Space Allocation Resource Committee Policies and Procedures

1) **Background**

The Space Allocation Resource Committee (SARC) Policies and Procedures establish a framework for the efficient use, equitable allocation, and periodic review of UTA’s physical resources to support the University’s mission. As such, this policy is intended to provide a basis for transparent space decisions that maintain a proper balance between teaching, research, student success, engagement and outreach, and administrative functions on campus.

Physical space can be a limiting resource in the development, advancement, and improvement of UTA’s academic, research programs, and student services; therefore, effective utilization of this valuable resource is essential to the success of the University, its faculty, staff, and its students. Space is a critical university-owned resource and is subject to allocation, evaluation, and reallocation to meet the overall needs and priorities of the institution. Stewardship of space resources is a joint effort between all University staff, faculty, and students and relies upon everyone to ensure that space is used to support student success, foster collaborative research, and promote positive productive work environments.

A. **Space Allocation Resource Committee**

The SARC is comprised of members from various campus constituents that embody a holistic view of University space resources regarding space planning and management decisions.

The SARC is responsible for developing policies and plans that promote stewardship of all University space resources including academic, auxiliary, and research spaces; ensuring that such policies and plans align with the University Strategic Plan; and prioritizing institutional needs for equitable and efficient allocations of space resources.

i. **Members**

The SARC is comprised of the following:

- Vice President of Administration and Campus Operations (Chair),
- Provost and Vice President for Academic Affairs,
- Vice President of Research,
- Vice President for Enrollment Management,
- Vice President for Student Affairs,
- Associate Vice Provost for Student Success,
- Assistant Vice President of Facilities Management,
- Assistant Director of Space Management,
- Representative of the Deans’ Council, and
- Representative of the Faculty Senate.
B. Space Management Group

The Space Management Group (SMG) in the Office of Facilities Management, which reports to the Vice President of Administration and Campus Operations, serves as a professional resource for space assets on and off campus; provides effective stewardship of the space inventory database; manages space requests; facilitates annual space surveys and conducts space audits; supports campus moves; and provides accurate and timely space inventory and utilization reports to inform decision-makers about short and long-term space needs.

SMG is charged with the stewardship of all campus spaces; reviews, maintains, and analyzes spaces to assist University leadership on how best to utilize space resources in an efficient yet flexible manner to support the University Mission; provides data, analyses, and reports as requested; and assists the SARC in making transparent recommendations on space that align with the University Strategic Plan.

2) Policies

A. The University, and not any academic unit (college, department, office, center, group or individual) within the University, is the owner of its physical space resources.

B. Identifying space needs early on is critical to SARC’s ability to keep up with demand and manage resources effectively. The campus master plan reflects the physical development required to support the strategic plan. It is during the strategic planning process that following space needs must be identified:

   - new programs or centers are proposed,
   - new faculty hires are anticipated,
   - new or expanded student services are considered,
   - enrollment trends are analyzed, and
   - projected growth of the research enterprise is determined.

C. Any facility-related costs required to support strategic planning space needs must be included in the operating budget in order for the space requirement to be realized. It is the responsibility of executive leadership (listed below) to communicate space needs, which are identified through their approval of annual operating budgets, to the SARC at the earliest possible time. Of the executive offices responsible for notifying the SARC of operating budget space needs, five executives currently serve on the SARC.

D. All space is subject to allocation and reallocation to align with the University Strategic Plan, institutional priorities, and best interests of the University and its programs. Space requests that directly support education and research, including activities that support the student experience, will be prioritized. Short and long-term priorities will be considered to promote fiscal responsibility and equitable space allocations for the University’s need.

E. Vacated space for which no new space allocation requests have been submitted and approved by the SARC will be returned to Central Administration for reallocation as needed.
F. The University strives to maintain an ample amount of vacated space to serve as swing space (temporary allocation) for departments needing to relocate, for a short-term, while their allocated space is under renovation.

G. Space requests will not be considered on historical grounds such as prior practices, informal discussions, or past use.

H. Space requests tied to the beginning of the fall semester must be submitted to the SMG or the SARC no later than the preceding April 1st.

I. All instructional space (classrooms, instructional labs, and computer labs), conference rooms, and meeting rooms, whether scheduled by the registrar or a department, will be scheduled through the university scheduling software (Astra).

J. All space occupancy changes occurring within a department’s allocated space will be reported to the SMG or the SARC to maintain data reliability.

K. A space request form must be submitted and approved by the SARC before any change can be made to existing space allocations.

L. All campus moves shall be coordinated with the SMG or the SARC regardless of whether the move is within the same building, department, or college to maintain data reliability and ensure proper stewardship of University space resources.

3) Procedures

A. Requesting Space for Allocation and/or Renovation

Departments requesting space allocation and/or renovation must provide a completed space request form (https://www.uta.edu/campus-ops/facilities/space-inventory/SARC-RequestFormV12-18-Interactive03.pdf) to the SMG. The SMG will review space renovation requests with Facilities Management’s Design Team prior to forwarding the request to the SARC for final review.

A space request form is required if a department is:

- requesting additional space or
- requesting renovation to their existing space where the scope of work involves adding/moving or removing walls.

A space request form is not required, but the SMG must be notified when a department is:

- relocating occupants within their allocated space* or
- changing the function of a previously-allocated room. An example of this would be changing a file room to function as an office.

* The relocation of occupants within departmental space must be communicated to the SMG via email (SpaceManagement@uta.edu) in a timely manner in order to keep employee locations current in CASIM.
B. **Supporting Documentation**  
Requesting departments are responsible for providing any documents that further details request justification, space needs, etc. This can include copies of budget/strategic plan which identify space need, letters of accreditation recommendations, photos of existing space, approval from Dean or Vice President, etc.

C. **Timing of Request Submission**  
Departments that want their space requests reviewed at a quarterly SARC meeting must provide their request forms and supporting documentation to the SMG at least two weeks prior to the upcoming SARC meeting. SARC meeting dates are posted at [https://www.uta.edu/campus-ops/facilities/space-committees.php](https://www.uta.edu/campus-ops/facilities/space-committees.php)

Space requests tied to the beginning of the fall semester must be submitted to the SMG no later than the preceding April 1st.

D. **Postponement of Request Review**  
Departments that are late in completing their CASIM space inventory survey, CASIM research space survey, or have outstanding questions regarding supplemental reporting from the SMG, will not have their space requests reviewed by the SARC until their reporting is completed. See “Department Responsibilities” below for more information regarding mandatory space inventory reporting.

E. **SARC Deliberations**  
The SARC meets quarterly during the months of January, April, July, and October to review complex requests requiring in-depth deliberation. Simpler requests may be handled via email and usually result in a decision within one month’s time.

The SARC takes a number of matters into account when deliberating space requests. Some of these considerations include but are not limited to:

- To what extent does the request contribute to achieving the goals of the Strategic Plan?
- To what extent does the request improve student outcomes and/or research productivity?
- Does the request’s use of space match the overall purpose and identity of the building in which the request is being made?
- What are the requesting department’s academic performance measures?
- In the case of research space requests, what is the requesting department’s research expenditures per square foot?
- Based on space inventory data reported by requesting department, how is the requesting department currently using their allocated space?
- Based on space audit results of the requesting department’s space inventory data, how well does the department utilize their space and how accurately are they reporting their use of space?
F. **SARC Decisions**
   i. **Approvals** - Requesting departments are notified of their approval within two weeks of the SARC meeting by the SMG.
   ii. **Denials** - In the case of a space allocation/renovation denial, the SARC will recommend that the requesting department work with Facilities Management to conduct a utilization review of the department’s existing space to identify opportunities to meet the requested space need.
   iii. **Decision Pending** - In some cases the SARC will require additional information in order to make a final determination. The requesting department will be notified within two weeks of the SARC meeting if more information is required.

G. **Department Responsibilities**
   i. **Annual Reporting** - Each department’s space inventory is referenced during space request deliberations. Shown below are the two annual surveys used to track space allocation and use.
   ii. **CASIM Space Inventory Survey** – During the month of June each department is required to report on every room that they occupy. Policies and procedures regarding the space inventory survey can be found here: [https://www.uta.edu/campus-ops/facilities/space-inventory/JuneSpaceInventorySurvey-PoliciesProcedures111518.pdf](https://www.uta.edu/campus-ops/facilities/space-inventory/JuneSpaceInventorySurvey-PoliciesProcedures111518.pdf)
   iii. **CASIM Research Survey** – During the month of September each department that occupies research space is required to report on which Principal Investigators occupy which research spaces. Policies and procedures regarding the research survey can be found here: [https://www.uta.edu/campus-ops/facilities/space-inventory/ResearchSurvey-PoliciesProcedures111518.pdf](https://www.uta.edu/campus-ops/facilities/space-inventory/ResearchSurvey-PoliciesProcedures111518.pdf)
   iv. **Year-round Reporting** - Maintaining an accurate account of room occupants and space use throughout the year is critical to SARC deliberations. Outside of the annual self-reporting survey periods of June and September departments are also responsible for conveying room inventory and room occupant updates to the SMG via email at SpaceManagement@uta.edu.

   **Note:** Providing timely updates of personnel relocation impacts safety as Emergency Operations will reference occupant locations in case of an emergency.
   v. **Space Requests** - **Supplemental Reporting** – Prior to forwarding space requests onto the SARC the SMG generates departmental space inventory reports to verify space utilization and clear up any outstanding space inventory questions. Departments are responsible for providing a timely response to SMG room inventory questions if they are to have their space requests reviewed by the SARC.

H. **Space Inventory Audits**
   i. **University Audits** – The SMG will conduct a regular sampling of room audits to verify year-round reporting accuracy for each department. These audits will help the SARC verify whether space requestors have a clear understanding of their current space allocation, room use, and room occupants.
   ii. **The Texas Higher Education Coordinating Board (THECB) Audits** – The THECB conducts a space inventory audit every 5 years. UT Arlington’s next audit is scheduled for Q1 2020. The SMG will conduct an internal audit of all Education & General (E&G) space in the months leading up to the THECB audit.