

CSM Space Allocation Guidelines (Spring 2012)

Preamble – What this Document is About:

The physical facilities of California State University San Marcos are resources that must be managed, maintained, and controlled in a manner that contributes most toward fulfilling the University's mission. Space is assigned on the basis of programmatic need and academic priorities, and may be reassigned if those needs or priorities change.

Deans and Vice Presidents **have been authorized to** reassign space within space already designated for that school, college or administrative unit reporting to them. Exceptions are provided in the University policy approved March 6, 2012. **Any such reassignment shall be the result of consultation with all affected units and appropriate governance structures.**

- This document covers the CSM philosophy behind, and the criteria to use in making decisions, for allocating and reconfiguring *space that has been assigned to CSM*.
- This document also covers the process and the timeline to follow.
- The CSM space to which this document refers include: **laboratories, both research and instructional, specialized instructional space¹ (such as computer laboratories or instrument rooms), and offices.**
- ***This document pertains to inter-department space transfer.*** However, if two departments mutually agree on swapping their rooms, the process outlined in this document does not have to be followed.
- For intra-departmental decisions (i.e. sharing of space among department members, relocation within space already used exclusively by the *department, conversion of space already used exclusively* by the department) each department is encouraged to have its own policy.
- **Departments considering reallocation within departmental space** or “friendly swapping” of space with another department **should consult with the Dean** when **substantial movement of equipment, safety considerations, and/or cost** is involved.
- The guidelines outlined in this ***document should be revisited as necessary.***

Important Note: Space is limited in CSM and all departments are already in need of additional space even without additional hires. Therefore, every effort should be made to seek additional space to be allocated to CSM before we engage in inter-department space transfer.

Guiding Principles:

The guiding principles behind the process and timeline outlined in this document:

- Space is ***allocated to*** departments, and not individuals. Space allocation/de-allocation/reconfiguration/relocation will be based on departments’ demonstrated needs.
- To maintain an atmosphere of ***transparency in the decision making process***, any discussion of inter-department space decision should involve, **not only the Dean and the affected departments, but *all* the departments** in the College through the *Governance and Planning Committee (GPC)*. This is also because space is limited in CSM and all departments are in need of additional space, making all of them stake-holders in space decisions.

¹ Regular instructional rooms, such as lecture rooms, do not belong to CSM.

- There shall be no surprise request for departments to give up their space. Therefore, *the “de-allocation candidate” list* shall be maintained and used to satisfy allocation requests, and short periods of under-utilization should not lead to de-allocation decisions.

Process Leading To De-Allocation Of Existing Space:

- **The Dean’s office** together with GPC (or its sub-committee) will review space utilization on an annual basis as necessary to form and maintain *the “de-allocation candidate” list*.
 - The criteria to be used for placing space on this list are outlined in the next section.
 - No space will be placed on the “de-allocation candidate” list without thorough discussion with the affected departments.
 - **Each department is responsible for identifying programmatic needs for space and justifying utilization of its space.**
 - When space is placed on the “de-allocation candidate” list, the factors leading to the decision must be given in writing and must be attached to the list.
 - Departments should understand that space on the “de-allocation candidate” list may be transferred to another department and should be prepared for requests to vacate the space.
- The Dean’s office will keep GPC informed of any additional space CSM receives from the Academic Affairs. We will refer to this list as *the “new space” list*.
- When the Dean and GPC are considering space allocation requests, *only the above lists* (“de-allocation candidate” and “new space”) shall be used as available space².

Criteria for placing space on the de-Allocation candidate list:

Research space should be placed on the list when that space is or will no longer be used for more than 24 months by the department for:

- projects with undergraduate or graduate students actively working with them as part of the requirements for a degree program or a grant, or
- active research grants directly related to laboratory use.

Research laboratory space should be *used efficiently*. They should not be used for the storage of rarely used equipment and supplies.

Specialized instructional space should be placed on the list when that space is or will no longer be used for more than 24 months by the department for:

- existing courses that require specialized equipment, or
- projects supported by a grant to enhance student learning,

Office Space shall be evaluated using the following guidelines:

- **Tenure-track faculty will have allocated office space.** Offices of current tenure-track faculty should never be placed on the list.
- Offices of adjuncts allocated to the college may be placed on the “de-allocation candidate” list if offices for tenure track new hires are needed.
- **Offices of tenure-track faculty who leave or retire should not be placed on the list if a replacement hire is expected within a year or adjunct office space is needed.**

² Neither the Dean nor GPC may introduce any other space as a solution to an allocation request.

- Any commitment of space to retired or retiring faculty will be made for a specified period and must be approved in writing by the CSM Dean. In general, retired faculty is expected to share office space and is not allocated research space.
- Office space should not be used for storage of disposable records or files, old furniture and equipment, or trash. Such office space may be placed on the “de-allocation candidate” list.

Other types of rooms (e.g. storage) may be placed on the “de-allocation candidate” list if they are severely under-utilized.

Process For Requesting Allocation Of New Space To A Department:

1. The department requesting additional space must submit the request in writing stating:
 - a. **The category** (research, specialized instruction, office, or other).
 - b. **The date** by which the space must be ready for use.
 - c. **The reason** for requesting space, chosen from the following list:
 - Instructional space:
 - For existing courses that require specialized equipment and facilities;
 - For projects supported by a grant to enhance student learning.
 - Research Space for faculty who:
 - have undergraduate or graduate students actively working with them as part of the requirements for a degree program or a grant;
 - have active research grants directly related to research space use;
 - are actively presenting and publishing their work.
 - Office:
 - For newly hired tenure-track.
 - For adjuncts.
 - For staff.
 - Other (specify).
2. The request must be submitted to the Dean, with a copy to GPC, as soon as the need becomes apparent to the department.

Process For Allocating New Space To A Department:

- 1) For each request³, the Dean and GPC (or its sub-committee) will meet *with the requester* to go over alternative solutions in the following order:
 - a) Can minor renovation or sharing of the department’s space take care of the problem?
 - b) Are there suitable rooms on the “de-allocation candidate” or the “new space” list?
 - c) If there are no such suitable rooms, are there rooms on the lists that can be made available with significant modification?
- 2) When prioritizing multiple requests or considering solutions, the group shall adhere to the following guiding principles:
 - a) Space for instruction is of **primary** importance. The delivery of a quality instructional program for undergraduate and graduate students should be the number one priority.

³ When many requests are received simultaneously, the Dean and GPC shall prioritize the requests considering all relevant factors.

- b) Only under extraordinary circumstances should *FTE generating instructional space* be converted to other types of space.
 - c) Recognize that *CSM students need specialized instructional space*, including but not limited to, laboratories, rooms with specialized computer software/hardware or **instrumentation** and group study/tutoring rooms.
 - d) *Sharing of specialized instructional space* such as tutoring and study rooms among departments, **when space and compatible activities permit**, should be the norm.
 - e) To support faculty **scholarship, creative activity and professional** development, to encourage faculty currency in their fields of expertise, and to provide high-quality research experiences to undergraduate and graduate students, **the CSM shall make every effort** to provide adequate *research laboratory space* to all research-active tenure-track faculty and their students
 - f) *No absolute square footage limitations* should be placed on a particular individual's laboratory space, since different disciplines have different needs. Every active research faculty member should be allocated space proportional to his or her needs.
 - g) *Sharing of research laboratory space* and equipment among faculty should be the norm whenever space and compatible projects permit. Sharing shall be considered first before seeking de-allocation.
 - h) *The location* of allocated research space is of significant importance for safety and collaboration reasons.
 - i) **Research laboratory space is essential to support new positions. Departments should identify suitable laboratory space when bringing forward competitive hiring justifications.** Lack of adequate space for approved hires is justification for requesting research space allocation
- 3) The group shall **strive to** arrive at a solution **in a timely manner** that will involve the least cost and the least interruption in anyone's work. When the group cannot reach an agreement, **the final decision rests with the Dean per University policy.**⁴
- 4) The Dean shall present the final decision as a memorandum to all affected departments and GPC, listing all factors leading to the decision. This memorandum shall act as a notification to the department that must vacate their space.
- 5) The decision memo and all relevant documents will be kept so that the College will have the record of all space transfer decisions.

⁴ Because the candidate lists may be short, it is possible that there are no rooms available to accommodate the request. In such cases, the final decision is to deny the request.