WEST TEXAS A&M UNIVERSITY

Facilities Space Management Procedures

Facilities Inventory Control
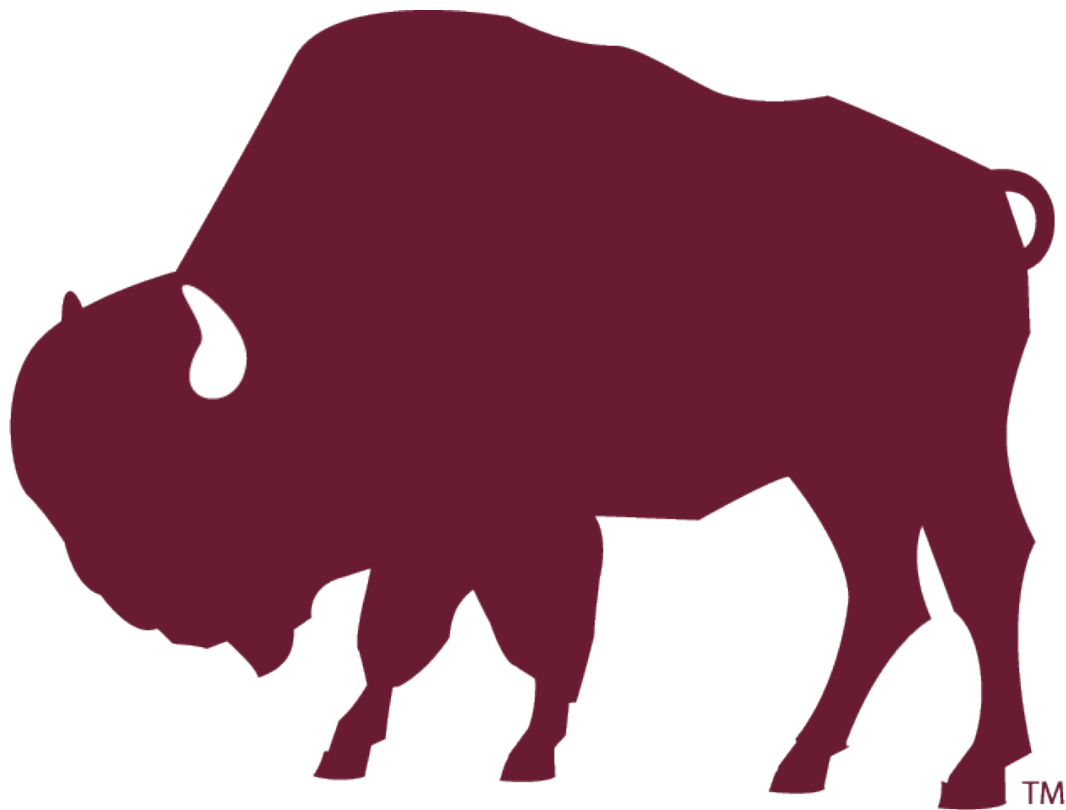
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Purpose and Overview

West Texas A&M University understands that the physical facility that comprises our campus represents a significant investment by the State of Texas and the Board of Regent of the Texas A&M University System. The University is responsible for the efficient and effective management and usage of these resources in support of our mission. The purpose of this document is to outline the processes and procedures by which the University maintains accurate facilities inventory records, as required by the Texas Higher Education Coordinating Board. Accuracy of this data is critical to good decision-making, both internally and externally. This document does not encompass all aspects of the facilities management and maintenance process, nor does it encompass all aspects of space usage analysis and reporting used within the University to aid in efficient usage of existing space.

Roles and Responsibilities

Responsibility for various aspects of space management and facilities inventory is distributed across several functional areas and groups.

1. The requests for renovations, reallocation and new construction are sent to the WTAMU Facilities (SSC).
2. SSC is responsible for reviewing requests for renovations, new construction and/or reallocation of space and gives estimates of probable cost related to the space of the proposed project and presents to the AVP for Facilities. SSC also reviews requests for changes to room usage and/or seating capacity which may impact Space Use Efficiency (SUE) score and the Texas Fire Marshall. SSC is responsible for supplying the room numbers and the dimensions of the room that will include the square footage of the space. The Director of Fire and Life Safety is responsible for determining the legal occupancy of each space.
3. The Space Management Committee (SMC) is made up of the following positions.
   a. Vice President for Business and Finance (VPBF) (Co-Chair) ;
   b. Vice President for Research and Compliance (VPRC) (Co-Chair);
   c. Vice President for Academic Affairs and Provost (VPAA);
   d. Assistant Vice President Institutional Research (AVP-IR);
   e. Assistant Vice President for Facilities;
   f. Director of Academic Research and Environmental Health and Safety;
   g. Registrar;
   h. Director of JBK;
   i. SSC Unit or Facilities Director (SSC);
   j. Director of Fire and Life Safety
   k. Academic Dean (chosen by the VPAA)
   l. IT Representative
4. This committee is responsible for the space oversight of the University. This includes proper assignment and categorization of the space, capacities, and review the Space Use Efficiency reports when available and as changes, additions

and deletions to the space inventory occurs. If the request is beneficial and feasible, the SMC will forward their recommendations on to the VPBF for review of funding and at certain levels – to be included on the TAMUS Capital Plan. This committee will meet at least twice a year (January and August) and as needed.

5. The VPBF will review the proposed project depending on funding available and if the project is required to be on the TAMUS capital plan. If the project is over the $4M threshold, it will require a Program of Requirements to be completed and it must be included on the TAMUS capital plan. The capital plan is produced each summer by the VPBF office for the upcoming five year period and is approved at the fall TAMUS Board of Regents meeting.   VPBF will review request and determine if adequate revenues are held to complete the project or determine if financing will be an option. If all requirements are met, the VPBF will present project to the President and the President's Cabinet.

6. President and President's Cabinet make the final decisions about renovations, reallocation and new construction based upon recommendation from SSC, SMC and VPBF.

7. If approved:
   a. If the funding is University based, the VPBF will send the approved recommendation to SSC along with notification to the requestor.
   b. If the project is to be funded by the department/school, a memo detailing the steps to complete the process, including creating a purchase order will be sent to the requestor.

8. SSC will represent West Texas A&M University in all construction projects which may result in new buildings or rooms. SSC will measure completed space, maintain up to date floor plans, and submit required changes to the inventory to both the Registrar and the AVP-IR.

9. The AVP-IR will maintain facilities data in the University's internal system (Colleague) and submit building and room data updates/additions to Texas Higher Education Coordinating Board. The AVP-IR will prepare the annual CBM014 and CBM011. The AVP-IR will work with University Registrar to verify CBM005. The AVP-IR will conduct internal analyses and prepare reports related to space utilization and scheduling and share periodically with the SMC. The AVP-IR maintains the MASTER facilities database and reviews codes assigned by others for reasonableness. This information will be shared with the University Registrar.

10. The AVP-IR will complete the annual validation of the facilities inventory and assign Space Use categories, Functional Category and CIP codes based on supplied knowledge or interviews with direct users of the space and serve as point of contact for collecting information about changes throughout the year.   The AVP-IR will obtain VPBF's signature on the Facilities Inventory Certification and submit to the Texas Higher Education Coordinating Board each October.

11. The Registrar is responsible for the class database and will verify the information is consistent with the Datatel master information.

Move of Existing Personnel

1. Requestor submits Space Needs Request (Appendix A) to SSC for an evaluation of space classification and a possible cost estimate, if any, for the pending move.
2. SSC will contact requestor once the form is received. Additional information may be received in order to understand the requested move of existing personnel.
3. If cost are involved (Construction and/or IT), those costs will be shared with the SMC and VPBF for further evaluation of funding sources.
4. Any change in purpose or classification of the space will be documented and given to the DIR. Same thing will occur if square footage space is changed.

Renovation of Existing Space

1. Requester submits Space Need Request Form (Appendix A) to the SSC for a cost estimate. Depending upon the cost and scope of the proposed project, approvals by the Board of Regents and the Texas Higher Education Coordinating Board may be required.
2. SSC prepares cost estimate and returns to the requestor.
3. SSC submits Space Need Request Form (Appendix A) with all other SSC completed Project cost estimates to the Space Management Committee, VPBF, or designee, for approval.
4. VPBF reviews request and any associated costs and makes recommendation to University President and Presidents Cabinet.
5. The University President and Presidents Cabinet make the decision and notify SSC.
6. Upon completion of the project, SSC measures the rooms involved, posts the information to the shared network drive, and updates floor plans and data bases.
7. Office of Institutional Research will collect additional information about occupancy and usage in order to correctly assign CB codes.
8. Facilities inventory database is updated and data uploaded to the Texas Higher Education Coordinating Board by the Office of Institutional Research.

Reallocation of Existing Space

1. Requester submits a Space Need Request Form (Appendix A) to SSC for referral to the VPBF.
2. SSC reviews request and makes recommendation to the Space Management Committee and VPBF.
3. The VPBF reviews request including cost estimate, if any, and makes recommendation to the University President and Presidents Cabinet.
4. The University President and Presidents Cabinet make the decision and notify SSC.
5. Upon completion of the project, SSC measures the rooms involved, posts the information to the shared network drive, and updates floor plans and data bases.

6. SSC will collect additional information about occupancy and usage in order to correctly assign CB codes.
7. Facilities inventory database is updated and data uploaded to the Texas Higher Education Coordinating Board by the Office of Institutional Research.

New Construction or Acquisition

1. President or others initiate discussion of new facilities construction or new buildings.
    a. This will require a Program of Requirements for the new construction.
    b. This may also require additional professional assistance or System help to gather adequate information to complete the task.
2. Requester(s) Space Need Request Form (Appendix A) to the SSC for a cost estimate. Depending upon the cost and size of the proposed project, approvals by the Space management Committee, Board of Regents and the THECB may be required.
    a. This may require the new project to be included on the Capital plan of both the Texas Higher Education Coordinating Board and The Texas A&M University System.
3. The estimated cost of the new construction or acquisition will determine whether:
    a. The project is managed by the Facilities Planning and Construction Department (FP&C) of The Texas A&M University System (if over ten million dollars and above).
    b. The project is managed by the University (if under ten million dollars).

Inventory Updates and Annual Inventory Validation

1. SSC is responsible for documenting all changes to space and or usage throughout the year based on renovations or University department reallocation of space requests.
2. During the first week of August, the SSC reviews a list of all space assigned; details include attributes, codes, square footage, etc.
3. SSC performs a walkthrough of all areas to determine current status and usage of each space. Any questions related to space are discussed with the manager of the space in question.
4. Room capacities are compared to the actual seating configuration and differences are noted. Differences are discussed with the manager of each space and the Director of Fire & Safety prior to SSC submitting the report.
5. Once all room data is accurate the Office of Institutional Research will sign off to certify the accuracy of the inventory (by October 15th).
6. Final updates are submitted to the Texas Higher Education Coordinating Board and CBM011 and CBM014 are certified by November 1st of each year by the Office of Institutional Research.

Reporting on Utilization and Efficiency

1. The Office of Institutional Research prepares and certifies the CBM011 and CBM014.
2. The CBM005 is prepared by the Office of Institutional Research and certified by Institutional Research each fall.

Documentation and Resources

1. The Texas Higher Education Coordinating Board Reporting and Procedure Manual and the accompanying Appendices outline the methods, requirements and codes required in relation to the facilities inventory.
2. West Texas A&M University Facilities Space Management Procedures (this document) outlines the internal processes and procedures by which the University implements the Texas Higher Education Coordinating Board requirements.
3. **Space Need Request Form** is used to request a cost estimate from the SSC for various types of service, including renovations. This form is also used to request an allocation, reallocation or lease of space. *See Appendix A.*
4. **Space Committee Members.** Space Committee members selected to review, evaluate and make recommendations. *See Appendix B*
5. **Space Management Approval Flow Chart**
   This will help in providing a visual flow chart with examples of the space utilization type methods. *See Appendix C*
6. CAD drawings of all buildings are maintained by the SSC and PDF copies are posted to the shared drive for access by other users.
7. **Facilities Inventory Database** is used to store all building and room details required for Texas Higher Education Coordinating Board reporting. Also, supports reporting and annual Facilities Inventory Certification.

West Texas A & M University (Appendix A)
Request for Allocation, Reallocation or modification of Space Need

Existing, WTAMU-owned space must be utilized as effectively as possible in order to support desired growth. Any endeavors that require additional space or space alterations should be addressed within a department unit's then within the department unit's lead college or division.

This form will document an expected or impending need for additional space, space alterations, and space modifications of any university owned space. A unit should complete this form as soon as it identifies an impending space need. *The submission of this form provides early notification to SSC Facilities and the Space Management Committee and Vice president for Business and Finance of an impending need, alteration or modification need for space. This form starts the process and will be reviewed by SSC Facilities, where a more detailed information gathering process will be conducted for feasibility and cost assessment. Once completed, this request will be directed to the Space Use Advisory Committee and Vice President for Business and Finance for final review and comment.*

Send this completed form and any relevant attachments to: SSC Facilities Physical Plant at physicalplant@wtamu.edu or call (806)-651-2133 with questions*.*

Part I: Requestor/Unit Contact Information   *[Person who should serve as primary contact]*

Name: Phone:

Department/Unit; College/Division: Email:

Building location and room #:

Part II: Desired Space needs

I am requesting for: *(check all that apply)*

___ Additional space to support a new or expanded activity

___ Relocation from an existing space

___ Renovation, alterations or modifications to a space

___ Rent or Lease space

___ Other

Part III: Purpose of Request

Briefly describe the need and or change of space.

Part IV Approval of Request

Person Initiating Request: _____ Date of Approval: _____/_____/_____
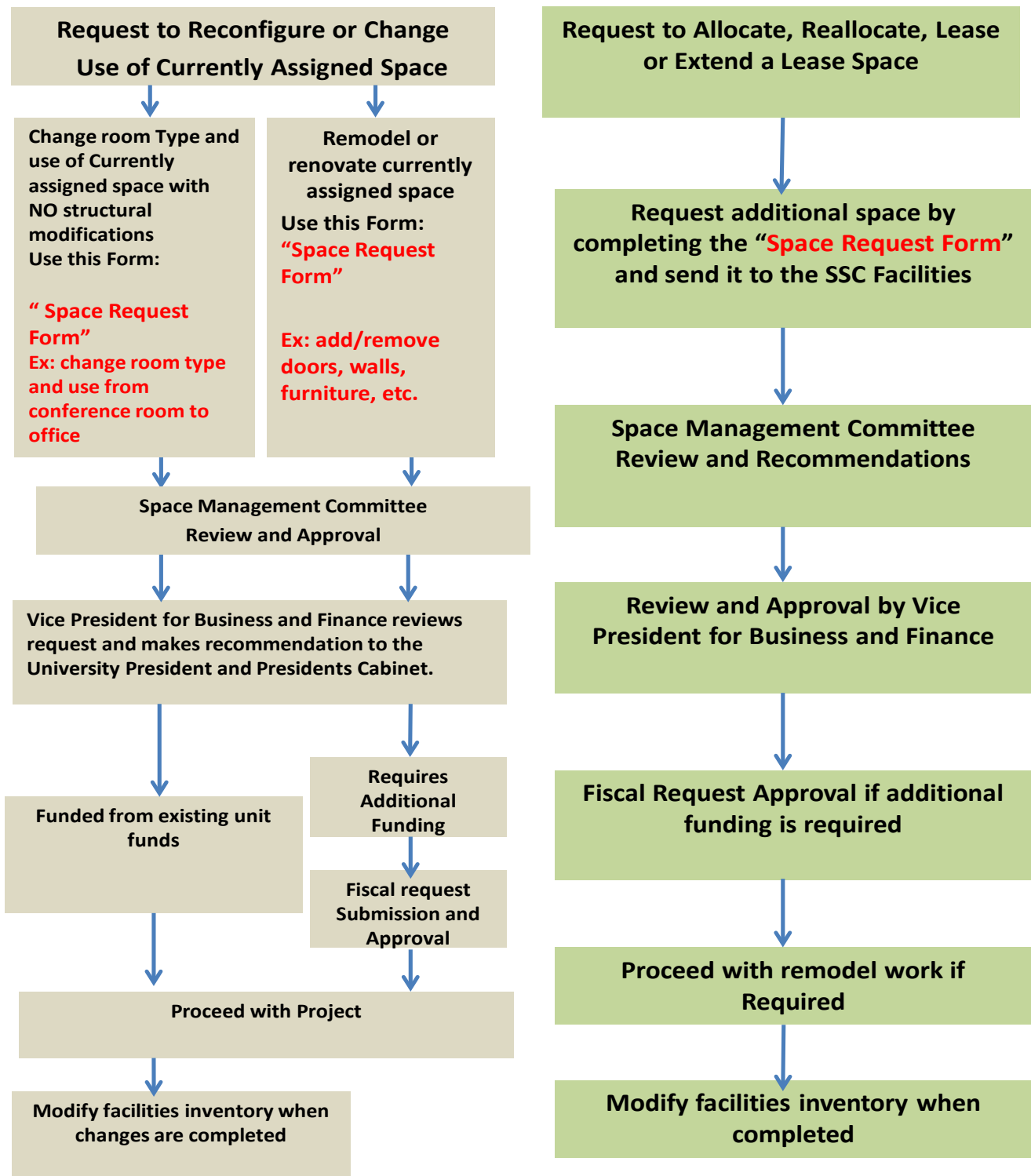
Dean/Senior Director: _____ Date of Approval: _____/_____/_____

Vice President/ Provost:_____ Date of Approval: _____/_____/_____

Part V: University Space Planning Action:
Received by SSC Facilities; Date: ____ / ____ / ____

Appendix B
West Texas A&M University
Space Management Approval Flow Chart

Request to Reconfigure or Change Use of Currently Assigned Space

Change room Type and use of Currently assigned space with NO structural modifications
Use this Form:

" Space Request Form"
Ex: change room type and use from conference room to office

Remodel or renovate currently assigned space
Use this Form:
"Space Request Form"

Ex: add/remove doors, walls, furniture, etc.

Space Management Committee Review and Approval

Vice President for Business and Finance reviews request and makes recommendation to the University President and Presidents Cabinet.

Funded from existing unit funds

Requires Additional Funding

Fiscal request Submission and Approval

Proceed with Project

Modify facilities inventory when changes are completed

Request to Allocate, Reallocate, Lease or Extend a Lease Space

Request additional space by completing the "Space Request Form" and send it to the SSC Facilities

Space Management Committee Review and Recommendations

Review and Approval by Vice President for Business and Finance

Fiscal Request Approval if additional funding is required

Proceed with remodel work if Required

Modify facilities inventory when completed

a. Vice President for Business and Finance (VPBF) (Co-Chair) ;
b. Vice President for Research and Compliance (VPRC) (Co-Chair);
c. Vice President for Academic Affairs and Provost (VPAA);
d. Assistant Vice President Institutional Research (AVP-IR)
e. Assistant Vice President for Facilities;
f. Director of Academic Research and Environmental Health and Safety;
g. Registrar;
h. Director of JBK;
i. SSC Unit or Facilities Director (SSC);
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k. Academic Dean (chosen by the VPAA)
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