**ESTATES & FACILITIES**

**SPACE MANAGEMENT POLICY**



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# CARDIFF METROPOLITAN UNIVERSITY

**Department of Estates & Facilities**

# SPACE MANAGEMENT POLICY 2014 - 2017

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# SPACE MANAGEMENT POLICY

**1.0 INTRODUCTION**

The importance of space management cannot be underestimated as space is the second highest cost after salaries, its quality significantly affects the student experience and its flexibility determines both the type of teaching and research that can be conducted as well as having a significant effect on the carbon footprint of the organisation.

The Estates Management Statistics indicated that the University operates with a space allocation of 8.6m2 per student full time equivalent (SFTE) against a sector median of 9m2.

The University is committed to a programme of space rationalisation and improvements to space utilisation to ensure space per SFTE remains within the sector norm.

In addition, Estates & Facilities will be simultaneously implementing the Estates Strategic Plan including major refurbishments and redevelopments of our estate to ensure we continue to provide a flexible high quality space fit for a modern teaching, learning and research institution, and consolidation of the estate onto two main campuses.

It should be recognised that all space is a corporate University resource, and ultimate responsibility for its provision, maintenance and effective management rests with the Estates & Facilities function. Nevertheless, space is allocated to Schools for their use, and the day to day responsibility for its effective utilisation within the School is therefore devolved to the Dean.

# OVERRIDING PRINCIPLES

The space policy aims to ensure:

* + - Space per SFTE remains within the sector norm
		- Provision of good quality and flexible accommodation
		- Improved utilisation of existing space
* Space resources are effectively used to support core business activity (teaching and research).
	+ - Lower running and maintenance costs
		- Optimal performance to minimise carbon emissions
		- Provision of non-commercial social/meeting/informal learning space (third space) for student and staff communities.
		- Maximise where appropriate the commercial potential of University estate.

# SPACE MANAGEMENT MECHANISMS

Space provision is integral to managing the Universities learning, economic and environmental costs and this increasingly complex matter requires a systematic management approach.

The University is committed to space management mechanisms that will enable the University to evaluate, manage and improve space performance.

## The Estate Strategy

As part of the Estates Strategy the University will maintain a plan of targets covering space rationalisation, utilisation, reallocation, remodelling and development. The targets will focus on achieving an efficient estate, and typical targets include:

* + - Improved space utilisation
		- Redistribution of space (elimination of pressure points or better use of underutilised
		- facilities)
		- Consolidation of excess space
		- Planning additional space
		- Reduction in the Carbon Footprint

## Space Records Database

Estates & Facilities will maintain a database of accurate estate information. The following information will be maintained:

* + - Space - Unique identifier for room types
		- Condition - Details of maintenance requirements
		- Services - All services provided with the space
		- Use - How spaces are currently used (teaching, research, learning resources, office, committee room, store, workshop etc.)
		- Occupier - Primary and secondary users of the space
		- Cost - Including maintenance, utilities etc.
		- Capacity - The optimum number of users who can be accommodated for particular activities

## Space Cost Reporting

Estates & Facilities will seek, in future, to prepare regular periodic reports on space costs relating to Schools and Units with the aim of raising the profile of space cost against activity. Space costs should seek to include insurance, utilities, rent & rates, waste, cleaning, security, porterage and maintenance costs as well as overheads and management costs.

The purpose of space cost reporting is as follows:

* + - Make transparent the costs of academic schools:
		- Enable space allocation and use decisions to take into account what is feasible and affordable for the institution
		- Improve corporate planning through more informed costs
		- Enable academic schools to make informed decisions about space management

## Centralised Timetabling

All academic schools will maintain central computerised timetabling, via Syllabus Plus, to ensure the coherent sequencing of planned teaching.

All teaching rooms will be incorporated into central computerised timetabling. Academic schools will maintain first option over previous own teaching space or space that may have a school specific use. However, mechanisms will be implemented across the teaching estate to allow cross school use to all teaching and seminar spaces to ensure that utilisation levels are achieved across the whole of the teaching space resource.

No School will be allowed to reserve teaching accommodation within individual buildings for its exclusive use. All teaching accommodation will be shared. However, Estates & Facilities will endeavour where possible to accommodate Schools within their existing accommodation.

Centralised timetabling will facilitate the following:

* + - Even out demand across the timetabled week
		- Better match between group size, room size and room availability
		- Make more intensive use of teaching accommodation
		- Allow modelling of introduction of new courses or the remodelling of space.

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Estates & Facilities will establish a mechanism to engage with Schools, specifically, to enable a productive and timely exchange of information relating to timetable provision to both staff and students. In order to facilitate this Estates & Facilities will seek to manage the relationship between the School and Timetabling with, as a minimum, quarterly Timetable planning meetings to promote proactive responses to issues and concerns.

## Room Bookings

All room bookings for centrally timetabled teaching rooms will be made via contact with the Timetabling Unit during the academic term as per the Timetabling Protocols.

## Forecasting Space Needs

There is a clear link between academic planning, estates planning, resource management and space management.

Deans of Schools and Heads of Units are responsible for considering their space needs for the next three years as part of the annual planning process. Estates & Facilities will annually review, in consultation with Dean’s and Heads of Unit, each academic school and unit space need to determine whether a mismatch exists between future space demand and current space provision.

Estates & Facilities will incorporate the results into a schedule of needs across the University to be reported to the Management Working Group and will inform the Estates Strategy and Capital Development Plan for future building developments and refurbishments.

## Space Utilisation Surveys

Estates & Facilities will from time to time and as a minimum twice each academic year, conduct sample surveys of schools use of the teaching accommodation resource to determine how intensively accommodation is being used in terms of occupancy and frequency.

Teaching Space Surveys and Audit Data:

Room audits will be conducted to help assess teaching space utilisation rates. These will be undertaken over all the operating hours for the campus. The following performance indicators will be used to assess space utilisation:

* **Room Frequency** is the number of hours the room is in use, divided by the number of hours that the room is available for use, during the audit period.
* **Room Occupancy** indicates the number of students in a room, when the room is in use, compared to the total room capacity. Room Occupancy is independent of Room Frequency.
* **Utilisation** combines Room Occupancy and Room Frequency data to give an indication of how the room is being used. Utilisation, as an abstract measure, is only useful as an indicator of rooms requiring further investigation of usage patterns, and comparative assessments.

The surveys will provide information on whether scheduled activities are actually taking place, how intensively a space is being used and if there is any mismatch between group sizes and room size. Whilst the survey is a snapshot in time, it will be used to help identify space surplus and shortfalls.

## Space Management Review

Estates & Facilities will conduct an annual review of space management to monitor progress and recommend future actions. The review will incorporate an assessment of:

* + - Progress against the Estate Strategy
		- Space Utilisation
		- Current Space provision
		- Quality of Space
		- Forecasted space needs
		- Implementation and maintenance of the space management system

From the review Estates & Facilities will formulate recommendations including any revisions to space management targets and actions for Working Group discussion.

# SPACE MANAGEMENT RESPONSIBILITIES

The effective management of space requires the cooperation of all members of the University community, with key responsibilities being:

## Resources Committee

* Ratify space management policy
* Receive recommended changes to space management policy based upon the annual space management review.

## Management Working Group

* Be responsible for space management policy
* Receive reports on the monitoring and management of space as a resource
* Receive recommendations for change to space management policy based upon the annual space management review.
* Authorise the Space Management Plan
* Raise awareness of space management as a strategic issue in cost and environmental (carbon) terms
* Receive recommendations for improvements

## Estates & Facilities (Estates Planning)

* Day to day management of space management matters
* Manage the provision of space to academic schools and departments
* Give advice on space availability and its potential for allocation/adaptation where required to support planned new uses.
* Maintain the space management system
* Maintain an up-to-date Space Management Database
* Monitor the use of space in conjunction with Room Bookings, Schools and Departments
* “Early stage” input to project development
* Give direction to senior management on space planning and use matters

## Schools and Units

* Appoint a School “space champion” to liaise with Estates & Facilities.
* Provide accurate and timely information relating to use of space and adhere to information deadlines referred to in Timetabling Protocols.
* Keep Estates & Facilities updated regarding changing space needs and occupancy
* Maximise the use of allocated space, in consultation with Timetabling Unit
* Ensure that the space management policy is adhered to throughout the School or Unit
* Ensure that space is used and maintained in a safe, operational, and tidy condition in accordance with the requirements of the Health & Safety at Work Act and other relevant legislation.
* Ensure that proposals for new courses or the appointment of new staff take into account any requirement for associated space provision.

# SPACE MANAGEMENT GUIDELINES

The University will manage the provision of space in accordance with:

* + - the Workplace Health Safety and Welfare Approved Code of Practice
		- Accessible Estate (DDA) requirements
		- Space Management Group Model of the Affordable Estates
		- Recognised higher education standards for teaching, research and office space.

Estate & Facilities will take every opportunity to maintain and create space that is appropriate, flexible and fit for a modern education environment.

## General Teaching Space (GTS) Provision

All General Teaching Space will be centrally managed and timetabled to ensure that supply effectively matches current and future demand. Estates & Facilities will aim to further enhance the quality of teaching space and improve the number, size, and distribution of such spaces as demand changes and dictates.

## Specialist Teaching Space (STS) and Research Space

Specialist teaching space must be managed via the Timetable system in order to better current utilization rates. Any room falling below a utilisation rate of 20% will be investigated and where feasible will be transferred to the central pool. To allow for ease of transfer, when the room is embedded within Schools, every effort will be made to prioritise the former room holder’s bookings in that room.

All teaching space will be monitored during utilization surveys.

## Office Space

Accommodation for all new staff must be finalized prior to the commencement of recruitment action: details of the proposed office allocation must be included in the recruitment requisition, and be a part of the HR Compliance procedure.

Where office accommodation is to be adapted, Schools and Units will be expected to reduce the number of cellular offices through more flexible methods of working (e.g. open plan, hot-desking, and hoteling) unless there is an absolute and legitimate requirement to the contrary as sanctioned by the Dean of School and approved by the Director of Estates & Facilities.

Schools or Units may not offer the use of or access to personal dedicated accommodation as part of a retirement or severance package. Schools may however consider it appropriate to maintain a hot desk facility for use by Honorary, Visiting or Retired staff, although such space may not be used as a repository for individuals’ books/journals/periodicals or personal effects. A ratio of 1 desk to 4 people is considered acceptable.

In extremis, the provision of a personal office in such circumstances must be justified on the grounds of a business case and presented for approval to the Director of Estates & Facilities

## Social, Meeting and Informal Learning Space

Estates & Facilities will support Schools in providing multi-purpose study and social space for students to meet, work and socialise together from within the School space allocation.

Estates & Facilities will endeavour to provide academic schools with access to appropriate welfare provision for staff. Such space will be provided from within the Schools space allocation.

Estates & Facilities will encourage all opportunities for sharing space (social, storage, welfare and workshop) between Schools and Units.

## 5.5. Changes in Use/new space requests

Any request for additional space, for changes to current room usage, and to relinquish space must be addressed to the Director of Estates using the official university Space Allocation Form, copies available from the Estates & Facilities website. The Director of Estates & Facilities must be informed of any change in room occupancy.

Following any informal consultations and formal applications for space, Estates & Facilities will perform a thorough analysis of the School or Units existing space occupation, usage and utilization through the application of space norms to determine need and feasibility. Should the issue still not reach a satisfactory conclusion, the issue will be considered by the Working Group for final decision.

# 6.0 DISABILITY

The University recognises its legal obligations in respect of the Disability Discrimination Act. Every effort will be made to best accommodate the needs of students and staff with disabilities.

Estates & Facilities will endeavour to address deficiencies in the Estate by reference to its own DDA Audit and ensuring that opportunities to do so are exploited when refurbishing or developing the estate

# 7.0 NEW INITIATIVES AND SPECIAL REQUESTS

The University is committed to pursuing “third mission” activities such as research and enterprise projects.

It is essential at the planning stage that the sponsor/leader of the project takes into account any estate implications such as re-allocation or procurement of additional space both on and off campus, through consultation with the Director of Estates & Facilities. Where a project is likely to lead to the adaptation of existing space, consultation should also be undertaken at the earliest possible stage. Such consultation is critical in ensuring that the full cost and implication of occupying a space can be factored into any cost/business models.

Where matters arise during the academic year and outside of planning processes, the Dean of School/Head of Unit is expected to initiate discussions on space with Estates & Facilities as soon as the new space need is identified.

It is expected that Deans of Schools and Heads of Units should firstly make every effort to locate any new activity within their existing space allocation. Estates & Facilities will assist with space planning on request.

# THIRD PARTY OCCUPIERS

From time to time it may be appropriate to allow third party occupation of space. In order for this to happen the activity must either:

* + - Support core business
		- Generate worthwhile income for the University
		- Meet “community” or “pastoral” need or aspiration.

Under normal circumstances, third party occupiers will be charged a fair market rent for space (subject to any external University factors that may pertain). In addition, service charges may be levied to cover the operational costs of all regular support activities (e.g. cleaning, regular maintenance, security, heating, lighting, and power).

All third party occupiers may only occupy space under the terms of a formal lease or “licence to occupy”, and this will be dictated by the anticipated period of occupation and type of space required.

# APPENDIX 1

* 1. **DEFINITIONS AND SPACE NORMS**

## Cardiff Metropolitan University Space Definitions

There are two categories of teaching space.

* + - General Teaching Space (GTS) which is centrally managed and allocated.

GTS refers to all lecture theatres, pooled teaching rooms, seminar rooms and other rooms that are supported by Estates & Facilities. These spaces are only bookable through the Timetable Unit.

* + - Specialist Teaching Space (STS) is space that will also normally be centrally allocated but which is linked to a particular School where the facilities are of particular relevance to that School.

STS refers only to practical laboratories, kitchens, workshops, studios and any other spaces associated with and supported by a specific School and approved as such by the Director of Estates. These spaces where appropriate will also be bookable through the Timetable Unit. The defining factor for this space lies in the specialist nature of the facilities and equipment in these rooms and use by others outside of the individual School is not feasible.

## Cardiff Metropolitan University Space Norms

Estates & Facilities has developed a set of space norm guidelines to serve as an aid in planning, allocating and managing space within the University. These have been devised from Sector Norms and from research conducted by the Association of University Directors of Estates, through the Space Management Group. It is intended that these guidelines will support the University in establishing equitable, consistent, efficient, and flexible space planning parameters as well as assisting it in making sound management decisions about space allocations both within existing or renovated buildings and in any future new constructions.

Estates & Facilities will administer these space norm guidelines and will assist the University community in their interpretation and implementation.

**Offices (Allocation by Position):** these figures are net areas and, therefore, include allowances for general usage (shelving, filing cabinets, etc.). The shown square metre rate for individual spaces are the maximum size to be used. Smaller unit sizes may also be legitimately used when converting space or creating new spaces.

|  |  |  |
| --- | --- | --- |
| **Item** | **Job Title** | **Max Sq m** |
|  |  |  |
| 1 | Vice Chancellor | As required |
| 2 | Pro Vice Chancellor | 25 |
| 3 | Senior Staff/Deans of School/Heads of Units/Director | 18 |
| 4 | Professor/Chair/Reader | 15 |
| 5 | Heads of Departments | 12 |
| 6 | Senior Lecturer/Lecturer | 10 |
| 7 | Tutor/Teaching Assistant (Shared/open plan recommended) | 8 |
| 8 | General Administrators/Clerical/Support Staff (Shared/open plan) | 6-8 |
| 9 | Research Assistant | 6 |
| 10 | Research Postgraduate (shared/ open plan) | 4 |
| 11 | Technician (shared/ open plan) | 6-8 |

|  |  |  |
| --- | --- | --- |
| 12 | Other academic staff incl. retired staff who remain active (Shared open plan hot desking) | 6 |
|  |  |  |

**Lecture Theatre/Classroom Space Guidelines:** these rooms are defined as general- purpose rooms for teaching that requires no special equipment for individual student use. The figures include lecturer and general/circulation space.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Room Type** | **Seats** | **Moveable Chairs/ Writing****Pallets** | **Fixed Seats & Benching** | **Moveable Tables & Chairs** | **Fixed Seats Tiered** |
| **Classroom** | 0-25 | 1.91 | 1.95 | 1.96 |  |
| **Classroom** | 26-49 | 1.59 | 1.77 | 1.96 | 1.00 |
| **Classroom** | 50-99 | 1.40 | 1.74 | 1.77 | 1.00 |
| **Lecture Rm** | 100-149 | 1.40 | 1.74 | 1.77 | 1.00 |
| **Lecture Rm** | 150-299 | 1.40 | 1.68 | 1.77 | 1.00 |
| **Lecture Rm** | 300+ | 1.40 | 1.56 | 1.77 | 1.00 |
|  |  |  |  |  |  |

# APPENDIX 2

**Target Utilisation Levels**

Utilisation level = mean frequency of use % x mean occupancy level %

|  |  |  |  |
| --- | --- | --- | --- |
| Usage will be calculated over a standard working week of 9am to 6pm, Monday to Friday.Calculations will be based on a typical week from each of the first two academic terms. | % Frequency Target | % Occupancy Target | % Utilisation Target |
| **Space Type** |  |  |  |
| General Teaching Space | 60 | 65 | 39 |
| Specialist Teaching Laboratories and other spaces | 40 | 30 | 12 |
|  |  |  |  |

**It is the responsibility of the School and of Deans to ensure that sufficient and accurate information is provided to enable room sizes to be matched with group size and to manage attendance to ensure that Occupancy levels can be achieved.**