

Critical Questions



Aerial view University of North Carolina Chapel Hill.

Space in any campus environment—college, university, school, museum, corporate—has both a cost and a value. Legacy office and lab space, hoarded and sometimes even hidden, is becoming a thing of the past. Our campus leadership has moved more determinedly toward asking the right questions that aid them in providing clear, fair, and effective space management and utilization services to the campus community.

Six top issues relating specifically to space in higher education, along with critical questions for institutional dialogue, were published by APPA in the 2012 Thought Leaders report, *Campus Space...An Asset and a Burden*. The issues and questions remain relevant and are worth reprinting here. They are intended to guide facilities managers and university leaders in the discussions at their own institutions, and to help individual colleges and universities assess where they stand and help them develop strategies for the future.

ALIGN SPACE MANAGEMENT TO THE MISSION OF THE INSTITUTION

The issue: Space management should be a tool for the institu-

tion to fulfill its mission and become a part of strategic planning for the future.

Strategies:

- Assess how well your mission, master plan, and space management program are in alignment today.
- Identify key priorities from your mission and master plan that need to be incorporated into space management.
- Build relationships between the groups and individuals in charge of updating and implementing both the master plan and the space management plan.
- Deal with the challenge of integrating space planning and scenario-based strategic planning for the future.

Critical questions for institutional dialogue:

- Describe the relationship between the academic mission, the campus master plan, and the space management program. How well are the three interrelated?
- What key priorities of your mission and master plan need to be built into space management?

for Space Management

From APPA's Thought Leaders Series



- If space management on your campus does not currently reflect the mission and master plan, what steps need to be undertaken to bring them into alignment?
- How are the institution's scenarios for the future aligned or integrated with appropriate space needs?
- Are space management and master planning under the control of the same department? If not, do those in charge understand the importance of working together?
- How are space management processes and policies communicated to the campus? Is alignment with the master plan emphasized?

MAKE SPACE ONE OF THE TOP ASSETS OF THE INSTITUTION

The issue: Space can no longer be an afterthought but must become one of the main priorities of institutional leadership. The entire campus must adopt the attitude that space is a key institutional asset.

Strategies:

- Understand how space is valued now within your institution.

DATA POINT: THE VALUE OF SPACE

"Space is a critical resource, just like your institution's financial resources; it has to be managed effectively and used efficiently. It is an asset that you need to allocate in order to support short- and long-term priorities."

—Frances Mueller, Project Manager for the Space Utilization Initiative, University of Michigan, quoted in "Allocating Space Strategically,"

Higher Ed Impact, June 13, 2012.

- Reach out to the right people.
- Gather data about the value of space to make your case.

Critical questions for institutional dialogue:

- How is space valued right now in the institution? How can you objectively measure its value—by organizational level responsible for space? By amount of attention from senior administrators? In comparison with other assets and operations, such as finances, labor, and technology? How will you know if the value of space has increased?

- What factors contribute to your institution's valuation of space?
- Who should be targeted in any campaign to increase awareness about space? Whose opinion matters?
- How do you increase the understanding of space as an asset?
- What will be the top benefits of well-managed space at your institution? How can you use these benefits to promote improved space management?

CHANGE THE CULTURE OF SPACE

The issue: Colleges and universities need to shift the culture of space within their institution away from territorialism to appreciation of a shared resource.

Strategies:

- Assess the current culture of space.
- Describe the sort of changes you want to see.
- Develop concrete steps to move toward your vision.

Critical questions for institutional dialogue:

- How would you describe the current culture of space in your institution?
- How does the current space management process inhibit or enhance the campus culture?
- What sort of new culture do you want to see?
- What steps are necessary to achieve the desired culture?
- What metrics can you use to measure progress?

DATA POINT: MANAGING OFFICE SPACE

"Offices are one of the largest uses of institutional space. The policy for allocating offices depends on institutional goals. For example, institutions supporting the socialization and tenure efforts of new faculty should locate them near departmental faculty and offices. If collaborative, multidisciplinary programs are desired, then faculty should be dispersed throughout the campus."

—Watson Harris, "Budgeting Academic Space,"

Planning for Higher Education, October 1, 2011.

DEVELOP EFFECTIVE POLICIES, PROCESSES, AND ORGANIZATIONAL STRUCTURES TO MANAGE SPACE

The issue: Institutions need a solid framework of policies and the people to manage space.

Strategies:

- Assess current processes, policies, and organizational structures.
- Prioritize what should change in your campus space management system.
- Emphasize key best practices.

Critical questions for institutional dialogue:

- Who are the key players and stakeholders? What roles and responsibilities do they have? What motivates them?
- What space policies are currently in place? How effective are these policies? Are they closely followed or routinely ignored?
- What processes are in place to request, allocate, reassign, and manage space?
- Are decisions about space transparent?
- Should space policies and processes be updated? Who has the authority to make this decision? Who will lead the effort? Is there a dedicated team of space champions who will see it through?
- What best practices should be built into your space management process?

IMPLEMENT A SPACE INVENTORY SYSTEM TO UNDERSTAND RESOURCES AND IDENTIFY NEEDS

The issue: Institutions need robust, detailed inventories of their space resources.

Strategies:

- Outline your priorities for a space inventory system.
- Assess the pros and cons of your current system.
- Move toward a robust, flexible, accessible inventory.

Critical questions for institutional dialogue:

- What is the purpose and desired outcome of your space inventory system?
- What sort of space inventory system exists on your campus right now? Where does it succeed? Where does it fail? Can



DATA POINT: KEY ELEMENTS OF SPACE INFORMATION

A study by the University of California at Berkeley examined the collection, maintenance, and use of space data on campus, paying particular attention to barriers that complicate the accuracy and accessibility of space-related data. The research team identified the following factors as hindering space management on campus:

■ **Consistency and reliability.** Lack of consistent and reliable space data interferes with the productivity of campus staff and hinders leadership from making strategic management decisions.

■ **Sources and access.** Data should be maintained in an easily accessible and customizable repository to avoid redundancy and duplication of efforts.

■ **Ownership and authority.** In the absence of clear and central governance over space data, both departments and individuals have taken ownership of space data related to their units. Since data is not maintained centrally, campus leaders must rely on the de facto owners of this data to make decisions.

■ **Transparency and security.** Campus leaders support a more transparent system for space data management, but concerns remain that transparency may have a negative impact on allocation and the security of sensitive data. Tackling these barriers will help the institution move forward in creating an effective space information system.

— *CalSTARS (Space Terminology and Recommended Standards) Team, "Space: An Institutional Data Management Challenge,"* September 2010.

the current system be adapted to meet your needs, or do you need a new approach?

- How accessible is the space inventory system?
- Does the inventory system integrate with other campus systems such as enterprise resource planning, computerized maintenance management systems, computer-aided facilities management, geographic information systems, etc.? How well?
- Does your inventory system support strategic planning? If not, what steps can you take to move in this direction?

ADDRESS SPACE UTILIZATION BY ASSEMBLING CREDIBLE DATA AND ADOPTING BEST PRACTICES

The issue: Institutions can make significant improvements in the use of their space through reliable information management and effective space policies.

Strategies:


- Integrate inventory and scheduling systems to automate utilization tracking.
- Examine best practices for improving utilization.

Critical questions for institutional dialogue:

- What sort of utilization data is available right now? Is this data credible?
- Are your scheduling and inventory systems integrated? What steps would be necessary to reach this point?
- Has your campus considered various best practices for improving utilization? Which practices would be a good fit for your institutional culture? How can you move toward implementing these practices or policies?
- Do you have defined utilization goals? How will you know you've made progress?

CONCLUSION

Space must be considered a key institutional asset, managed accordingly. No other issue has such potential to transform the institution than that of the policies and practices related to effective space management and utilization.

To receive a free download of the full 2012 Thought Leaders report, *Campus Space...An Asset and a Burden*, or any of the APPA Thought Leaders reports, go to www.appa.org/research/cfar/tls.cfm. 

APPA developed the Thought Leaders Series, a program of the Center for Facilities Research, to conduct dedicated discussions on the future of higher education and the impact of that future on educational facilities. The 2012 report was sponsored in part by Jacobs and DTZ.