1.0 METHODOLOGY

The Oregon University System (OUS) Facilities Guidelines and Standards provide the direction for allocating space at Oregon State University (OSU). The guidelines were developed to provide each OUS institution baseline space guidelines for facilities planning for capital construction and master planning efforts. The guidelines were revised in 1998; however, OSU Facilities Services benchmarks annually with peer institutions (both private and state universities and colleges) to keep current on space utilization and allocation methods.

The OSU Space Allocation Model will help facilitate good space utilization to meet OSU’s teaching and research initiatives. The Space Allocation Model contains three (3) major components:

- Phase I: Tactical Space Audit;
- Phase II: Strategic Space Audit; and
- Phase III: Space Reallocation and Improvement Plan.

2.0 HOW THE SPACE ALLOCATION MODEL WORKS:

The development of the Space Allocation Model comes directly from OSU’s Strategic Plan (Appendix B): Goal Three of the Implementation Plan states: “Develop a space allocation model based on the principle that space belongs to the University and shall be allocated based on the needs of this strategic plan and reflecting the diversity of our programs.”

Regarding the prioritization of space allocation, alignment with the university’s strategic plan as articulated in each unit’s strategic plan will be an overarching consideration. This strategic planning information should be provided on the space request form.

The following process will support the equitable assessment of the university’s space needs.

2.1 TACTICAL SPACE AUDIT

- Assigned Allowable Report distributed to all Units
  - Data from the space inventory.
  - General standards are applied as guidelines (CEFPI: Center for Educational Planning Institutes)
  - Provides a broad view of a unit’s space surplus or deficit

2.2 REQUEST FOR SPACE (RFS)

- Units identify need for additional space
- Contact Facilities Services with space request
- Request for Space form sent to unit
- Submit completed RFS to Facilities Services
  - Requests are copied by Facilities Services to OSU Space Committee for review and tracking

2.3 STRATEGIC SPACE AUDIT

- Review Assigned Allowable report for potential reallocation options
- Schedule space audit of unit requesting additional space
  - The review of the unit’s existing space can find underutilized spaces unknown to the unit.
Complete space programming (specific criteria applied based on unit need)
- (Faculty Office Standard = 135 SF vs. Tactical Office Standard = 190 SF as standard)
- If programming reveals a surplus, recommend space reconfiguration of existing space
- If programming reveals a deficit, then the Reallocation Process begins

2.4 REALLOCATION PROCESS
- Identify units with space surplus; program adjacencies are considered
  - Meet with unit head with space surplus to discuss possible options and current RFS; identify space reallocation options;
  - Negotiate with all principals for best space allocation solution
- REALLOCATION SUCCESSFUL
  - Complete a Space Inventory Control for space reallocation/update space inventory
    - Complete Memorandum of Understanding for space reallocation
    - MOU includes five year sunset date for reallocated space; space review completed at five year threshold;
- REALLOCATION UNSUCCESSFUL
  - Circle back to see if other surplus space available
  - If no space is available, request cannot be completed and is either closed or placed on wait list.

3.0 PROCESS FOR REQUEST FOR LEASED SPACE
- University develops policies for leasing OSU space to NON-OSU program/unit.
  - Review existing requests for space by OSU departments
- Business Services contacted to begin leasing process and contracts. (Business Services is responsible to develop lease agreement with the University).
- Request for Space submitted by Units to Facilities Services for approval
  - Director of Facilities Services signing authority
- Approved Request for Leased Space sent to Business Services.
- Business Services closes the loop on the process for space, reimbursements, etc.

Considerations:
- Any vacated space to be assigned to Flex Space Program or Provost’s Reserve/Space Bank
  - Managed by Facilities Services; considered when Request for Space received
- Prioritize space needs for OSU units prior to leasing space to outside entities.
- If a university auxiliary building is vacated, consider options for the space be allocated to the Flex Space Program or Provost’s Reserve/Space Bank
- Flex space for units displaced by capital construction projects need to be financed by the construction project
- Flex space that occurs by the construction of new buildings to be placed in the Flex Space Program or Provost’s Reserve/Space Bank
- In general, when units with high priority programs are requested to relocate to another location, they can expect assistance from the University. The space into which they are moved should be of equivalent or better condition than the vacated space. The unit responsible for displacement of the program may be responsible for or share the relocation cost.