



Original Approval Date: March 28, 2008
Most Recent Approval: February 18, 2026
Editorial Amendments: n/a

Parent Policy: [Space Management Policy](#)

Space Management Procedure

Office of Administrative Responsibility:	Office of the Associate Vice-President (Infrastructure Planning, Development and Partnerships)
Approving Authority:	Provost and Vice-President (Academic) Vice-President (University Services, Operations and Finance)

Purpose

The purpose of this procedure is to detail the processes, methods, and required documentation that govern the management and control of University Space. This includes:

- Clarifying the specific responsibilities of all those involved during the University Space request lifecycle.
- Outlining the sequential steps for the allocation, allotment, and assignment of all University Space.
- Establishing the controls and criteria for maintaining the University Space data inventory and formalizing exceptions to this procedure.

Definitions

The attached definitions table outlines the terms used in this procedure and any specific rules of interpretation that apply. Capitalized words or phrases not otherwise defined in this procedure have the meaning ascribed to such words or phrases in the *Space Management Policy*.

Scope

This procedure applies to all members of the University Community to the extent they are engaged in activities or functions governed by this procedure. This procedure also applies to all University Space.

Procedure

1. AUTHORITY AND DELEGATION

a. *Delegation Framework:* The VP USOF delegates:

- i. the power for the operational management of Effective Space Use to the University Provost and Vice-President (Academic) and the other respective University Vice-Presidents, each responsible for applying this power within their defined portfolios; and
- ii. the power to manage and control University Space to the AVP IPDP, which power shall be exercised subject to the specific management and control subdelegations for certain University Space as detailed in subparagraph 1.b. and is further subject to the immediately preceding subparagraph.

b. *Functional Responsibilities and Roles:* The key functional responsibilities and roles necessary for the management of University Space are hereby established:

- i. **Strategic Planner:** Aligns all allocations of University Space with long-term strategic objectives. This responsibility encompasses:
 1. developing Master and Capital Plans;
 2. conducting feasibility reviews of existing allocations of University Space; and
 3. performing internal and external benchmarking to inform critical long-term strategic decisions.
- ii. **Space Planner:** Optimizes existing and future University Space through a technical and data-driven approach. This role involves:
 1. conducting consultative assessments with Space Contacts and Interest-Holders to determine functional requirements;
 2. interpreting functional requirements, evaluating the feasibility of potential solutions, and ensuring alignment with approved General Space Programs (GSPs) and Functional Space Programs (FSPs);
 3. developing project-level concepts; and
 4. allocating and making recommendations for the allotment and assignment of University Space.
- iii. **Space Contact:** The essential Unit-level liaison designated to manage space on behalf of a Unit. This role is responsible for:
 1. serving as the primary point of contact between their Unit's Interest-Holders and the Space Planner;

2. gathering and confirming functional requirements from the Unit and that Unit's Interest-Holders;
 3. securing Senior Leadership support for all University Space requests and ensuring all approvals are formally documented; and
 4. actively contributing to all related planning and programming processes.
- iv. **Space Sponsor:** The Space Sponsor is defined as a Unit overseeing student programming or external entities using University Space. Responsibilities, in consultation with the Space Contact, include:
1. defining and validating functional requirements for a particular initiative;
 2. assuming financial obligation for costs the sponsored group cannot cover, including coordinating payments for rent, operating costs, and related expenses;
 3. ensuring appropriate use of the University Space allocated to the sponsored group and communicating all obligations for its use and maintenance; and
 4. leading the move-out process, which includes ensuring the particular University Space is returned to its original condition and covering all associated costs.
- v. **Senior Leadership:** Senior Leadership is institutionally mandated to prioritize and advance supported University Space requests originating from their respective Units. Their mandate in this regard includes:
1. prioritizing Unit University Space requests based on academic and institutional needs;
 2. ensuring alignment of all requests with core institutional priorities; and
 3. securing formal approvals required for associated University Space needs, such as those related to new programs.
- vi. The functional responsibilities outlined above are defined by the required actions and responsibilities, not necessarily by a formal or singular appointment. For any given function, the responsibility may be fulfilled by more than one person, or entity as required by the size, complexity, or structure of the Unit or initiative. The specific person or entity performing the role must still adhere to all prescribed duties and consultation requirements.

2. UNIVERSITY SPACE STANDARDS AND DISTRIBUTION

- a. *Standards:* Decisions concerning the type, sizing, and quantity, for University Space will be based on the University Space Standards outlined in the Space Management Overview. The determination of office workspace eligibility, type and size is based on factors

including employee category, full-time equivalency (“FTE”), and alternative workplace agreements and arrangements. The University permits no more than one dedicated workspace (office or open workstation) per person, regardless of role(s), subject to the following minimum criteria:

- i. A minimum appointment of 0.5 FTE or greater.
- ii. A minimum required on-campus presence of three days per week.

The need for a secondary workspace may be addressed through the provision of a shared unassigned office, workstation or touchdown station.

b. *Principles of Space Distribution:*

- i. The processes of allocation, allotment, and assignment of University Space are interdependent and require collaborative effort to ensure compliance with the following institutional mandates:
 - 1. adherence to the principles outlined in the *Space Management Policy*;
 - 2. maintenance of accurate space inventory records;
 - 3. alignment of decisions with approved Master Plans, GSPs, and/or FSPs; and
 - 4. conformity with University Space Standards.
- ii. Where adherence to University Space Standards is not feasible, University Space will be allocated, allotted, and/or assigned using best practices to achieve the closest possible alignment with the required standards.
- iii. Interest-Holder input should be considered, summarized, and reviewed in all requests for University Space and subsequent allocation, allotment, and/or assignment decisions, including how the input influenced the decision, if applicable.
- iv. Determinations for the allocation of University Space are ultimately made by the AVP IPDP. This decision-making process is informed by required collaboration with the Senior Leadership of the impacted Unit.

c. *Allocations:*

- i. University Space is allocated to Units.
- ii. The allocation of new or exclusive University Space is prohibited where communal or shared University Space can adequately accommodate the desired function.
- iii. Actual University Space allocations will be determined by the physical layout and availability of suitable space, which may result in an allocation different from the Unit’s original request.

- iv. All allocations of University Space are provisional and subject to periodic reassessment and reallocation. University Space may be reallocated to align with the core mission and accommodate emerging functional priorities of the University Community.
- d. *Allotment:*
 - i. University Space must be allotted in a manner that:
 - 1. supports the intended space function and ensures effective use of University Space; and
 - 2. considers future flexibility and growth opportunities to further the institutional goal of Space Optimization.
 - ii. The Space Planner must be consulted when reallocation is being considered in order to provide recommendations, discuss future planning, and update University Space inventory records.
- e. *Assignment:*
 - i. Following the allocation of University Space to a Unit (e.g., faculty) and subsequent allotment of that space to a sub-unit (e.g., department), the final assignment of space to the end-user (e.g., individual, team, or Student Group) is the responsibility of that sub-unit, subject to the internal policies and procedures of the overarching Unit.
 - ii. The Space Contact serves as a key resource to assist Units in considering the optimal assignment and management of their allotted University Space. To ensure alignment with institutional standards and to minimize disruption, the responsible Unit is required to formally consult with the Space Planner when an assignment or reassignment involves four (4) or more offices and/or workstations simultaneously. The Space Contact will, in turn, consult with the impacted occupants as appropriate during this review process.
- f. *Reallocation, Reallocation or Reassignment of University Space:*
 - i. Any decision to reallocate, reallocate, or reassign University Space must follow the same procedures and obtain the same approvals as those established for the original allocation, allotment, or assignment of space, as detailed in this Procedure. This ensures that all changes to the inventory of University Space are governed by the same standards, principles, and required documentation.
 - ii. Following any reallocation, reallocation, or reassignment of University Space, the former occupying Unit will not be reimbursed for costs related to previous renovations or improvements it funded, regardless of the original source of those funds (e.g., operating budget, internal grants, or reserve funds). Reimbursement will only be provided if it is explicitly required by the terms of a binding external agreement, such as a capital grant agreement or a gift agreement.

iii. Responsibility for costs associated with the implementation of a reallocation, reallocation, or reassignment of University Space are governed by the following provisions:

1. in all cases, the Unit or occupant vacating the space is responsible for ensuring that the following items and waste are removed and that the space is left "ready for cleaning" prior to the change taking effect: all surplus items, contents (excluding furniture), branding (excluding University standard wayfinding and signage), shredding, and general waste. All costs associated with this removal are the responsibility of the vacating Unit or occupant, regardless of who initiated the change;
2. where the change (reallocation, reallocation, or reassignment) is initiated by the occupant or their Unit, they are responsible for all associated implementation costs. These costs include: physical move and transportation of items; furniture and equipment installation; University standard wayfinding and signage; rekeying of both the vacated and newly occupied space; and any necessary modifications or renovations required to support their function in the new space;
3. where the change is initiated by USOF or is required to accommodate a University Priority Project, the requesting Unit or Project Sponsor is responsible for all associated implementation costs. These costs include: physical move and transportation of items; furniture and equipment installation; University standard wayfinding and signage; rekeying of both the vacated and newly occupied space; and any necessary modifications to the new space required to support a comparable functionality for the former occupants. Costs associated with any items or modifications requested by the relocating occupants that are over and above what is required for comparable functionality shall remain the responsibility of the occupants; and
4. if the cost responsibilities outlined above are not met by the responsible party, the Space Sponsor, Unit or Administrative Portfolio associated with that party shall bear the responsibility to cover the unpaid costs.

iv. The requirements and responsibility for costs associated with decontamination, decommissioning, and infrastructure and/or equipment removal from spaces being vacated are described in the New Construction, Renovation, and Demolition Procedure.

g. *Space Requests:*

- i. Requests for allocations of University Space must be initiated by one of the following:
 1. A Unit (or its respective internal faculties or departments), submitted via their designated Unit Space Contact. This includes space requests for an external entity where the Unit acts as the Space Sponsor for such entity.

2. A Strategic Planner or Space Planner within USOF.
 3. Student Groups, submitted via the Space Contact of their respective Space Sponsor.
- ii. The University of Alberta Students' Union (UASU) and the Graduate Students Association of The University of Alberta (GSA) may play the role of a Space Sponsor for Student Groups they formally recognize who are in University Space but do not have a faculty or Administrative Portfolio Space Sponsor (excluding leased University Space governed by the terms of the applicable lease and other University policies and procedures). In such instances, the UASU and the GSA may develop internal processes for the allotment and assignment of space in alignment with the *Space Management Policy* and this procedure.
 - iii. The UASU or the GSA may act as an advocate for Student Groups they formally recognize who are in University Space and that have a faculty or Administrative Portfolio Space Sponsor. In such instances, the UASU or the GSA (as the case may be) may support the Student Group requesting University Space but do not have decision-making authority.
 - iv. All requests for allocations of University Space:
 1. are reviewed, prioritized and forwarded to the appropriate Space Planner who will consult the Space Contact for more information about the request (if necessary) and/or progress the request; and
 2. must align with the principles of the *Space Management Policy* and any current Master Plans, GSPs, FSPs, and strategic plans, and which reflect Demonstrated and Rationalized Need (guided by input from Interest-Holders and users of the University Space).
 - v. Requests for net increase in a particular allocation of University Space will be declined if existing distribution and use of such space does not align with the University Space Standards, and will remain declined until such a point that those standards are met, unless an exception to the foregoing is supported by the AVP IPDP and the applicable college dean and vice-provost, stand-alone faculty dean, vice-president, or deputy provost.
 1. In all instances, the approval of a net increase in a particular allocation of University Space will be based on the principle that allocations of University Space are provisional in nature and will be periodically re-assessed to ensure effective and fair distribution of space across the University.
 2. Where adherence to the University Space Standards is not possible, best practices for the use of existing University Space may be used to align as closely to standards as possible.

3. COMPLIANCE AND CONTROLS

- a. *Space Data Inventory Requirements:* USOF is responsible for monitoring and maintaining the University's space inventory data and record drawings for the purposes of recording space allocation decisions, internal and external benchmarking and reporting, and future planning.
- b. *Conflict Escalation:* Conflicting requests for University Space will be escalated and resolved in accordance with the table below:

Escalation/ Resolution Level	Administrative Portfolio or Academic Portfolio Representative	USOF Representative/ Space Management Policy oversight
Level 1	Space Contact	Space Planner (IPDP)
Level 2	Department chair, director, vice-provost, or equivalent	Director (IPDP)
Level 3	Faculty dean, associate vice-president, deputy provost, or equivalent	AVP IPDP
Level 4	College dean and vice-provost, stand-alone faculty dean, vice-president, or equivalent	VP USOF and Provost and Vice-President (Academic)

If a resolution cannot be reached within the first 3 levels of the above chart, the applicable college dean and vice-provost, stand-alone faculty dean, vice-president, and/or deputy provost and the AVP IPDP will make a recommendation to the VP USOF and the Provost and Vice-President (Academic) to make a joint and binding decision.

- c. *Exceptions:* Requests for exceptions to this Procedure must be documented and formally approved based on the following process and requirements:
 - i. Prior to submission, the requesting Unit must conduct a review to explore all alternatives and ensure comprehensive understanding of the impact of the exception. This process includes mandatory consultation with the following parties:
 - 1. The Space Planner and Strategic Planner within USOF.
 - 2. The Space Contact of the requesting Unit.
 - 3. The responsible USOF Director(s) and/or Associate Vice-President (in the case of administrative Units).
 - 4. The department chair (if applicable), faculty dean, and/or general manager of the affected Unit.

Following these consultations, the Unit Head must submit a formal recommendation for the exception.

- ii. The formal recommendation must be submitted in writing (via email) to the Office of the AVP IPDP from the Unit Head. The submission must contain the following information and approvals:
 1. Formal documentation for approval by the AVP IPDP.
 2. Required content:
 - a. The specific type of exception requested and the timeline for which the exception is required.
 - b. Confirmation that the exception, despite the deviation from this Procedure, still aligns with the core principles of the *Space Management Policy*.
 - c. A comprehensive review of risks created by the exception, along with the respective mitigation strategies.
- iii. The AVP IPDP holds the authority to approve most documented exceptions to this Procedure. However, if the scope and impact of the request exceeds the AVP IPDP's delegated authority—specifically requests that involve:
 1. a capital cost commitment above a pre-determined financial threshold;
 2. a significant long-term functional change to a building or major facility; or
 3. a decision that requires cross-portfolio sign-off on a major institutional priority;

then the recommendation from the Unit Head must be escalated for joint sign-off by the VP USOF and the Provost and Vice-President (Academic).

Definitions Table

<i>Any definitions listed here apply to this procedure only with no implied or intended institution-wide use. Capitalized words and phrases used in this procedure that are not otherwise defined herein shall have the same meanings ascribed to them in the Space Management Policy.</i>	
Administrative Portfolio	The grouping of University executive offices and areas of responsibility, including those led by the President, the Provost, the Vice-Presidents, the General Counsel, and the University Secretary.
Assignment	The distribution of allotted space by a department, or equivalent level, for the placement of individuals, purposes, and functions.

AVP IPDP	The individual holding the title and position of Associate Vice-President, Infrastructure Planning, Development and Partnerships, or the individual holding any renamed or equivalent position.
Capital Plan	The strategic financial document outlining the University's planned major infrastructure and capital investment requirements over a set period. This document is formally prepared and approved by the Board and submitted to the Minister responsible for the PSLA by a specified deadline, in a form and containing information acceptable to the Minister, as required by the PSLA.
Demonstrated and Rationalized Need	The evidence-based justification required for a formal request for an allocation of University Space. This justification must be substantiated by verifiable data and evaluated to confirm the proposed use's alignment with all three criteria: University strategic priorities, the principles of the <i>Space Management Policy</i> , and the University Space Standards.
Effective Space Use	The strategic, efficient, and flexible utilization of University Space to maximize its potential in support of the University's primary academic and administrative missions. This is achieved through the optimal distribution of space that supports the intended function while accommodating future operational needs and changes.
Functional Space Program (FSP)	Identifies solutions for building projects or major renovations, detailing the specific space components required to meet the needs of a user group. FSPs focus on current and future space requirements, functional adjacencies, and co-location needs to support effective design and construction planning.
General Space Program (GSP)	Describes a user group's activities in terms of their space needs, including student, staffing and support requirements. GSPs include a space budget that outlines how much space the unit has currently, how much it will require in the near future, and also predicts what amount of space may be required over a long-term planning period, but does not define solutions.
GSA	The Graduate Students Association of The University of Alberta.
Interest-Holders	Groups of people whose interests should be considered in the context of the management of University Space. These groups may include user groups, subject matter experts, USOF groups, impacted groups, etc.
Master Plan	A high-level, long-term strategic document that guides the future physical development of University Space. It identifies anticipated space needs over a designated timeframe by applying space formulas based on projected enrolment growth and the strategic priorities of all University Units. It details high-level infrastructure redevelopment and renewal scenarios that inform the foundation for subsequent, more detailed implementation plans

	(e.g., General Space Programs and Functional Space Programs).
Project Sponsor	The Unit Head or Senior Leader who is formally accountable for the successful definition, execution, and realization of the benefits of a specific University Priority Project. The Project Sponsor is responsible for the associated implementation costs when the project causes a reallocation, reallocation, or reassignment of University Space.
Senior Leadership	The collective executive officers of the University, including the President, the Provost and Vice-President (Academic), the college deans, stand-alone faculty deans, and all other Vice-Presidents, Deputy Provosts, and Vice-Provosts. This group is responsible for high-level strategic decisions and institutional priorities.
Student Group	Includes student groups formally recognized by Student Success and Experience, the UASU and/or the GSA as well as extracurricular or co-curricular programs managed by faculties or administrative programs and for which groups of students may seek designated space (e.g. faculty student project groups, student clubs, varsity athletics, club sports, etc.).
UASU	The University of Alberta Students' Union.
University Priority Project	A major initiative, capital project, or program deemed by Senior Leadership to be of strategic institutional importance, requiring an accelerated timeline or a significant change in University Space, and which is executed with a defined Project Sponsor. This designation impacts the financial responsibility for implementation costs.
University Space Standards	The official institutional guidelines that define the target specifications for the quantity, size, entitlements, and optimal adjacencies of University Space. These standards describe the ideal state for various space categories and serve as the primary benchmark for defining allocations and calculating space requirements in functional programs and space formulas.
Unit	A University college, stand-alone faculty, faculty, or Administrative Portfolio.
Unit Head	The most senior executive responsible for a Unit, including the college dean, stand-alone faculty dean, vice-president, or deputy provost, or the designated director, manager, or equivalent authority in charge of a specific Administrative Portfolio or Student Group.
VP USOF	The individual holding the title and position of Vice-President (University Services, Operations and Finance), or the individual holding any renamed or equivalent position.

Parent Policy Suite

- [Space Management Policy](#)
- [Space Management Procedure](#)

Related Policy Documents

- [Infrastructure Capital Expenditure Authorization \(ICEA\) Policy](#)

Related Links

- [Project Intake and Work Requisition Form](#)
- [Space Management](#)

History

March 28, 2008	Approved.
May 13, 2025	Editorial amendment. Formatting and links.
December 12, 2025	Editorial amendment. Formatting, office name and links.
February 18, 2026	Approved.

*For questions surrounding policy document interpretation or implementation,
please contact the Office of Administrative Responsibility.*

The official version of this document may be obtained from <https://www.ualberta.ca/policies-procedures/index.html>