

# Space Management Policy and Procedures

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## Introduction and Overview

Space at Utah State University belongs to the University. University space is administered by the Dean or Vice President under whom the occupants report. All space issues and requests for new space should first be discussed with the appropriate Dean or Vice President. Inter-college and inter-vice presidential unit discussions should occur between Deans and/or Vice Presidents. However, any such exchanges of assignment must be reviewed and approved by the Space Management Committee via the Space Resolution Form in Curriculog prior to any such change. When an issue or request is unable to be resolved, the Dean and/or Vice President should bring the matter to the attention of the Executive Vice President and Provost, who will work with all parties to seek a final solution.

All Utah State University buildings and space are subject to assignment and reassignment to meet the overall needs and best interests of the institution. Each individual and unit must recognize the authority of the University to assign space in all buildings in an effort to meet changing needs. The Space Management Committee, when possible, will move like units together in order to work in conjunction with the mission of the USU Master Plan.

Additionally, each individual and unit must recognize the value of the Space Resolution Form in Curriculog for the maintenance of an accurate database of occupants, purpose, access control, and scheduling of each space that is reported annually to the Utah System of Higher Education as part of our Capital Facilities Inventory Report.

## Process for Resolving All Space Issues

Requests for space will be made to the Space Management Committee Chair by filling out submitting a proposal in Curriculog using the Space Resolution Form. Requests must be approved on the Curriculog form and signed by the appropriate Department Head/Director and Dean/Vice President prior to submission consideration and approval by the Space Management Committee.

The Space Management Committee Chair, in consultation with Facilities, will study each request and develop a proposal of resolution which is brought to the Space Management Committee for approval. Elements of the study may include but are not limited to:

- Meeting with the requesting unit to further define the need.
- Evaluating current utilization of the requesting unit's space.
- Comparing requested space to current standards/guidelines.
- Determining suitability of available space and need for renovation of existing space.
- Contacting occupants of adjacent or otherwise affected offices or buildings and solicit input for consideration.

The Space Management Committee Chair will present the proposal or resolution to the Space Management Committee. Affected units may be invited to present their case to the Space Management Committee.

If the proposal is approved by the Space Management Committee through a majority vote in the affirmative, a Letter of Assignment will be sent from the Committee confirming the assignment of space and include the approved use and conditions for assignment. (This letter will be copied and sent to USU Facilities.) Should the affected units believe the Space Management Committee acted in a capricious, arbitrary, or biased manner, appeals are directed to the Executive Vice President and Provost.

For future reference, this entire process is called the "Space Resolution Process."

### Types of Space Issues

Space issues and requests dealing with space changes (listed below) must be submitted following the Space Resolution Process prior to any modification of the space.

The following types of space issues must be brought to the Space Management Committee via the Space Resolution Process.

#### 1. Change of Function

The **Space Resolution Process** must be followed when space within a department changes function. For example, if office space is converted to graduate student space (or vice-versa) or if lab space is converted to office space (or vice-versa), a "change in function" of that space occurs. An audit of existing space will be triggered when a request for change of function is submitted. Proposals under this category are regarded as informational items unless major concerns arise.

A change of function cannot be requested if it results in the elimination of any classroom. Classroom space must be preserved for delivery of courses to satisfy the needs of students. **Also note that no additional departmental or college assigned classrooms will be approved from the existing centrally scheduled classrooms.** Exceptions to this policy must be submitted to the Space Management Committee and recommendations will be forwarded to the Executive Vice President and Provost.

#### 2. Reassignment across Departments within a College or Division

The **Space Resolution Process** must be followed when space is to be reassigned across departments within a college/division. In the justification box field on the Space Resolution Form in Curriculog, please indicate that the space is an internal change across departments within a college or division, and which

departments are involved. Proposals under this category are regarded as informational items unless major concerns arise.

### 3. Reassignment across Colleges or Divisions

The **Space Resolution Process** must be followed when space is to be reassigned across colleges or divisions. In the justification box field on the Space Resolution Form in Curriculog, please indicate that the space is a change across colleges/divisions, and which units are involved. Proposals under this category require approval in order to continue.

### 4. Improvement of Space

All improvements of existing space require a Facilities Modification Request (FMR), formerly known as a "Green Sheet," obtained from Facilities Planning. All FMRs that are involved with the **Space Resolution Process** are presented to the Space Management Committee. Facilities will review and advise units on the soundness of intended improvements. Affected units must follow the process set forth by Facilities Planning for construction projects. Proposals under this category are regarded as informational items unless major concerns arise.

### 5. Vacated Space

Vacated space is defined as space that becomes available due to an occupant's departure. When changes within departments/units occur and vacant space is the result, that space is not available for internal reassignment. The Space Management Chair must be informed when space becomes vacant due to an occupant's departure.

All requests for the reassignment of vacated space should follow the procedures described in the **Space Resolution Process** and will be evaluated based on a justified need. Proposals under this category require approval in order to continue.

### 6. Requests for Additional Space

When additional space is needed and departmental or college space is unavailable, a proposal (following the **Space Resolution Process**) can be submitted to the Space Management Committee. However, it should be noted that additional space is very hard to come by. Resolution of additional space requests will be based on appropriate space as it becomes available. Proposals under this category require approval in order to continue.

### 7. Resolution of Space Conflicts

All space conflicts must be presented to the Space Management Committee (following the **Space Resolution Process**). In turn, the Space Management Committee will develop a plan to resolve the space conflict.

### Important Notes

Where possible, space should not be mentioned in grant and contract proposals in terms of what is available. Faculty should not offer space as cost sharing or imply that the university's contribution to the grant is space.

Moreover, changes in assigned space should not be included in grant and contract proposals without prior approval. This means, you should not write space into grants without first making sure that new or converted space is available for the project, and prior approval for modification has been obtained.

Each department will receive a Space Inventory report for their review which will be represented in the annual submission of the Capital Facilities Inventory Report submitted to the Utah System of Higher Education. Updates to space inventory data should be made on the Space Inventory report and returned to the Space Coordinator in Facilities.

An on-site review of space will occur every two years. The Space Coordinator will meet with College/Division or department contacts and visit each assigned room. The purpose of this review is to gain a better understanding of space use and utilization. Current utilization will be a factor when evaluating a request for additional space.

Audits of existing space will be conducted regularly by the Space Coordinator and the Chair of the Space Management Committee.

Both departmentally controlled and centrally scheduled classroom space are protected from conversions to other uses unless the requesting unit identifies replacement space, makes a formal request through the Space Resolution Process, and the conversion is approved by the Space Management Committee.

### **Space Resolution Form**

[Click here](#) to go to Curriculog to submit a proposal. If you need help logging in or completing a proposal, contact Michelle Smith at 797-1166 or Michele Hillard at 797-0121. Please see below for Curriculog instructions.

[Click here](#) to see a list of the current Space Management Committee members and your college/division representative.

Instructions on how to submit a request for space management on Logan campus is included on the following pages of this document.

## Submitting a Space Management Request in Curriculog

1. Log in to Curriculog at [usu.curriculog.com](http://usu.curriculog.com). If you don't yet have access, contact Michele Hillard at 797-0120 or [michele.hillard@usu.edu](mailto:michele.hillard@usu.edu).
  - a. The login link is on the top right corner of the screen.
2. Once in Curriculog, click on the word PROPOSALS at the top left of the screen. The proposals folder with four tabs will now be visible in the main area of Curriculog.
3. Click on the any of the four tabs. By default, the screen typically opens to MY TASKS.
4. Now click on the plus sign next to the word New Proposal.

The screenshot shows the Curriculog web application interface. At the top, there is a navigation bar with 'Proposals' highlighted in red. Below this, there are tabs for 'My Tasks', 'My Proposals', 'Watch List', and 'All Proposals'. A 'Filter by:' dropdown is set to 'All Proposals'. A 'New Proposal' button is circled in red. Below the filter, there is a list of proposals with details such as title, course number, and last activity. On the right side, there are sections for 'My Recent Notifications' and 'My Upcoming Events'.

5. This will open to a list of forms that you can choose from. You will want to click on NEXT 10 to find the Space Resolution Form for new requests. It is on the second page of forms.

The screenshot shows a list of forms in the Curriculog interface. The forms are listed under the 'All Processes' tab. The forms include: '2.2 Catalog Changes - College & Other Pages', '3.1 Sabbatical Leave Application', '4.1.a R401 Abbreviated Program Proposal', '4.1.b R401 Full Program Proposal', '4.1.c R401 New Administrative Unit', '5.1.a Space Resolution Form', and '5.1.b USU-Eastern Space Resolution Form'. A red arrow points to the '5.1.a Space Resolution Form' entry, which has a checkmark to its right.

6. The necessary form is 5.1.a Space Resolution Form. Click on the check mark far to the right of the form name to start a new request.

7. This opens up the form for you to enter information in fields or choose selections from dropdown menus.

The screenshot shows a web interface for a 'New Proposal' titled '5.1.1 a Space Resolution Form'. The main content area is titled 'Space Resolution Information' and contains a note: 'This request form must be submitted prior to any space realization or changes.' Below this, there are 'Forward Questions to:' listed as Michelle Smith (797-1840) or michelle.smith@usu.edu, Andi McCabe (797-1121) or andi.mccabe@usu.edu, and a link to 'Space Management Policy and Procedures'. The 'Step 1: Provide contact information for the responsible person making this request.' section includes fields for 'Contact Person\*', 'Point of Contact for Request', 'Contact Person's Department\*', 'Phone Number\*', and 'Email Address\*'. On the right side, there is an 'Approval Steps' queue with the following items: 'Originator' (Michelle Smith), 'Space Management Committee College Rep' (Andi McCabe), 'Department Head' (Michelle Smith), 'Dean' (Michelle Smith), 'Provost Office Space Management' (Michelle Smith), and 'Space Management Committee Chair Preliminary Review' (Andi McCabe). Each step in the queue has a 'Participants' list and a 'Step Details' button.

On the right side of the form is the queue for approval steps. When you submit your proposal, you will be able to see the progress of the proposal through the different stages of the process.

8. Enter all fields with a star.
  - a. Begin with Step 1. Enter contact information. (Note, the phone number should be typed with no dashes between numbers.)
  - b. In Step 2, enter the department(s) and college/unit(s). PLEASE NOTE: You must include all departments and colleges involved with this request in these fields before launching the request. Check with Amanda Thomson (amanda.thomson@usu.edu) to confirm that the spaces involved within the request do not affect or involve another department. All open lobbies, hallways, storage, maintenance, restrooms, etc. belong to Facilities and all classrooms belong to AIS. You can select an option from the drop-down menu or begin typing to find the department and college. The field will let you enter multiple departments and colleges/units and will pull in the appropriate approvers for all listed.
  - c. In Step 3, select the appropriate action item. Make sure to select all that apply. Your proposal can be more than one type of request if needed. If you need clarification on what to select, contact Michelle Smith or Andi McCabe.
  - d. In Step 4, enter the building name by using the drop-down menu or by typing. If you are requesting additional space, select N/A.
  - e. In the Room Numbers field, you must type the room number. Because some proposals include more than one building involved, please type the name of the building followed by the room number. Separate buildings with a semi-colon.
    - For example, if rooms in Old Main and the TSC are part of your proposal, you would type the rooms as OLD MAIN 214, 220; TSC 119, 144B.
    - If you are requesting additional space or if no room number is involved at this stage of your proposal, simply type N/A.

- f. Enter a brief description of your proposal in the text field. If you need help deciding how to describe your proposal, feel free to contact Andi McCabe or Michelle Smith.
- g. You must include a floorplan and other Facilities forms (if applicable) with the proposed changes. You can add those files by clicking on the files icon located to the right of the request form. If you need a floorplan, contact Amanda Thomson or Michelle Smith.

The screenshot shows the CURRICULOG interface for a 'New Proposal' titled '5.1. a Space Resolution Form'. The main form area contains instructions and 'Forward Questions to:' which lists contact information for Michelle Smith and Andi McCabe. Below this are input fields for 'Contact Person\*', 'Point of Contact for Request', 'Contact Person's Department\*', 'Phone Number\*', and 'Email Address\*'. The 'Approval Steps' sidebar on the right lists several steps, each with a 'Step Details' button. A 'Files' icon in the top right corner of the sidebar is circled in red.

NOTE: Curriculog currently supports Word documents, Excel files, jpegs, or pdf files best. Simply adding a snip may not upload into the system in a readable format. If you want to include a snip of a floorplan, it may be best to first copy and paste the snip onto a Word document, then save and upload that Word document.

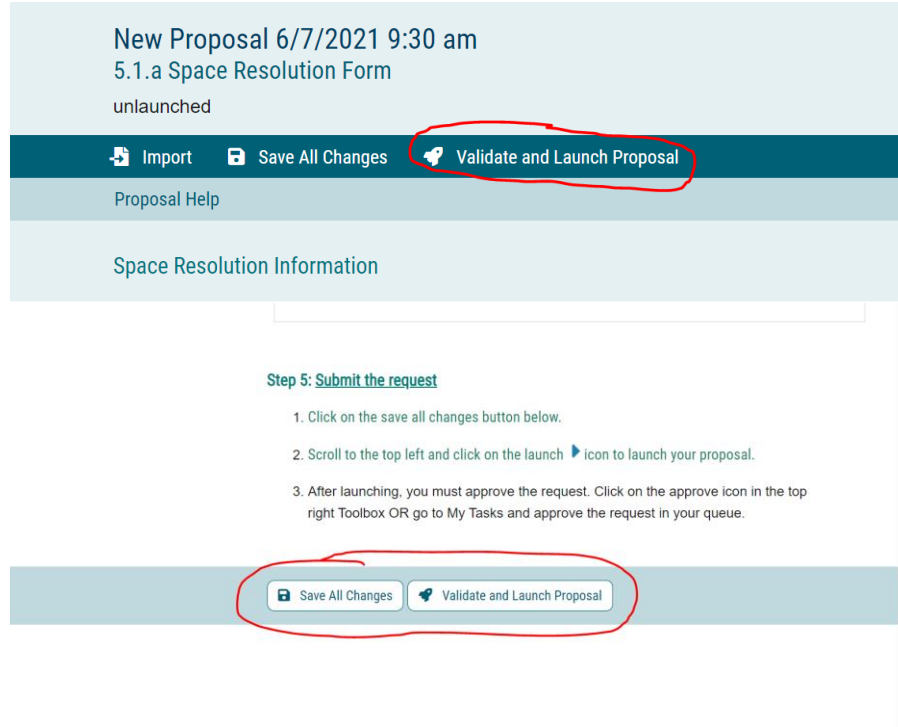
When you click on the files button, a new screen appears that allows you to upload files from your computer.

The screenshot shows the 'Upload File' dialog box. It has a title bar with a close button (X). Below the title bar, there is a 'File' icon and the text 'Choose File' (circled in red) followed by 'No file chosen'. There is an 'Upload' button below this. At the bottom, there is an 'Attached Files' section with the text 'There are no attached files.' On the right side, there is a vertical sidebar with icons for 'Steps to Approval', 'Files' (highlighted in blue), 'Crosslistings', and 'Proposal Lookup'.

- h. Now enter financial funding information. List any indexes involved with your funding first and then describe your funding sources and plans.

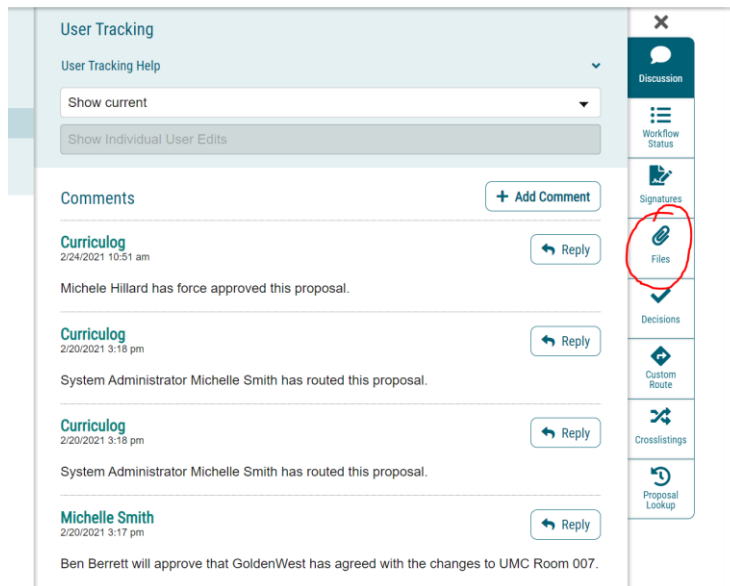
- i. With Step 5, save your changes. AGAIN, please make sure ALL affected departments and colleges are included on Step 2. Then you must launch your proposal.

Launch your proposal by clicking on the Validate and Launch Proposal button. This is located at the top of the form and at the bottom of your screen.



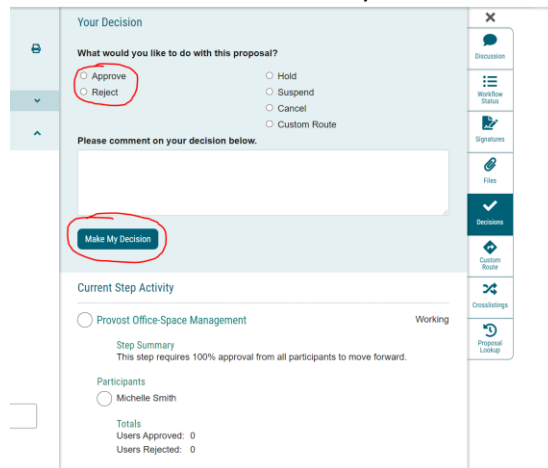
- j. After launching your proposal, you will need to approve your request.

Click on the Decisions button to the right of your form.





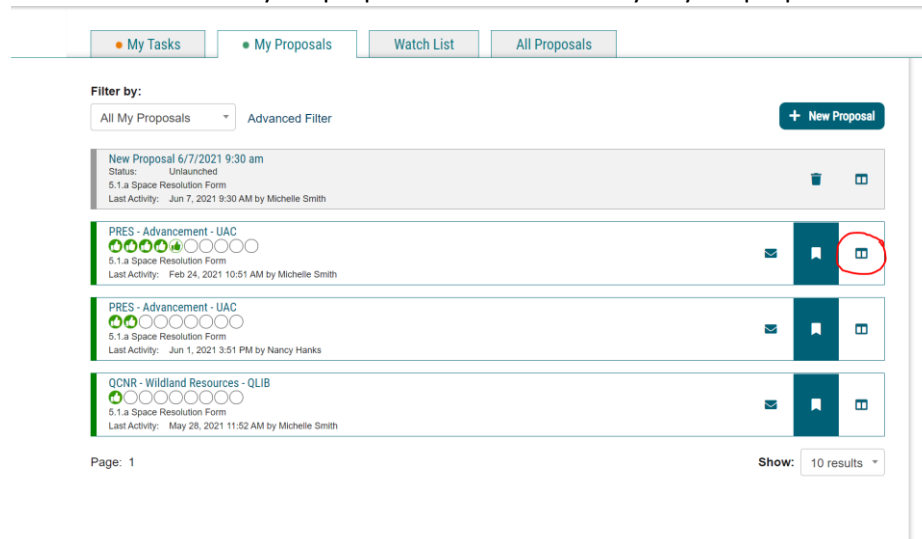
This opens to a new window where you can make your decision. Click on the appropriate decision. Make a comment if you so desire. Then click on Make My Decision.



You can also see your proposal under the tab My Proposals once it is launched. You can still edit your proposal or delete your proposal once it is launched. You won't be able to edit your proposal once you have approved it in the next step, however.

*Please note: launching your proposal will not push your proposal through the queue. You must also approve your proposal to move it along in the workflow.*

9. Once you approve your proposal, you'll be able to see it under the My Proposal tab.
  - a. Click on the name of your proposal to see a summary of your proposal.



- b. Click on the far right divided rectangle to see a summary appear to the right of the list of proposals.
    - c. You can also see the status of your proposal by looking at the bubbles or circles under the name of your request in the list. Approved steps have a green "thumbs up" and

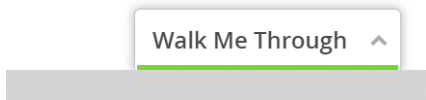
rejected requests have a red “thumbs down”. Any that are restarted have a red circle arrow.

- d. In your queue listed on the right side of the form under User Tracking you can see that Curriculog automatically sends the proposal to your college representative on the Space Committee for review.

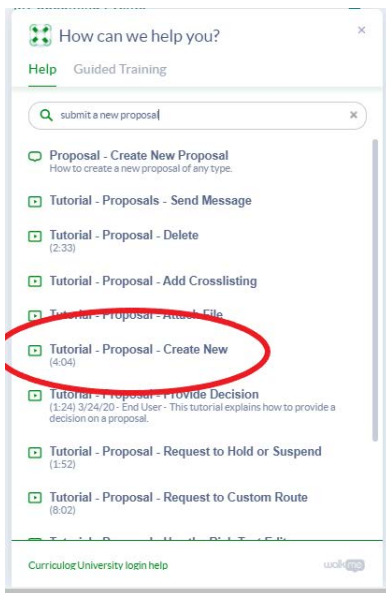
NOTE: Once you have approved your proposal, you will no longer be able to make edits or changes because it is now in another person’s task list.

If you need to edit your proposal or add more files, Michelle Smith can make any edits on any forms. Andi McCabe can do this once the proposal has reached her queue for review. You can reach out to Michelle or Andi to edit or add documents to your request. She may also reach out to the submitter/originator of the proposal for more information to add that to the proposal as well.

If at any time you need additional help, you can also click on the “Walk Me Through” square at the bottom right corner of your screen.



This launches a window with selections for you to choose from. Type "Submit a new proposal" in the search bar. Scroll down using the toolbar on the right side of your screen until you see Proposals. Click on the word Proposals. Then, select Tutorial - Proposal - Create New.



This will launch a video you can watch regarding how to submit any kind of proposal on a form in Curriculog.

For any questions, contact the Provost’s Office for help at 797-1160 or 797-0210.