

University Council

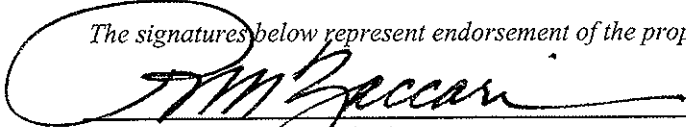
To: Dr. Ronald Zaccari, President
From: Dr. Christy Coons Yates, University Council *CCY*
Cc: James L. Black, Vice President of Finance and Administration
Date: March 28th, 2006
Re: Endorsement of Space Management Document

Attached you will find a copy of the Space Management document endorsed by the University Council on March 28th, 2006 and an executive summary of the revisions that have occurred throughout the document review process. All changes recommended by the University Council in its initial reviews of the document have been incorporated into the final version presented to you at this time. Other than the changes therein, the University Council has only one recommendation. The Council would like you to consider tasking a group to look at the feasibility and desirability of having an integrated space scheduling system that could combine current efforts made by Institutional Research, the office of Academic Affairs, and the office of Events Services. Currently, these groups utilize separate systems for tracking and scheduling room usage. The University Council felt that consolidating these tools into one system might provide enhancements to our overall efficiency of operation that would provide for improved room usage and improved record keeping. The Council felt this suggestion was outside the context of the overall Space Management document, so we submit it to you for future consideration and action.

Accompanying the Space Management guidelines and executive summary, are three documents bearing the signatures of representatives from Faculty Senate, the Council on Staff Affairs, and the Student Government Association. These documents signify participation in the University Council's document review process and assure that every effort has been made to fulfill the collaborative mission of the University Council.

As there were no discussion items resulting from review by any of the three constituent groups on campus, I am able to offer this endorsement as a collective statement of support for the proposed Space Management guidelines. My signature below indicates that the University Council has completed its thorough review and revision of the document and is forwarding their endorsement to you for action. I am pleased to present his packet on behalf of the University Council for your review and approval.

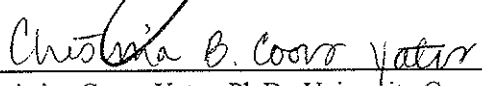
The signatures below represent endorsement of the proposed Space Management Guidelines.



President Ronald Zaccari, Ph.D.

4-4-06

Date of Final Approval



Christina Coons Yates, Ph.D., University Council

3-27-06

Date

Valdosta State University Space Management Guidelines

Submitted by the University Council for Presidential approval March 28th, 2006

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I. INTRODUCTION

Facilities are primary components of Valdosta State University and are integral to the accomplishment of our mission. They must be adequately managed and made available to departments with justified needs. Mechanisms must be provided to request, justify, prioritize, and assign University space in a prompt and responsive manner. The Board of Regents of the University System of Georgia mandates that each member institution maintain accurate records of all property and structures owned or leased, as well as an accurate accounting of total square footage and the specific uses assigned to that footage. To accomplish these tasks, well defined Space Management Guidelines must be employed. This document provides examples of common projects and their process, but is not all inclusive. The examples are meant to be general guidelines of the most commonly encountered space management issues.

The goals of the Valdosta State University Space Management Guidelines are:

- To plan and manage change in University facilities
- To outline procedural guidelines for;
 - Requesting changes in existing facilities or their usage,
 - Submitting new facilities needs,
 - Reviewing requested changes and determining their impact on the University, and
 - Ensuring that all changes in space usage (additions and reductions to square footage and/or changes in function) are accurately recorded in the Facilities Inventory Database which is maintained by Strategic Research and Analysis.
- To ensure that departments have the information and tools required to plan for their facilities needs and provide information required for decision making.

The Space Management Guidelines apply to all campus facilities requiring modifications or renovations of existing space, new construction, and moving from one space to another that results in a change of space usage (such as changing function of an office to a storage room). **Requests for these actions must be submitted by creating an initiative in the Strategic Planning Database.** The flowchart appendix describes the process once an initiative is presented. Initiatives are reviewed and ranked in priority order by the originating department, then by the Dean or next level supervisor, and finally by the respective Vice President or appropriate Cabinet-level officer.

After the Space Management Council reviews the initiative to insure its alignment with our Strategic Plan, and other campus priorities, funding criteria will be evaluated. If funding is available, the project can be approved. If new funding is required, the initiative along with a recommendation for approval will be forwarded to the Budget

Advisory Council where funding alternatives will be considered. After its review, the Budget Advisory Council will communicate funding information and availability to the appropriate Cabinet officer, Dean (if applicable), and Department head. Actual implementation of an initiative takes place only after funding is identified and made available.

The Space Management Guidelines do not address the scheduling of classrooms. Room utilizing of this type is made at the Departmental level which has “ownership” of the rooms and reported to the Office of the Vice President for Academic Affairs for record keeping purposes. The responsibility for scheduling public meeting spaces is delegated to the Office of Events Services, a unit of Student Affairs.

II. DEFINITION OF TERMS

1. **ROUTINE MAINTENANCE.** Routine maintenance is general building repairs that do not normally result in any structural changes or changes in occupancy. Although the determination of routine maintenance is somewhat subjective, it can be described as the repair of anything facility related which is broken and not operating as it was originally designed. Such repairs are always made at no cost to the department because budgets are provided in Plant Operations and Auxiliary Services for such service. Periodic re-painting, repairing leaking roofs, unblocking plumbing are examples of routine maintenance. However, re-painting walls which have been recently painted, which are undamaged, or which have colors not preferred by the occupant are not considered routine maintenance. Charges will be assessed to the department for these non-routine services.

2. **CHANGES IN ROOM FUNCTION.** Changes in room function include altering room assignments of faculty and staff within the space allocated to their departments. For example, these modifications may include things such as changing a lab into a classroom, or turning an office into a storage area. If assignments are made that **change the function of a space**, such change must be approved by the Space Management Council prior to implementation.

3. **REQUEST TO USE EXISTING SPACE.** This includes requests to move into a space that is currently vacant. These requests should be made by entering an initiative into the planning database so room assignment and space-usage may be tracked through the Facilities Inventory Database maintained by Institutional Research.

4. **PROJECT WORK.** This is work that cannot be classified as routine maintenance of building systems. Generally it involves the renovation or remodeling of a facility, at the request of the Department, including changes to its structure. This can also be a large carpeting job or relighting of a space. Requests in this category require funding sources

outside Plant Operations and most often require funding determination by a Dean, Cabinet member, Vice President, or the Budget Advisory Council.

MAJOR REPAIR AND RENOVATION (MRR) – MRR is a **funding mechanism**, not a type of facility request. It is one of several ways that facility work, such as Project Work, may be funded and requires approval by the Board of Regents. The primary purpose of MRR funding is to ensure building infrastructure systems such as roofs, air conditioning systems, and other major building systems are maintained. Therefore, infrastructure needs precede other priorities developed through the strategic initiative process. Repairs and renovations (excluding those in Auxiliary Services facilities) which do not exceed one million dollars can be included in this category. If a division does not have funding to complete an approved project, MRR funding may be considered by the Space Management Council, or other funding possibilities may be recommended by the Budget Advisory Council. Projects subject to this funding will be compiled and prioritized annually by the Space Management Council and submitted to the Board of Regents in March for approval and funding. MRR funds are allocated to the Board of Regents each year by the legislature of the State of Georgia and dispensed by the Office of Facilities to state institutions.

5. MINOR CAPITAL PROJECTS – Projects costing more than one million but less than five million dollars are considered Minor Capital Projects. These may include repairs, renovations, and new construction. Minor Capital Projects are compiled by Plant Operations and the President for annual submission in March to the Board of Regents. Funding is dependent upon the legislature of the State of Georgia.

6. MAJOR CAPITAL PROJECTS – These are projects with total costs exceeding five million dollars and which normally represent new construction of major buildings. An example of a Major Capital Project is the recent construction of the Hugh C. Bailey Science Facility. The process which results in the realization of a major project is complex and usually takes several years. Each Major Capital Project must be in keeping with VSU's Master Plan, have the guidance and approval of the Vice Chancellor for Facilities, approval by the Board of Regents, and ultimately funding by the legislature of the State of Georgia usually through bond issuance. Major Capital Projects are submitted annually in March to the Board of Regents by Plant Operations and the University President for approval.

III. SPACE MANAGEMENT COUNCIL

The Space Management Council is charged with reviewing requests for changes in existing facilities or their usage. The Council considers alternatives, prioritizes needs, and makes recommendations to the Budget Advisory Council if funding is required.

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Ultimately, the Council is designed to ensure the optimum use of facilities and the best solution to overall campus space needs. It formulates and presents an informed recommendation to other approving or funding bodies and ensures that changes are in keeping with VSU's mission, institutional strategic plan, and physical master plan. The Council also prioritizes projects for the annual MRR Funding Request and recommends these to the President for approval. This Council functions by evaluating facility requests and recommendations received from departments and colleges through the Strategic Planning Initiative Process and makes specific recommendations to fulfill the requested facility needs.

The output of the Space Management Council will be a prioritized listing of projects that are approved for further consideration. These projects are then sent to the Engineering Division of Plant Operations for review and development of an approximate budget. After budget costing and review, Plant Operations sends the projects as an information item to the University Council and to the Budget Advisory Council accompanied by suggested funding options. The Budget Advisory Council may then recommend that the project be funded from internal sources, that it be placed on a priority list for inclusion on the next submittal of MRR, Minor Capital, or Major Capital Projects. It may also recommend private funding. **A list of campus projects, in priority, reviewed and amended quarterly, will be published to the campus community to be used as a facilities planning tool.** If a project is not highly prioritized or is not recommended for funding, the requestor may resubmit the request through the standard processes outlined in Section IV, with additional information and description of why there is an imperative need.

1. COMPOSITION

Members of the Space Management Council are appointed by the President and constitute a comprehensive representation of campus communities, interests, and knowledge bases. Members strive to make recommendations which serve the interests of Valdosta State University as a whole in the present and the future.

2. MEETING SCHEDULE

The Space Management Council holds regular monthly meetings but schedules special meetings as required.

IV. BUDGET ADVISORY COUNCIL

The Budget Advisory Council is charged with recommending and securing funding for approved projects which are outside the funding capability of a Division's original budget. The Council considers information from the Planning Database, recommendations of the Space Management Council, suggestions from the University

Council, and advice from members of the President's Cabinet in order to best manage the financial resources of the University.

V. UNIVERSITY COUNCIL

The University Council will, along with its other functions, ensure the consistency of all proposed capital projects with the University's accepted ten-year Campus Master Plan. To that end, the Council will consider capital project requests transmitted through or initiated by the Strategic Planning process and provide a recommendation to the President regarding Major and Minor Capital Projects for transmission to the Board of Regents annually in March. The University Council also monitors the implementation of the Campus Master Plan and considers proposed amendments to this plan within the larger campus context to ensure consistency with VSU's mission statement, institutional strategic plan, and physical master plan.

VI. PROCEDURAL GUIDELINES

Comprehensive and responsive space management guidelines serve the needs of faculty, staff, and students by creating a planning environment that provides the mechanisms necessary to bring facility needs into fruition. It is important that each department understand the procedures for requesting additions, changes, modifications, or renovations to spaces needed to complete its assigned mission.

A. ROUTINE MAINTENANCE

Fill in here with information from Plant Operations about the Routine Maintenance request procedures.

B. CHANGES IN ROOM OCCUPANCY

Deans, Department Heads, and Directors have the authority to make changes in room assignments of faculty and staff within the space allocated to their departments. Examples of such changes include transforming a regular classroom to a computer lab or studio. However, if assignments are made that **change the function of a space**, such change must be approved by the Space Management Council prior to implementation. As noted earlier space usage accounting, auditing, and reporting are mandated by the Board of Regents.

When changes in use of a facility are approved by the Space Management Council, the changes will be reported, after their completion, by the Plant Operations Engineering

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Department to the Office of Strategic Research and Analysis to effect changes in the Facilities Inventory Database. The Office of Strategic Research and Analysis will make the necessary updates to the facilities database upon receipt of the changes and documented approval by the Space Management Council.

Requests for telephone/technology installation or changes must be coordinated with Auxiliary Services by the using agency. Please allow a minimum of three weeks for additions or changes in telephone/technology access to be completed.

C. PROJECT WORK (Changes in new or existing structures)

Changes to existing structures must be based upon demonstrated, justified need. **The initial step in this process is the submission of a planning initiative which enters the request into the planning database and positions it for consideration and approval.** Initiatives will receive final priority from respective Vice Presidents or Cabinet Level officials and will be reviewed by the Space Management Council based upon their recommendations. These submittal documents will be used by the Council as a step in the approval process. Through evaluation of the requested space addition or renovation, the Council will prioritize the project and start it through its approval process. Every project, regardless of complexity and size requires programming, design, costing, funding, and approval. Changes based upon preference will receive a lower priority than those which are critically needed.

The funding mechanism for the completion of approved projects will be selected by the Space Management Council and the Budget Advisory Council cooperatively based upon the project's complexity and size.

There shall be no changes made to existing facilities without a review by the Space Management Council. This includes aggregate painting of areas, carpeting, or any activity which changes the appearance or use of the space. It does not include painting or carpeting that falls into the category of routine maintenance of facilities. The Plant Operations Department is responsible for the coordination and oversight of all modifications or renovations to campus facilities. **Colleges and Departments are not authorized to make building changes or modifications without proper approval even when that entity serves as the source of funding for the project.**

Modifications or renovations to existing facilities are classified as projects and as such must be evaluated and prioritized by the Space Management Council. Examples of projects are the request to change room use by converting a classroom space into a laboratory, computer classroom, or faculty or staff offices. **Departments requesting projects should submit an initiative within the Strategic Planning Database.** This procedure is outlined below. The Space Management Council must make its recommendation regarding the request and funding sources must be determined before any work can begin. Projects will be coordinated and managed by the Plant Operations

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Department to ensure continuity and adherence to existing federal, state, and local code requirements.

A critical element of this process is ensuring that the Facilities Inventory Database is maintained and updated by the Office of Strategic Research and Analysis. Plant Operations and the VSU Foundation (for leased properties) will each designate a contact person who will coordinate with the Office of Strategic Research and Analysis. These contact persons will inform the Office of Strategic Research and Analysis of all changes in use of the University's state-owned or leased facilities after the change is approved by the Space Management Council and affected by the responsible party. Plant Operations Engineering Department will provide this function for completed renovation and construction projects. The Office of Institutional Research will make the necessary updates to the facility-use database upon receipt of the completed changes.

D. CAPITAL OUTLAY PROJECTS

Capital outlay construction and renovation projects are prioritized by the Board of Regents and funded by the legislature of the State of Georgia. These projects are submitted to the Board of Regents of the University System of Georgia annually in March. Capital Projects can be Major or Minor in nature and can include construction of new facilities or renovation and expansion of existing facilities. The formulation of a submittal for new or renovated facilities is based upon a building block of information submitted through the Strategic Planning Initiative to the Space Management Council. This Council is charged with recommending space for use by departments based upon justified needs. Thus, it is important for each department to develop both short and long range plans and make requests in time for the Council to determine the best avenue of response to meet the needs of the department and the institution. When existing facilities cannot be retrofitted or renovated to serve justified needs, then new facilities must be planned and constructed. This activity must relate to the University's Master Plan which outlines the overall direction of the institution for the immediate ten year future. Department Heads, Deans, and Directors must be knowledgeable about the Master Plan and how their disciplines fit into this planning strategy.

Valdosta State University will maintain a list of approved facilities projects in priority order to inform departments of the status of their requests for new or renovated space. This list will be updated quarterly and posted on the web. The list will allow for adequate planning, funding and design to ensure the projects are completed in a timely manner. Because projects can be completed only as funding is made available, appropriate estimates of completion time should be given to serve as a time template for departments to determine the planning lead time necessary to meet their space needs.

At the conclusion of any new or renovated facilities project, the Office of Institutional Research will ensure a comprehensive accounting of room numbering, room usage, and square footage in the new or renovated structure. Plant Operations Engineering will

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notify Strategic Research and Analysis immediately upon completion of a project to ensure that the Facilities Inventory Database is updated in a timely manner and contains accurate, current data.