

Procedure #	TBD
Related Policy Name & #	Space Allocation and Management Policy
Approved by:	Rani Dhaliwal
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Policy Holder:	Senior Vice President, Planning and Corporate Services and CFO
Admin. Contact(s):	Senior Director, Capital Development & Facilities Management
Review Date:	TBD

SPACE ALLOCATION AND MANAGEMENT PROCEDURE

Purpose:

The Space Allocation and Management Procedure (hereinafter referred to as the “Procedure”) assists The Humber College Institute of Technology and Advanced Learning and the University of Guelph-Humber (hereinafter referred to as “the College” or “Humber”) to apply its Space Allocation and Management Policy and supports other activities related to space allocation and space management.

This document is available in alternate format on request.

Definitions:

In this procedure:

“CDFM” means Capital Development and Facilities Management

“CDP” means Campus Development Plan

“CPSC” means Capital Planning Steering Committee

“SEM” means Strategic Enrolment Management

“SMSC” means Space Management Sub-Committee

Procedures:

1. Space Allocation Requests by Users

- 1.1 Space allocation requests can be made by completing Part A of the Space Allocation Request Form.
- 1.2 The Senior/Vice-President in charge of the school or department submitting the space allocation request must approve it in principle (by signature). This approval indicates the merit of the application and authorizes the Department of

Capital Development and Facilities Management (“CDFM”) to assist and advise applicants as per Section 2 below.

- 1.3 Schools and other departments planning changes to existing programs/services that affect the type and quantity of space needed must submit a request as part of their overall evaluation and planning process.

2. Technical and Advisory Assistance

- 2.1 CDFM will assist applicants to describe, quantify and estimate the cost (high level) of implementing the request, based on the College’s space allocation standards, other space-related policies, high level cost estimates and past experience. Following the outcome of its initial assessment, CDFM may request additional information using the following guidelines:

Part A Only: The space allocation request is deemed to be self-explanatory, preapproved, self-funded or self-contained within existing space allocations. The request does not require further study or justification before proceeding with its implementation (by CDFM) or with further evaluation as per Section 3 of the Procedure.

Part A + Part B: The space allocation request is deemed complex, or its implementation potentially triggers resource allocation choices by the College. Further evaluation is required as per Section 3 of the Procedure.

In addition to Part A and Part B; the description of requirements specific to classroom, laboratory and office spaces will be completed as per the pro forma templates provided in Appendices D, E and F of the Procedure.

3. Evaluation of Space Allocation Requests

- 3.1 The Space Management Sub-Committee (“SMSC”) of the Capital Planning Steering Committee (“CPSC”) will evaluate the requests submitted to the College and will submit non-binding recommendations to CPSC to implement, defer, modify or reject a request.
- 3.2 The criteria and guiding principles to be used by SMSC to evaluate and submit its non-binding recommendations to CPSC are provided in Appendices D-F.
- 3.3 CDFM will advise and support, in an expert advisory capacity, the space planning and allocation tasks and decisions of SMSC (and CPSC). The support by CDFM includes the development and maintenance of various data sets that inform space allocation and space planning decisions by the College.

4. Key Space Allocation and Management Inputs

- 4.1 The College’s space allocation and planning process and subsequent decisions will be informed by the following five (5) key inputs:

I. Information on Current Space Allocations and Space Utilization:

Up-to-date and accurate information on space allocations and space utilization is a key element in effective planning and management of space at Humber.

Building Space Audits - CDFM will carry-out audits on a revolving and routine basis to assess the allocations and the utilization of space using the methodology, standards and inputs indicated in the College's Space Allocation Standards Policy.

Space Inventory Data and Floor Plans - CDFM will maintain a central record of space inventory in all buildings that provides information on room floor areas, classification by primary and secondary use, occupancy, responsibility and room condition.

II. Strategic Plan, Campus Development Plan and Other High-Level Planning and Policy Documents:

The College's Strategic Plan and the Campus Development Plan ("CDP") will frame the planning and the allocation of all spaces at Humber.

Space allocations, particularly those whereby the use or the occupant of the space changes, will be aligned with the CDP.

III. Related Policies, Plans and Practices on the Allocation and Use of College Space:

The Policy will often be applied in conjunction with two other College policies on space allocation standards and on scheduling:

- College Space Allocation Standards
- College Instructional Space Scheduling Practice
- For Reference:
 - The focus of the College's Space Allocation Standards is to describe the **quantity** of space to be allocated.
 - The aim of the College's Instructional Space Scheduling Practice is the **effective use and equitable access to the College's instructional spaces on a timetabled basis**, while considering learner success factors and delivery constraints.

IV. SMSC Consultations with Users and with Proponents of New Space Allocations:

SMSC is the forum for discussing and considering measures and solutions regarding College space allocation and management issues. SMSC's range of responsibilities include: review of policy; space standards; current and proposed allocations; and dispute resolution.

All space allocation requests and decisions by the College are to be considered by SMSC, which in turn will formulate non-binding recommendations for further action and/or allocations to CPSC.

SMSC will accommodate all reasonable requests for deputations and presentations by College stakeholder concerning space allocation issues, opportunities and space allocation requests.

V. Professional Support and Advisory Services Provided by CDFM:

CDFM is responsible for the documentation and the analysis of current College space allocations, and for the forecasting of future space needs and allocations.

The College provides CDFM the capacity and the professional expertise to give advice and analytical services to SMSC and CPSC, as well as to College users needing to describe their current or anticipated space needs and/or the utilization of the spaces they are currently allocated.

CDFM will support SMSC and CPSC by:

- Providing data on space allocations and utilization levels on a semester basis.
- Maintaining space inventory database and as-built drawings.
- Assessing space allocation and renovation requests in existing buildings from a space planning standard, utilization and engineering perspective.
- Coordinating from time to time a utilization audit to ascertain that College classrooms, laboratories, studios and workshops are being used as per the room timetables on record.
- Assessing space allocation requests in existing and proposed buildings in relation to the CDP and planned or required capital improvements works.
- Engaging with space users to assist them in the definition of space requirements in support of their space allocation requests.

CDFM representatives will attend SMSC and CPSC meetings as required to provide information and guidance on the items listed above.

5. Appendices Overview

5.1 Request for Space Allocation

Part A

Part A is used to provide a summary of a request for space allocation and to indicate its approval (by signature) of the Senior/Vice-President in charge. Part A is submitted to CDFM for technical and advisory assistance.

Part B

Part B is used to present the rationale, merit and details of a request for space allocation. It provides a detailed description of space requirements and capital cost estimates developed with the assistance of CDFM.

Part C

Part C is used to assist in the evaluation of the space request application. Ensure that information related to these criteria is included in the submission (Part A and/or Part B).

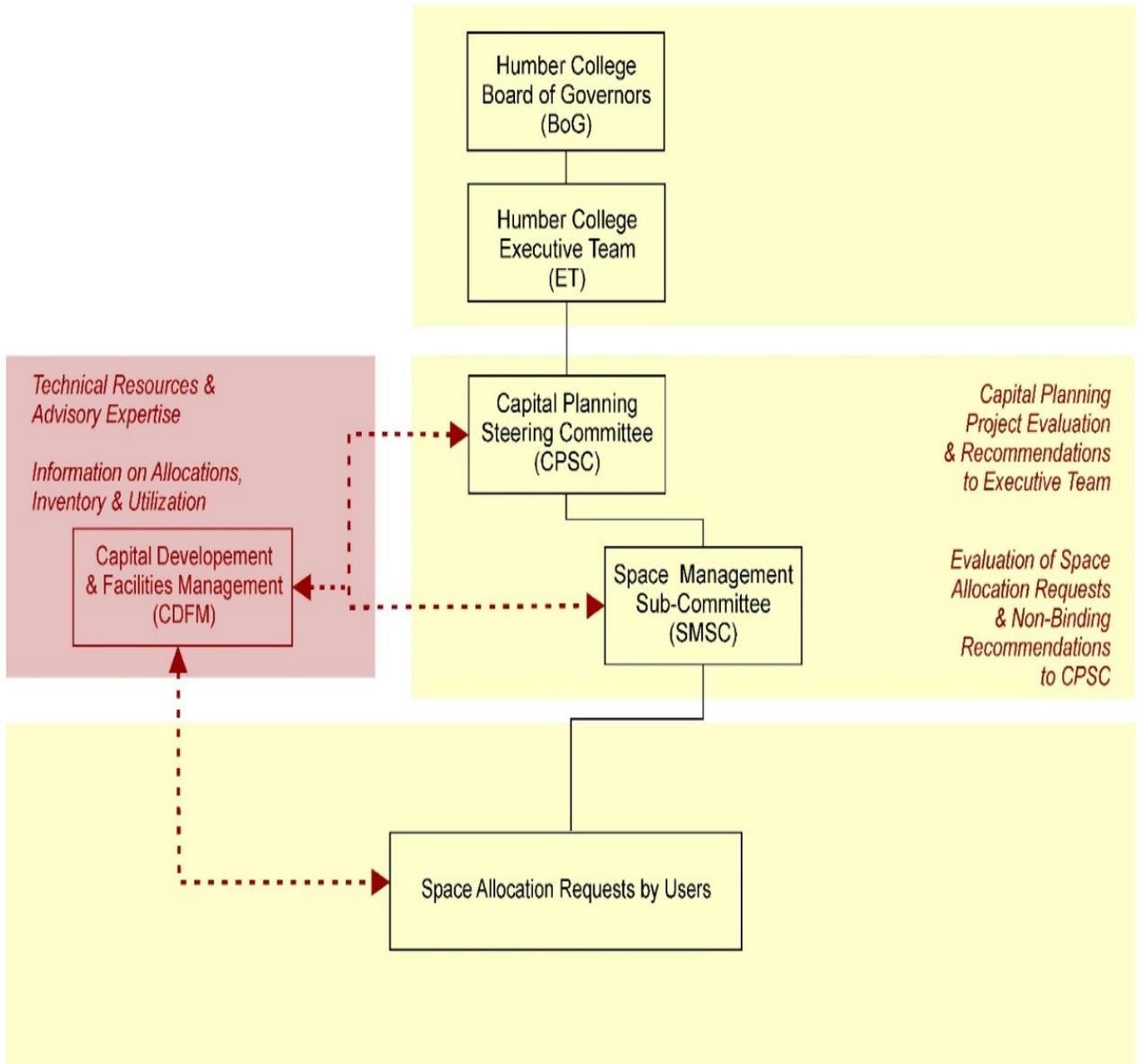
Part C is submitted to SMSC for evaluation as per the criteria presented in the assessment form and Appendices D-F. Upon evaluation SMSC formulates non-binding recommendations to CPSC to implement, defer, modify or reject a given request.

- 5.2 Appendix A: Terms of Reference
- 5.3 Appendix B: Request for Space Allocation Process Flow Chart
- 5.4 Appendix C: Classroom Space Requirement Calculation Template
(*source – Classroom Worksheet - College Space Allocation Standards*)
- 5.5 Appendix D: Laboratory Space Requirement Calculation Template
(*source – Laboratory Worksheet - College Space Allocation Standards*)
- 5.6 Appendix E: Office Space Requirement Calculation Template
(*source – Office Worksheet - College Space Allocation Standards*)

Appendices:

- Appendix A: Request for Space Allocation Process Flow Chart
- Appendix B: Space Management Sub-Committee Terms of Reference
- Appendix C: Space Allocation Request Forms
- Appendix D: Space Allocation Worksheet to Evaluate the Number of Classrooms Required
**to be completed by CDFM*
- Appendix E: Space Allocation Worksheet to Evaluate the Number of Specialized Scheduling Laboratory Required
**to be completed by CDFM*
- Appendix F: Space Allocation Worksheet – Academic Offices
**to be completed by CDFM*
Space Allocation Worksheet – Student Services Units
**to be completed by CDFM*
Space Allocation Worksheet – Administrative Units
**to be completed by CDFM*

Appendix A: Request for Space Allocation Process Flow Chart



Legend

_____ Direct Reporting Structure

..... Support provided by CDFM

Appendix B: Space Management Sub-Committee Terms of Reference

1. Terms of Reference

- a. Space Management Sub-Committee (herein after referred to as “SMSC”) is responsible for the review of space-related policy, space standards, space allocations, requests by users for space allocations as well as dispute resolution related to the same.
- b. All space allocation requests by College users are to be evaluated first by SMSC, who in turn will formulate non-binding recommendations for further action and/or allocations to the Capital Planning Steering Committee (herein after referred to as “CPSC”).
- c. SMSC operates as per Terms of Reference approved by CPSC.

2. SMSC Specific Responsibilities

- a. Establish and periodically review all College space-related procedures and policies and recommend to CPSC, as appropriate, modifications deemed necessary.
- b. Review the current utilization and allocations of space to schools, departments and administrative units described in the reports prepared by CDFM.
- c. Recommend measures to CPSC to align the utilization and allocation of spaces with the College’s standards, utilization targets, policies and strategic directions.
- d. Review and formulate non-bidding recommendations to CPSC regarding all space allocation requests submitted as per section 1.2 of the Space Allocation and Management Procedure. SMSC’s recommendations to CPSC will fall into four (4) categories:

- I. Implement

That a space allocation request be accepted and be incorporated in the College’s Capital Plan. The location, timeframe, preliminary budget and funding source for implementation of the request have been described.

- II. Defer

That a space allocation request be accepted but its implementation be deferred until the necessary resources (space, capital, other) for its implementation are available, or until other related decisions have been made by the College.

SMSC will review all new requests and deferred requests on an equal basis when formulating its non-binding recommendations to CPSC for implementation.

A “deferred” request will be considered active and awaiting implementation until it is either implemented, or withdrawn by the Senior/Vice-President in charge.

III. Modify

That the request should be modified and re-submitted to allow its proponent to address aspects of the proposal deemed unsatisfactory or unclear.

IV. Reject

That the College should not proceed with the request. SMSC's reason(s) for the recommendation must be outlined in its transmittal to CPSC. The co-chairs of CPSC will communicate to the applicant(s) the decision and reasons for rejecting a space allocation request (if CPSC endorses SMSC's recommendation).

Maintain compilation of all deferred requests, listed in order of priority and with a tally of estimated building areas requested and estimated project costs.

Review and advise CPSC on program and service initiatives to ensure that resource requirements that impact space are considered and factored into their feasibility assessment, including but not limited to the initiatives stemming from College's Strategic Enrolment Management ("SEM") process.

3. Appeal Process

All space allocation requests are considered and reviewed by the SMSC. The SMSC will formulate non-binding recommendations to CPSC regarding all space allocation requests. The CPSC will provide the final recommendation to executive, therefore, any appeal(s) to the recommendation need to be presented to the CPSC, with a rationale for the appeal.

4. SMSC Reporting Structure

- a. The SMSC reports to the CPSC through its co-chairs.

5. SMSC Meetings

- a. SMSC will meet on a regular scheduled basis. Additional meetings may be called by the SMSC's co-chairs at their discretion.
- b. The frequency of meetings must allow SMSC to deal with arising space planning issues and allocation requests on a timely basis and to review and take action on the reports produced by CDFM.
- c. The frequency of meetings will also consider the schedule and decision cycle of CPSC as well as the College's business planning cycle.
- d. The agenda and meeting minutes will be posted on the general college Committees webpage.

6. SMSC Membership

- a. The chair (co-chairs) will be member(s) of CPSC. SMSC voting members will be appointed by the co-chairs of CPSC.

Voting Members

SMSC will count nine voting members selected to represent the College's broad and complex mission and day-to-day operations. Voting members will include:

Member 1 & Co-Chair	Associate Vice-President, Academic Operations (<i>Ex-Officio</i>)
Member 2 & Co-Chair	Senior Director of Capital Dev. and Facilities Mgmt. (<i>Ex-Officio</i>)
Member 3	Director, Capital Development (<i>Ex-Officio</i>)
Member 4	Lakeshore Campus Principal (<i>Ex-Officio</i>)
Member 5	Dean / Academic Representative
Member 6	Dean / Academic Representative
Member 7	Division of Student and Community Engagement Representative
Member 8	Office of the Registrar Representative
Member 9	Finance Representative

Non-Voting Members

SMSC will count three non-voting advisory members:

Member 10	Manager, Facilities and Space Planning (<i>Ex-Officio</i>)
Member 11	Director, Strategic Planning & Institutional Analysis (<i>Ex-Officio</i>)
Member 12	Dean, Program Planning, Development & Renewal (<i>Ex-Officio</i>)