



Space Management and Timetabling - Policy, Procedures, Roles and Responsibilities

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Space Management: Policy Statement

Introduction

This policy sets out the required steps for the allocation and release of space.

Changes to the allocation of space must be agreed and approved by the Space Management Unit (SMU) under the delegated authority of the Space Management and Timetabling Group (SMTG).

All changes must be recorded to ensure the University continues to meet statutory obligations, tenancy requirements and to maintain accurate records for management reporting.

Policy Statement

The University recognises its obligation to ensure the efficient use of space across the estate and acknowledges the need for current records of allocation and use. In order to achieve this it has established a process and controls that will deliver a transparent audit trail, with appropriate documentation and evidence of approvals for space allocation and any subsequent changes.

The Management Process

1. Space Planning

The objectives of space planning are:-

- ◆ To ensure that the proposed needs of Schools and Offices are validated within an approved system.
- ◆ To provide guidelines for the distribution of space to all users based on actual, validated needs that serve the best interest of the University as a whole.
- ◆ To provide appropriate utilisation standards for various types of facilities and to establish methods of monitoring actual utilisation against those standards.
- ◆ To establish appropriate communication links for all information in respect of space.

The process of space planning is complex and requires several iterations at any of the points indicated in (**Appendix A**). The development and maintenance of the academic process within which all space planning is undertaken is key.

The decision making body is the SMTG who will receive all requests, analyse the options against the University Corporate Plan and Estates Strategy and make recommendations to the Resources Sub Committee (RSC) where appropriate.

The process is underpinned by the data in respect of current space allocation and this practice is advised via space monitoring, including a policing function, based on the utilisation data.

2. Space Management and Timetabling Group (SMTG)

Reporting directly to the RSC the SMTG will have delegated responsibility for the management and allocation of space within the University. The DVC (Resources) will chair the SMTG and membership will be constituted to reflect the overall operation of the University. The main duties of the SMTG include:-

- ◆ Further development and updating of space management policy and procedures
- ◆ Space allocation
- ◆ Monitoring of space utilisation
- ◆ Setting of appropriate space standards
- ◆ Quality of the pooled teaching environment
- ◆ Referral of requests to RSC where appropriate.

Strategic development in the process of introducing centralised timetabling will be the responsibility of a sub group of the SMTG and members will be invited as required. The membership of the group will include School and Office Space Stewards, representatives from the SMU, the Banner team and ILS. The group's role is to oversee the planning and implementation of the project and to monitor progress until 2012 after which time an operational management group will be established.

3. Space Management Operation and Responsibilities

The SMTG assigns ALL University space whether owned or leased, according to the approved Space Management and Timetabling Policy.

4. School/Office Steward Duties

Each School/Office will appoint a space steward (usually the DoR in a School and a senior officer within an Office). The designated person will be responsible for liaison with SMU and the SMTG for all spatial issues within their School/Office including the establishment of space requirements.

The role of space stewards is to act as custodians for the spaces allocated to their Schools/Offices. They are responsible for the effective utilisation of the space assigned to them and for acting in accordance with the Space Management and Timetabling Policy and Procedures.

- ◆ To be the single point of contact within the school/office for all issues in respect of non-bookable space allocation.
- ◆ To prepare and present to SMTG, school/office rationale for the acquisition of additional space, alterations to existing space or the return of space.
- ◆ To attend meetings of the SMTG as required.

Requests for changes in use or occupancy of space must be submitted to the SMU for approval, which will not reasonably be withheld. Disputes will be forwarded to the SMTG for resolution. Requests must be made by completing the Request for Additional Space or Changes in Existing Allocation form (**Appendix C**).

5. Space for Proposed New Programmes

All new programme proposals are required to have been approved via Academic Planning Cttee. Any additional space requirements must be identified in the proposal. Comments from the SMU on the implications of additional space requirements must be appended to and considered as part of the validation process.

6. Space for Proposed New Posts

All new proposals for additional staff must be accompanied by a statement as to where they will be accommodated. Requests that entail additional space will need to be accompanied by comments from the SMU.

7. The Change Process

A step by step guide attached as (**Appendix B**) illustrates how the process will work if there is a desire to obtain more space, relinquish space or alter existing space.

Generally, change requests will be made utilising the Request for Additional Space or Change in Existing Allocation form attached as (**Appendix C**).

Some requests for changes in space are of such complexity or of such institutional impact that it is necessary to gain the endorsement of the RSC or Court. Proposals should be submitted in the form of a report which clearly identifies the need and justification for additional, or a major alteration to, existing space. Examples include the following:

- ◆ A sequence of moves each requiring modest renovation. The entire project will require more than a year to complete.
- ◆ A proposal is estimated to require resources beyond those available to the Head of School or Office Director in whose area the proposal originates.
- ◆ One or more plans for some changes require a considerable expenditure of time or other financial resources in order to obtain a close estimate of the costs of implementing the plan(s).
- ◆ There is an intention to raise funds from outside the University. This includes grant or contract proposals that are sought from within the sector or from private sources.
- ◆ The plan involves a strategic change/development for the University, the Head of School or Office Director's organisational area.

8. Overall University Space

In order to measure itself against its peer group, regular comparisons will be made against the following data produced from within the HESA EMS returns.

- ◆ Space per student (GIA/SFTE)
- ◆ FTE Teaching space per taught student

- ◆ Support space per student FTE
- ◆ Study space per research student FTE
- ◆ Support office space per office FTE staff.
- ◆ Income from commercial letting
- ◆ Capacity utilization

As a policy, the University will develop new or refurbished office space as open plan wherever possible. Requests for cellular office space must be supported with a comprehensive rationale.

9. Space Audit

An audit of space and its usage will be made at least annually

10. Room Audits and Audit Data

Room audits will be conducted to help assess space utilisation rates. These are usually undertaken over all the operating hours for the campus. Teaching space audits using AV/IT usage will be piloted during 10/11. The following performance indicators will be used to assess space utilisation:

Room Frequency (RF)

Room Frequency is the number of hours the room is in use, during the audit period, divided by the number of hours that the room is available for use, during the audited period.

For example Room in use 40 hours

 Room available for use during audit period 50 hours

 Room Frequency = $\frac{40 \text{ Hrs}}{50 \text{ Hrs}} = 80\%$

Room Occupancy (Occ)

Room Occupancy represents the average number of students in the room, when the room is in use, compared to the total room capacity. Room Occupancy is independent of Room Frequency.

For example Total number of students counted in room = 800

 Capacity of the room = 80

 Room use = 40 hours

 Room Occupancy = $\frac{800}{80 \times 40} = 25\%$

Utilisation (U)

Utilisation combines Room Occupancy and Room Frequency data to give an indication of how the room is being used. Utilisation, as an abstract measure, is only useful as an indicator of rooms requiring further investigation of usage patterns, and comparative assessments.

For example Room Frequency = 80%

 Room Occupancy = 25%

 Utilisation = 80% x 25% = 20%

11. Leasing Policy

All leases must be approved by the University Court. No executive officers of the university have the authority to sign a lease as either lessor or lessee.

Proposals for any new leases must be presented to the SMTG for onward comment to RSC and the Vice Chancellor's Group. Once the University has entered into a lease the space falls under this procedure and management by the SMU.

12. Allocation of Timetabled Space

The University will move to centralised space management and timetabling by 2012.

From the start of the 2011/12 session all timetabling will be scheduled via Syllabus +.

Current procedures and practices include:

- ◆ all support services maintaining bookable space are delivered to a University standard by (SMU/ILS/FM);
- ◆ all teaching spaces (including laboratory space) are incorporated into the timetabling software to enable students and staff to view personalised timetables via the University Portal;
- ◆ The SMU is responsible for allocating all space according to transparent priority rules.

The University's strategy is to maximise space availability and utilisation through centralized timetabling and this will be fully operational by 2012/13.

13. Guiding principles

- ◆ To optimise use of the University's space in line with the Corporate Plan.
- ◆ To support the delivery of the highest quality learning and teaching to students at the University;
- ◆ To ensure that students are taught in the most appropriate learning environment;
- ◆ To ensure the delivery of a standard level of facilities across all Schools;
- ◆ To support staff, at all levels, in the construction and production of the teaching timetable;

- ◆ To deliver personalised student and staff timetables;
- ◆ To provide easy access to timely and accurate timetabling and room booking information via the University Portal;
- ◆ To provide a unified approach to timetabling and room booking - one corporate system for all;
- ◆ To ensure that all stakeholders use the same data source;

14. Teaching Space

There are three categories of teaching space. General Space (GS) which is centrally managed and allocated. Specialist space (SS) that is also centrally managed and allocated which is linked to a particular School or Office where the facilities are of particular relevance to that School or Office, and a special category of space that is shared with other institutions for example, the University of Kent at the Medway.

GS refers to all lecture theatres, pooled teaching rooms, seminar rooms and other rooms that are supported by FM/ILS. These spaces are only bookable through the SMU. SS will also only bookable through the SMU from the 2011/12 session. Due to the specialist nature of the facilities and equipment in these rooms the demand for them is unlikely to spread beyond the linked School or Office. These spaces are often supported by specialist staff in Schools or Offices. Agreements will be reached regarding maintenance of specialist spaces if used by parties other than the linked School or Office.

Use of GS and SS by approved external clients is supported by the University in line with the Corporate Plan. The hiring of GS and SS to external clients is carried out by the Conference Office who are responsible for requesting and managing the booking.

15. Teaching Times

University core teaching hours are Monday-Thursday, 0900-2100 and Friday, 0900-1800;

University teaching weeks are currently numbered on the timetable software from mid September (week 1) to mid September (week 52);

All bookings shall commence on the hour and finish ten minutes before the scheduled finish time to allow for the necessary changeover;

Activities may be scheduled outside core hours e.g. Saturday, Sunday or evenings with appropriate prior arrangements made with FM and the SMU;

Undergraduate teaching should not take place after 1200 on Wednesday unless an option is provided to attend at an alternative time, or exemption has been approved by Academic Council. Postgraduate teaching will be scheduled;

Students and staff should not normally be scheduled to back-to-back activities between 1200 and 1400.

16. Teaching Timetable

Open Days and Alumni events should be scheduled at weekends during term time and will be scheduled as part of the timetable construction process.

Ad-hoc bookings for timetabled teaching activities will only be considered if received from the SMU by the relevant School/Office space steward within the agreed timescale;

All bookings must be timetabled via the timetabling software;

Students should not normally attend more than three consecutive hours of lectures without a break;

Timetable clashes should be resolved, where possible, by School timetabling staff prior to the final publication of the timetable.

17. Room Allocation

Allocation of all space is the responsibility of the SMU (**Appendix D**) identifies the annual scheduling process;

Access for students and staff with a disability will be accommodated wherever possible. Recruitment and Admissions/Student Affairs will alert the SMU in advance to any special student requirements. School /Office Space Stewards will alert the SMU to any staff requirements;

Booking requests will be accompanied by an indication of the room type required and any equipment requirements;

In the allocation of GS classes that fill 80% of the room capacity will take precedence over classes that occupy a smaller percentage;

Where a suitable room cannot be found within the required timescale the SMU will suggest an appropriate room at an alternative time. In the first instance, conflicts will be resolved by the SMU and the parties concerned. Unresolved conflicts will be referred to the Head of Space Management and ultimately to the DVC (Resources).

18. Timetabled Room Allocation Changes

Requests for changes to the timetable after the publication date will only be considered if approved by the Head of School and accompanied by a detailed explanation of the reason for the request.

Changes affecting facilities and support needs will be communicated by the SMU and ILS respectively;

Schools are responsible for notifying all students and staff affected by a change (changes will be reflected on the University Portal and students/staff should be encouraged to check this regularly);

The SMU may, occasionally, need to move a booking to a different location. Such changes will be kept to a minimum. The reason for the change will be communicated to the affected School/Office and any change will be reflected via the University Portal.

19. Timetable Publication

An initial draft timetable will be published during the first week in June which will be based on the programme and course information data maintained by the Office of Student Affairs. All programme and course changes must be notified to the Office of Student Affairs by 1 March in the preceding academic year.

Requests for other bookings for the following academic year from Schools and Offices must be received by the end of May.

A second draft timetable will be available during the first week in July. Space Stewards are responsible for checking each draft of the timetable to ensure that all teaching activities and other booking requests have been entered correctly and resourced appropriately including confirmation that staff are assigned to their respective teaching activities. The confirmed teaching timetable for each academic session will be available from the end of July.

Requests for changes following publication of the final timetable will only be accommodated if there is no consequential impact on the remainder of the final timetable.

Students should contact the School space steward if they wish to request a booking for academic purposes. All student society activities should be requested via the Student Union.

20. Accessing Timetable Information

All academic timetable information and subsequent updates are reflected on the University Portal.

21. Equality and Diversity

In line with the University's Equal Opportunities policy (disability/equality scheme), the University will make every effort to accommodate students and staff with special needs;

Students or staff requiring special arrangements should make their needs known (via Student Affairs or the School Space Steward) by 1 May.

22. Facilities and Support Services

GS facilities and support services will be managed and delivered via SMU/ILS/FM;

Quality standards will be maintained by the SMU in collaboration with ILS/FM;

Integrated customer-facing GS support functions and facilities (e.g. help lines), will operate to provide advice, assistance and resolution of any GS issues; (The nature of the integration and a standard service definition requires consideration).

SS facilities and support services are provided by the linked School or Office. Bilateral arrangements will be agreed with the particular linked School or Office where substantial use by other parties occurs.

23. Ad-hoc Non Academic Room Bookings

GS and SS not required for teaching may be booked for *ad-hoc* purposes following the timetable being finalised on 31 July. Staff can request ad hoc bookings via the on line room booking facility on the Portal.

24. External Bookings

External hire of GS and SS is requested by the Conference Office and booked by the SMU. The Conference Office will liaise with service providers if support is required;

Events booked by University staff where external visitors are present (whether attracting a fee or not) should be initiated by the Conference Office;

The use of the University's rooms and facilities by external bodies should be compatible with the University's mission;

Changes should not normally be made to the University's teaching timetable to accommodate external use unless authorised by the DVC (Resources).

25. Space Management Unit Responsibilities – TT Process

- ◆ Plan and co-ordinate space planning in meeting the University mission and Corporate Plan;
- ◆ Construction and production of the University's teaching timetable;
- ◆ Produce a diary of key dates that outlines dates for collection, submission and publishing of timetable information for the forthcoming academic year;
- ◆ Provide timelines for preparation of the University timetable;

- ◆ Mediate and assist in resolving timetable clashes;
- ◆ Manage publication of the timetables via the University Portal in conjunction with ILS;
- ◆ Provide user support to all School/Office Space Stewards and refer any hardware/software issues to Scientia/ILS as appropriate;
- ◆ Accountability to users and stakeholder management groups for service quality;
- ◆ Communication with Schools, Offices, Conference Office and other users;
- ◆ Work closely with the ILS/FM to ensure appropriate facilities are available for users together with timely delivery of support services.
- ◆ Monitor adherence to institutional deadlines.
- ◆ Adhere to timelines for data submission;
- ◆ Compliance with institutional deadlines;

26. School /Office Space Stewards TT Responsibilities

- ◆ Manage the preparation of the timetabling and associated business processes across the School;
- ◆ Provide timely advice to School teaching staff in respect of their requests regarding overall workload and equity issues, and ensure that these issues are reflected in the draft timetable;
- ◆ Ensure provision of accurate data to the SMU/School when the timetable is being drafted;
- ◆ Ensure collection of accurate data from the School and the transition to the SMU via the appropriate system;
- ◆ Liaise with the SMU, Heads of Department, Programme Leaders and Course Coordinators to resolve timetabling anomalies and request adjustments to the draft timetable;
- ◆ Check draft and final versions of the timetable to ensure accuracy;
- ◆ Coordinate School *ad hoc* room bookings and ensure any cancellations are communicated;
- ◆ Educate students to regularly check the Portal for timetable amendments at the start of each session and regularly during each term;
- ◆ Distribute relevant timetabling policies and procedures to affected parties;
- ◆ Approve full and part-time staff availability;
- ◆ Ensure adherence to University calendar, 3 term schedule and Banner key dates/deadlines.

27. Students Responsibilities

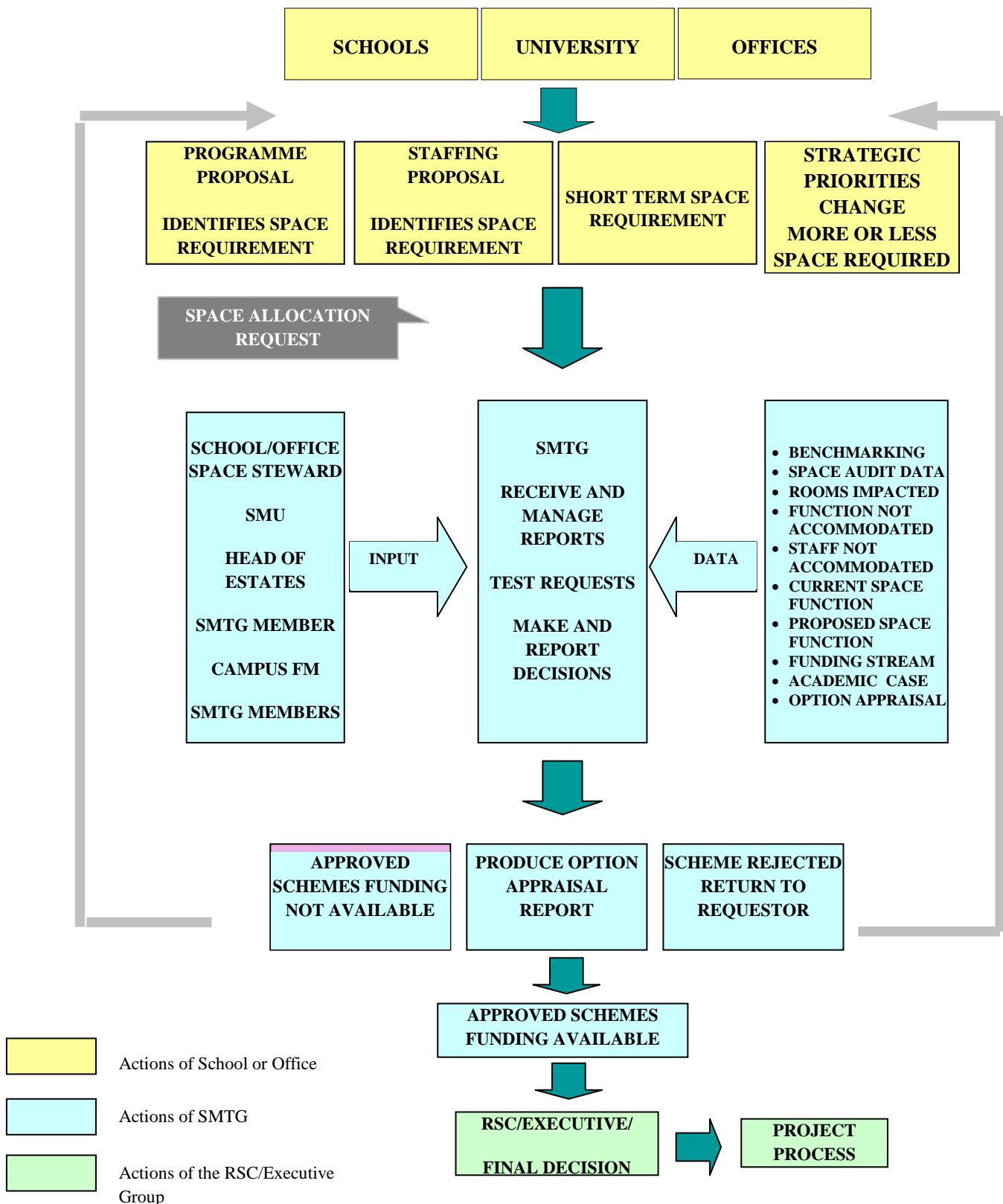
Read and check the published timetable as it appears on the University portal and advise School Space Stewards in the event of:

- ◆ clashes between courses;
- ◆ unreasonable clustering of activities without sufficient breaks;
- ◆ special arrangements not previously notified;

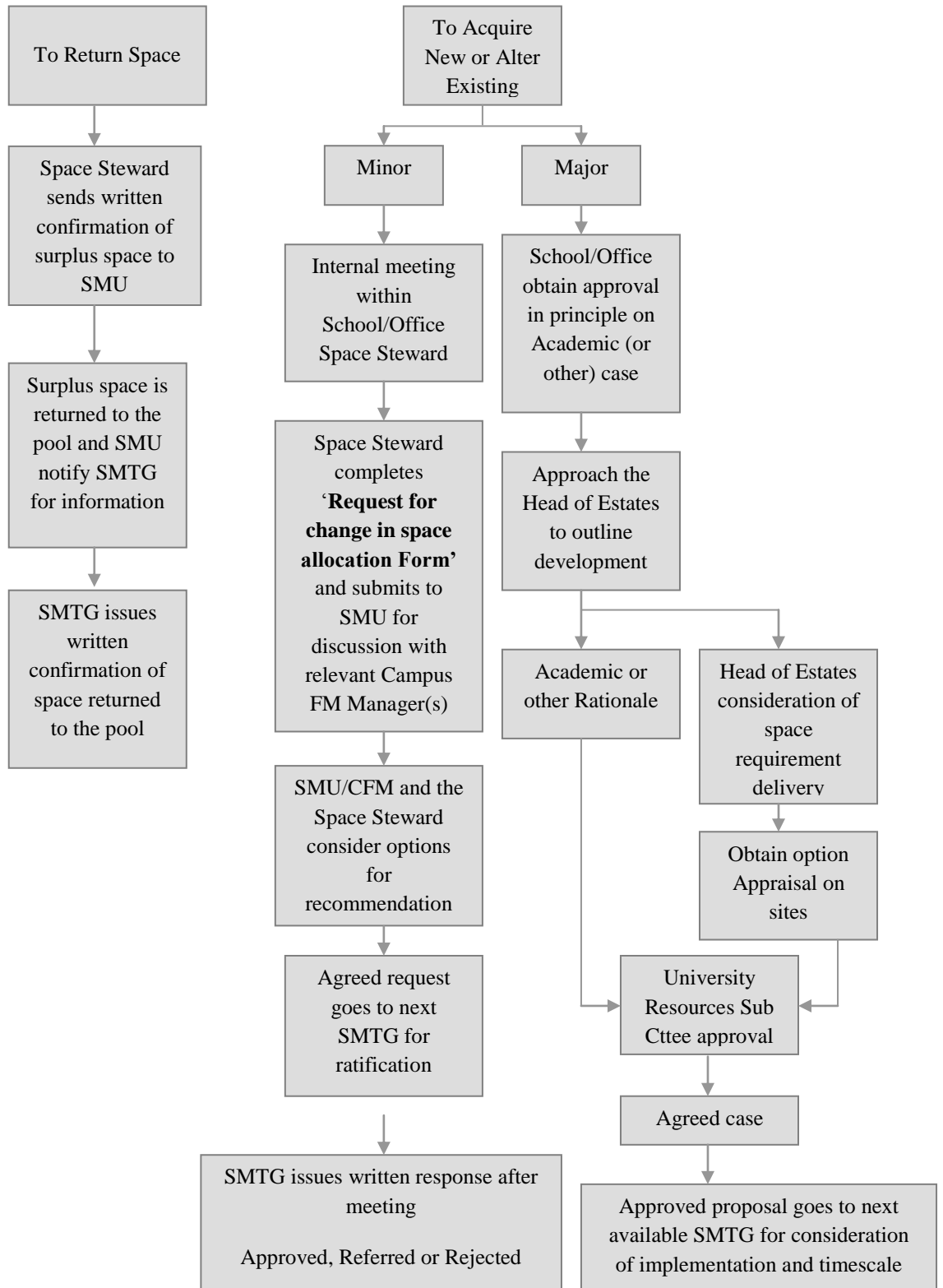
Regularly check the University Portal for any scheduled timetabling changes - additional activities,



Appendix A: Space Planning Process



STEP BY STEP GUIDE



Appendix C



REQUEST FOR ADDITIONAL SPACE OR CHANGES IN EXISTING ALLOCATION

School/Office requesting change	
Contact Person	
Date	
Phone Number/Fax	
Email	

Requested Space Requirement (classified as a major change)

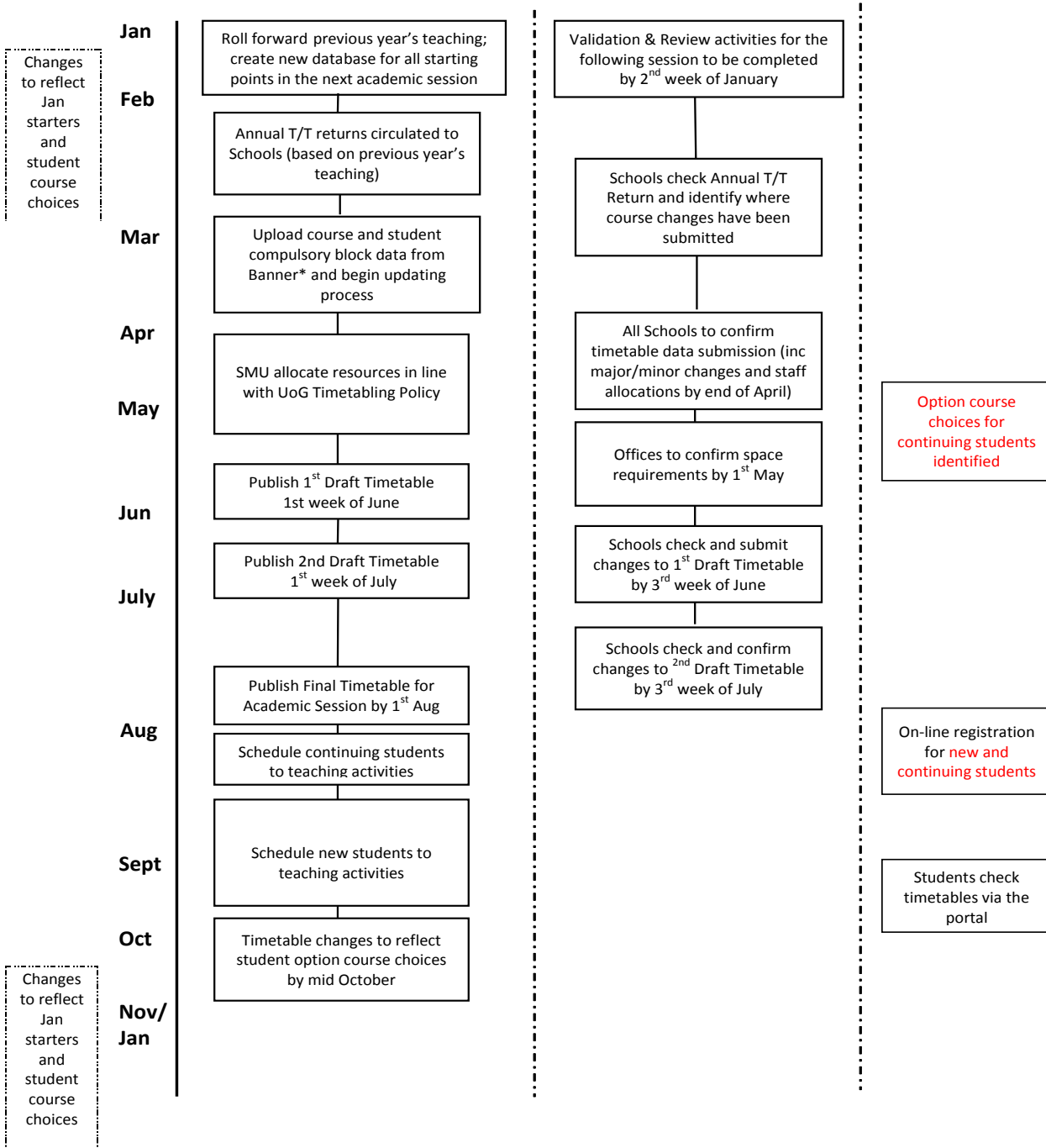
Please provide as much of the following information as possible/relevant on a separate sheet:-

- ◆ What functions or staff require accommodating
- ◆ In what way is existing space assigned for those functions inadequate
- ◆ What requirements are there for the new space
- ◆ Does the additional space need to be on Campus?
- ◆ Please give details of staff or students that are to be accommodated. i.e. number of staff/students, staff job functions, any special requirements
- ◆ Identify any specialist equipment or functions other than those implied by the standard space needed by employees [e.g. student workstations, greater than normal need for storage space, waiting areas, conference facilities etc
- ◆ Include any budget costings available
- ◆ Does this request impact on any other School/Office

Space to be disposed of:	
Space to be reallocated:	
Signature of School /Office Steward	Date:-
Signature of Head of School/Office Director	Date:-
Approved	Rejected see comments below
Comments of the Space Management and Timetabling Group	
For further information please contact your representative on the SMTG	



Appendix D: Room Allocation Schedule



*Banner data uploads to S+: weekly



Appendix E: Requesting Space for Non-teaching activities

