

**SPACE ALLOCATION**

**POLICY**

**Implementation Date:** 3/6/12

---

**Definition**

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.

**Authority**

The Trustees are responsible for all CSUSM facilities, regardless of the original source of construction or acquisition of funds, and have delegated authority to manage the facilities on a day-to-day basis to the President of the University.

**Scope**

Applies to all physical facilities and to all division departments on campus.



Karen S. Haynes, President

3/6/12  
Approval Date

Revised: 9/6/11

**SPACE ALLOCATION****PROCEDURE**

---

**Implementation Date: 3/6/12**

---

**I. Introduction**

This procedure provides guidance for allocation of space to campus units.

**II. Space Allocation****1. Space Allocation Categories**

Space allocation needs are evaluated based on the following campus-wide space category guidelines:

- **Instructional Space**—Lecture classrooms and classroom laboratories, or any other space that generates FTE for the campus.
- **Faculty Offices**—Faculty offices including Lecturer needs, Department Chairs, and Academic Deans.
- **Instructional Support**—Areas providing support to the instructional spaces and academic programs on campus, i.e., Instructional Support Technicians, campus study rooms, etc.
- **Direct Student Services**—Area providing direct student services such as Enrollment Management Services, Disabled Student Services, etc.
- **Student Life**—Areas that support student activities, student recreation, and student involvement on campus, i.e., Student Life & Leadership, Associated Students Inc., etc.
- **Administrative Support**—Areas that provide administrative functions for the University and/or do not have a direct correlation to instruction, i.e., Finance and Administrative Services division, University Budget Office, etc.
- **Other**
  - Centers & Institutes: University entities that focus on a particular area of study or service not normally offered by a single academic program or department.
  - Self-Support Entities: Areas that are funded either through private funds and/or collected fees.
  - Grants & Contracts: Areas that receive external funding to conduct research or offer programs and services.

**SPACE ALLOCATION****PROCEDURE****Implementation Date: 3/6/12**

---

- All other functions that do not correspond with any of the above sub-categories.
- Access for persons with disabilities will be considered when allocating space.

**2. Criteria for Space Allocations**

Space requests are reviewed based upon the relevant Academic Plans, operational/business plans, and the following criteria:

- **University Strategic Priorities**—Academic Excellence, Student Life, Campus Climate, Community Partnerships, and Educational Equity
- **Workload**—factors include present and projected numbers of students, faculty, and staff. Both full-time equivalent and headcount are considered, as appropriate, based upon the request
- **Program Requirements**—factors include special program requirements and stage of program development
- **Adequacy of Existing Area**—factors include type, quality, and quantity of existing facilities and comparison with other campus departments
- **Utilization of Existing Space**—factors include an analysis of how the existing space is being utilized
- **Technological Improvements**—factors include changed space requirements for fixed and/or movable equipment, for changed instructional methodology, and for new fields of research
- **Environmental and Geographic Considerations**—factors include location requirements based on programmatic needs and access to students, faculty, and staff
- **Cost of New Space**—factors include the cost of renovations to the space to accommodate the functions of the requesting department, along with available sources for funding new or renovated space
- **Approved Guidelines**—factors include consideration of space and design standards that are part of the campus physical master plan

**SPACE ALLOCATION****PROCEDURE****Implementation Date: 3/6/12**

---

**III. Space Requests****1. Requests for additional space**

Requests for additional space to meet unanticipated space needs may be submitted via the Space Request form, available on the Planning, Design and Construction (PDC) Web site.

**2. Re-Assignment of Existing Space**

Deans and Vice Presidents may reassign space within space already designated for that school, college or administrative unit reporting to them, with the following exceptions that must be reviewed by Executive Council:

- Interdivisional reassignments
- Space assignments made for a specified period of time e.g., space allocated temporarily for software implementation project teams.
- Vacancies due to assignment of new space e.g., space vacated due to relocation to a new facility.
- Changes in the primary function of space e.g., request to change a faculty office into a conference room.
- Renovations changing the assignable square footage of a room
- Space allocation plans resulting from new capital construction

**3. Reporting Space Changes**

The Chancellor's Office requires the campus to maintain accurate records of space inventory, space reassignments, changes in room functions, and physical alterations, which cause a change in the square footage of a room. All space reassignments will be reported to Planning, Design & Construction via the Employee Status Pages request submitted to Instructional and Information Technology Services.

**4. Funding**

- A. When possible, funding should be identified in advance for costs associated with space moves or renovations and included in the space requests. Space requests that are dependent upon unconfirmed funding sources, should clearly indicate that contingency.
- B. PDC will provide cost estimates to departments.
- C. Renovation costs will generally be paid for by the department requesting the space.

**SPACE ALLOCATION**

**PROCEDURE**

---

**Implementation Date: 3/6/12**

---

- D. If an employee or department is asked to move, the campus will identify funding to accommodate the move(s).
  - E. Requests for minor capital outlay funds for space renovations may be made in accordance with the minor capital outlay policy and procedure.
  - F. Executive Council will approve the funding request for minor capital outlay funds submitted to the Chancellor's Office on an annual basis.
5. Approval of Space Requests
- a. Prior to being forwarded to PDC, space requests must be submitted to the appropriate Vice President for review and approval. If a request is received in the PDC office without signature approval, it will be routed to the Vice President in charge for approval.
  - b. The Planning, Design and Construction office analyzes the proposals and prepares a recommendation for Executive Council.
  - c. Executive Council's decisions are communicated in writing to the Planning, Design and Construction office, which will inform the originators of the space requests.

6. Periodic Space Inventory

Periodically, Planning, Design and Construction evaluates and reports to Executive Council on space assignment and use.