

Space Allocation and Renovation Policy – Operating Procedures

Procedures for Space Transfers Between Units

For proposed transfers involving 2,000+ SF or \$25,000+ in project costs, as well as all transfers involving the Main Building, the initiating unit (whether seeking to acquire or divest space) should submit a [Space and Renovation Request Form](#) for potential matches with other submitted Space Requests *before* approaching other units to propose a space transfer. If the Space Allocation Committee (SAC), through University Facilities Planning and Design (UFPD), responds that no matches are available, the Requestor may initiate discussions with other units. In this event, the unit proposing to acquire the space in question (the "acquiring unit") and the unit to which the space is currently assigned (the "affected unit") are expected to engage in good faith discussions intended to resolve the issues, resulting in a voluntary agreement to submit a Space Request form proposing the transfer. Reassignments of space contained within a unit, and any attendant costs, are ordinarily the responsibility of the business administrator of that unit. Thus, the process described here pertains only to requests to transfer space between different units on campus.

- a. **Agreement Between Business Units:** If a request to reassign space on campus is agreed to by the acquiring unit and the affected unit, the proposal may be brought to the SAC with documentation written by the acquiring unit listing the spaces involved and agreeing to incur the costs associated with that space. This documentation must be copied to the affected unit and the dean/Senior Vice President (SVP)/Executive Vice President (EVP) of the acquiring unit. The SAC will review the request and may ask for staff analysis of impacts. (Requestors must submit the signed form **by the first of the month** in order to have a request reviewed by the Space Allocation Committee that same month.) The SAC will then make a recommendation to the Capital Asset Allocation Committee (CAAC) for final approval. The SAC's recommendation and CAAC's approval will be based on University priorities. An agreement between business units does not guarantee approval, and the SAC may recommend that the space instead be used to meet the needs of other Space Requests if such alternate uses are in alignment with University priorities.
- b. **Non-Agreement Between Business Units:** If a request to reassign space on campus is not agreed to by the acquiring and affected units, a request for transfer of space between units will begin with a proposal submitted to SAC by the acquiring unit. This proposal must contain:
 - A detailed description of the space(s) involved (e.g. building name and room numbers)
 - A full description of the proposed uses for those spaces
 - A description of the relevance of the transfer to University goals, with specific references to the Strategic Plan and/or the Campus Master Plan

- A quantitative and programmatic justification that space is needed by the acquiring unit and that the transfer will increase the efficiency of utilization and quality of programs, with a specific reference to the unit's three-year space utilization and needs plan
- The source and available amount of funds to be used for occupying and renovating the space and the estimated ongoing facilities charges for the acquired space

After the SAC's receipt of the acquiring unit's proposal, the affected unit has the right to submit a request to maintain the status quo (or a counter-proposal) to the SAC. This request must be submitted to the SAC within 45 days of the acquiring unit's initial proposal to the SAC. Upon receipt of a request to maintain the status quo or a counter offer from the affected unit, the business administrators responsible for the units involved will meet with the deans and/or directors and attempt to resolve any disagreements arising from the proposed transfer. If an agreement cannot be reached, the SAC will review all available information relating to the current and proposed use of the spaces involved. Members of the committee will decide, by simple majority, whether all, some or none of the spaces will be transferred. The SAC will make a recommendation to the CAAC for final approval.

If a contested transfer is recommended by SAC and approved by CAAC, any change in space assignment will take place no sooner than six months and typically no later than nine months after the date of approval. All transfers of space are subject to potential review in the future.

Appeal Process

If a unit disagrees with the CAAC's decision regarding its space, the dean, SVP or EVP of the unit may submit an appeal to the RCM Executive Committee (consisting of the Executive Vice President, Treasurer & COO, the Provost and the President) within 10 business days. The RCM Executive Committee will review the appeal and make a final decision within 10 business days of receipt of the appeal.