Administrative Space

Strategic Approach

Leadership Council
January 14, 2015
COB 105
The Problem

- Supply of Administrative Space falls short of the Demand
- Many solutions exist, both immediate, interim and long term

The Goal

- Alleviate Kolligian Library 3rd Floor demands
- Improve adjacencies based on function of departments
- Minimize expenses and investments in leased spaces
- Optimize space utilization where possible
• IMMEDIATE – Occupancy February 2015
  • Lease 755 Promenade Suites C & K
    ~ 2,000 sq. ft

• INTERIM – Occupancy May 2015
  • Lease Parcade and share usage between Administration and Business Incubator Program.
    ~ 3,500 sq. ft

• LONG TERM – Target Occupancy August 2017
  • Downtown Center
    3 – 4 Stories: 75,000 – 100,000 sq. ft
Conclusion of the Analysis

- Conclusions of the analysis will be discussed with the Space Advisory Committee today (2 pm, KL 397)
- Subject to final decision by the Provost
Space Planning Update

University of California, Merced
Leadership Council
January 14, 2015
SAAC 219
Many campus functions require space-related information

• **Operations Functions**
  - Campus space assignment and control
  - Scheduling of maintenance, alterations, and janitorial service
  - Insurance
  - Emergency management, including Clery Act reporting

• **Construction and Planning Functions**
  - Construction project planning and management
  - Capital outlay budget development

• **Analysis Functions**
  - Projections of future space needs
  - Development and maintenance of space standards
  - Space utilization standards and analysis
  - External reporting, audits, contractual accountability requirements

• **Budgeting Functions**
  - Determination of building use component of the indirect cost rate
  - Equipment budgeting standards
  - Operating budget workload measures
Multiple “spreadsheet” space inventories are continuously conducted on campus

- **By Design & Construction**
  As new space is programmed and brought on line

- **By Facilities Management**
  For Lock & Key Control, Building Management, etc.

- **By the Deans**

- **By Office of Research Administration**
  For indirect reimbursement rate calculations

- **By the Capital Finance Group**
  For capital planning purposes and annual space reporting to Office of the President

- **By Space Planning**
  For space planning
Office of Real Estate Services
Space and Capital Resources

- **Office of Real Estate Services (ORES)**
  - Supports UC Merced’s capital investment program
  - Tracks campus’s facilities inventory to optimize the use of physical space
  - Performs analysis of the adequacy of the campus’s facilities

- **Space Planning serves on program committees for new capital projects to ensure**
  - Designs serve the long term interest of the campus
  - Designs serve the needs of its initial users

- **Space Planning Responsibilities**
  - Space administration (Policy and allocation procedures)
  - Space inventory (Suitability—count, category, condition, configuration, and adjacencies; spatial representation; special places; annual audit)
  - Space planning (Standards; ratios and trends; pedagogy; capital renewal)
  - Space utilization (Metrics; optimization; best use; efficiencies)
  - Works with the **Space Advisory Committee** and **Campus Physical Planning Committee** to resolve competing needs
Having an accurate inventory is critical to these functions

**Facilities Link**
https://ucmerced.metabim.com/

Robust Facilities Information System used by many UC campuses

Only as good as the quality of the data that is in it

Data from Facilities Link enables the analytical process to develop options that meet campus goals

We have not historically had the data to inform analysis - so this effort is a first

Subject to continued improvement
Facilities Link is now 90+% current

• Stakeholders have been working towards this goal during 2014
• Drawings have been loaded
• Space assignments have been updated
• Space classification is under review
• Download from Payroll of personnel so that space assignments are current, or we can identify where an update might be needed
• Updates from IT when telephones change
• Updates from Keys and Locks when key assignments change
We need your help to record changes in real time so that it is a useful tool for all

- Space Planning does not approve or disapprove space changes
- Provides analysis and recommendations to decision makers including:
  - Deans
  - Space Advisory Committee (SAC)
  - Campus Physical Planning Committee (CPPC)
- Keeps the space inventory as accurate as possible at all times
- Facilities Link Stakeholder Workgroup is designing space assignment processes that ensure that Facilities Link is current so that you all have complete, correct facilities information available to you
PROPOSED Pre-job Posting Space Assignment Process

START HERE

1. Request for New Position made to VC or Delegate
   - No
   - Yes
     - VC or Delegate makes decision on Position
     - Hiring Manager Requests Space Assignment from Real Estate Services

Real Estate Services
   - Real Estate Notifies VC or Delegate
   - No Space Available
   - Space Available

Real Estate Services develops suggestions for VC or Delegate
   - Space Options
     1. Off-Site Lease
     2. Space Reconfiguration
     3. Others?

Real Estate Services places hold on space and updates Facilities Link

HR posts job online

HIRE

HR Notifies Real Estate Services of Name, Department and Hire Date

New hire assigned to Space

Post-Job Posting

Job Posted Online

Pre-Job Posting Process
PROPOSED Process for Internal or Adjacency Request

Special consideration with internal moves:
KEY CONTROL

START HERE
Request for Space Move or Adjacency Request made to VC/Delegate

No

VC or Delegate Decision on Move or Adjacency Request

Yes. Request sent to Real Estate Services

No Space Available

Space Available

Real Estate Services develops suggestions for VC or Delegate
Space Options
1. Pending Availability
2. Hold

Real Estate Notifies VC or Delegate

Real Estate places hold on space and updates Facilities Link

Space Modifications, if any

MOVE IN PROCESS BEGINS
PROPOSED Process for Unit Moves

START HERE
Request for Department Move made to VC or Delegate

No
VC or Delegate makes decision on move

Yes
VC or Delegate Provides Scope/Proposal of Need on Spreadsheet via Website to Real Estate Services

Real Estate Services develops suggestions for VC or Delegate
Space Options
1. Existing Space
2. New Lease
3. Options?

VC or Delegate Accepts Option(s)

Real Estate Makes Note/Hold on Space

PMSC Process Begins

Business Case Analysis

Establish Project Charter

Project Completed

Closed

VC or Delegate Comment/Approve to Move Forward

Project Management Services Center Process
How you can help

If you are planning to move people, major equipment, or reconfigure space, please contact Space Planning first

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Space Advisory Committee Meeting Dates
Campus Community is Welcome

January 14, 2015 in KL397, 2-3pm
February 11, 2015 in KL232, 9-10am
March 11, 2015 in KL397, 2-3pm
April 8, 2015 in KL232, 2-3pm
May 13, 2015 in KL232, 2-3pm
June 11, 2015 in KL232, 2-3pm
July 8, 2015 in KL232, 2-3pm
August 12, 2015 in KL232, 2-3pm
September 9, 2015 in KL232, 2-3pm
October 14, 2015 in KL232, 2-3pm
November 4, 2015 in KL232, 11am-12noon
December 9, 2015 in KL232, 2-3pm

Space Advisory Planning Website
http://opb.ucmerced.edu/sac