



University of California, Merced
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MEMORANDUM

TO: Campus Community

FROM: Tom Peterson, Executive Vice Chancellor and Provost
Dan Feitelberg, Senior Advisor to the Chancellor

RE: UC Merced Space Planning and Allocation

DATE: February 2017

Physical space is one of UC Merced's most valuable – and expensive – resources; and like universities across the country, UC Merced has been examining ways to improve the nature and utilization of its buildings in order to advance its teaching, research and public service mission as efficiently as possible.

This purpose of this memo is to outline the launch of a collaborative, campuswide space management framework that UC Merced will use as it moves forward in the coming year.

The Opportunity: Space can be a tool to promote academic distinction and student success

The successful and steady growth of our campus over the past five years has put intense pressure on our physical space, and the new facilities being developed through the 2020 Project will provide much needed relief. However, even after the expansion is complete, it will be critical for the efficient use of space to remain an ongoing strategic priority – especially if we are to meet our goals for supporting faculty, promoting student success and ensuring staff satisfaction.

The 2020 Project has been intentionally planned in a mixed-use format designed to nurture a vibrant, continuously active campus environment. For example, this means that a building may have multiple uses or a gathering space that might be used in the daytime for one purpose could potentially be used in the evening for an entirely different one. If this approach is applied thoughtfully and strategically, it will help us meet our overall goals while increasing the efficiency of resources. But it also means the traditional rigid method of distinguishing space types will be less useful than it has been in the past.

A structure to ensure space is used strategically and with campus wide input

To guide the campus through the space planning and allocation process, UC Merced's academic and administrative leadership will be asked to participate as members of a new entity known as the UC Merced Space Planning and Allocation Board (SPA Board).

The SPA Board includes the primary users (the Deans, the Academic Senate, the Program Chairs, Student Affairs, Administration) and multiple resource managers (e.g., the Division of

Planning and Budget, the Division of Business and Administrative Services, the Department of Physical Operations, Planning and Development).

As constituted, the Board will be advisory to the Executive Vice Chancellor and Provost (EVC) who will retain decision making rights - as is the case today. The Project Management function for this Board will be performed by the Office of Space Planning and Analysis.

The Space Planning and Allocation Board's membership will include the following:

- Executive Vice Chancellor/Provost (Chair)
- Chancellor's designated representative
- Dean of the School of Natural Sciences
- Dean of the School of Engineering
- Dean of the School of Social Sciences, Humanities, and the Arts
- Representative of Organized Research Units
- Deans of any Future Schools
- Chair of the Committee on Academic Planning and Resource Allocation (CAPRA)
- Vice Chancellor for Planning and Budget
- Vice Chancellor for Business and Administrative Services
- Vice Chancellor for Student Affairs
- Vice Chancellor of Development and Alumni Relations
- Vice Chancellor of Research
- Vice Provost for Academic Affairs
- Vice Provost for Graduate Education
- Vice Provost for Undergraduate Education
- Associate Vice Chancellor for Physical Operations, Planning and Development
- Assistant Vice Chancellor for Planning and Real Estate

This broad structure is essentially an expansion of membership and scope of the Space Advisory Committee established in 2012, but that will be superseded by the SPA Board.

Next Steps: "Principles of Space Allocation" will be developed by May 2017

During the Spring 2017 semester, the EVC will convene a group representing space users and space resource managers, staffed by the Office of Space Planning and Analysis to undertake a consultative process to develop for the SPA Board's consideration, review, and revision, a set of "Principles of Campus Space Allocation".

At a minimum, the Committee staff will independently consult with the Deans' Council, CAPRA, Faculty Chairs, and the Vice Chancellors. At the end of the process, the Executive Vice Chancellor will recommend the principles to the Chancellor for consideration by May 18, 2017.

"Conceptual Campus Space Plan" will be complete by October 2017

Once the Principles are agreed upon and the designs of the 2020 Project's buildings are at the detailed design phase (anticipated to occur for the majority of 2020 buildings by late summer 2017), the Office of Space Planning and Analysis will develop several conceptual block space

allocations at the Division level for the entire campus, including backfill allocations on the existing campus once new space begins to be occupied, with the goal of creating a “Conceptual Campus Space Plan”.

The proposed block allocations will be based on the Long Range Enrollment Plan, the Strategic Academic Focusing Initiative-based Faculty Hiring Plan, the Workforce Plan, the Campus Operating Budget and Campus Capital Budget including the campus space inventory, and the space allocation principles developed as described above. Estimated costs for each set of options will also be provided.

Once approved, these conceptual allocations may be subject to the following additional reviews:

- If an individual space assignment that falls within a space allocation involves capital costs for renovations or fit-out of existing or new space and funds have not yet been appropriated for the purpose, it must go through the capital budgeting process.
- If the work would cause a change order to the 2020 Project contract, it must be reviewed and approved by the 2020 Project Governance Board, and will be subject to the financial constraints imposed by limited project contingency.
- If the improvement or change does not impact the 2020 Project but costs over \$35,000, it must go through the regular campus capital budget process. Stakeholders must be mindful that capital planning requires long lead times and plan accordingly.

It is anticipated that the first iteration of the Conceptual Campus Space Plan will be completed by October 2017.

It is worth noting that the first delivery of the 2020 Project, which is scheduled for Fall 2018 and contains student housing and classrooms, does not replace any existing space uses or involve any moves of those already located on campus; it is simply allocated to Student Housing and the Registrar, respectively.

The more complex allocation process is needed for the Fall 2019 and Fall 2020 deliveries of the Project.

Individual Assignments of spaces will be made at the Division level

Once the Executive Vice Chancellor has submitted the Conceptual Campus Space Plan to the Chancellor for approval, which will result in the initial allocation of campus space to the various Divisions, the assignment of individual spaces to individual occupants will be accomplished as described in the attached process map.

Getting from here to there: Space used by the Office of the Chancellor to be reassigned for use by Undergraduate and Graduate Students

As our new buildings are developed, it will be critical for all of us to keep the campus mission and priorities in mind as we occupy space.

One urgent need for student success is space for students to engage in the activities that are critical to undergraduate engagement and retention. Another is the need to alleviate the lack of

desk space at which graduate students can do their research and teaching-related tasks, which is currently constraining graduate admissions.

With that in mind, in Spring 2017 the Office of the Chancellor will move its location to the Promenade office complex at 767 East Yosemite Avenue in order to prioritize space on the third floor of Kolligian Library's West Wing for student activities and graduate student seating.

By rearranging some offices, increasing occupancy, and making small physical changes to the third floor of Kolligian Library, we can provide additional student activity meeting space as well as desk space for graduate students – all without straining our very limited capital resources.

The current target for this move is April 2017, subject to the imminent move of the 2020 Project Management team from the Promenade to portable construction trailers. The duration of the relocation of the Office of the Chancellor will be sufficient new space been delivered through the 2020 Project. Additional similar temporary measures may be necessary until new 2020 office space is delivered in Fall 2019, which is the second delivery of the Project.

Fortunately, the Downtown Campus Center will open in early 2018, and most administrative staff currently located in the Promenade will move downtown. At that point in time, this will free up the Promenade for use as “swing space” for offices until the 2020 Project's buildings are delivered.

An Integrated Planning Process

Chancellor Leland has asked you all to prioritize the allocation of workforce resources in accordance with campus strategic objectives. We must prioritize the allocation of our physical resources, particularly space, in the same way.

Thanks to the work we have all done over the last two years, we are now instituting a true **integrated planning process** – one that flows from the mission and goals of the campus, a strategic academic plan to achieve them, a faculty hiring plan, a long term enrollment plan, a workforce plan, a space plan, a campus financial plan, an all-funds operating budget and a capital budget.

Equipped with these tools, we look forward to UC Merced combining them into a rolling five-year planning process that creates the opportunity to identify, validate and prioritize resource requests in light of their importance to the mission rather than their urgency.

Moreover, an annual assessment of actual progress toward our goals and the actual resources available versus our long range plans will enable us to annually re-calibrate the strategic plan going forward.