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# Space Allocation and Administration Procedures

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A resource for  
stakeholders

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Jan 2019

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# Space Allocation and Administration Procedures

3rd of January 2019

## OVERVIEW

The following procedures have been developed by the Office of Vice President of Finance and Administration (VPAF) to support the University Space Allocation and Administration Policy. This document will serve as an aid in planning, allocating/reallocating and administering UPEI's space.

These procedures assist UPEI with:

- Consistent, effective, efficient and flexible administration of space.
- Effective and efficient utilization of the substantial taxpayer investment in capital and infrastructure.
- This is a living document that will be regularly reviewed and adapted to represent the uniqueness of UPEI.

## SCOPE

Compliance with this University procedure extends to all academic staff, administrators, colleagues, and support staff, undergraduate, graduate, postdoctoral fellows; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.

## PURPOSE

The Purpose of this document is to ensure:

- **Efficiency and Effectiveness.** Space utilization across all units is to be tied to levels of activity. Space is to be accounted for and assigned according to its utilization.

- **Equity.** Space allocation to units is closely related to their present and projected levels of activity.
- **Accountability.** Administrators are responsible for ensuring that all space within their units is effectively utilized.
- **Transparency.** All stakeholders have access to information on space system development, policy development, and space utilization across all units of the university.
- **Currency.** Information is available and up to date.
- **Simplicity.** System is not bureaucratic or difficult to manage, and stakeholders easily understand the allocation system.
- **Adaptability.** Space allocations are tied to future needs and can be adapted readily in response to internal and external changes.
- **Strategic.** The use of space and prioritization of allocation is tied to UPEI's mission and long-term goals.

## RESPONSIBILITIES

It is the responsibility of each Dean, Chair, Director, or Manager to ensure that all units under their responsibility comply with these standards and guidelines and that all space changes and reassignments are approved by the Vice President of Administration and Finance and then reported to Facilities Management utilizing proper documentation. It is also the responsibility of each dean and director to report to Facilities Management any reduction of faculty, staff or students.

- **Facilities Management.** Via the Space Coordinator will be responsible for:
  - maintaining the inventory of space,
  - the physical audits of utilization
  - the ongoing maintenance of the data within the space management and planning database. This will be done through the physical inputting of data provided by units.
  - creating and providing standard and ad hoc space management reports for use by decision makers.
  - web-based software which enables all departments to view the space utilization of bookable rooms is available for use (25Live). Facilities Management employees will be responsible for the maintenance of the data within this software.
- **Department Heads and Managers.** Will be responsible for:
  - nominating a space coordinator for space management issues relating to their functional unit.
  - ensuring data received through the functional space coordinator is current and accurate.
    - data to be provided includes space inventory data, utilization data, and data that identify the uniqueness of the department.
  - making a summary of space utilization available to the dean or director.

- **Deans and Directors.** Will be responsible for:
  - the management of space within their units based on the corresponding allocation.
  - making requests for additional space beyond their allocation to the Vice-president Admin and Finance via the Space Request Form.

## PROCEDURES

- **Space Requests**

- **For New Programs/personnel:** Prior to advertising for new staff, the responsible unit is to ensure that a suitable space, in accordance with the allocation standards detailed in the Space Allocation and Administration Policy, is available for the new staff member(s). If no suitable space is available, the responsible unit will request advice from VP Admin and Finance. Requests for space allocation can be made using the request form on the UPEI Website found here: [https://files.upei.ca/vpaf/upei\\_space\\_request\\_form.docx](https://files.upei.ca/vpaf/upei_space_request_form.docx).

- **Changes in role, secondments and fixed term positions**

Where a staff member has a new role or is being seconded to another role or position within their existing space custodianship, it may be possible for them to remain in their existing space for the duration of the secondment.

Where a change of role involves different duties and responsibilities resulting in different space requirements, the nominated responsible unit should review these requirements and assign a suitable space. Where no such space is available, a request for additional space should be made to VP Admin and Finance via the Space Request Form.

Where a staff member is being seconded to another role or position which has an office or space assigned to that role, they should relocate to that assigned space. Their vacated office or space can then be temporarily reassigned for another purpose, such as space for visiting or casual staff, or as meeting/quiet space for those working in open-plan areas. No later than one month prior to the staff member's secondment completion, the unit responsible must initiate return arrangements, in consultation with FM as required.

- **Transfer or reassignment of space** Where relocation requires removal of items such as furniture and belongings; The Vice President of Admin and Finance is to be notified of all internal staff relocations/reassignments. With the approval of the VPAF, FM two weeks prior to the relocation to maintain the integrity of the space management system, and other records. Intercampus move requests. It is the responsibility of the relocated staff member to inform other functional units of the University.

- **For classroom change:** If you are a faculty member and the assigned classroom that is indicated in the scheduled timetable needs to be re-evaluated, please complete the 'Classroom Change Request' Form on the Room Booking Forms page. Once this form has been submitted, you will receive a confirmation email with an attached PDF file confirming that your submission has been received. You will be contacted within one business day, by the Registrar's Office with additional information regarding the requested space. Please note that completing this form does not confirm nor guarantee the classroom change will be possible.
- **Maintenance, alteration, repairs and installation requirements**

All maintenance issues at UPEI (except Residence maintenance requests) are submitted to Facilities Management via a work order system. For students living in UPEI Residences, they would need to submit a Residence work order. Each maintenance request requires a personal password and a submittal password. First-time submitters must register an account. All work order requests will be assessed and scheduled by Facilities Management as outlined in the Work Order Priorities Policy. This policy also outlines response time standards.

- **Leasing of Spaces**
  - **Conference Services:** To lease Conference space and services please go to the UPEI website: <http://www.upei.ca/conference/online-booking> and fill out the form.
  - **Athletics and Recreation:** To rent the Chi-Wan Young Sports Centre, UPEI Alumni Canada Games Place or the UPEI Turf you need to contact Athletics and Recreation at 902-566-0305 or email [sknickle@upei.ca](mailto:sknickle@upei.ca). All bookings must be secured with a major credit card. A minimum of 72 hours advance notice for bookings is required. 24-hour notice of cancellation is required for facility rentals. Refunds will not be issued for cancellations under 24 hours' notice. A user group policy is available and will be adhered to under the Athletic Facility Rental.
- **Booking**
  - **Bookable spaces**
    - **Internal Bookings.**

If you are a member of the campus community and would like to book a space for a meeting or event that involves University work, you need to use your UPEI credentials to sign into 25Live. Space bookings in 25Live should be made at least two business days in advance of your meeting or event if there are **no** space setup requirements or other services needed, and at least 10 business days in advance if there are space setup requirements or other services needed (a reminder that work

order submissions are required for space setups). All efforts should be made to choose a space with existing furniture that meets your needs. You will be contacted within two business days. There is no fee for internal bookings. Requests submitted outside of regular business hours (includes Saturday or Sunday) or on holidays will be processed within the next two business days.

- **External Bookings**

If you are interested in booking space for an event hosted by an organization outside of UPEI (even if you are a member of the UPEI campus community), please complete the 'External Booking Form' on the Room Booking Forms page. Space booking requests should be made at least two business days in advance of your meeting or event if there are no space setup requirements or other services needed, and at least 10 business days in advance if there are space setup requirements or other services needed (a reminder that work order submissions are required for space setups). Once this form has been submitted, you will receive a confirmation email with an attached PDF file, confirming that your submission has been received. You will be contacted within one business day by Conference Services with additional information regarding the requested space. There is a fee associated with any meeting room, event space, or athletic facility booking at UPEI.

- **Sporting Events**

To book an athletic facility for an event, please complete the 'Sporting Facility Booking' Form on the Room Booking Forms page. Once this form has been submitted, you will receive a confirmation email with an attached PDF file confirming that your submission has been received. You will be contacted, within one business day, by Athletics and Recreation with additional information regarding the space that's been requested. Please note, there is a fee associated with any meeting room, event space, or athletic facility booking at UPEI.

- **Non-bookable Spaces**

The Vice-President Admin and Finance office and Facilities Management Office engage units in planning exercises to determine and assess current and future needs for offices. This consultation enables accurate tracking of University space usage, which is a benefit to individual units, as well as to the whole campus community. Planning exercises include general and functional programming, as well as other specific studies that determine effective accommodation for all campus users. Together with cooperative planning

exercises, the Vice-President Admin and Finance adheres to the University's strategic documents when facilitating the management of space.

- **Space Tracking**

Unit heads assign allocated space to faculty members, staff, or to other individuals and groups at their discretion, and may re-assign space to meet their needs after consulting with the Vice President of Admin and Finance. Units should review their space usage on a regular basis with Facilities Management. Any unit requiring the repurposing of space must consult with the Vice President of Admin and Finance Office. UPEI uses a computer-aided (25Live) system to track bookable and non-bookable space. Units choosing to employ this tool can track their allocated or assigned space. Units are responsible for updating Facilities management and confirming all information is correct. Facilities management is responsible for maintaining this information for University use.