Name of Policy: Permanent or temporary space allocation.

Policy Number: 3364-20-04

Approving Officer: President

Responsible Agent: Vice President of Administration

Scope: all University of Toledo campuses

Most recent review date: September 1, 2012
Original effective date: April 15, 2009

New policy proposal
Major revision of existing policy
Minor/technical revision of existing policy
Reaffirmation of existing policy

(A) Policy statement

All requests for space allocation must be approved by the provost and executive vice president for academic affairs or the chancellor and executive vice president for biosciences and health affairs. Requests for space allocation involving space at the UT Medical Center (UTMC) also require approval from the vice president and executive director, UTMC.

(B) Purpose of policy

To promote the efficient use of space.

To foster a coordinated approach to addressing space needs on all campuses.

To improve customer service for those making requests.

To ensure transparency and accountability in the space allocation process.

To ensure that all requests for space, requests for change in occupancy, and requests for change in room use are authorized by the responsible parties.

To ensure that the university's facilities information (building floor plans and space inventory) is current, for internal space management purposes and for accurate reporting to external agencies (Ohio Board of Regents, Medicare, National Science Foundation, etc.)

(C) Procedure
The space request form (found on the facilities and construction website at http://www.utoledo.edu/facilities/spaceplanning/pdf/Request_for_change_in_Occupancy.pdf) is the vehicle for making space requests.

Part I of this form is to be completed any time there is a “Request for Space” (a request for different or additional space when a specific space has not been identified). Part II of this form is to be completed any time there is a “Request for Change in Occupancy” (a request for a change in the departmental assignment of a room). Part III of this form is to be completed any time there is a “Request for Change in Room Use” (a request for a change in the primary use of a room).

(1) Submittal Process:

The form should be filled in electronically and then printed for required signatures and distribution. Any relevant supporting material should be attached.

For a “Request for Space” (a request for different or additional space when a specific space has not been identified):

- Complete the fields in Part I of the form. (Attach additional sheets if necessary.)
- Obtain authorizing signatures at department level (director or department chair) and division/college level (vice president or dean).
- Submit form to office of space planning (MS #216).
- Note: In the case of a “Request for Space” based on domino moves required by a capital project (rather than generated by the user), facilities and construction staff will initiate a “Request for Space” for each impacted unit, and the process will continue as outlined below.

For a “Request for Change in Occupancy” (a request for a change in the departmental assignment of a room):

- Complete the fields in Part II of the form, for both present and proposed room assignments.
- Obtain authorizing signatures at department level (director or department chair) and division/college level (vice president or dean) – for both present and proposed room assignments (the unit that will vacate the space and the unit that will occupy the space).
- Submit form to office of space planning (MS #216).

For a "Request for Change in Room Use" (a request for a change in the primary use of a room):

- Complete the fields in Part III of the form, for both present use and proposed use of room.
- Obtain authorizing signatures at department level (director or department chair) and division/college level (vice president or dean).
(2) Review process:

For all requests (involving Part I, Part II or Part III of the space request form), the office of space planning will log the request and guide it through the review process. This may involve:

- Reviewing request with main campus (MC) provost’s office, health science campus (HSC) chancellor’s office, and University of Toledo Medical Center (UTMC) vice president and executive director (as appropriate) to determine relative priority of request.
- Analyzing “Requests for Space” and proposing option(s), based on information provided by requester on Part I of form and follow-up investigation by office of space planning with requester.
- Reviewing option(s) with MC provost’s office, HSC chancellor’s office, and UTMC vice president and executive director (as appropriate), as well as with the requester.
- Completing Part II of form (“Request for Change in Occupancy”) for the particular space(s) involved in the accepted option developed in response to a “Request for Space”.

(3) Approvals:

The office of space planning will coordinate obtaining the required approvals.

For a “Request for Change in Occupancy” (Part II) or a "Request for Change in Room Use" (Part III), this involves:

- Vice president and executive director, UTMC – approval required for all requests involving space at the UT Medical Center.
- Provost and executive vice president for academic affairs – final approval required for all requests involving space on main campus, scott park campus, and satellite campuses associated with MC.
- chancellor and executive vice president for biosciences and health affairs—final approval required for all requests involving space on health science campus and satellite campuses associated with HSC.

Note: If a space change involves a program/department associated (either geographically or administratively) with both MC and HSC, approval is required from both MC Provost and HSC Chancellor.

Note: A “Request for Space” (Part I) does not itself progress to the point of needing final approval by the Provost(s). It may develop into a “Request for Change in Occupancy” (Part II), which does require such final approval.

(4) Notification:
The office of space planning will notify involved parties after “Requests for Change in Occupancy” and “Requests for Change in Room Use” receive final approval by provost(s). The parties to be notified include:

- Requester
- Director/department chair and VP/dean who authorized the request
- Current occupant (if different from requester)
- UT police
- Information technology (for data and telecommunications)
- Facilities and construction (for maintenance and key control)
- Research administration (if research space is involved)

If a request is not approved, at any step in the process, the office of space planning will notify the requester of this action, with a brief description of why the request was not approved.

(5) Related issues:

If physical alterations are required, initiate a capital project request form (found on the facilities and construction website) after the “Request for Change in Occupancy” or “Request for Change in Room Use” is approved. The capital project request must be approved in its entirety before work can begin.

Submit form to office of space planning (MS #216).

Policies Superseded by This Policy:
- 01-42 Permanent or Temporary Space Allocation – HSC (former Health Science Campus policy, previous review date 07/01/03)

Original effective date: April 15, 2009
Review/Revision Date: September 1, 2012
Next review date: September 1, 2015