SPACE MANAGEMENT PROCEDURES TOOLKIT

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1. Introduction

Space is a valuable asset/resource at Queen's University (“University”). Therefore, effective planning and space management is critical for maximizing the use of University space resources. This encompasses space assignment, standards, allocation, building inventory, space utilization and optimization, modification and evaluation of academic, research and administrative spaces on campus.

The following space management procedures govern the allocation and management of all space at the University, and are intended to ensure a consistent and transparent process for evaluating requests and making strategic decisions regarding space assignment and use under the Space Management Policy and Space Management Guidelines.

As there is now an occupancy charge for space allocated to departments/faculties and support units, please refer to section 2.10 “Procedure for Charging for Space” for a description of how space costs are determined.
2. Space Management Procedures

2.1. Procedure for Submitting a Space Request

Contact Officer: Director, Campus Planning and Development

Purpose
The purpose of this procedure is to describe the process for an Applicant(s) to submit a space request.

Procedure

1. Applicant(s) prepares and submits a Space Request Form (SRF) to CPD

2. CPD records request

3. CPD/PPS review and assign request. Refer to one of the following procedures:
   - Renovation of an Existing Space within a Department or Shared Service Unit
   - Space reassignment within a Faculty or Shared Service Unit
   - Space reassignment between a Faculty or Shared Service Unit
   - Space Divestiture
   - Requesting Additional Space
   - Leasing Additional Space Off Campus
   - Leasing of Surplus Space
   - PPS Renovation of Space

4. CPD sends confirmation email to the Applicant(s)

Yes

No

Project Cost

Yes

Major Capital Projects Approval Process

> $2.5m?

No
Step 1. Applicant(s) prepares and submits a Space Request Form (SRF) to Campus Planning and Development (CPD)

The unit/department/faculty ("Applicant(s)"") completes the Space Request Form (SRF) that is located on the Campus Planning and Development (CPD) website. The SRF must bear the signature of the appropriate Dean or Department Head. Briefly outline the building and room(s) affected, articulate the project definition and scope and any potential funding available.

There are seven (7) potential types of space requests and the Applicant(s) should mark the appropriate box on the SRF:

1. Renovation of an Existing Space within a Department or Shared Service Unit
2. Space reassignment within a Faculty or Shared Service Unit
3. Space reassignment between a Faculty or Shared Service Unit
4. Space Divestiture
5. Requesting Additional Space
6. Leasing Additional Space Off Campus
7. Leasing of Surplus Space

Step 2. CPD records request

Once a copy of the request with the appropriate signatures is received, CPD adds a tracking number, and sends a confirmation email to the Applicant(s).

Step 3. CPD and Physical Plant Services (PPS) review and assign the request

a) If the project is expected to exceed $2,500,000 the project will be subject to the Major Capital Project Approvals Process (Built Environment). [http://www.queensu.ca/secretariat/sites/webpublish.queensu.ca.uslcwww/files/policies/board/mcpapolicy/mcpaprocess.pdf](http://www.queensu.ca/secretariat/sites/webpublish.queensu.ca.uslcwww/files/policies/board/mcpapolicy/mcpaprocess.pdf). CPD advises and provides the Applicant(s) with the Major Capital Project Approvals Template.

b) If the project is not expected to exceed $2,500,000 the request is reviewed by the Space Request Review Committee, comprised of CPD team, PPS Directors of Engineering and Operations, Design & Construction and PPS administrative support, and assigned to either CPD or PPS. Please refer to Appendix B for Evaluation Criteria for Minor Capital Projects.

c) The Review Committee assigns the request to one of the procedures categories listed below:

- Renovation of an Existing Space within a Department or Shared Service Unit
- Space reassignment within a Faculty or Shared Service Unit
- Space reassignment between a Faculty or Shared Service Unit
- Space Divestiture
- Requesting Additional Space
- Leasing Additional Space Off Campus
- Leasing of Surplus Space
1. If the project involves space assignment or reassignment, space planning, and/or furniture procurement and does not require renovation of the space, it will be assigned to CPD for follow up. If construction is required, a PPS resource will be assigned and will work in collaboration with CPD and the client.

2. If the project does not involve space reallocation but will involve physical design or modification to the space, it will be assigned to PPS Design & Construction for design and implementation.

The contact person from one of the two business units is assigned the work based upon:

- **Complexity of scope** – the work could be assigned to a PPS Area Manager or depending on the complexity of the work it might be assigned directly to Design and Construction/project management.

- **Impact to other user(s)** – determine whether this work affects other departments, programming, students, and if so, the Space Request Review Committee will assign the work to the appropriate implementation team.

- **Number of resources that will be required** – if a number of disciplines and resources are required for the work, the Space Request Review Committee will assign the work to the appropriate implementation team.

- **Impact to other support services groups (i.e. technology)**

- **Impact to University operations** – if the project is significant and is likely to impact University operations the request could be subject to Operations Review Committee (ORC) or Vice-Provost Operations Committee (VPOC) for review.

**Step 4. CPD sends confirmation email to the Applicant(s)**

Once appropriate parties are assigned, CPD sends an email to the Applicant(s) identifying the lead and supporting persons assigned to the project.
2.2. Procedure for Renovation of Existing Space within a Department, Faculty, or Shared Service Unit

Contact Officer: Director, Campus Planning and Development

Purpose
The purpose of this procedure is to describe the process for renovating existing space held by a department, faculty, or Shared Service Unit.

Procedure

1. CPD/PPS meet with the Applicant(s) to review space request

2. CPD/PPS assess requirement for space renovations

   Renovation required?

   Yes → 2a: PPS prepares a cost estimate

   No → CPD closes the project

2a: PPS prepares a cost estimate

   Applicant(s) approves/rejects cost estimate

   No → CPD closes the project

   Yes → 2c: PPS renovates space

   Refer to procedure 2.7

2c: PPS renovates space
**Step 1. CPD/PPS meet with the Applicant(s) to review space request**

CPD and PPS meet with the Applicant(s) and reviews the request to determine exactly what space is being considered for renovation. PPS will be included if renovations are contemplated.

**Step 2. CPD/PPS assess requirement for space renovations**

CPD and PPS work with Applicant to determine if renovation requirements can be handled with a furniture solution or if physical renovations to the building are required. CPD in conjunction with PPS will prepare preliminary test design drawings for the client to approve in principle.

**Step 2a. PPS prepares a cost estimate**

If renovations are required and after the Applicant approves the test design drawings, PPS prepares a cost estimate.

**Step 2b. Applicant(s) approves/rejects cost estimate**

The Department/Faculty Head (or designate) reviews and approves or rejects the cost estimate. If the cost estimate is rejected the project is closed. If the cost estimate is accepted, the process will proceed to **Step 2c: PPS Renovates Space**.

**Step 2c: PPS renovates space**

PPS will proceed with design development and renovate space. Refer to [procedure 2.7](#) for further information.
2.3. Procedure for Space Divestiture (includes Space Re-assignment between or within a Faculty or Shared Service Unit)

Contact Officer: Director, Campus Planning and Development

Purpose

The purpose of this procedure is to describe the process for divestiture of space that is no longer required by a department or faculty. A department or faculty that no longer requires a specific space, must notify CPD by submitting a space request form. No Faculty or Shared Service Unit will allocate space to another Faculty or Shared Service Unit without the knowledge of CPD and authorization of the Office of the Provost.

Procedure

1. CPD meets with the Applicant(s) to review space request

2. Identification of new tenant

3. CPD/PPS assess requirement for space renovations

Renovation required?

Yes

3a: PPS prepares a cost estimate

3b: Applicant(s) approves cost estimate

No

5a). Applicant(s) retains space

5b). CPD reassigns space and updates Space Management Tool

Yes

4. Office of Provost Approval of Space Divestiture

No

Refer to procedure 2.7

6. CPD completes Project Status Review
Step 1. CPD meets with the Applicant(s) to review space request

CPD meets with the Applicant(s) and reviews the request to determine exactly what space is being considered for divestiture or reassignment. PPS will be included if renovations are contemplated.

The following factors will be considered with respect to the divestiture of space:

- The creation of non-contiguous space within a faculty or department is discouraged;
- That it is in the Interest of the University as a whole;
- That it is in the best interest of the unit;
- Results in improved programming adjacencies;
- Optimizes current and future staff to square foot ratio;
- Considers impact to students; and,
- The solution aligns with key planning documents including but not limited to the Campus Master Plan, Academic and Enrolment Plans, the Library and Archive Master Plan, the Queen’s University International Plan, and the Strategic Framework.

Step 2: Identification of new tenant

A new tenant must be identified prior to any space being released by the existing user(s). New user(s) of space are typically identified in three ways.

1) Existing Applicant(s) identifies that space is to be reassigned within the faculty or department;
2) Existing Applicant(s) identifies that space is to be reassigned between the faculties or departments;
3) Through an existing unmet space request, managed by CPD.

If the existing user(s) has identified that space is to be reassigned within the faculty/department or between faculties/departments, the unit to receive the space must fill out a space request form highlighting the need for additional space. The request for additional space will be processed as identified in the procedures for requesting space, found in the Space Management Guidelines (Section 4.6). All space requests will be logged, tracked and the required signatures secured for each request.

If the existing user(s) has not identified a new user(s) for the contemplated vacant space, CPD will work with the Applicant(s) to find a prospective user(s) for the space. CPD will conduct a review of both current and historic space requests, to identify potential new user(s) for the space.

In the event a new user(s) cannot be identified for the space, the process proceeds to Step 3a): Office of the Provost Approval.

Step 3. CPD/PPS assess requirement for space renovations

Space to be vacated must be returned to base building condition prior to transfer to another group or department. All costs associated with bringing the space to base building condition will be the responsibility of the department or faculty vacating the space. Fit up, sufficient to meet the specifications of the new occupant will be the responsibility of the incoming user or client unless, otherwise negotiated. CPD, in conjunction with PPS, will perform a site visit to ascertain the condition of the space proposed to be vacated. If renovations are required to refresh the space, the process will proceed to Step 3a: PPS prepares a cost estimate. If renovations are not required, the process will proceed to Step 5b: CPD reassigns space and update Space Management Tool.
**Step 3a. PPS prepares a cost estimate**

If renovations are required to bring the space to base building condition, PPS prepares a cost estimate.

**Step 3b. Applicant(s) approves/rejects cost estimate**

The Department/Faculty Head (or designate) reviews and approves or rejects the cost estimate. If the cost estimate is rejected, the department/faculty will keep the space and the request to divest the space will be terminated. Refer to Step 5a). If the cost estimate is accepted, the process will proceed to *Step 3c: PPS Renovates Space.*

**Step 3c: PPS renovates space**

PPS will undertake the renovation of the space to base building condition as part of the renovation of the space for the future user(s). Refer to procedure 2.7 for further information.

Base building renovations will be undertaken if it is deemed necessary by the future user(s) and the Office of the Provost.

**Step 4: Office of the Provost approval of space divestiture**

In the event a new user(s) cannot be identified for the space, the Applicant(s) must obtain approval from the Office of the Provost for the divestiture. If the Office of the Provost approves the request, the University will take back the space until such time as a new user(s) is identified. If the request is denied, the department/faculty will retain the space.

**Step 5a): Applicant(s) retain space**

The space will be paid for by the user(s) department, even if vacant, and until such time as the space is either reassigned or taken back into central inventory.

**Step 5b): CPD reassigns space and updates Space Management Tool**

If the divestiture of space is approved, CPD reassigns the space and updates Space Management Tool.

**Step 6: CPD completes Project Status Review**

After a 6 month period, CPD reviews the status of the request with the Applicant. If no activity has taken place, CPD and the Applicant can either close the request or keep it open for a further term of 6 months.
2.4. Procedure for Requesting Additional Space

Contact Officer: Director, Campus Planning and Development

Purpose

The purpose of this procedure is to describe the process for requesting additional space on campus.

Procedure

1. CPD/Applicant(s) meet to review the space request

2. CPD sources appropriate additional space on campus

2a) CPD prepares layout & PPS prepares a cost estimate

2b) CPD helps Applicant(s) find off-campus space solution. Refer to procedure 2.5

Yes

Appropriate space on campus?

3. CPD/Applicant(s) prepare a business case that is forwarded to the Office of the Provost for approval

4. CPD notifies Applicant(s) and Department/Faculty Heads of the Office of the Provost’s decision

Approved?

Yes

5. CPD assigns space and updates Space

6. Project transitions to PPS for renovations, if required

Refer to procedure 2.7

No

5. CPD assigns space and updates Space

6. Project transitions to PPS for renovations, if required

Refer to procedure 2.7

7. Six months review of request
Step 1. CPD meets with Applicant(s) to review the space request.

CPD defines the overall space program requirements and determines how much additional space is required, if any. As part of this process, furniture and space intensification, hoteling and touch down solutions are also explored.

Step 2. CPD sources appropriate additional space on campus.

CPD assesses the additional space requirement against the space inventory on campus. If appropriate space is found, CPD prepares a preliminary layout and PPS prepares an initial cost estimate, if renovations are required. If space is not available on campus, CPD will work with the Applicant(s) on an off-campus space solution. Refer to Queen’s as Lessee process map. (2.6). If the Applicant approves the cost estimate, then the request will move to Step 3.

Step 3. CPD/Applicant(s) prepare a business case.

The Applicant(s) and CPD prepare a business case which is forwarded to the Office of the Provost for review and approval. As required, CPD refers to the University’s Evaluation Criteria for Minor Capital Projects for projects that do not exceed $2.5M.

Step 4 CPD notifies the Applicant(s) and Department/Faculty Heads of the Office of the Provost’s decision.

CPD notifies the Applicant(s) and Department/Faculty Heads whether the Office of the Provost has approved or denied the business proposal. If approval is not secured, CPD goes back to the Applicant(s) to explore alternative space solutions.

Step 5. CPD updates Space Management Tool.

If approval is granted by the Office of the Provost, CPD notes the space reassignment in Space Management Tool and notifies stakeholders of changes.

Step 6. Project transitions to PPS for renovations, if required.

PPS is responsible for working with the Applicant(s) on the design and implementation of required physical changes, if any. Refer to procedure 2.7 for further information.

1. If approval in principal is received, CPD meets with Faculty/Department that is releasing the space to obtain their agreement to release it.

2. Reassignment is noted in Space Management Tool and stakeholders are informed.

3. If renovations are required by the receiving department the project transitions to PPS for design and implementation.

Step 7: Project Status Review

After a 6 month period, CPD reviews the status of the request with the Applicant. If no activity has taken place, CPD and the Applicant can either close the request or keep it open for a further term of 6 months.
2.5. Procedure for Leasing Additional Space Off Campus
(Queen’s University as Lessee for Non-Residential Off-Campus Space)

Contact Officer: Director, Campus Planning and Development

Purpose
The purpose of this procedure is to describe the process for leasing additional space off-campus. Only after all “on campus” space solutions have been explored and exhausted will the option of leasing space off-campus be discussed with the Applicant(s). In certain circumstances Applicant(s) may require space off campus based on:

- unique functional requirements
- geographic location
- partnership with other stakeholders
- special adjacencies
- exceptional power, mechanical, floor loading, electrical, UPS, seismic

Procedure
There are five project phases for leasing of space off-campus and each phase requires a number of steps that are described in the sections below. The following is an overview of the five (5) project phases in leasing space off-campus:

**Overview of Process to Lease Space Off-Campus**

1. **Phase I: Off-Campus Space Project Development**
   (Steps 1-5)

2. **Phase II: Identification of Appropriate Off-Campus Space**
   (Steps 6-11)

3. **Phase III: Securing Off-Campus Space**
   (Steps 12-23)

4. **Phase IV Occupancy**
   (Steps 24-26)

5. **Phase V Lease Maintenance**
   (Steps 27-30)
• **Phase I: Off-Campus Space Project Development**
  If it is determined that the Applicant(s) specific space needs cannot be met on campus, CPD assists the Applicant(s) to determine their off-campus space requirements.

• **Phase II: Identification of Off-Campus Space**
  CPD work with the Applicant(s) and real estate broker(s) to locate off-campus space that will accommodate the Applicant(s)’ needs. This process commences by securing approval from the Office of the Provost to conduct a search for an off-campus space solution.

• **Phase III: Securing Off-Campus Space**
  CPD processes the application to meet the Applicant(s)’ space needs off-campus. This includes receiving the appropriate University approvals to enter into an Offer to Lease agreement, and the Lease Agreement.

• **Phase IV: Occupancy**
  CPD, and PPS where appropriate, works with the Applicant(s) and Landlord to develop an occupancy strategy, Steps 24-26. The project moves through tenant fit up and ends with the Applicant(s) occupying the space.

• **Phase V: Lease Maintenance**
  CPD is responsible for monitoring the lease and informing the Applicant(s) of upcoming notice dates that require the Applicant(s)’ attention.

### Phase I: Off-Campus Space Project Development

1. Determination of off-campus space requirements
   - 2. Occupancy analysis
   - 3. Occupancy analysis review
   - 4. Preliminary Applicant(s) approval
   - 5. Office of the Provost, approval for space search

   - Approved, proceed to Phase II
   - Denied
   - Space request withdrawn or revised

   **Appeal**
Step 1. Determination of Off-Campus Space Requirements

CPD meets with the Applicant(s) to determine geographic requirements with respect to off-campus space needs. The geographic requirements may include, but are not limited to the following:

- Geographic catchment area;
- Client catchment;
- Required adjacencies; and,
- Transit requirements.

Step 2. Occupancy Analysis

CPD prepares an occupancy analysis based on the factors identified in Step 1 as well as the following:

- Occupancy dates;
- Estimated lease cost including common area maintenance fees; and,
- Required lease term.

PPS will provide an estimate of the fit up costs, when applicable.

The occupancy analysis will include a comparison of costs associated with the proposed space solution(s), a comparison to campus occupancy costs together with a risk assessment associated with the various space options identified. PPS will be included as required during the analysis.

Step 3. Occupancy Analysis Review

CPD meets with the Applicant(s) to present the occupancy analysis and recommendation(s), review findings and provides any additional information or clarification as required by the Applicant(s).

Step 4. Preliminary Applicant(s) Approval

CPD receives authorization from the Applicant(s) to proceed with an off-campus space search. Alternatively the Applicant(s) may request to withdraw the application for additional space, or refine the geographic and spatial requirements. If requirements are refined, the process reverts back to Step 1.

Step 5: Office of the Provost Approval for Space Search

Discussions are held with CPD, the Applicant(s) and the Office of the Provost to discuss whether the leasing of space off-campus is a viable solution. The following criteria will be used to support the request for leasing off-campus space:

a. Site specific requests to support program and service activities that cannot be conducted at an on-campus location;
b. Situations where functionally adequate space for program or administrative units cannot be provided on campus;
c. Requests to support functions which benefit the entire campus and for which no acceptable on-campus space is available;
d. Requests for swing space which cannot be accommodated on campus within the existing portfolio;
e. Specialty space or adjacency needs unable to be met on campus;
f. Specialty mechanical, electrical, structural, load bearing, UPS and/or technology requirements;
g. Niche or specialty space.

Requests for leased space to meet program requirements will be considered only if the lease costs can be funded by the requesting program unit.

The occupancy analysis is presented to the Office of the Provost. The search for space off-campus is either approved, denied, or amendments to the space requirements are requested, in which case the process reverts back to Step 1.

If the request for space has been denied, the AVP, VP, Dean or Director of the respective unit may submit an appeal (need form link here) in writing to the Office of the Provost within three (3) months of the date of the denial. The original request plus any additional or new information must be submitted with the written appeal to the Office of the Provost for reconsideration. In the case of an appeal, refer to the process map for an appeal of a space decision. (2.8)

If approved in principle by the Office of the Provost, the Applicant(s) proceeds to Phase II.

**Phase II: Identification of Appropriate Off-Campus Space**

1. **Step 6. Engagement of real estate broker**
2. **Step 7. Off-campus space search and short listing of spaces**
3. **Step 8. Applicant(s) reviews short listed off-campus spaces**
4. **9. In-depth review of off-campus space**
5. **10. In-depth review presented to Applicant(s)**
6. **11. Applicant(s) selects preferred options**

Process proceeds to Phase III
Step 6. Engagement of Real Estate Broker

CPD engages a real estate broker being mindful of Queen’s University procurement process. CPD provides the broker with the University’s space requirements.

Step 7. Off-Campus Space Search and Short Listing of Space

Real estate broker provides CPD with a list of potential locations which are reviewed by CPD for space test fit, cost, availability, location, and suitability. The real estate broker and CPD conduct site searches and develop a short list of locations.

Step 8. Applicant(s) Review of Off-Campus Space

CPD presents a short list of off-campus space options to the Applicant(s) together with their recommendations. The Applicant(s), CPD and real estate broker conduct site visits to the short listed locations. Applicant(s) and CPD select the off-campus space(s) for an in depth review.

Step 9. In-Depth Review of Off-Campus Space

CPD performs an in-depth review of off-campus space including but not limited to the following:

- Financial implications;
- Functional program fit;
- Spatial requirements;
- Net present value;
- Parking availability and costs associated with parking;
- Rentable/usable ratio;
- Renewal term;
- Inducements;
- Free rent period; and,
- Staff to square foot ratio.

Step 10. In Depth Review Presented to Applicant(s)

Findings of the in-depth analysis are presented to the Applicant(s) by CPD with recommendation(s).

Step 11. Applicant(s) Selection of Preferred Options

The Applicant(s) selects and ranks a maximum of two (2) options for further analysis and negotiation. Process proceeds to Phase III.
Phase III: Securing Off-Campus Space

Step 12. Space Layout Analysis

Step 13. Business Case

Step 14. Offer to Lease Negotiated

Step 15. Applicant(s) Presented Offer(s) to Lease

Step 16. Applicant(s) Approves Offer(s) to Lease

Step 17. Internal Approval Process of Offer(s) to Lease

Step 18. Offer(s) to Lease Executed Internally

Step 19. Offer(s) to Lease Executed Internally

Step 20. CPD enters Offer to Lease Data into Space Management Tool

Step 21. Lease Negotiation

Step 22. Lease Execution

Step 23. CPD Enters Lease Data into Space Management Tool
Step 12. Space Layout Analysis

Once a preferred option has been identified, a preliminary space and furniture layout, and preliminary cost estimate will be conducted, or depending on complexity, an architect will be engaged to do so. The decision to engage an architect will be based on a variety of factors including but not limited to:

- Complexity;
- Capacity;
- Cost;
- Schedule;
- Applicant(s) preference;
- Need for a building permit;
- Landlord requirements; and,
- Regulatory requirements.

If an architect is engaged, the Applicant(s) will be advised of all fees associated with the works to be completed and it is the responsibility of the Applicant(s) to pay for the architect fees. The Applicant(s) must have funding to pay the architect fees and provide written authorization to engage an architect.

Step 13. Business Case

Applicant(s) prepares business case, supported by CPD which is submitted to the Office of the Provost for approval. If a project is expected to exceed $2.5M, the Applicant(s) will consult the Major Capital Approvals: Idea Development Funding Request Form to develop the business case. For projects not in excess of $2.5M, the Idea Development Funding Request Form should still be used to develop the business case, however, all answers to questions on the form should be limited to 200 words or less.

The Idea Development Funding Request Form can be retrieved from the Queens University, Campus Planning and Development website homepage at http://www.queensu.ca/cpd/home.

Step 14. Offer(s) to Lease Negotiated

Upon receiving approval from the Office of the Provost, CPD will work with real estate broker and Landlord to secure an Offer to Lease.

Step 15. CPD Presents Offer(s) to Lease to Applicant(s)

CPD will present Offer(s) to Lease to the Applicant(s) for review and provide recommendations.

Step 16. Applicant(s) Approves Offer(s) to Lease

Applicant(s) agrees to terms and conditions of the Offer to Lease and signals approval to proceed by executing the offer.
Step 17. Internal Approval of Offer(s) to Lease

If approval in principle is granted by the Applicant(s) and supported by CPD, the Offer to Lease and the Idea Development Funding Request form (insert link) will be submitted for internal approval and may include a review by: Queen’s University legal department, Secretariat, Finance, VPOC/CPAC/QUPC, BoT as applicable. CPD and PPS will attend meetings with the Applicant(s) to provide planning and technical support, as appropriate.

The Board of Trustees must approve all Real Estate purchases and dispositions. CPD will work with PPS as well as the Secretariat and Vice Principal Finance portfolio to obtain the approval(s).

Step 18. Offer(s) to Lease Executed Internally

The Offer to Lease is executed internally by using the Queen’s University signing authority protocol for real property acquisition, Disposition, and leasing http://www.queensu.ca/secretariat/policies/board-policies/policy-approval-and-execution-contracts-and-invoices/real-property.

- PPS will coordinate signature of legal documentation related to the property acquisition or disposition, including review by University Counsel. University Counsel is required on all agreements to purchase or sell real estate.
- Documentation related to the acquisition or disposal of real estate must be signed in accordance with the policy on approval and execution of Contracts and invoices.
- Copies of documentation must be forwarded to Financial Services, Attention: Controller

Step 19. Offer(s) to Lease Executed Externally

The Offer to Lease is executed externally by the landlord.

Step 20. CPD Enters Offer to Lease Data Into Space Management Tool

The executed Offer to Lease information is entered into Space Management Tool by CPD. Depending on the complexity of the lease, negotiations may take a protracted period of time; however the executed Offer to Lease enables the Applicant(s) and CPD to move forward.

Step 21. Lease Negotiated

CPD negotiates lease agreement.

Step 22. Lease Execution

CPD secures the appropriate approvals in keeping with the signing approval protocol for real property acquisition, disposition, and leasing. Lease is executed by both parties. http://www.queensu.ca/secretariat/policies/board-policies/policy-approval-and-execution-contracts-and-invoices/real-property.

Step 23. CPD Enters Lease Data Into Space Management Tool

CPD enters all salient facts with respect to the lease agreement into Space Management Tool database. “Read only” access to the Space Management Tool is provided to selected internal user(s). Notification is provided to internal user(s) that new information has been secured and that Space Management Tool
has been updated. (*Process template to be developed*) Executed lease is transferred to - Department reference for care and control needed. TBD) for care and control.

Data entered into Space Management Tool database includes but is not limited to the following:

- Landlord Information;
- Rent increases;
- Renewals;
- Common Area Maintenance fee increases;
- Options to expand/sublet/terminate;
- Tax increases;
- Operating/Capital adjustments; and,
- Notice Periods.

**Phase IV: Occupancy**

**Step 24. Occupancy Strategy**

CPD works with the Applicant(s) and Landlord, in consultation with Physical Plant Services (PPS), if approved by the Landlord, to develop an occupancy strategy which may include project staging and or phasing. Requirements with respect to tenant fit up will have been previously negotiated through the Offer to Lease process, which could impact the occupancy date. Schedules for fit up and occupancy will be established and prepared for all parties.

**Step 25. Tenant Fit Up**

The process and conditions with respect to tenant fit up will be largely based on the terms and conditions established in the Offer to Lease. If during the Offer to Lease negotiation the Landlord approves Queens undertaking of a tenant fit up; CPD will consult with PPS regarding fit up. Tenant fit up may include but are not limited to the following drivers:

- Architect,
- Contractor(s),
- Engineer(s);
- Insurance;
- Timing;
- Delivery schedule;
Step 26. Occupancy

Applicant(s) moves into leased space.

Phase V: Lease Maintenance

Step 27. Data Management

Step 28. Tickle File/File Forward Dates Created

Step 29. Ongoing Rental Payments

Step 30. Applicant(s) Updates

Step 27: Data Management

CPD manages lease agreement through Space Management Tool database including, but not limited to, the following information:

- Landlord Information;
- Rent increases;
- Renewals;
- Common Area Maintenance fee increases;
- Options to expand/sublet/terminate;
- Tax increases;
- Operating/Capital adjustments; and,
- Notice Period.
Step 28: Tickle File/File Forward Dates Created

CPD creates Tickle File/File Forward dates (to be developed) in Space Management Tool database with respect to dates requiring action on the Applicant(s)' behalf, as identified in Step 27.

Step 29: Ongoing Rental Payments

The Applicant(s) is responsible for the ongoing rental payments as agreed to in the lease agreement.

Step 30: Applicant(s) Updates

CPD informs the Applicant(s) of upcoming dates requiring action on the Applicant(s)' behalf as identified in step 27.
2.6. Procedure for Leasing of Surplus Space  
(Queen’s University, Lessor of Non-Residential Space)

Contact Officer: Director, Campus Planning and Development

Purpose
This procedure describes the three (3) project phases regarding the leasing out of space that is surplus to the University’s needs. Each phase requires a number of steps that are described in the sections below.

Procedure
The following is an overview of the three (3) project phases:

- **Phase I: Securing Tenants**
  CPD works with the potential tenant and their agent to evaluate their specific space needs and determine if there is available space within the University portfolio to meet their needs. If a space matching the tenant’s needs is available, CPD will show the space to the potential tenant, develop the Offer to Lease, seek the appropriate approvals to enter into both the Offer to Lease and the Lease Agreement, and secure the tenant(s).

- **Phase II: Occupancy**
  CPD and PPS work with the tenant(s) to develop the occupancy strategy, see the project through tenant fit up and concludes with the tenant occupying the space.

- **Phase III: Lease Management**
  CPD will be responsible for monitoring the lease and informing the tenant of upcoming dates that require their attention and action.

Overview of Process Flow for Leasing of Surplus Space

```
Phase I: Securing Tenants (Steps 1-11)  
Phase II: Occupancy (Steps 12-14)  
Phase III: Lease Management (Steps 15-17)
```
**Step 1. Providing Space to Marketplace**

CPD will act as a broker on behalf of the University. A list of vacant space(s) that have been identified as surplus to the University’s needs and that are available for lease will be provided to local commercial real estate brokers. Commercial real estate brokers are advised that brokers are protected.
Step 2. Identification of Applicant(s) Needs

Potential tenant(s) may be identified through a variety of sources including but not limited to the following:

- KEDCO;
- Potential tenant approaching the University;
- Broker approaching University; and,
- Department approaching University on behalf of potential tenant(s).

In either scenario, CPD will meet with potential Applicant(s) and/or their representative to determine the Applicant(s)’ space requirements and, in concert with PPS, identify appropriate space within the university’s landholdings.

Step 3. Applicant(s) Review of Space

CPD will work with PPS to ensure that all vacant space is ready for showing. CPD will show appropriate spaces to the Applicant(s).

Step 4. Space Layout Analysis

Once a preferred option has been identified, CPD in concert with PPS, will undertake a preliminary space and furniture layout and preliminary cost estimate or engage an architect to do so. The decision to engage an architect will be based on a variety of factors including but not limited to:

- Complexity;
- Capacity;
- Cost;
- Schedule;
- Applicant(s) preference; and,
- Regulatory requirements.

Step 5. Offer(s) to Lease Negotiated

CPD works with the real estate broker to secure an Offer to Lease.

Step 6. Internal Approval of Offer(s) to Lease

The Offer to Lease will be submitted for internal approvals and may include a review by: Queen’s University legal department, Secretariat, Finance, VPOC/CPAC/QUPC, BoT as applicable.

Step 7. Offer(s) to Lease Executed Internally


Step 8. Offer to Lease Data Entered Into Space Management Tool

CPD enters Executed Offer to Lease information into Space Management Tool.
Step 9. Lease Negotiation

CPD negotiates the lease agreement.

Step 10. Lease Execution

CPD secures the appropriate approvals as per the signing approval policy. The lease is executed by both parties.

Step 11. Lease Data Entered Into Space Management Tool

CPD enters salient facts with respect to the lease agreement into Space Management Tool database. “Read only” access to Space Management Tool the tool is provided to internal user(s). Notification is provided to internal user(s) that new information has been secured and that Space Management Tool has been updated. Data entered into Space Management Tool database includes but is not limited to the following:

- Rent increases;
- Renewals;
- Common Area Maintenance fee increases;
- Options to expand/sublet/terminate;
- Tax increases;
- Operating/Capital adjustments; and,
- Notice Period.

Phase II: Occupancy

Step 12. Occupancy Strategy

CPD/PPS work with the Applicant(s) to develop an occupancy strategy. Requirements with respect to tenant fit up are negotiated through the Offer to Lease agreement. Timetables for fit up and occupancy are established and prepared for all parties.
Step 13. Tenant Fit Up

PPS, in conjunction with CPD, will coordinate tenant fit up. Process and conditions with respect to tenant fit up will be solely based on the terms and conditions established in the Offer to Lease.

Conditions may include but are not limited to the following:

- Insurance;
- Timing;
- Delivery schedule;
- Permitted work schedule
- Hours of operation; and,
- Space access.

Step 14. Occupancy

Applicant(s) moves into the leased space.

Phase III: Lease Management

Step 15. Data Management

Step 16. Tickle File/File Forward Dates Created

Step 17. Applicant(s) Updates

Step 15: Data Management

CPD manages the lease agreement through the Space Management Tool database including, but not limited to, the following information:

- Rent increases;
- Renewals;
- Common Area Maintenance fee increases;
- Options;
- Tax increases;
- Operating/Capital adjustments; and,
- Notice Dates.
**Step 16: Tickle File/File Forward Dates Created**

CPD creates Tickle File/File Forward dates in Space Management Tool with respect to dates requiring action on the tenant’s behalf as identified in step 15.

**Step 17: Applicant(s) Updates**

CPD tracks dates of pending increases in fees or of pending dates requiring action on the University’s behalf as identified in Step 17. CPD actively manages milestones with respect to the lease in consultation with the Queen’s University Legal Department. CPD informs the tenant of upcoming milestones including but not limited to:

- Rent increases;
- Renewals;
- Common Area Maintenance fee increases; and,
- Tax increases.
2.7. Procedure for PPS Renovation of Space

Contact Officer: Associate Vice-Principal (Facilities)

Purpose
The purpose of this procedure is to describe the process followed by Physical Plant Services (PPS) to renovate space.

Procedure

1. PPS logs project, provides project number, and Develops Charter & Schedule

2. Applicant sign-off on Project Charter

3. PPS retains Architect (if required)

4. PPS / Applicant /Architect prepare final design

5. Applicant approves final design & budget

6. Architect provides tender drawings & specifications

7. RFP issued to Bidders

8. Contract awarded to successful bidder

9. Project Manager and Contractor hold start-up meeting

10. Contractor mobilizes on site

11. Construction Phase

12. Project Manager obtains project sign-off by Applicant(s)
Step 1: Project Charter and Schedule developed
PPS enters the project into the database and develops the Project Charter and Schedule based upon the Applicant(s)’ approved cost estimate previously provided.

Step 2: Applicant sign off on Project Charter
The PPS Project Manager obtains Applicant(s) signoff to proceed with the project.

Step 3: Project Manager retains Architect, if required, for design

Step 4: PPS/Client/Architect prepare final design
Project Manager, Architect and Applicant(s) work on Final Design and proposed implementation dates, including revised budget, if required. PPS discusses any changes to the scope of the project, or initial layouts with CPD, if required.

Step 5: Applicant(s) approve final design

Step 6: Architect provides tender drawings and specifications

Step 6a): CPD reviews drawings
CPD reviews working drawings relative to AODA, accessibility, and space.

Step 7: RFP issued to bidders
Project Manager issues a Request for Proposal to Bidders.

Step 8: Contract awarded to successful bidder
PPS Project Manager awards contract to the successful proponent.

Step 9: Project Manager and Contractor hold start up meeting

Step 10: Contractor mobilizes on site

Step 11: Construction Phase

Step 12: Project Manager obtains project sign off by Applicant(s)
2.8. Procedure to Appeal a Denied Space Request

Contact Officer: Director, Campus Planning and Development

Purpose
The purpose of this procedure is to describe the process to appeal a space request decision, should a space request be denied.

Procedure

1. Applicant(s) submits appeal to the Office of the Provost

2. Office of the Provost reviews appeal submission

3a. Appeal denied

3b. Appeal approved

3c. Further analysis required

3c1. Space Request Reverts Back to Assessing Applicant(s) Needs

4. Space request process continues

Step 1. Applicant(s) submits appeal to the Office of the Provost
If the request for space has been denied, the AVP, VP, Dean or Director (“Applicant(s)” ) of the respective unit may submit an appeal in writing to the Office of the Provost within 3 months of the date of the denial. The Applicant must complete the Denied Space Request Appeal Form. The original request plus any additional information must be submitted with the appeal form to the Office of the Provost for reconsideration.

Step 2. Office of the Provost reviews appeal submission
The Office of the Provost reviews all materials submitted with respect to the appeal. CPD and PPS provide support to the Office of the Provost, as needed, and supply additional information as required.
Step 3. Office of the Provost Decision

Once all materials have been reviewed by the Office of the Provost, three (3) choices are available to the Office of the Provost.

a. **The appeal is denied**: the space request is terminated (‘Denied Space Request Appeal Form’)
   (add link)

b. **The appeal is approved**: the space request continues through the process map; the step from which the original request was denied.

c. **Further analysis is required**: CPD, PPS or others (depending on specific request) works with the Applicant(s) to provide additional information as requested.
2.9. Procedure for Determining the Space Allocation – “Occupancy Cost”

Contact Officer: Director, Campus Planning and Development

Purpose
The purpose of this procedure is to describe the process for calculating the space allocation, referred to as “occupancy cost”, as part of the annual budgeting process.

Procedure

Step 1: CPD maintains and updates space inventory in Space Management Tool

The Inventory of all space is maintained by CPD in Space Management Tool, a space management tool for the administration of space accounting. On a regular basis CPD accesses the Space Management Tool database with a view to updating the records by searching for the “to be assigned” category and updating the remainder of the record through discussions with the department or on-site inspections.

As space is acquired/disposed of or transferred between departments/faculties, CPD records the changes in Space Management Tool.
Step 1a): PPS updates and uploads AutoCAD drawings into Space Management Tool

How data is collected and updated:

a. PPS prepares/updates building and room drawings in AutoCAD for:
   i. New buildings
   ii. Major renovations
   iii. Minor renovations

b. Once AutoCAD drawings are prepared/updated they are published to Space Management Tool which calculates the Net Assignable Square Meters (NASM) for each room or space. Details on the room specifics are included by PPS, if known, if not, then a ‘to be assigned’ code is assigned.

Step 2. CPD performs semi-annual space verification

Annually in November, CPD downloads the entire space database into Excel and verifies that the space allocation to each department/business unit is correct. Any discrepancies are vetted, corrected and the Space Management Tool database is updated. The focus of this comprehensive review is to confirm the “ownership” of the space and primary use.

Step 3: CPD checks accuracy of Space Management Tool data

Annually, and in early May, CPD extracts the data from Space Management Tool to Excel and rechecks to ensure accuracy. If required, CPD updates Space Management Tool to reflect identified changes.

Step 4: CPD sends space inventory data to Office of the Associate Vice-Principal (Planning and Budgeting) for annual budgeting

CPD takes a snapshot of the space database as of May 30th, annually, and prepares pivot tables based on the following criteria:

a. Whether the building is included or excluded for Occupancy calculations
b. Whether the department is included or not for Occupancy calculations
c. Whether the department is identified as Academic or Support space

Using the information from the pivot tables, CPD submits the NASM for all departments and faculties to the Office of the Associate Vice-Principal (Planning and Budgeting) for determination of:

a. Assigned space costs per NASM
b. Assigned occupancy costs by Department

Step 5: CPD conducts space audit

Every 3 years, CPD conducts a comprehensive and mandatory audit of all the space on campus, with the exception of residences, to confirm the actual space allocation and use, record any physical changes (new walls/doors/removal of walls) which are then forwarded to PPS, who are required to update their drawings, reimporting the drawings and information back into Space Management Tool. This 3 year audit is used for submission to the Ministry of Training Colleges and Universities (MTCU) for the tri-annual “Inventory of Physical Facilities of Ontario Universities” prepared by the Council of Ontario Universities (COU).
2.10. Procedure for Charging For Space

Contact Officer: Director, Budget

Occupancy costs or the cost of space is comprised of elements from Physical Plant Services (PPS) as well as Taxes, Deferred Maintenance and Insurance Costs. These costs are attributed in three categories or bins: 1) assigned space, 2) common space and grounds, and 3) central teaching space. For illustrative purposes, the following table shows the occupancy costs for fiscal 2015-16.

<table>
<thead>
<tr>
<th>Occupancy Costs</th>
<th>Cost per SM</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilities</td>
<td>$ 16.8</td>
<td>43.5%</td>
</tr>
<tr>
<td>Operations/Maintenance</td>
<td>$ 15.8</td>
<td>40.8%</td>
</tr>
<tr>
<td>Deferred Maintenance</td>
<td>$ 4.2</td>
<td>10.9%</td>
</tr>
<tr>
<td>Solid waste</td>
<td>$ 0.5</td>
<td>1.4%</td>
</tr>
<tr>
<td>Insurance</td>
<td>$ 1.1</td>
<td>2.7%</td>
</tr>
<tr>
<td>Taxes (Municipal + Net Tax due grant reduction)</td>
<td>$ 0.3</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

In recognition of the significant variation in the age and condition of Queen’s buildings, full occupancy costs are blended to allow an equal distribution of costs for utilities (electricity, steam/natural gas/fuel oil for space heating); small gas uses (non-space heating); water and sewer; custodial services; maintenance; taxes; waste disposal; insurance; deferred maintenance; and security across all buildings in which user(s) do not have control of the mechanical, electrical or structural conditions. These costs net, of the grounds expenses, are then divided over the total net assignable square metres (NASM) on campus which produces an “Assigned Space Cost per NASM”.

The following is the 2015-16 assigned space cost per NASM:

| Assigned Space Cost per NASM | $ 164.15 |

The total cost of each of the three bins outlined below is determined by the number of NASM’s in each of the three bins multiplied by the assigned space cost per NASM. In addition, for common space and grounds, the actual grounds expense as per the PPS budget is added into the NASM cost that is calculated to produce a total expense related to common space and grounds. The resultant occupancy expense per bin is then attributed to the Faculty/Schools and Shared Services based on the unique drivers for each bin which are outlined below. The assignment of space into each of the following bins is completed on a snapshot of the space assignments on May 30th annually. This data is compiled by Campus Planning and Development and then provided to the Office of the Associate VP (Planning and Budget). The assigned space data is then used for the upcoming budget cycle.

1. **Assigned Space**

   *Description*: Facilities, Schools and Shared Service units are assigned, and occupy, space – faculty and staff offices and workspaces, laboratories, meeting rooms, etc. The total of this space is calculated for each Faculty and School & Shared Service unit based on actual assignment/occupancy.
Cost Driver: The share of assigned space for each Faculty, School and Shared Service unit is measured in Net Assignable Square Metres (NASM). The occupancy expense for Shared Service units is added to their other expenses and forms the total for the attribution of Shared Service units’ expenses to the Faculties and Schools.

2. Common Space and Grounds
Description: Refers to indoor space that is not specifically assigned to individual units and therefore shared by the Queen’s community (e.g. the Agnes Etherington Art Centre, Grant Hall) and the outdoor space or grounds that are also shared (e.g. athletics fields and all University grounds maintenance).

Cost Driver: Each Faculty’s and School’s total Fall “community count” – its total number of faculty members, staff, undergraduate and graduate students. Faculty and students who work or study off-campus and those whose activities are located primarily within one of the teaching hospitals are assigned a lower (20%) weight.

3. Central Teaching Space
Description: The Office of the University Registrar maintains an inventory of 130+ central teaching spaces which are assigned through the University-wide timetabling process and through Faculty or School block bookings for academic purposes.

Cost Driver: Maintenance, utility and related costs of teaching space are attributed to each Faculty and School on the basis of actual “seat hours” used.
Appendix A - Glossary of Terms

**ACADEMIC PLAN** – A document prepared by the University which outlines the academic planning principles for the University

**AODA** - Accessibility for Ontarians with Disabilities Act

**APPLICANT(S)** – school, faculty, department, program areas and or shared service units

**BASE BUILDING** - Refers to the part of a multi-tenant building that directly serves and affects all tenants. In conventional North American practice, base buildings are constructed by speculative office building developers, leaving choice and responsibility for the remainder of the building to tenants during the **fit-out** phase. The base building normally includes the building's primary structure; the building envelope (roof and facade) in whole or part; public circulation and fire egress (lobbies, corridors, elevators and public stairs); and primary mechanical and supply systems (electricity, heating and air conditioning, telephone, water supply, drainage, gas, etc.) up to the point of contact with individual occupant spaces.

**BINS** - Bins are used to capture the operating costs associated with the University’s shared service units. Costs captured by the bins are allocated to Faculties and Schools based on cost drivers (see below). Some shared service units allocate all their costs to a single bin (e.g. Human Resources), whereas other shared service units require multiple bins to reflect different cost structures of parts of their operations (e.g. IT Services defines its activities as either “Enterprise Services” or “Learning Services”). Other examples of bins are Occupancy Costs (Utilities, Deferred Maintenance, Insurance, etc.), Teaching Space Costs and Student Affairs.

**BOT - BOARD OF TRUSTEES** of Queen’s University

**CMP - CAMPUS MASTER PLAN**  A document and framework prepared by Campus Planning and Development that will guide how Queen’s University physically evolves over the next 10 – 15 years and illustrates how Queen’s lands can evolve in a coordinated manner

**CPD** – Campus Planning and Development

**CHARETTE** – A collaborative session in which the stakeholders of the project engage in a concentrated meeting to draft a solution to a design challenge

**COU** – Council of Ontario Universities

**CPAC** – Campus Planning Advisory Committee

**DESIGN DEVELOPMENT** – Production of floor plans, sections, and elevations with full dimensions. The drawings at this phase typically include door and window details and outline material specifications. This phase also lays out mechanical, electrical, plumbing, structural and architectural details.

**FCI** – Facilities Condition Index is used in facilities management to provide a benchmark to compare the relative condition of a group of facilities
Mathematically the FCI is represented as

\[
\text{FCI} = \frac{\text{Maintenance, Repair, Replacement Deficiencies of the Facility(-ies)}}{\text{Current Replacement Value of the Facility(-ies)}}
\]

**LAMP** – Library and Archives Master Plan

**MCPAP** – Major Capital Projects Approval Process – the Queen’s University planning process to be followed for projects that are expected to exceed $2.5 Million dollars

**NASM** – Net Assignable Square Meters

**OBC** – Ontario Building Code

**ORC** – Operations Review Committee

**PPS** – Physical Plant Services

**PRELIMINARY BUSINESS CASE** - A scalable document that provides a preliminary outline of the needs and costs for the potential project.

**QUPC** – Queen’s University Planning Committee

**SHARED SERVICES** – The units on campus that provide services to the University as a whole, such as Human Resources, Advancement, the Library, senior administration, student services, and IT Services. Occupancy costs, like utilities and custodial services, and student financial support are also included among shared services. Shared Services should be viewed as facilitators whose purpose is to support and enhance the academic and research enterprise, through direct support to faculties and schools or indirect support to other shared services.

**SPACE** - The sum of all areas on all floors of a building either assigned or available for assignment to an occupant or specific use or is necessary for the general operation of a building.

**SPACE MANAGEMENT TOOL** – A software tool comprising of several linked modules including space management, accessibility and leasing

**SPACE REQUEST REVIEW COMMITTEE** – A review committee comprising of members from both PPS/CPD who review, weekly, all received SRF’s.

**SRF** – [Space Request Form](#)

**Tickle File** – An electronic bring forward file for pertinent lease data

**UPS** – uninterruptible power supply

**UTSC** – University Teaching Space Committee

**VPOC** – Vice-Principals’ Operations Committee
Appendix B - Evaluation Criteria for Minor Capital Projects

The following guidelines will be considered when evaluating space need or acquisition, space divestiture and space change requests.

a) Optimal Utilization of Space
   An assessment as to whether existing space occupied by the department is being used efficiently which will be measured using existing space inventory data and current Queen’s space planning standards as well the Council of Ontario Universities (COU) space standards and will be used as a guide to assess space needs.

b) Justification
   The requesting department needs to clearly explain why their program cannot be accommodated within their existing occupied and allocated space envelope.

c) Program Fit
   The department needs to clearly articulate that the space is needed for a department to grow in directions that are consistent with stated goals of the University and the unit’s strategic plan.

d) Special Need
   The requesting department is able to demonstrate a change in circumstances exist which warrants special consideration.

e) Economic Feasibility
   The requesting department is able to demonstrate that the cost of the space is consistent with the benefit served and department funds are available.

Additional factors that will be considered include:

- The interest of the University as a whole
- The suitability of the space and the possible future uses
- Adopting and advancing sustainable space, design and furniture
- Impact to operating costs
- Adopting and applying standards in space size, furnishings and space design
- Increase or decrease in Facility Condition Index (FCI) for the entire portfolio
- Providing every user with an equal level of space and furniture and applying that standard throughout the University
- Costs incurred by granting the space and who will bear them
- Academic space requests will take precedent over non-academic space requests
- The effects on people who must be relocated if the space request is granted including upstream/downstream dependencies
- What is in the best interest of the unit’s approved strategic plan
- Improved programming adjacencies
- Need to meet regulatory requirements (OBC, AODA)
- Current and future staff to square foot ratio
- Potential space sharing, hoteling, touch down, work from home space opportunities/solutions
- Potential systems furniture solutions (improved space utilization)
- Impact on students
- Impact on productivity – internal and external to the requesting unit
- Length of time the demonstrated need has been unmet
- Alignment with key planning documents including but not limited to the Campus Master Plan, Academic and Enrollment Plans, and the Principal’s Strategic Framework