition funding, and have delegated the authority to manage the facilities and lands on a day-to-day basis to the president of the university.

## Scope

This policy applies to all university space and university units.

## Statement of the Policy

Space is allocated by and may be reallocated by the president to ensure optimal utilization of space to respond to current and emerging needs and priorities.

No unit “owns” the space that has been allocated to it. Space is not permanently allocated. Space may be allocated and/or reallocated as needs and priorities change at any time.

The president has appointed the university Space Committee to oversee the management of space and its assignment and utilization by campus units that are subject to this policy. The Space Committee is responsible for:

Maintaining:

* The Space Inventory and Classification Database,
* The Space Request Database, and
* The Space Available Database.

Defining the university Space Management Principles and Priorities based on the objectives of this policy.

Developing and maintaining Comprehensive Utilization Metrics to evaluate the use of all university space and make determinations as to its highest-and-best use.

Outlining and implementing the Space Request Process including the decision-making processes to allocate space in alignment with the university’s Space Management Principles and Priorities and Comprehensive Utilization Metrics.

Evaluating and prioritizing all Major Renovation Requests to determine if such requests best support the university’s Space Management Principles and Priorities and Comprehensive Utilization Metrics.

In general, the Space Committee is to establish a review process for all Space Requests and Major Renovation Requests.

After Space Requests or Major Renovation Requests have been reviewed and action taken by the Space Committee, the action can be appealed to the president.

## Definitions

Allocation or assignment: to give primary jurisdiction over use of a space to a specific unit for a specific time period.

Assignable Square Feet (ASF): usable floor space, measured in square feet, of buildings and non-building structures assigned or allocated to a unit.

Building or facility: the physical structures either on and off campus owned or leased by the university including state and non-state funded buildings, as well as non-building structures such as farm structures, pole-barns, etc.

Comprehensive Utilization Metrics: the data-based measurements and calculations to be specified by the Space Committee to determine if space is being operated efficiently and achieving maximum value in regards to supporting the university’s mission.

Lands: the plots, parcels or other property either owned or leased by the university including developed urban areas, agricultural lands, and natural/ undeveloped areas, as well as water bodies and streams.

Major Renovation Requests: important renewal projects as defined by the Space Committee that will expend significant university resources and/or significantly change the use and/or allocation of existing space.

Relocation: the process whereby a person, unit or activity is moved from one location to another. It includes associated activities such as space reassignment if necessary, modification of space or spaces to suit the new user/use, changeover of IT and telephone, and physical movement of room contents.

Renovation: the physical changes to space to improve and/or modernize it, including accessibility upgrades, movement of doors or walls, addition of technology, air conditioning, etc.; and which may also involve changing the use or type of space.

Space: an area on or off campus under control of the University to be allocated and/or assigned to university unit on the basis of programmatic needs and university strategic priority. Space includes all interior rooms defined by some form of structure or building, as well as exterior land areas either open or within a constructed boundary. The number, type, condition, assignment and utilization of university space help shape all aspects of university programs and activities.

Space Available Database: the listing and associated metadata of space that is available to be reassigned or is anticipated to be available for reassignment.

Space and Facilities Database (SFDB): SFDB is the official record of existing space and facilities for the California State University and is maintained by Capital Planning, Design and Construction department of the Chancellor's Office. Cal Poly’s Office of Space Management is responsible for annually submitting updates to the SFDB to maintain accurate data.

Space Inventory and Classification Database: the locally maintained comprehensive database of space at Cal Poly developed to support and track edits to be submitted to the SFDB and also support tracking additional data associated to rooms, facilities and lands. This local database is managed by the Office of Space Management and serves as the official university record for the assignment, classification, numbering, titling, addressing, utilization, and size of individual buildings and spaces on campus. This database should also include information on space occupants, specialized equipment contained in spaces, specialized utilities contained in spaces, and other information necessary to make decisions on the efficient and effective use of space. Changes in the use of space that change data within the Space Inventory and Classification Database must be reported to Office of Space Management by all units assigned or allocated space. Departments requesting new space or space alterations will be required to review and provide updates to the Space Inventory and Classification Database as part of the Space Request Process.

Space Management Principles and Priorities: the overarching goals and guidelines that are to be developed by the Space Committee to direct university units and central administration as to the process for evaluating space requests and the criteria for prioritizing space requests to ensure the efficient use of existing space and that the creation or renovation of space best supports the university’s mission.

Space Reassignment: the process whereby custody of space is transferred from one space custodian to another on the Space Inventory and Classification Database.

Space Request Database: the database maintained by the Office of Space Management which tracks requests from university units for new space or alterations to existing space, as well as the process for requesting review and prioritization.

Space Request: the required documentation of expected or impending need for space by an academic, administrative, support or other unit of the university that cannot be met within the existing college or division space allocation.

Space Request Process: the methods to be defined by the Space Committee for units to submit space requests, and for those requests to be tracked and processed via a clear, transparent decision-making procedure as to the approval/disapproval of requests and prioritization of the allocation/renovation of space.

Unit: any department, division, auxiliary or other office identified on the University’s organizational chart or department tree.

References for CAP 390:

1. Date approved by the President: To be determined.
2. Effective Date: To be determined.
3. Responsible Department/Office: Facilities Management and Development
4. Revision History: Not applicable
5. Related University Policies, Procedures, Manuals and/or Documents:
	1. [CAP 718](http://policy.calpoly.edu/cap/700/Cap%20718%20Final.pdf)
6. Laws, Regulations and/or Codes of practice referred to herein or related to this policy:
	1. [CSU Space and Facilities Database (SFDB)](https://www.calstate.edu/cpdc/Facilities_Planning/Space_Mgmt/sfdb.shtml)