University of Victoria

Space Planning, Management and Optimization Policy

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Associated Procedures: Space Procedures
Associated Guidelines: Workspace Allocation Guidelines

Purpose

1.00 The purpose of this policy is to ensure effective management and allocation of university Space and Space Optimization in alignment with the university's strategic plans and priorities.

Definitions

2.00 For the purposes of this policy, the following definitions apply:

"Change of Use" means changes to the primary use of any Space (e.g., office to lab, lab to storage).

"Day-To-Day Operational Administration" means the allocation of Space; resolution of Space issues; verification that Space is being used for the purposes specified; and prompt reporting of changes in allocation, use or configuration of Space.

"Dedicated Workspace" means a Workspace intended for exclusive use by a specific user such as an enclosed office.

"Furniture Optimization" means the purchase or repurposing of furniture and the reconfiguration of existing Workspace that does not entail any major structural modifications. This type of update focuses on enhancing the functionality and aesthetics of the Space through changes that do not disrupt building services or involve the removal of fixed facility components.

"Monitor Space Usage" means to collect, review, and analyze Space Utilization Data over time to support planning, allocation, operational decision making, and stewardship of facilities.

"Renovations" means construction to modify or upgrade the existing facility involving activities that cause a service disruption, require demolition, or require removal of a fixed facility component (e.g., sink) or assembly (e.g., countertop). Examples include but are not limited to:
(a) A Space, room or area that is undergoing a change of use;
(b) Removal of floor coverings, ceiling tiles and cabinetry;

(c) Replacement of windows;
(d) New wall construction;
(e) Heating, ventilation and air-conditioning upgrades; and
(f) Plumbing work that requires disruption of the water supply for more than 30 minutes.

"Shared Workspace" means a type of Workspace specifically designated for use by two (2) or more allocated users, whose schedules are coordinated to maximize use.

"Space" refers to any physical area within a university owned building that serves a functional purpose, supporting the university's academic, research, administrative activities. This includes but is not limited to classrooms, laboratories, offices, meeting rooms, common areas, and specialized facilities.

"Space Utilization Data" means data, collected in aggregate, that measures how often, how fully, and for what purposes institutional space is used relative to its capacity and intended function. This data shall be used, collected, and disclosed in accordance with Protection of Privacy Policy GV0235.

"Space Allocation" means the distribution and assignment of university Space to individual Units.

"Space Optimization" means the process of evaluating and improving the use of physical areas within a Workspace or facility to enhance productivity, efficiency, and user experience. This involves analyzing current Space utilization, identifying inefficiencies, and implementing design and layout changes that align with organizational objectives and maximize the functionality of available Space.

"Touchdown Space" means a Workspace that is not allocated to any particular user and cannot be claimed for long-term or repetitive use. Touchdown Spaces are smaller workspaces that are equipped with basic equipment (e.g. desk, docking station, computer screen).

"Unit" means academic, research or administrative areas at the university, including but not limited to: executive portfolios, faculties, departments, divisions, schools, offices and centres.

"Workspace" refers to any physical area designated for work-related activities across the university, including open office areas, enclosed offices, Shared Workspaces, Touchdown Spaces, and meeting rooms, supporting both academic, research and administrative functions.

Scope

3.00 This policy applies to all Space owned, leased or licensed by the University of Victoria.

Policy

4.00 All Space at the University of Victoria is a shared resource owned and operated by the university; it is not owned by any individual or Unit. Space is a finite resource that must be managed effectively and efficiently.

5.00 The University shall ensure efficient and effective planning and management of Space to achieve the goals established in strategic plans by:

- Instituting a consistent and transparent framework for making strategic decisions regarding Space allocations;
- Providing guidance on maximizing efficiency and optimizing the utilization of physical resources while supporting the university's teaching, research, and operational mandates;
- Maximizing the use of limited university Space resources;
- Prioritizing the reuse and redevelopment of existing Space to meet new program needs without adding net new Space.
- Reviewing Unit Space Allocations annually to ensure continuous alignment with the university's strategic goals and to optimize space utilization based on evolving needs and priorities.

6.00 Space Allocations are not permanent and are subject to change in support of the academic, administrative, and strategic priorities of the university. Space Allocations must:

- Support the goals established in the university's strategic plans, including the Strategic Enrollment Management Plan;
- Demonstrate alignment with specific Unit goals and contribute to their achievement;
- Provide appropriate spatial resources required for program accreditation;
- Support sustainability, accessibility and technology integration;
- Comply with university policies; and
- Align with any site-specific and/or health and safety guidelines.
- Space allocated for academic, administrative, and university-related activities may not be leased, licensed, assigned, shared, or otherwise provided to external users without explicit approval from the Vice-President Finance and Operations.

Effective Space Management

7.00 The following principles will inform all Space management decisions:

- Ensure all Spaces are used efficiently to meet functional requirements while also allowing flexibility to support future needs, including assessments of usage and reconfiguration where necessary to avoid unused or underutilized areas;
- Align Space Allocations with the university's academic, administrative, and strategic goals, advancing teaching, research, and community engagement.
- Prioritize designs that are both sustainable and flexible, reducing environmental impact, renovation waste, and allowing Spaces to adapt as needs evolve.
- Consider life-cycle costs when making decisions regarding Space Allocations, including initial construction, long-term maintenance, and operational costs.
- Use Space Utilization Data to inform decisions, ensuring alignment with Space Allocation policies and long-term strategic planning.
- Design Spaces to accommodate individuals with diverse needs, ensuring all Spaces are accessible and inclusive, meeting regulatory and institutional standards.
- Implement technology solutions to Monitor Space Usage, collect data, and improve the management of shared spaces, meeting rooms, and Workspaces.

Space Changes

8.00 Any Change of Use requires approval of the Executive Director, Facilities Management and must comply with university standards.

9.00 Following a Workspace utilization audit, any Workspace that does not meet the target utilization rates provided in the Workspace Allocation Guidelines will be reviewed and may be reclaimed, reallocated or repurposed following appropriate notice and consultation. Any change needed to conform to this policy will be discussed in advance with the appropriate Unit leaders.

Authority and Responsibility

10.00 The Capital Planning Advisory Team (CPAT) will be engaged to review and prioritize Space Optimization Studies and provide final approval for space optimization strategies and priorities for Faculties and Units.

11.00 If CPAT is unable to achieve consensus, the Vice-President Finance and Operations exercises final authority over all Space Allocations and Change Of Use.

12.00 The Director of Campus Planning and Sustainability is responsible for approving Space Allocation or Re-Allocation requests from Units and reviewing and recommending Space Optimization Studies to the Capital Planning Advisory Team.

13.00 Unit leaders are responsible for the Day-To-Day Operational Administration and/or requests for additional space within their Unit.

14.00 The Executive Director Facilities Management is responsible for reviewing requests for conducting Space utilization audits and developing studies that provide data-driven recommendations for Space Optimization, Change Of Use, Renovations, Furniture Optimization and Space Allocations.

Requests for Additional Space

15.00 Before requesting new Space, the Unit Leader must consult the Director of Campus Planning and Sustainability to determine if a furniture optimization process, space utilization or workstyle assessments is required to ensure existing Space is being used optimally.

16.00 Requests for newly assigned Space to support near-term Unit growth must be submitted at least 12 months in advance and include a clear justification for the need including existing and ongoing Space Optimization efforts. Requests for the construction of new Space must follow the university's Capital Planning Guidelines to ensure alignment with institutional priorities and sustainability goals.

17.00 Space Optimization study requests will be reviewed by the Director of Campus Planning and Sustainability and approved by the Capital Planning Advisory Team. Upon completion of a Space Optimization Study, space strategies shall be presented to the Capital Planning Advisory Team for approval.

18.00 When an allocated Workspace is being vacated, the current allocated group is responsible for ensuring that the Space is cleared of any equipment, files, and other materials in adherence to any applicable university policies, procedures, and guidelines. All costs associated with the removal and disposal of remaining items shall be borne by the departing Unit.

19.00 Regular audits and assessments are required to ensure optimal use of existing Spaces before new Space is allocated. When new space is allocated, it should be assigned in a contiguous manner with the existing growing Unit whenever feasible.

Conflict Resolution

20.00 If conflicts arise, whenever possible, Space issues and appeals should be resolved by Unit leaders at a local/site level. Issues and appeals that are complex or cannot be resolved at the local/site level will be resolved by Unit leaders with support from the Associate Vice-President Financial Planning and Operations, per Workspace Procedures.

Authorities and Officers

21.00 The authorities and officers for this policy are:

(i) Approving Authority: Vice-President Finance and Operations
(ii) Designated Executive Officer: Vice-President Finance and Operations
(iii) Procedural Authority: Associate Vice-President Financial Planning and Operations
(iv) Procedural Officer: Director Campus Planning and Sustainability

Relevant Legislation

University Act

Related Policies and Documents

Furnishings, Fittings, Finishes and Artwork BP3130
Information Security Policy IM7800
Purchasing Policy FM5105
Protection of Privacy Policy GV0235
Records Management Policy IM7700

University of Victoria

Space Procedures

Procedural Authority: Associate Vice-President Financial Planning and Operations
Procedural Officer: Director, Campus Planning and Sustainability

Effective Date: March 2026
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Parent Policy: Space Planning, Management and Optimization

Introduction

1.00 This document outlines the procedures for managing Space within the university, ensuring optimal use and compliance with relevant policies and standards.

Space Reporting

2.00 By June 30th of each calendar year, using the template provided by Facilities Management, every Unit leader shall provide a Space report to Space Planning Manager providing an overview of the Unit's Space Allocation and Space assignments within the allocation.

Non-Contiguous Workspace

3.00 If allocated Workspace that is non-contiguous to a Unit (such as in a different building or wing) becomes vacated or under-utilized, the Unit Leader must promptly notify the Director of Campus Planning and Sustainability before any re-assignment within the Unit. This notification will initiate a review process to either reallocate the Space to the original Unit or consider it for reassignment to support the growth of another Unit. Major changes in space allocations resulting from significant academic or research program changes will be referred to the Capital Planning Advisory Team.

Space Optimization

4.00 Prior to requests for construction or renovation work, Units are required to complete a Space Optimization study, conducted by the Space Planning Manager to ensure the existing Space assignment is optimized and used in an efficient manner. The results of the Space Optimization study shall inform future new construction or renovation requests. Space Optimization studies may also be carried out at the direction of the Office of Campus Planning and Sustainability to support strategic needs of the university.

Workspace Utilization

5.00 Prior to requests for new Space or Workspace, the Space Planning Manager may conduct Workspace utilization and workstyle assessments to determine if existing space is being used optimally. Where development of new Workspace requires a significant financial commitment, a detailed feasibility study will be conducted based on space planning design guidelines to ensure the best value for money and an efficient and effective work environment. The findings will be brought to the Director of Campus Planning and Sustainability for consideration as part of the university's major capital planning process.

Renovations

6.00 Any Renovations and Furniture Optimization within a Space or Workspace requires the approval of the Executive Director, Facilities Management to ensure compliance with applicable regulatory, health, safety, accessibility, and university standards. All discretionary alterations or renovations, including those not covered by a Space Optimization Study, must be approved by the Executive Director, Facilities Management. The costs for such discretionary projects will be the responsibility of the requesting Unit.

Requests for Additional Workspace

7.00 Unit leaders shall submit requests for additional Workspace in writing to the Director of Campus Planning and Sustainability. Requests must be submitted 12-18 months in advance of anticipated time of need and must identify a rationale for the request, the type of space required, the funding source to support the new activities, the period during which the space is required, interim accommodations that may be required.

Furniture, Fittings and Artwork

8.00 The procurement of furniture, fittings and artwork on university campuses must comply with Furnishings, Fittings and Artwork policy BP3130.

Storage (digital, paper records, equipment)

9.00 Units are expected to manage records and equipment in a manner that ensures workspace efficiency and functionality. This includes following university procedures for the disposition of records and decommissioning of surplus equipment to ensure that Workspaces remain functional and do not serve as storage areas.

Roles and Responsibilities

	Control & Allocation of Space	Effective management and allocation of space	Resolving space issues	Space planning for new hires and/or program/unit expansion
Vice-President Finance and Operations	Exercise final authority over all university Office Space allocations, designations and Change Of Use.			
Associate Vice-President Financial Planning and Operations			Assist Unit leaders in resolving space-related conflicts by working with Unit leaders to find equitable and strategic solutions that align with institutional priorities	
Executive Director Facilities Management		Develop space planning standards and guidelines to align with policy objectives. Review proposals for construction or renovations in academic and non-academic administrative space. Develop and manage processes and procedures for space optimization; ensure space optimization are completed as required by the Unit Leader or the Director of Campus Planning and Sustainability. Provide support, guidance and recommendations to Faculties, Departments, Schools, Centre/Institutes or Administrative Units on the implementation of this policy. Maintain the university space inventory. Ensure suitability of existing building conditions and mechanical capacity against proposed use of space to ensure compatibility and cost-effective planning, design and construction.	Support Unit leaders to develop resolutions for space issues and appeals that are complex or cannot be resolved at the local/site level.	Lead capital projects related to the space program development, design, construction and utilization of academic and non-academic administrative space. Determine academic or non-academic administrative space allocation for new faculty and staff in consultation with the Deans and Unit Leaders. Approves renovations, including those not covered by a Space Optimization Study, to ensure compliance with applicable regulatory, health, safety, accessibility, and university standards Develop program and cost requirements for major capital request to support future space needs, including development of new facilities.

	Control & Allocation of Space	Effective management and allocation of space	Resolving space issues	Space planning for new hires and/or program/unit expansion
Director of Campus Planning and Sustainability	Ensure overall equitable and optimal use of university space resources. Approve allocation of space to Units. Approve reallocation of space and requests for additional space. Develop major capital request to support future space needs, including development of new facilities. Develop and advise on policy measures to ensure sustainability and effective utilization of space.	Approve space planning standards and guidelines to align with policy objectives.	Assists Unit leaders in resolving space-related conflicts by working with Unit leaders to find equitable and strategic solutions that align with institutional priorities	Recommend Space Optimization Studies for approval by CPAT to ensure alignment with institutional priorities.

	Control & Allocation of Space	Effective management and allocation of space	Resolving space issues	Space planning for new hires and/or program/unit expansion
Capital Planning Advisory Team	Reviews and advises on major space re-allocation strategies to ensure alignment with institutional priorities.	Advises on best practices for space utilization and efficiency. Supports data-driven decision-making for optimizing space use.	Offers recommendations for resolving competing space demands and conflicts. Identifies opportunities for repurposing underutilized spaces.	Provides input on long-term space planning needs for staffing and program growth. Ensures alignment with institutional priorities and capital planning frameworks. Review and Approve Space Optimization Studies to ensure alignment with institutional priorities.

	Control & Allocation of Space	Effective management and allocation of space	Resolving space issues	Space planning for new hires and/or program/unit expansion
Unit Leaders	Ensure overall equitable and optimal use of university space resources within their respective Faculty or Administrative Unit. Allocate space within Units.	Provide day-to-day operational oversight of the allocation, utilization and management of academic administrative space on behalf of Faculties, Departments, Schools, Centre/Institutes or Administrative Units. Review and approve requests for additional space within their respective allocated space footprints. Ensure results of space optimization studies are implemented and prioritized for Routine Capital submissions Ensure space reviews and utilization reports are generated and submitted to Facilities Management. Engage Facilities Management when construction, renovations or furniture and equipment upgrades in academic and non-academic administrative space are required.	Resolve space issues and appeals at the local/site level, with support from Facilities Management.	Engage Facilities Management Capital Development and Delivery prior to the commencement of any proposed construction or renovations to ensure compliance with applicable regulatory, health, safety and university standards.

WORKSPACE ALLOCATION GUIDELINES

These guidelines provide a reference for Workspace planning and management and are not intended as entitlements. At any particular building or site/location, allocations may be limited by the existing infrastructure, building configuration and type of Space that is available. Workspace allocations are based on a number of criteria including operational activities and requirements, utilization, and position functions. It is recommended that Units incorporate a variety of Workspace types at sites/locations where possible to support flexibility and daily operations. The following table describes the various workspace functions and identifies allocation criteria for each.

Type Description Criteria for Allocation:

Type	Description	Criteria for Allocation	Utilization Rate Target
Campus First - Dedicated Workspace	Intended for the dedicated use of specific users	Employees that spend 80% or more of a typical work week (4 or more days/week) on-site.	80% or more of a typical work week
Campus Friendly - Shared Workspace	Workspaces shared by 2 or more allocated users. Schedules are coordinated by the Unit Leader to maximize utilization.	Employees that spend 40-60% of a typical work week (2 to 3 days/week) on-site.	80% of a typical work week
Remote First / Friendly - Touchdown Space	Workspaces that are shared between multiple users and/or groups and are intended for use by the allocated users/groups. Space cannot be claimed for long-term or repetitive use. Schedules are coordinated by the Unit Leader to maximize utilization.	Employees that spend 20% of a typical work week (1 day/week) on-site or Employees that spend 1-2 days per month on site. Visitors or employees, grad students requiring interim space during a short visit, layover or temporary transition.	80% of a typical work week

Sharing Workspace
Intra-departmental sharing of Workspace and facilities is expected to optimize utilization (e.g., support spaces, equipment rooms, conference rooms, Touchdown Space).

Working at Multiple Locations
An individual requiring a Dedicated Workspace must only be allocated one Dedicated Workspace. Should a job function require work at more than one location, access to shared or touchdown space will be provided, depending on availability. The need for multiple workspaces

must be addressed on a case-by-case basis and in consultation with the respective Unit leaders.

Full-time Employees
Full-time employees are eligible to be allocated one Dedicated Workspace, provided that the individual spends at least 80% of a typical work week (or 4 days) of their time at a particular site/location.

Faculty with Administrative Appointments
Faculty members with additional administrative appointments that include a Dedicated Workspace shall, if applicable, make their existing Shared or Dedicated Workspace available for temporary reallocation.

Senior Administrative Roles
Some roles may require that a particular Dedicated Workspace be allocated to that role. Individuals may have an existing Dedicated Workspace prior to taking on the new role. If so the existing Dedicated Workspace should be available for temporary reallocation.

Professor Emeritus
Professors emeriti active in teaching and/or research may be allocated a Shared Workspace or Touchdown Space within respective Faculty space allocations. Workspace allocations must be reviewed by the Space Planning Manager, on behalf of the Dean, and in consultation with respective Unit leaders to ensure space is being used appropriately and is consistent with these guidelines. The review process will also ensure the appropriate Space Allocation based on level of academic activity.

Adjunct Professors
Adjunct professors may be provided with access to Touchdown Space within respective Faculty Space Allocations, if available.

Visiting Professors
Visiting professors may be provided with access to Shared Workspace or Touchdown Space within respective Faculty space allocations, if available.

Graduate Students
Graduate students may be provided with access to Touchdown or Shared Space within respective Faculty space allocations, if available.

Periods of Leave
If an employee will be away for more than four months, their Dedicated or Shared Workspace should be made available for temporary re-assignment.