SPACE MANAGEMENT GUIDELINES

Date: September 2017

Brief Summary

The following information will aid in establishing sound and rational planning parameters for the allocation and management of University-assigned space. _This will be reviewed and modified on a continual basis and should not be considered all-inclusive_. As new information presents itself, and as time permits, the guidelines will be revised.

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Introduction

With the demand for available University space growing, the need to utilize North Dakota State University's (NDSU) space to its fullest potential also grows. As programs and departments continually fluctuate in size and diversity of roles, so do the requirements for the type and quantity of space. NDSU's desire is to have work environments that are safe, welcoming, comfortable and functional. Therefore, efficient care of our assigned space is both important and beneficial. The prime purpose of space management is for the maintenance and official reporting of the academic, research and administrative facilities on the NDSU campus and at off-campus facilities owned or leased by the University.

Facilities Management administers space management and has developed the guidelines specified below. It is our hope that the following information will aid in establishing sound and rational planning parameters for the allocation and management of University-assigned space. *This will be reviewed and modified on a continual basis and should not be considered all-inclusive*. As new information presents itself the guidelines will be revised.

Please note that what follows are basic guidelines and thus they cannot cover all possible specific contingencies (in which case consulting with the relevant parties is advised). NDSU will make every attempt to provide an integrated approach to facility planning and space allocation and welcome your comments and suggestions on these guidelines and their application.

Goals of Space Management Guidelines

- **Consistency** – to produce uniform practices for NDSU space management.
- **Efficiency** – to reduce costs and concurrently develop superior working venues.
- **Flexibility** – to create working environments that satisfy today's needs and can adapt to fulfill our future requirements.
- **Equity** – to ensure space is allotted fairly throughout the University.
- **Sustainability** – to fully utilize our existing resources and avoid undue waste.
- **Transparency** – to communicate to all NDSU members the basis for decision-making regarding space management.
- **Productivity** – to establish a climate of a productive work environment that values the professional life and work of those occupying the space throughout the University.
- **Comfort** – to provide a comfortable environment that encourages those occupying the space to utilize their offices frequently.
- **Collaboration** – to encourage collaboration among individuals within and across areas.
- **Safety** – to consider the safety and security of individuals in space allocation, and to consider the safety and responsible care of documents and data.
- **Access** – to be consistent with ADA guidelines so that over time the allocation and renovation of space will be consistent with universal access guidelines.

Space Allocation Guiding Principles

A. ALL SPACE IS OWNED BY THE UNIVERSITY
- Space is a highly valued resource that is to be used efficiently to further the mission of the University. As such, the University may, at times, make changes to our space directly or indirectly. The University assigns space on an as-needed basis and frequently reviews how we utilize our currently assigned space.

B. SPACE IS RE-ASSIGNABLE
- Per our Space Move Authorization Form, the Vice President of Finance and Administration and the Provost of the University have the final determination for the planning, allocation, assignment, and reassignment of NDSU-assigned space.

C. SPACE IS TO BE USED EFFECTIVELY
- Departments are expected to be proactive with space planning by anticipating future needs, seeking to create flexible, functional space and encouraging collaborative and multi-disciplinary use of space to increase efficiency and reduce costs. Everyone is expected to make efficient use of space within their Departments.
- Those occupying a space are in the best position to determine how their space can best be utilized, furnished, and otherwise configured to support their work. Individuals are also free to move furniture within their spaces as deemed appropriate.

D. SPACE IS TO BE ALLOCATED EQUITABLY AMONG USERS
- Periodic reviews of space occupancy and utilization will occur and may result in the reallocation of space in order to maximize use and meet University priorities.
- The Space Allocation Guidelines will be used to assess space needs. In many cases, uses and space assignments may not align with those guidelines. However, any renovation or re-assignment of "new" space shall conform to the University Space Allocation Guidelines as closely as possible.

E. SPACE IS TO BE A SHARED RESOURCE
- To avoid duplication of space, equipment and staff services, space is to be shared whenever practical. If necessary, usage procedures should be developed when multiple parties use the same space. Shared space (i.e. due to joint appointments, interdisciplinary work, and/or other research) should follow the same goals as the guiding principles.

F. SPACE ALLOCATION DECISIONS ARE TO BE TRANSPARENT
- Space allocation requests must be discussed as openly as possible and communications MUST include all the relevant parties.

Space Management Procedures

In order to track space effectively, there are procedures in place when requesting keys and/or card access, requesting replacement keys, signage updates, any kind of moves request and floor plans, to name a few. A Space Move Authorization Form is necessary (Sample in APPENDIX A) when occupants and/or departments are moving offices and/or locations; acquiring new space or relinquishing space.

This information is tracked in order to keep the Facilities Management space information as accurate as possible for reporting purposes. Facilities Management may:

- Conduct surveys (annual space survey; random sample survey; continual space data update surveys, etc.)
- Track space to the occupant in each type of office (graduate student space does not require names of each occupant, the space code should indicate graduate office)
- Provide reports regarding space utilization

Floor Plans

Floor plans are updated as changes/renovations occur. The floor plans are also used to keep the Facilities Management system up to date for accurate reporting.

Renovations

Requests

In an effort to coordinate and prioritize the physical changes throughout NDSU's locations, all requests for renovations (regardless of funding source) are to be sent to Facilities Management. Requests will be reviewed with consideration of the following:

- Support of the University mission and initiatives
- Alignment with the Universities' strategic plan
- Availability of funds
- Repurposing or enhancement of research space, inter-disciplinary space, and/or other shared space collaborations
- Availability of swing space (if applicable). Thus, when a department renovates their own spaces, they have somewhere to locate their personnel temporarily.
- Proposal to cost-share

Project Initiation

Approved renovations will be initiated with Facilities Management by the submission of a Service Request. Facilities Management will review the Service Request in coordination with the requesting Department. Facilities Management will verify the requested renovation space belongs to the department making the request. If the space is not occupied by the requesting department, then approval must be obtained from the current occupying department.

Relocation

Departments have the liberty of relocating their faculty and staff as necessary, which allows the departments a degree of control in managing their assigned spaces. Equally important, it makes each Department accountable for their relocation costs. However, it is important to inform Facilities Management of changes so updates can be made to the system and office signs. For inter-office moves (changes), complete a Space Move Authorization Form; however, signatures are not required. For moves to other buildings/departments and newly acquired space, complete the Space Move Authorization Form and obtain all required signatures.

An example that requires a signatures is: Sue was located in Ceres Hall and now she accepted a position within Old Main. The form needs to indicate where Sue was (in Ceres) and where she is going (in Old Main). This scenario assumes the departments are different; therefore, all signatures are required. The form should also indicate who will be moving into Sue's office in Ceres once she vacates that space as well as who vacated the office within Old Main prior to Sue moving into that space.

Temporary Moves

There are times when a department needs to move temporarily. If you are moving to another location for a short period of time and then moving back into your original space, submit a Space Move Authorization Form when the move takes place as well as when you move back into your original space.

Temporary moves do not require signatures; however the Space Move Authorization Form should still be completed to ensure Facilities Management has the correct and most current occupant of that space.

Acquiring New Space

At times, moves/renovations happen and a different department may become the new occupant of a space. If a department will occupy a space that they did not previously occupy, then a Space Move Authorization Form must be completed with all the appropriate signatures.

For example, a classroom was previously occupied by the Engineering department, but they are relinquishing that space to the Registrar. The Space Move Authorization Form must be submitted by the Registrar requesting the space; Engineering would need to provide a signature relinquishing the space and then the form must be passed on to obtain the additional required signatures. All signatures are required for these types of moves.

Additional Space

All requests for additional space can be sent to Facilities Management. Requests will be reviewed by Facilities Management with many of the same considerations listed above for renovations.

Every effort is made to honor space request; however, at times, it may be difficult for Facilities Management to accommodate additional space that is requested.

Office Space

A. Considerations for Determining Office Types

One of the more difficult space decisions concerns the appropriate working environment allocated to personnel (i.e., private office or open-office environment). Several factors for consideration of the decision process are listed below:

- Appointment – full-time, part-time, other
- Degree of document security required
- Extent of team work engaged in
- Frequency of confidential communication, both in-person and over the phone
- Job position, rank and classification
- Processing of confidential data
- Proximity to co-workers
- Supervisory and/or managerial responsibilities
- Volume of noise generated by work activities

B. Office layout sample
1. The Design Guidelines provide some examples of typical office layouts to help visualize efficient space configuration. The office sizes shown align with the University Space Allocation Guidelines.
2. While private offices for staff (administrative and research) and graduate students are generally preferred, that may not always be possible.
3. It is understood that existing buildings (especially older buildings) do not always offer uniform sized spaces and may prevent precise conformity to the Space Allocation Guidelines. Nonetheless, these layouts present a sampling of commonly used arrangements for reference in planning the use of your spaces and can be adapted to various sized rooms.

C. Second Offices
NDSU discourages the assignment of second offices for faculty and staff. However, assignment of a second office may be provided in the following cases:

- Faculty members who have a joint appointment with a center or a second academic Department whose principal office is located a considerable distance away.
- Faculty members who are Associate Deans and desire spaces in both Administration and their Department.
- Department leaders whose principal office is in a separate building from the Department office.

Second offices should be smaller than 120 asf. The Provost and/or Department head will collaborate to consider requests for second offices.

Move Request

If you need assistance from Facilities to move items (i.e. furniture, boxes, etc.) to another location, please fill out the Move Request Form. (Sample in APPENDIX B)

Key Requests/Card Access

Keys will be issued by completing the required Key Request Form (Sample in APPENDIX C). The information on the form is verified to ensure that the space is occupied by the department requesting a key. Please do not request a master key unless it is required for that person's role. Indicate the rooms/buildings the employee or student will need access to. Also, please indicate whether or not the request is for additional keys or the old keys will be exchanged for new ones.

If a move is also happening (internally or across campus) then a Space Move Authorization Form must also be completed. If the key request is submitted prior to the Space Move Authorization Form, then processing may be delayed.

Some areas on campus have card access instead of keys. When you submit a key request form, Facilities Management may send you a message to indicate a Card Access Request is required. (Sample in APPENDIX E). For instructors listed with the Registrar, card access will be granted automatically with the submission of the class information.

Lost Keys

If keys are lost, complete the key request form as well as the Lost Key Report (Sample in APPENDIX D). Please explain what happened so a determination can be made as to whether or not the keys can be replaced or if the cores will need to be replaced. This process is in place to ensure the safety of everyone on campus. Provide information as to whether you think the keys may have been lost on or off campus? If they were misplaced or possibly taken by another individual? Was every effort been made to find the keys?

Signage

Work is being done to update signage to create a unified look - a campus standard. For example, a 4x6 frame with insert is typically used outside most doors. The 6x12 frame with insert will be used outside an office suite. The inserts will display a name and the green bar at the bottom will indicate the building – not department. And if necessary, a 36x24 frame with insert will be used for a building directory.

When someone moves, their office sign will need to be updated (i.e. office moves from one building to another or even swapping of offices). To have signage updated, please send a Service Request to Facilities Management and provide the building name/number, room number, the name you would like listed on the sign as well as the title (if necessary). If a Space Move Authorization Form has not been completed, please submit that form to avoid delays.

If you notice a sign needs to be updated, please notify Facilities Management of the location and update that needs to be made. The funding source will be determined based on the type of signage requested.

Space Survey/Audit

In order to keep current on space and its usage, space audits will be conducted. This information helps provides solid examples of why funds for additional space is being requested and shows the needs of the University. These surveys will be conducted on an as needed, continual and/or annual basis (around November).

Below are some examples of the type of information that is gathered on the space survey:

1. Building Number
2. Building Name
3. Floor
4. Room number
5. Occupant Name
6. Occupant EMPLID
7. Occupant Type (Faculty, Staff, Student, Other)
8. Usage type (Single use or multiple uses)
9. Occupying Department Number
10. Occupying Department Name
11. Department % - your department occupies this space 100% or is it shared?
12. Use code (i.e. 110 – general classroom, 210 – teaching lab, 314 – graduate office, etc.)
13. Use Description (i.e. classroom, office, lab, etc.)
14. Use % - is it used 100% as a classroom or is it 50% class and 50% lab, etc.?
15. Contact information for person completing the survey

Please complete the audit/survey as accurately as possible. If your department no longer occupies the space, please indicate that by making a note in a different color. And, if possible, list the department who acquired that space. We want to ensure we have proper documentation and accurate data.

Photography

Photos of spaces on campus may be taken to serve as a benchmark.

The Registrar also has photos available for the Registrar scheduled classrooms, which are presented on their website.

Contact Information

Facilities Department, Thorson Maintenance Building
https://www.ndsu.edu/facilities/
Main Phone: 701-231-7911

Melissa Schwengler, Space Coordinator
Email: Melissa.schwengler@ndus.edu
Phone: 701-231-8378

Frequently Asked Questions (FAQ)

1. **There is an empty office located in my building, is it okay if we use it?**
   Check with Facilities Management as that space may already be allocated to another occupant.
2. **Can the Custodial Staff open offices for rooms we are using, but are not assigned to us?**
   It is against the University policy for the custodial staff to open doors/offices where the occupant is not assigned.
3. **I got married and have a name change, how can I update my office sign?**
   Submit a Service Request to update the insert. Indicate the office location and new name.
4. **Where do I find the form for a key request or a space move?**
   All forms can be found at https://www.ndsu.edu/forms/
5. **Do I need to update Facilities Management with graduate student changes?**
   Since graduate students tend to change often, Facilities Management does not track graduate offices down to the occupant. The insert for the signage for graduate offices will indicate GRADUATE STUDENTS and will not list each one. However, in order to obtain keys, a key request would need to be submitted.
6. **Why can't I put paper over a sign if it is not correct?**
   When changes to a sign need to occur, it is best to have the sign updated as we want to keep the campus signage looking consistent throughout campus as well as keep a professional look.
7. **How long does it take to get a sign?**
   This can vary depending on the type of sign needed; its location and size.
8. **Who should I contact if a space needs attention?**
   Please contact Facilities Management at 701-231-7911
9. **My organization needs a storage space on campus, how do I find that space?**
   Every effort will be made to help find space; however, with limited space, it may be difficult to find additional space.
10. **The floorplan for my building is not correct, who can fix this?**
    Floor plans are typically updated when renovations or changes occur. If you notice that a floor plan is incorrect, please check with Facilities Management to get it updated or request a current copy of the floorplan.

APPENDIX A:
SAMPLE Space Move Authorization Form

Space Move and Use Change Form

Questions about this form? Please call 701-231-5862

This form is to be used for any departmental space moves or newly acquired spaces. Complete Section B if moving from one space to another. Complete Section C if you are moving into a vacant space and do not currently reside in an existing space. Please enter any notes pertaining to the space move under Section D.

Reference #: _____

Generate a Reference # with the *reference number generator*

A. Contact Information

Requesting Department: _____ Date of Request: _____

Contact Name: _____

Contact Phone: _____ Contact Email: _____

B. Space Move/Change

Current Location: Identifies existing location, departmental assignment, room use, and occupancy.

☐ This occupant no longer occupies this space.

Building	Room #	Occupant Name	Dept #	Room Use (Office, Classroom, Storage, Etc.)	Occupant Group (Director, Grad, Student, Etc.)	Effective Date

New Location: Identifies new location, departmental assignment, room use, and occupancy.

Building	Room #	Occupant Name	Dept #	Room Use (Office, Classroom, Storage, Etc.)	Occupant Group (Director, Grad, Student, Etc.)	Effective Date

C. Newly Acquired Space*

Newly Acquired Space: Identifies department moving into a vacant space, departmental assignment, room use, and occupancy.

Building	Room #	Occupant Name	Dept #	Room Use (Office, Classroom, Storage, Etc.)	Occupant Group (Director, Grad, Student, Etc.)	Effective Date

*If space is newly acquired, you must complete Section E and page MUST be attached to process the form.

D. Comments

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Space Move and Use Change Form

Questions about this form? Please call 701-231-5882

E. Authorizations

Complete this section only if Section C. of this form is utilized.

_____	_____
Head of requesting department - Printed Name	Head of requesting department - Signature
_____	_____
Head of current occupying department- Printed Name	Head of current occupying department- Signature
_____	_____
Dean or Director of current occupying department - Printed Name	Dean or Director of current occupying department - Signature
Bruce Bollinger	
_____	_____
Vice President Finance and Administration - Printed Name	Vice President Finance and Administration - Signature
Beth Ingram	
_____	_____
Provost - Printed Name	Provost - Signature

Upon receipt of the completed form, a copy will be e-mailed to the head of the requesting department, the head of the occupying department, and the contact indicated in section A.

Route this completed form to:

Facilities Management
Work Control Group
Thorson Maintenance Center

701-231-5882 phone
701-231-8008 fax

ndsu.facilitiesmanagement@ndsu.edu

Reference #: _____

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**Check website to ensure usage of the most up-to-date form

APPENDIX B:
SAMPLE Move Request

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Move Request
Questions about this form? Please call 701-231-7911

Upon requesting a move to take place, the minimum time for the move to be complete is 3 weeks.
If moving computers, phones or faxes, contact IT or your Telephone Administrator before the move to ensure the hookups are in working order.

Date Submitted: _____

Requestor Information:
Name: _____
Phone: _____ E-mail: _____

Move From:
Building: _____ ▼
Floor: _____ Room: _____

Move To:
Building: _____ ▼
Floor: _____ Room: _____

Details about the move:

Items to be moved	Number of items	Detail: select all that apply
☐ Desk	_____	Does desk have an "L"? _____ ○ No ○ Yes How many? _____
☐ Lateral File Cabinet	_____	Number of drawers each? _____
☐ Regular File Cabinet	_____	Number of drawers each? _____
☐ Chair	_____	Type of chair: ○ Desk ○ Conference
☐ Table	_____	Type of table: ○ Standard ○ End Table ○ Coffee Table ○ Conference Table
☐ Credenza	_____	
☐ Bookcase	_____	Number of shelves each? _____
☐ Wall Shelves	_____	
☐ Chair Mat	_____	
☐ Appliances	_____	Type: _____
☐ Boxes	_____	
☐ Other/Miscellaneous Items	_____	Describe:

- If you would like a technology item (computer, monitor, printer, phone, fax etc.) moved, contact IT or Telecom.
- These items are the responsibility of the requestor to move: pictures, wall hangings, personal items, window decor, office decor.

Route this completed form to:
Facilities Management
ndsu.facilitiesmanagement@ndsu.edu
Thorson Maintenance Center
Tel: (701) 231-7911
Fax: (701) 231-8008

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**Check website to ensure usage of the most up-to-date form

APPENDIX C:
SAMPLE Key Request Form

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Key Request

Questions about this form? Please call 701-231-7911

Date: _____   Choose One: ○ Staff   ○ Faculty   ○ Student   ○ Other

Empl ID#: _____   Employee Name: _____

Dept #: _____   Dept Name: _____

Is this space currently assigned to your department per Facilities Space Inventory? ○ Yes   ○ No - *If "no," a space move form is required or the department assigned to the space must authorize the key request.*

Reason: Choose One
○ New Employee   ○ Current Employee   ○ Lost Key (make a replacement)   ○ Lost Key (no replacement)   ○ Other _____

○ Moving/Changing Offices *(Submit a Space Move Form if this is selected)*

Building Name	Building #	Room #	Key Code (if known)	Facilities Management Use Only

**Lost keys will be charged to the department at actual cost which will vary based on the type of key lost.
Lost Key Report form is required to be completed for all lost keys. It is the policy of Facilities Management to issue no more than one key per person for each lock. Rekeying also requires a service request. A campus-wide key inventory will be completed annually. Please provide funding below.

Fund: _____   Dept: _____   Account: _____   Program: _____   Project: _____

Contact Information for Key Pickup:
Name: _____   Phone: _____

E-Mail: _____

All keys issued through this authorization process are considered property of the University.

Requested by: **Requesting Dept Authorization:**

Signature _____ Phone _____ Date _____   Signature _____ Phone _____ Date _____
Printed Name   Printed Name

Funding Use Authorization: **Key Control Official Verification:**

Signature _____ Phone _____ Date _____   Signature _____ Phone _____ Date _____
Printed Name   Printed Name

FM Authorization:

Signature _____ Phone _____ Date _____
Printed Name

FM USE ONLY:	Route this completed form to:
Entered By:_____ Date:_____ WO#_____	Facilities Management-Thorson Maintenance Center
Billing Info: # of Keys _____ MC#:_____ Total Billed: _____	Phone (701) 231-7911 Fax (701) 231-8008

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**Check website to ensure usage of the most up-to-date form

APPENDIX D:
SAMPLE Lost Key Form

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DIVISION OF FINANCE AND ADMINISTRATION

Lost Key Report

Questions about this form? Please call 701-231-7911

Date: _____ Choose One: ○ Staff ○ Faculty ○ Student ○ Other

Empl ID#: _____ Employee Name: _____

Dept #: _____ Dept Name: _____

Building Name	Building #	Room #	Key Code (if known)

Circumstances Concerning Loss of Key(s):
Provide date and place of key loss, as best known, including all details that could possibly compromise security.

Contact Information for further details if needed:
Name: _____ Phone: _____
E-Mail: _____
A Key Request Form will need to be filled out for replacement keys. A service request will need to be submitted to re-key a space.

Funding:
If a replacement key is not needed, please provide a fund number for the lost key costs:

You may split by percentage. If you need additional lines for funding, please list below.

Fund	Dept #	Account #	Program #	Project #	%
Fund	Dept #	Account #	Program #	Project #	%

X_____   _____
Signature to authorize funding   Date
Signatory must have the authority to approve depletion of funds

Route this completed form to:

Facilities Management-
Thorson Maintenance Center

Phone (701) 231-7911
Fax (701) 231-8008

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**Check website to ensure usage of the most up-to-date form

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APPENDIX E:
SAMPLE Card Access Request Form

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Card Access Request
Questions about this form? Please call 701-231-7911

Date: _____   Date Received: _____

Name	EMPL #	Building	Room/Door	Action (choose 1)	*Other Information/Justification (e.g.Start/End dates, limited access)
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	
				▾	

*Access to A. Glenn Hill building requires justification. Access to this building is only granted for a single semester at a time.

Requested by: _____
Signature   Phone #   Date   Department

Dept Authorization: _____
Signature   Phone #   Date   Department

Key Control Official: _____
Signature   Phone #   Date   Department

FM Authorization: _____
Signature   Phone #   Date   Department

Route this completed form to :
Facilities Management-
Thorson Maintenance Center

Phone (701) 231-7911
Fax (701) 231-8008

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**Check website to ensure usage of the most up-to-date form