



Policy Title: GE2055 - Space Planning and Assignments

Subject Area: General

Responsible Official(s): Executive Vice President and Chief Financial Officer

Responsible Office(s): Space Planning and Utilization

Policy Statement

All University of Memphis land, facilities and buildings belong to the University as a whole, not to a particular college, school, department, or activity. An accurate and complete physical facilities inventory will be maintained, and periodic assessments of this data completed to assure that space allocations are consistent with the University of Memphis Strategic, Academic and Master Plan goals and objectives.

The University is responsible for the allocation of space to specific users for a certain period of time. To ensure the most efficient and equitable allocation and utilization of University space, the University is committed to adhering to the Tennessee Higher Education Commission (THEC) space allocation standards, State Building Commission Policies (SBC) and those developed locally.

The University is also committed to adhering to the established standard procedure for requesting space (see **Request for Space and Reallocation of Space**) and the process for approving space allocations and utilization.

Procedures

- [Space Standards, Analysis, Programming, and Evaluation](#)
- [Archibus Space Database and Physical Facilities Inventory and Survey \(PFIS\)](#)
- [Request for Space and Reallocation of Space](#)
- [Approval of Space Change Requests](#)
- [Reporting Changes in Use or Allocation of Space](#)
- [Annual General-Purpose Classroom Audits](#)
- [Scheduling of Classes per Occupancy Requirements of THEC](#)
- [Room Numbering for New or Existing Buildings](#)

- [Lease of Internal and External Space](#)

Space Standards, Analysis, Programming and Evaluation:

1. Space Planning, Utilization and Administration will develop appropriate standards for space allocation and utilization following those established by the THEC for new and existing buildings and spaces.
2. Space Planning, Utilization and Administration will provide recommendations on the various standards, analyses, programming, and evaluations for all space under the Universities space portfolio.
3. To ensure compliance with both the THEC standards and local guidelines, Space Planning, Utilization and Administration will perform various analyses, programming, audits, and evaluations considering the following criteria:
 - University Strategic, Master and Academic Plans
 - Present and projected numbers of students, faculty, and staff
 - Program requirements and priorities
 - Adequacy of existing space
 - Utilization of existing space allocations
 - Technology improvements
 - Funding and cost
 - Space programming and design standards

Archibus Space Database and Physical Facilities Inventory and Survey (PFIS):

Space Planning, Utilization and Administration is responsible for maintaining all changes and updates to the Archibus Space Database where all University space data is housed locally. This database is reported nightly to THEC and utilized for all submissions of space data reporting as requested by THEC. Information connected to the Physical Facilities Inventory System (PFIS) is to be kept current and accurate as it is linked to the University funding allocations for maintenance, facility improvements and new construction. Periodic space audits will be conducted to confirm that any changes to space use, utilization, allocations, or square footage have been captured in Archibus and PFIS. These audits will consist of both the reconciliation of the Annual Space Utilization Report and physical audits. Additional audits might also be conducted when a [Request for Space Change Form](#) is entered as part of the analysis toward allocation of space.

Request for Space and Reallocation of Space:

THEC requires the University to maintain accurate records of space inventory, space allocation, changes in room function and use, and physical alterations/renovations. Every department with allocated space is to request any of these changes through the [Request for Space Change Form](#). Changes are not official until an approval of space change memo is attached to the original request form. After approval is received, Space Planning, Utilization and Administration will update the change in allocation or use in our internal Archibus database and notify impacted campus Departments of the changes. (i.e., Archibus, Event Management System (EMS), Virtual Event Management System (VEMS) and Conference and Event Services (CES), Campus Planning and Design (CP+D), Physical Plant and Environmental Health and Safety (EHS).

A Request for Space Change Form should be submitted in the following instances:

- The space is reallocated from one Department to another.
- The room use or user changes.
- Physical alterations and/or renovations that change the physical characteristics of the space.
- Renovations or alterations that affect the current room numbering of the space.

Requests for the allocation of new or additional space will be submitted to Space Planning, Utilization and Administration by the requesting department. The [Request for Space Change Form](#) should be used to make these requests or by accessing the [Space Planning Utilization and Administration webpage](#).

Space Planning, Utilization and Administration will review the request, secure additional information to assist in evaluating it, discuss it with appropriate officials, and provide other information and analysis related to the request. Space Planning, Utilization and Administration may initiate alternate reallocation recommendations. When a request involves physical modifications to the space(s), a copy will be provided to Campus Planning and Design and Physical Plant.

The [Request for Space Change Form](#) and all additional information obtained will be reviewed with the Chief Operating and Financial Officer and Provost for final approval. The President may review and give final approval depending on the space request factors, as needed.

Any official or group in the process may request additional information or consideration of other alternatives.

1. All space allocations remain in effect until the date of allocation expires or approved reallocation occurs.
2. Space that becomes vacant within a college or unit should be reallocated, back to the college or unit, by the Dean or highest approving authority within that unit; however, the reallocation plan must be directly forwarded to Space Planning, Utilization and

Administration for review. Additionally, if the space use is being reclassified, or the space requires renovation, it will need to go through the normal space approval process, via the [Request for Space Change Form](#).

3. Space specifically allocated for time-limited uses (i.e., grants, use during renovations or repairs, temporary space use agreements) shall revert to unassigned status or previous user after completion of the specified time. The user(s) must vacate these spaces according to the specified time and all existing or temporary furniture and equipment shall remain in place or be relocated as needed. In some instances, timeline extensions will be considered as needed if the space remains available.
4. After laboratory space changes and renovations have been approved by Space Planning, Utilization and Administration, Environmental Health and Safety should be notified to have the lab and all its components decommissioned per their [Laboratory Decommissioning Procedure](#).

NOTE: The Request for Space Change process can take a considerable amount of time depending on the nature of the request. Thus, requests should be made with as much lead time as possible and information about the request provided on the [Request for Space Change Form](#). Inadequate lead times and information may result in an inability to meet requested timelines.

Approval of Space Change Requests:

After data collection and analysis of the [Request for Space Change Form](#), Space Planning, Utilization and Administration will meet with the EVP/Chief Operating and Financial Officer and the EVP/Provost to review, approve, or deny the request. Approved and denied request will receive a memo attached to the original [Request for Space Change Form](#). If approved, instructions on next steps will be provided in the approval memo and attached to the original requestor(s) [Request for Space Change Form](#).

Reporting Changes in Use or Allocation of Space:

The [Request for Space Change Form](#) is not required for other changes, such as reallocation of a faculty office from one faculty member to another, within the same department or unit. These changes should be emailed directly to spaceplanning@memphis.edu to update the Archibus Space Database with the following updates once provided; new occupant's name, title, full-time or part-time, PI information, Research Grant information, and FOPAL information.

Changes in allocation or room use which are not expected to be permanent should all be reported via email to the Space Planning, Utilization and Administration; the temporary allocations and a timeline of the allocation will be noted in Archibus Space Database

Annual General-Purpose Classroom Audits:

Space Planning, Utilization and Administration conducts audits on all 250+ General-Purpose classrooms annually to complete the following items; rearrange all furniture to meet code requirements, test all ADA furniture for code compliance and make sure placement meets ADA code clearances, collect the occupancy counts of all rooms and report any changes to the Registrar's Office, note all maintenance items and enter work orders to Physical Plant to have repairs completed, check all audio visual items, and report any repairs needed to ITS. Space Planning, Utilization and Administration uses the data collected during these annual audits to formulate a priority list of General-Purpose Classrooms in need of updates to meet standardized furniture and layouts. Space Planning, Utilization and Administration provides the recommended updates, which are reviewed by the Chief Operating and Financial Officer and Provost for prioritization and approval to proceed with the updates proposed.

Scheduling of General-Purpose Classrooms per Occupancy Requirements of THEC:

Classrooms designated as General-Purpose are centrally scheduled by the Registrar's Office in accordance with THEC Space Allocation Guidelines. These spaces are scheduled on a first come, first served basis. THEC Guidelines for scheduling General-Purpose Classrooms focuses on the percent of seats that are occupied when the room is scheduled. The THEC Space Allocation Guidelines call for an average of 60 percent occupancy. Classroom Laboratories designated as departmental allocated are scheduled by the departments through the Registrar's Office. Changes in designation of departmentally allocated spaces, require approval of the Dean responsible for the room(s) and the Provost. Change of classroom use to another use requires approval as described above in Request for Space and Reallocation of Space. An impact report from the Registrar's Office should be included with any requests for changes to classroom usage or classroom designation.

Room Numbering for New or Existing Buildings:

1. New Building Room Numbers:

Space Planning, Utilization and Administration is responsible for providing building interior room numbers for new buildings and renovation of existing buildings.

- a) At the end of the Schematic Design process, the Design Architect should submit a draft building floor plan with numbering scheme to Space Planning, Utilization and Administration for review/concurrence with the University's room numbering guidelines.
- b) Space Planning, Utilization and Administration will review the room numbering submittal and provide any changes back to the Design Architect so they can be captured in the Design Development floor plans and documents.
- c) If building layout or room number changes occur at Design Development, or any subsequent phase, the Design Architect must report these changes to Space Planning, Utilization and Administration for additional coordination to capture the changes.

- d) In no case should construction or bid documents be issued without completion of steps b or c.
- e) Space Planning, Utilization and Administration should be sent and or copied on the signage package transmittal to review with Campus Planning and Design for concurrence. Any changes will be submitted back through the transmittal process within the allotted time provided by the Design Architect.
- f) Final University room numbering should be reflected in all architectural and design documents contained in the 100% Construction Document [CD] set.
- g) The final floor plans with room numbers will need to be submitted electronically in a dwg. format via AutoCAD to Space Planning, Utilization and Administration.

In order to facilitate this process, the dwg. files need to be submitted via email to the Space Planning, Utilization and Administration.

2. Existing Space Room Numbering Needs:

- a) Space Planning, Utilization and Administration will provide building interior room number changes and updates upon receiving the architectural floor plans or design drawings from, the Design Architect, Campus Planning and Design or the Office of Facilities Development, at the beginning of the Design Development phase.
- b) All final floor plans should be submitted 30-days prior to project closeout to Space Planning, Utilization and Administration, so the Archibus Space Database can be updated to reflect all changes. Please submit floor plans or design drawings via email to spaceplanning@memphis.edu.

Lease of Internal and External Space:

1. Request for Lease of Real Property by or to the University:

The following process is to provide guidelines to University officials who engage in the lease of real property by or to the University. Lease approval authority and reporting requirements vary depending on the annual rent and the term of the lease agreement. This policy is based on SBC, THEC and applicable University policies and procedures; see related policies below.

All request for leasing of outside spaces and buildings should first be reviewed with Space Planning, Utilization and Administration. This is to ensure the request aligns with the Universities Strategic, Academic and Master Plan goals and objectives, as well as oversight for additional coverage by Physical Plant not specified in the lease.

The following information is required and will be reviewed with the Chief Operating and Financial Officer and Provost:

- a) Executive Summary that explains the history of the program(s) that will occupy the space, funding source(s) for the lease request, programmatic need for the space,

- and how the lease correlates to the Universities Strategic, Academic and Master Plan goals and objectives.
- b) Type of space, square footage needed, site/location preferred, date needed, and any special equipment, renovation needs or requirements.
 - c) Space Planning, Utilization and Administration's review and analysis of the lease request may include, but is not limited to, the gathering of comments from various executive leaders regarding the lease request, the funding implications, and the appropriateness of the lease in lieu of a new capital outlay request through the annual capital budget process.

2. General Requirements for Leases:

- a) The lease procurement process shall be objective, impartial, transparent, and consistent in its application. All leases must comply with the policies and procedures of the SBC, THEC, the Office of the State Architect, Procurement and Contract Services, Campus Planning and Design, and this policy. Any exception from the requirements must be requested in writing by the Chief Operating and Financial Officer and, if applicable, then submitted for review to proceed approval to the SBC.
- b) Any lease over \$50,000.00 must be bid through Procurement and Contract Services.
- c) Any lease that is over 1-year in term or over \$250,000.00 in fee must be approved by the SBC.
- d) Any lease where the University is the landlord or owner must be reviewed and approved by the SBC.

Related Documents, Policies and Forms

[Request for Space Change Form](#)

[BF4022 - Access to and Use of Campus Property and Facilities](#)

[GE2003 - Identification of Buildings and Facilities](#)

[GE2028 - Facilities and Grounds Alterations and Improvements](#)

[GE2018 - Lease/Rental of University Property](#)

[GE2034 - Campus Planning and Design](#)

[GE2047 - Environmental Health and Safety Policy](#)

Last Revision Update Log: 03/27/2025

GE2055 – supersedes BF4038

AA3024 – supersedes UM1457

UM1457 – Revised February 10, 2017

UM1457 – Issued: February 20, 2012