



Planning, Design & Properties
Space Planning & Management
Principles for Use of Space

Overall Principle

Space is an institutional resource that is assigned to units to meet the institutional goals of the unit and University. The amount and location of space will change as programs, institutional priorities, and needs change.

Definitions

Units can include departments, centers and institutes. Enterprise space refers to space that is not permanently assigned to any department but can be shared by several groups, or temporarily assigned to any investigator or group of investigators who have had a sudden increase in their research activities, and/or in the development of new programs. Assignment of enterprise space is temporary until permanent space is located.

Specific Principles

1. Space and resource use will be consistent with the mission and strategic plan for the unit and for the campus. Each request should have a business plan; requests for movements within the unit will be handled by the unit head.
 - o All missions are included - education, student affairs, and research
 - o Decisions will be consistent, fair and timely, and consider recruitment commitments. When recruitment commitments cannot be immediately achieved short-term, mid-term and long-term space plans shall be developed.
 - o Some reversion of assigned space to enterprise space will be needed
2. The relative amount of space and location of new initiatives will be developed based on best uses of space and resources
 - o Clustering of some groups may be advantageous
 - o Contiguous space will not always be available
 - o Decisions will be made with input from a range of sources including heads of the affected units
 - o Different units and individuals within units may share space to optimize outcomes and efficiencies, specifically, scientists and Ph.D. researchers engaged in translation or collaborative research may share laboratory space

3. The best available data will be used for benchmarking and master planning
 - o Sponsored funding benchmarks are proposed on a sliding scale
 - o Space for outpatient office space will be measured by the number of visits
4. All space will be used to its highest potential
 - o Wet labs will be used for bench research
 - o Offices will be moved from wet labs; units requesting additional wet lab space will be asked to revert such space - if any - as part of the solution
 - o Support functions will not occupy prime research or instructional space
5. Underutilized space will revert to enterprise space
 - o Space and physical resources including core functions, must enhance missions
 - o Enterprise areas can be targeted for development as interdisciplinary areas

Decisions

Decisions involving the request for more space, transfer of space from one unit to another or from one functional use to another (i.e., conference room to office) should be forwarded to PDP/Space Management for presentation to the Provost and FRC (Facilities Resource Committee) for review, discussion, and potential implementation. The requester should reference and use the "Space Request Form" available on the OPP website and return to FacilitiesSpace@psu.edu.

Office Space - Strategic Principles

Overarching Principle: The proper identification, allocation and monitoring of office space is critical to supporting the continued success and growth of the educational and research missions of The Pennsylvania State University. All office space is institutional space and does not belong to an individual department or unit. As such, all office space may be reassigned as needed.

The following considerations should be central to the selection and allocation of office space:

- The primary consideration should be to locate office space to optimally support our missions of education and research.
 - o Individuals who have significant interaction with students (graduate and undergraduate) should have office space located where they are readily accessible by the students.
 - o Office space should be assigned to support strategic thematic research initiatives.
- Location of office space should consider financial issues, including investments already made, costs to modify the space, costs of relocation, and lease vs. build factors. We should consistently use space for its highest and best use.
- Office space options should be made in an environment of open communication with an emphasis on a solution-focused discussion.

- Where possible, operational cohesiveness and efficiencies and the co-location of members of research teams should be maintained within and between departments. When possible, the offices of laboratory-based faculty should be near or contiguous with their laboratory. However, the assignment of contiguous or closely located office space is only one of several considerations and may not be the primary consideration.

Decisions for office assignments (internal/external) should be based on:

- Office Space Strategic Principles and Guidelines for Allocating Office Space.
- Utilizing existing departmental allocated space first before seeking assignment of additional space.
- Adherence to the existing space request process.
- Strategic Plan initiatives.
- Coordination with faculty recruitment plans (new versus replacement).
- Coordination with projections for staff growth.
- Coordination with most current Facilities Master Plan.
- The need to maintain confidentiality, fiscal responsibility, planning, and the adherence to policy and procedures.

The following are all important parts of a timely and accurate communication process regarding the successful transitioning of officespace.

- Adherence to the existing space request process.
- Timely response by the OPP to the requesting service/entity.
- Timely decision making.
- Communication, by Departments, to all involved faculty and staff.
- Implementation of move in coordination with Office of Physical Plant.

Guidelines for Allocating Office Space

1. Input on assignment of office space shall be provided by the Department and the College / Unit, shall include the Dean / Vice President, Department Head, and designated Faculty representatives, and shall be communicated to the Project Team which includes the OPP Project Leader, OPP Planning Staff, and Architectural Consultants and Engineers. The final decision on office space shall acknowledge that this space is part of a project’s overall Program Statement space allocation and shall provide rationale for assigning a deviation above the target square footage to one space over another, such as research, labs, classrooms or collaboration areas. See President’s 06/11/20 memo of authorization to implement, and the Advisory report Appendix C, dated 03/17/20, from Faculty Senate which documents examples of rationale and process. Any major deviations requested from the guidelines shall be approved by the College Dean or Unit Head and the AVP of OPP.

2. Departments must effectively use office space assigned to them by adhering to the space guideline table (see next page). All divisions within a department must effectively use assigned space before the department requests additional space. For example, space designed for office use should not be used for other functions such as storage of files, equipment, or office supplies. Office space should not be assigned beyond what is required by the level of responsibility. Individuals who hold senior leadership positions in the organization should have an office located near to the mission(s) he or she oversees. Being visible is an essential part of being a leader and serving the organization.
3. Faculty offices that are vacant due to active recruitment can be reserved by the department for 12 months. After 12 months, if there is not a successful recruitment, the office space may be evaluated for maximum utilization. Reassignment to another department may be accomplished by Space Management based on guidelines.
4. Individuals will not have more than one office or dedicated workspace.
5. Full-time faculty with standing appointments will have office space, which may be shared. Office space for full-time faculty, with fixed term appointments will be provided on a space available basis.
6. Part-time faculty should, in most cases, share an office. Departments can accomplish this by putting two or more desks in a single office. This is also the case for full-time faculty who spend less than 40% of their time at their office.
7. Department Chairs, due to their additional administrative responsibilities, may require offices of about 180 sq. ft.
8. Unit Deans, due to the need to meet with small groups in their offices, may require office space of 200-250 sq. ft.
9. Staff Assistants should be provided a work area with adequate countertop workspace. Generally, the work areas are 50 to 60 sq. ft. An additional 30 sq. ft is often required for file cabinets. Additional space should be allotted for copiers, printers, and minimal office supply storage to support the office.
10. Graduate Students and Post-Doctoral Fellows, and laboratory technicians or managers should not be provided with private offices but may require workspace within the lab or in a cubicle configuration to conduct daily work assignments. Workspace is estimated at 4-6 linear feet or 16-24 sq. ft.
11. In general, office space should be provided according to level of responsibility and job requirements rather than title degree. Not all supervisors will have a private office.
12. In certain circumstances, it may be appropriate for a given faculty or staff member to work from their home ("remote work"). In this case they would not require a full-time office. In addition, "hotel office space" can be made available for certain faculty and staff.

Office Space Guidelines

Penn State Office Space Guidelines

09/04/20

<u>Type of Office/Workspace</u>	<u>Target Sq. Ft.</u>	<u>Maximum Sq. Ft.</u>
Vice President	250	300
College Dean / Assoc. V.P.	200	225
Assoc. Dean / Dept. Chair	180	200
Faculty Office – Full Time Standing Appointment	120	150
Faculty – Part Time (0.9 FTE)*	Shared Private Office	
Director / Manager	100	120
Prof. / Support Staff	80	100
Clerical Staff (not including support space)	60	80
Grad Students / Post Docs (may be shared work spaces)	30	40

(*Includes Asst. Prof., Research Assoc., Assoc. Prof.,/Sr. Research Assoc.)

Space is an institutional resource that should be utilized to its highest and best use. Future space requests will include a survey and analysis of department space to determine best and highest use of space. Storage can be categorized as active storage and archival storage. Storing items that are obsolete or will never be used again is a misuse of space as there is not enough storage space on campus to meet required storage needs.

Active storage is accessed frequently, often many times per day to support daily work and is located at or near the work site. Examples are office supplies such as file folders, pens, print cartridges, etc. in an office setting. Active storage should contain essential items in an appropriate quantity.

Archival storage is accessed infrequently and can be located more distant from the active work area. Departments are required to review the items in archival storage at least annually to determine whether the items still need to be stored or can be salvaged or destroyed. The following criteria are developed to guide decisions regarding whether items should be retained.

Legal or business requirement relates mostly to files. Files must be retained based on legal requirements, as indicated by policy, especially employee information and research data as agreed with the grantor agency. There are also business reasons to retain files such as audits or need to document certain tasks. When appropriate, files can be scanned. Files that no longer require retention often require shredding or another appropriatedisposal.

Economic benefit sometimes it is beneficial to retain a piece of equipment that can be used for parts to keep similar equipment running and avoid costly replacement. Departments often store furniture, believing this will be less expensive than buying new furniture when it is needed. The reality is that unless there is a defined short term need for the furniture, it would be better to salvage the furniture. There is a cost to store the furniture, the value of the storage space and when that is calculated, salvage is a better decision.

Temporary storage due to renovation sometimes items need to be stored during a renovation period; this may include furniture and other items. Temporary is typically less than six months except for extenuating situations.

Off-Site Storage Options are available for long-term archival storage needs. One option is the Penn State Records Center. The monthly storage rate and fees for services, including emergency retrieval, fax and copy, can be found at the following site:

<https://libraries.psu.edu/about/departments/inactive-records-center> or you can call (814) 865-3276 for assistance.