

**UC San Diego**  
**Executive Vice Chancellor**

**Space Management Guidelines**  
**for**  
**Academic Affairs**

*May 1, 2024*

**EXECUTIVE SUMMARY**

Space is a critical, valuable, and limited resource at UC San Diego that will be assigned based on the principles of the highest and best use of that space in service of university priorities and the Strategic Plan. Assignment of space is a dynamic endeavor, since the highest and best use of space will change as the University's needs evolve.

This document provides space management guidelines for the allocation of space for all units reporting to the Executive Vice Chancellor (EVC) and recognizes the School/College Space Policies and the School Space Committees.

The Chancellor has delegated space management authority for Academic Affairs<sup>1</sup> to the Executive Vice Chancellor (EVC). The EVC in turn, assigns the responsibility of allocating space within their assigned portfolios to the School Deans; and to the Dean of Undergraduate Education for space allocated to the Colleges. The EVC retains authority over space allocations for all other Academic Affairs units not specifically noted above, including the non-College units within the Division of Undergraduate Education and the administrative units. Each School will have a School Space Policy and Committee. The Colleges will have an all-Colleges Space Policy.

Because space is a resource that is not owned by any person or unit, Deans and Provosts are expected to take an active role in space management. These leaders are responsible for demonstrating efficient and effective utilization of all space allocated under their portfolios in support of excellence in teaching, research, and public service.

The Space Management Guidelines contained in this document are not intended to be all encompassing in terms of defining a detailed process for unique space-related scenarios that will undoubtedly arise. The EVC and Chancellor maintain ultimate authority and will exercise appropriate flexibility in the decision-making process.

**GUIDING PRINCIPLES**

1. Campus space will be allocated to operations that serve students, faculty, or staff who have an operational need to be on campus. Priority will be given to programs and activities that are

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<sup>1</sup> This includes any Organized Research Units (ORU's) that currently have a reporting line to the Executive Vice Chancellor. Also refer to the most current Campus Organization Chart.

directly related to the vision to be a student-centered, research-focused, service oriented public university as outlined in the Strategic Plan.

2. Allocation of space will be consistent with University of California system-wide and UC San Diego initiatives including [Sustainability](#) and [Inclusive Excellence](#).

## OUTLINE

- Types of Space
- Facilities Information Management System (FIMS)
- EVC Space and Renovation Request Form
- School Space Policies & Committees
- All-College Space Policy
- Academic Affairs Non-School Academic and Administrative Units

## TYPES OF SPACE<sup>2</sup>

Space management guidelines contained herein are organized into several categories as follows:

1. General Assignment Classrooms
2. Department Instructional Space
3. Office Space
4. Lab and Research Space
5. Opportunity Space

### ***General Assignment (GA) Classroom***

General Assignment Classrooms are scheduled and managed by the University Registrar. Any requests to utilize this space should be submitted directly to the University Registrar for consideration. In July 2023, a Strategic Classroom Advisory Committee (SCAC) was appointed by the Executive Vice Chancellor (EVC). The SCAC is tasked with making recommendations regarding quantity, design and functionality of new classroom space and proposing strategies to maximize functionality and usage of existing teaching space. Any SCAC recommendations affecting the management of this space will be incorporated into this document once they have been approved for implementation by the EVC and Chancellor.

### ***Departmentally Scheduled Instructional Space***

In addition to making recommendations about General Assignment classrooms, the SCAC has been tasked with developing recommendations for joint management of departmentally scheduled instructional spaces to optimize their use in response to tremendous pressure university-wide for instructional space. Upon receipt and acceptance of these

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<sup>2</sup> For a complete list of UC San Diego Space Classification Guidelines, refer to:  
<http://rmp.ucsd.edu/fsim/esm.html#Tririga-Training-and-Resources>

recommendations, this document will be updated to describe how these spaces will be managed via collaboration between departments and Academic Affairs.

## *Office Space*

Demand for office space, including faculty, research, graduate student, and administrative staff offices has outpaced new construction campus-wide. Management of office space should follow the guidelines contained herein. Academic Affairs academic units and administrative units are expected to utilize the definitions and strategies described below to achieve optimized use of existing space.

The following **definitions** apply to the space strategies outlined below:

- **Enclosed Private Office** – an enclosed space with a door assigned to one person
- **Enclosed Shared Office** – an enclosed space with a door assigned to two or more people
- **Enclosed Hoteling Office** – an enclosed space with a door that can be reserved for a specified period of time
- **Open Workstation** – a workspace in an open office area that can be assigned to one person, several people, or that can be reserved as needed. A workstation that can be reserved can also be referred to as “hoteling” or “touch-down”.

The following guidelines were inspired by the [2020 Administrative Office Space Planning Guidelines](#) that describe how to leverage activity-based space assignments that focus on the task and hybrid schedule rather than solely on the job title. Also refer to the [Hybrid Office Sharing](#) Case Study.

- a) Campus leaders such as Vice Chancellors, Deans, Assistant Deans, Provosts and staff working on campus three or more days per week with an operational need for an **Enclosed Private Office** as deemed by their leadership will be assigned a dedicated, enclosed private office.
- b) An **Enclosed Shared Office** will be assigned to staff with an operational need (as deemed by their leadership) who work on Campus three or fewer days per week. These staff would share with another staff member on alternating days based on their approved hybrid work schedules and should also have access to [reserve](#) an **Enclosed Hoteling Office** when they need to be on Campus on an atypical day per their approved hybrid work schedule. If there is an operational need, an **Enclosed Shared Office** can also be furnished with more than one workstation which would allow two or more staff to work simultaneously.
- c) **Open Workstations** will be allocated to the following uses:
  - Assigned to one staff member that works on campus three or more days per week and does not regularly require an Enclosed Private Office;
  - Assigned to two or more staff members that work on campus three or fewer days per week and do not regularly require an Enclosed Private Office. These

staff would share with other staff members on alternating days based on their approved hybrid work schedules.

- Open Work stations will be made available for hoteling through a reservation system.

**d) Management of Hoteling Space:**

- Managers are encouraged to provide staff who are assigned to an Open Workstation with access to reserve an Enclosed Hoteling Office when their task requires privacy.
- Enclosed Hoteling Offices and Hoteling Open Workstations can be managed by the [Campus Reservation System](#) for ease and convenience.
  - The hoteling reservation system includes functions that allow units to restrict reservations to a predetermined list of staff members if operationally necessary.

***Lab & Research Space***

As part of their Space Management Policies, Schools are required to establish a Space Committee that is tasked with reviewing space utilization periodically and in alignment with the strategic goals of the School and in the context of their Faculty Recruitment Plan. Space utilization reviews will be conducted no less than once per year in advance and in support of the Annual Chancellor's Fall Space Review, to ensure that space is being optimally utilized. Space reviews will examine research productivity, space utilization, the importance of the work to the [UC San Diego mission](#), and the funding supporting the assigned space.

The determination of utilization will be based on quantitative evaluation (dollars per assignable square foot) and qualitative criteria such as observation of activity level made during space walks, the integrative value and academic contributions (grants, peer reviewed publications, institutional service, etc.) of the research or other work being carried out in the space. Other metrics for determining underutilized space may also include a review of room access data (if available). Written results should be provided to the Department and AVC-AAFA Space & Capital Planning (SCP) Team.

The School Space Committee will document lab and research space that is identified as underutilized, by observation and/or application of published metrics, and notify the School Dean. If underutilization persists, the space will revert to the School Reserve for reassignment and the EVC should be notified, via the AVC-AAFA SCP Team.

Space Managers and Space Committees should keep a record of any labs that are currently vacant pending reassignment to a new hire by including them in the meeting minutes and also by maintaining accurate, current space assignments in Tririga.

The School Space Committee will meet regularly to review requests for additional space within the school's allocated portfolio for existing and new faculty as defined in their

approved recruitment plan. Recommended assignments will be presented to the Dean for approval. If the need cannot be met within the School portfolio, a request should be submitted using the EVC's Space & Renovation Request form.

### ***Opportunity Space***

When a group vacates existing space, the vacated space is referred to as "Opportunity Space." Space may also be categorized as "Opportunity" when it remains vacant for an extended period (typically four months or longer) or when it is identified for rescission by the School or All Colleges Space Committee.

Requests for allocation of Opportunity Space should be submitted using the EVC Space and Renovation Request [Form](#) online.

## **FACILITIES INFORMATION MANAGEMENT SYSTEM (FIMS)**

Space Managers are responsible for maintaining the campus [Facilities Information Management System \(FIMS\)](#) database, also known as Tririga. As their unit's main point of contact for all space-related communications, Space Managers should attend recurring Space Manager meetings hosted by the AVC-AAFA SCP Team. Space Manager meetings are intended to provide a collaborative forum that allows for communication of lessons-learned, sharing of best practices, and other instructional topics related to space management.

Tririga should be current at all times and should include current department assignment, staff assignments, [current space classifications](#) (room-use or room type) and current workstation and capacity counts to support the accuracy of occupancy/vacancy reports. Space Managers will conduct regular walk-throughs of space to ensure the accuracy of Tririga data.

**Note that only the AVC-AAFA Space & Capital Planning (SCP) Team and the School or College designated Space Manager are authorized to change department allocations in Tririga.**

In addition, the AVC-AAFA SCP team will coordinate with Space Managers to perform regular walk-throughs to review usage of space and will work with Schools, Colleges and other departments to make recommendations that ensure optimized use of space. Independent of space tours with the AAFA SCP Team, Space Managers will regularly conduct walk-throughs with the School or College Space Committee to evaluate use of space and verify that Tririga data reflects current/actual space use.

## **EVC SPACE & RENOVATION REQUEST FORM**

If a School or College Space Committee determines that there is a need that cannot be met within the existing space portfolio, or if a renovation is proposed, the Committee should recommend to the Dean that a formal space request should be prepared and submitted to the AVC-AAFA SCP Team using the online submission [form](#).

The space request should include documentation that substantiates the need to request space outside of the current space allocation. Upon receipt, the AVC-AAFA SCP Team will contact the requesting party to arrange for a tour of all space allocated to the School, College or Unit. In addition to gaining increased understanding of the space request, an evaluation will be conducted to identify any underutilized space within the existing portfolio that may be a candidate for reallocation.

The form should also be submitted when:

- A space-related need or other conflict arises that cannot be resolved within the School, College or unit;
- A space swap with another School, College or unit is proposed;
- The School, College or Unit would like to request allocation of Opportunity Space;
- There is a proposal to convert an existing restroom to gender inclusive;
- A renovation to interior or exterior space is proposed. See “Renovations” and “Public Realm & Other Exterior Improvements” below.

The AVC-AAFA SCP Team will review, analyze and collaborate with affected units to prepare a recommendation for approval by the EVC.

In the event that competing needs arise for a space, collaboration between Schools, Colleges, Research Units, and other divisions/departments is encouraged to develop recommended solutions that have been endorsed by all affected parties.

Space requests that provide evidence of good space usage efficiency and that demonstrate programmatic need will receive greater consideration. Space usage efficiency will be evaluated based on the quantitative and qualitative space analysis described in the Lab and Research Space section above.

### ***Renovations***

The University of California is bound to the California public contracting code<sup>3</sup>. At UC San Diego, the Vice Chancellor of Operations Management and Capital Programs, via Facilities Management (FM), Capital Program Management (CPM), and Environmental Health and Safety (EH&S), has the responsibility of ensuring that the campus adheres to the public contract code, including serving as the Authority Having Jurisdiction (AHJ), which encompasses the Campus Building Official and Campus Fire Marshal. CPM and FM are responsible for administering and contracting with all design professionals and construction firms for the UC San Diego campus, using official professional service agreements and other contractual documents issued to campuses by the UC Office of the President.

Prior to submitting a renovation request to FM or CPM, requests for renovations exceeding \$35,000 (including all construction and related costs) must be authorized by the Executive Vice

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<sup>3</sup> <https://www.ucop.edu/construction-services/facilities-manual/index.html>

Chancellor via the online [form](#). Assistant Dean or Dean approval is required to submit this request. Per the Chancellor's directive, Vice Chancellor signature is required on all Charters prior to proceeding with the [capital improvement process](#).

### ***Potential Renovations related to Faculty Recruitments***

The campus has established a Lab Renovation Work Group (LRWG) that meets frequently to review current processes and make recommendations for improvements. This section of the Guidelines will be updated as recommendations from the LRWG are approved by campus leadership and implemented.

### ***Public Realm & Other Exterior Improvements***

All requests for exterior improvements (often referred to as Public Realm Improvements) should be submitted to the AVC-AAFA SCP team for review and approval by the EVC. In addition, Campus Planning manages the framework that guides future development of the built environment (which includes the buildings, open space, transportation, circulation and infrastructure improvements needed to keep the campus functioning effectively). The requesting party should consult with Campus Planning on all proposed exterior/public realm improvements prior to final scoping and budgeting.

### ***Public Art***

The [Campus Art Assessment Advisory Committee](#) (CAAAC) receives proposals for acquisition or donation of public art, vets them according to an established rubric, and brings structured recommendations to university leadership. The CAAAC would also oversee any campus policy matters arising in the discussion of new indoor and outdoor artwork and the committee will make recommendations to the EVC and Chancellor for review, consideration and approval

## **SCHOOL SPACE POLICIES & COMMITTEES**

Each School will appoint a Space Manager who will provide the Associate Vice Chancellor Academic Affairs Finance and Administration (AVC-AAFA) SCP Team with regular access to space utilization data, which will be utilized by the AVC-AAFA office to develop and recommend both short- and long-term strategic solutions to space needs for EVC and Chancellor approval.

Schools will have a current, written Space Management Policy that describes how laboratory, research, educational, and student-services space will be allocated. The policy should include the following:

1. Clearly defined quantitative and qualitative metrics to describe how utilization of space will be measured.
2. Process to describe that vacated spaces will be evaluated for required maintenance in consultation with the AVC-AAFA SCP Team as soon as possible after the space is vacated.
3. Upon an individual's retirement or separation from the University, a space rescission plan will be developed to provide ramp down of activity based on an agreed timeline.
4. When a retired faculty member is recalled as part of the campus Return to Active Duty (RTAD) program, any related space request for the RTAD requires EVC Approval per the campus guidelines for Academic Recall<sup>4</sup>. Prior to submitting the RTAD request to the EVC, the School Space Committee and School Dean should endorse the request.
5. If the School determines there is enough space to accommodate this, Emeritus faculty may occupy a shared office on campus when they are actively engaged in substantial ongoing work that serves the university. These scenarios should be reviewed by the School Space Committee in terms of prioritizing overall space needs and decided on a case-by-case basis. Before submitting a request for space outside of the School portfolio, an evaluation of any space assigned to Emeriti should be conducted to determine the highest and best use of the space in support of the campus mission.
6. Graduate students, teaching assistants, and postdocs will share offices and every effort should be made to optimize usage of this space.
7. In the rare case where a Department has specific needs that vary from those of other Departments within the School, these differences should be specified within the School's policy.
8. The School Space Policy should include an appendix to list the current inventory of all space allocated to the School as of the date of the Policy.

Given that Campus office space is a limited and finite resource, assignment of multiple offices to one individual is strongly discouraged. If a faculty member must maintain a primary and a secondary office, this space allocation should be formally approved by the School Dean via recommendation by the School Space Committee. If/when a faculty is assigned two offices, every effort should be made to optimize use of the secondary office, which may include sharing the second office with another staff or faculty member or the secondary office should be made available for hoteling via reservation to a preauthorized staff roster when it is not scheduled to be occupied by the faculty member.

The School Space Policy will be submitted to the AVC-AAFA, Sr. AVC and EVC for approval and a final copy should be provided to the AVC-AAFA SCP Team to be retained on file. The policy should be reviewed every three years and either reaffirmed or updated.

School Deans will appoint a School Space Committee that is tasked with updating the School Space Management Policy and reviewing space utilization alignment with the School's strategic goals and university priorities. School Space Committee membership will most often include the Assistant Dean, the School Space Manager, representatives from each Department in the School

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<sup>4</sup> Link to guidelines: [https://aps.ucsd.edu/\\_files/compensation/2022-Academic-Recall-Guidelines.Final\\_2210263.pdf](https://aps.ucsd.edu/_files/compensation/2022-Academic-Recall-Guidelines.Final_2210263.pdf)



or other School faculty or staff who are subject-matter-experts in terms of the types of spaces needed within each of the departments. The School Space Committee should also include any other participants the School Dean determines appropriate for their specific needs. Schools are encouraged to periodically invite a member of the AVC-AAFA SCP team to School Space Committee meetings and space evaluation tours. This standing committee should meet as needed and will be a consultative body whose members are charged with making recommendations to the School Dean on the Space Policy; space allocations within the School portfolio; proposed renovations; and the resolution of any space-related conflicts.

The School Space Committee will:

1. Review the School Space Policy and reaffirm or recommend changes at least every three years. The School Space Policy will be submitted to the School Dean, AVC-AAFA, Sr. AVC and EVC for approval.
2. Define specific metrics for how utilization of space will be measured and how frequently metrics will be run, which should be clearly described in the School Space Policy.
3. Conduct periodic space reviews including a walk-through of all space under the School's allocated portfolio. The School Space Manager will document observations from the walk-throughs and share data during Committee meetings. The walk-throughs should also provide the Committee with an opportunity to identify space that is potentially available for reallocation.
4. Run space usage metrics at published intervals and report findings to the Dean.
5. Evaluate space usage in the context of separations, retirements and active recruitments to make recommendations to the Dean regarding space allocations.
6. Analyze requests for space, review proposed renovations, and present all recommendations to the School Dean for decision.
7. Direct ad hoc targeted space analyses as needed or as requested by the Dean, AVC-AAFA, or EVC.
8. Conduct space surveys and support Space Manager completion of the annual Chancellor's Fall Space Information Review.
9. Recommend programmatic priorities for existing research space as well as make recommendations regarding the need for and description of future/new space to the Dean.
10. Space Committee meeting agendas should include an inventory of offices, labs or other spaces that are currently vacant pending reassignment to a new hire. This data should also be reflected in Tririga using the "New Hire" Cluster. This information must be kept current at all times due to the on-going *campus transformation* and other campus renovations that temporarily displace occupants, frequently creating demand for temporary and short-term space needs.
11. Share updates and other space evaluation data with the AVC-AAFA SCP Team.

## **ALL-COLLEGE SPACE POLICY**

Colleges will appoint a Space Manager who will provide the Dean of Undergraduate Education (DUE) and the Associate Vice Chancellor Academic Affairs Finance and Administration (AVC-AAFA) SCP Team with regular access to space data, which will be utilized by the AVC-AAFA office to develop and recommend both short- and long-term strategic solutions to space needs for EVC and Chancellor approval.

The All-College Space Policy should describe: the different types of space classifications within the Colleges; how space will be allocated; and a definition of the metrics that will be used to evaluate space usage. The policy should also include statements on how space will be reassigned after separations and retirements. In the rare case where one College has specific needs that vary from those of the other Colleges, these differences should be specified within the policy. In consultation with the DUE, Colleges should develop specific metrics for how utilization of space will be measured, and these metrics should be clearly defined in the All-College Space Policy. The All-Colleges Space Policy should include an appendix to list the current inventory of all space allocated to each College as of the date of the Policy.

The DUE and Council of Provosts may elect to establish a Space Committee to oversee effective space management. If a Space Committee is appointed, it should include representatives from the eight Colleges and at least one member of the DUE's staff. The College Space Committee is encouraged to include a member of the AVC-AAFA SCP Team. The Committee should conduct periodic space surveys and support space manager completion of the annual Chancellor's Fall Space Review. The Committee should also recommend programmatic priorities for space assignment and/or proposed renovations to space.

The All-College Space Policy should be submitted to the AVC-AAFA, Sr. AVC and EVC for approval and a final copy will be provided to the AVC-AAFA SCP Team to be retained on file. The policy should be reviewed every three years and either reaffirmed or updated.

## **ACADEMIC AFFAIRS**

### **NON-SCHOOL ACADEMIC UNITS & ADMINISTRATIVE UNITS**

All other units reporting to the EVC, including those listed below, will adhere to the space guidelines contained within this document. The AVC-AAFA Sr. Facilities Planner will coordinate with the Management Services/Business Officer or other staff member appointed as the main space contact for each unit to ensure the accuracy of all data entered into the Facilities Information Management System (Tririga). These staff will work together to review space utilization, taking into consideration growth plans and hybrid work schedules for each group. Space reviews will be conducted no less than once per year in support and in advance of the Annual Chancellor's Fall Space Review to ensure that usage of space is optimized. This work

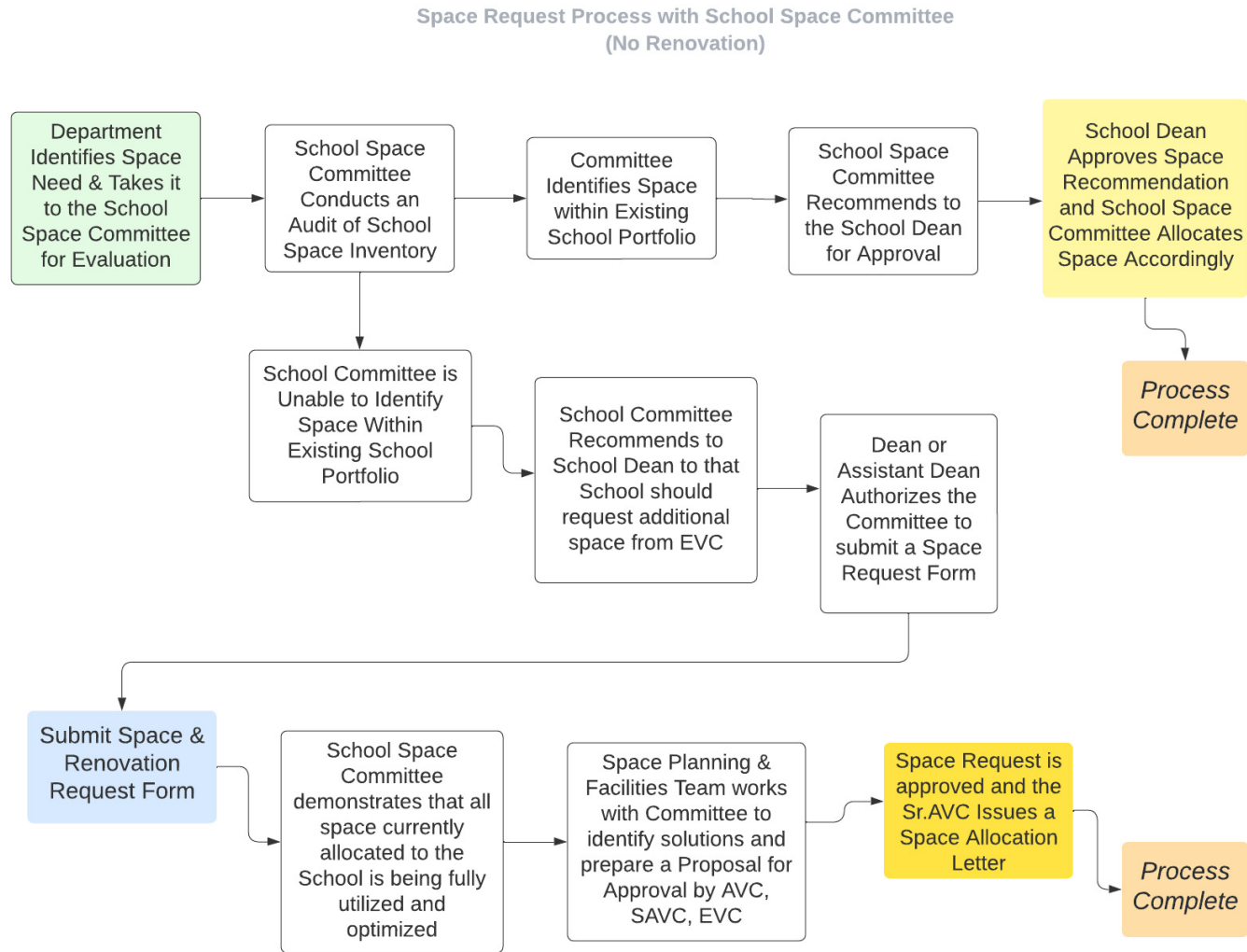
will include regular walk-throughs to field-verify and develop strategies for optimized use of space. Each of the units listed below will participate in this management plan:

1. EVC Office
2. Academic Affairs Finance and Administration (AAFA)
3. Dean of Undergraduate Education, including Academic Integrity Office (AIO) & Triton Testing Center (TTC) and the Office for Students with Disabilities (OSD)
4. Academic Personnel Services, including Office of Academic Recruitment Services (OARS)
5. Institutional Research
6. Library
7. Qualcomm Institute (QI)
8. Design Lab
9. Educational Innovation (EI), including Teaching and Learning Commons (TLC)
10. Division of Graduate Education and Postdoctoral Affairs (GEPA)
11. Enrollment Management, including all units reporting to EM

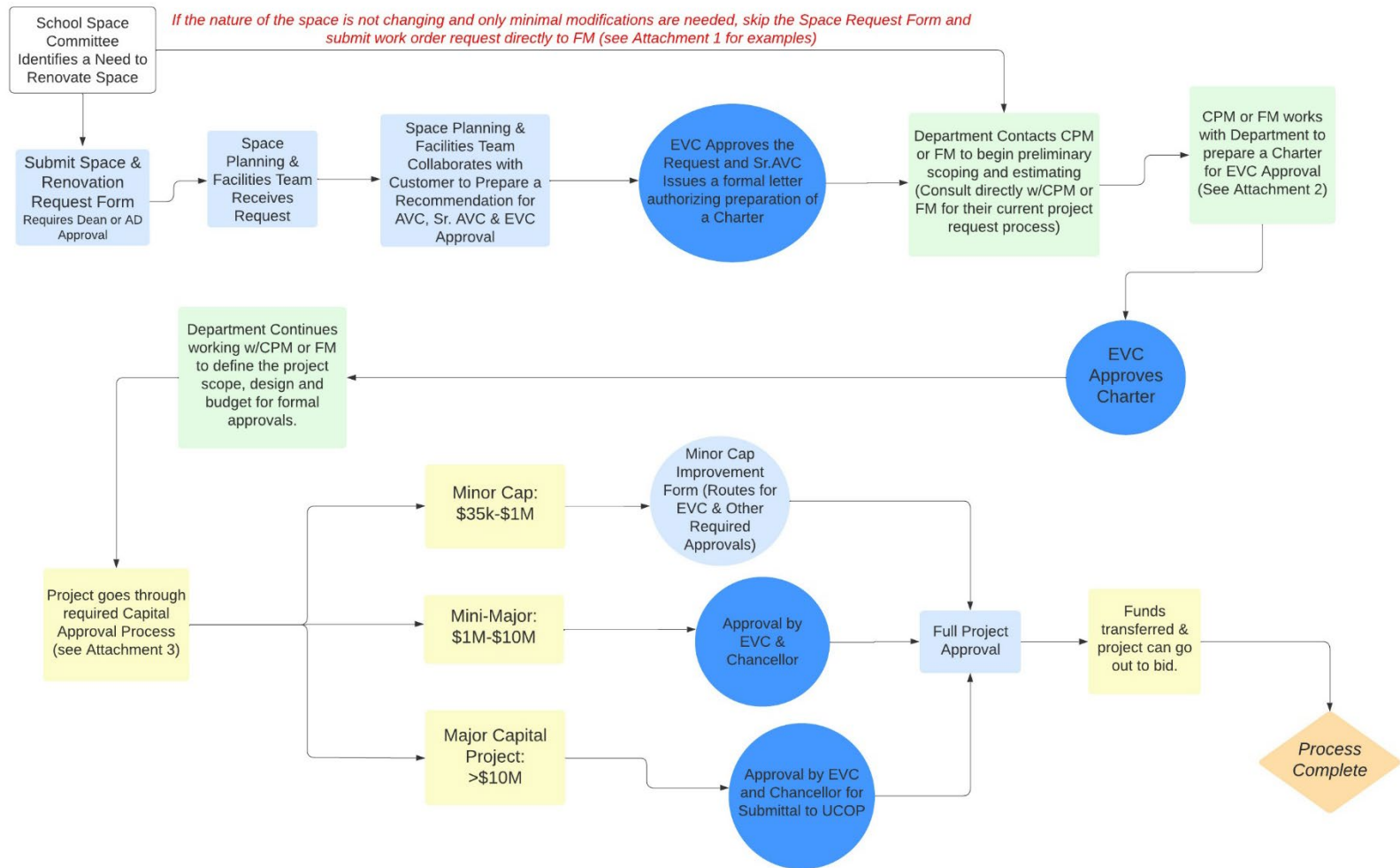
**APPENDICES:**

- I. Space Request Workflow
- II. Renovation Request Workflow (with Attachments 1, 2 & 3)
- III. Furnishings, Fixtures and Equipment (FF&E)

**I. Space Request Workflow**



## II. Renovation Request Workflow



## Attachment 1

If the nature of the space is not changing and only minimal modifications are needed, skip the Space/Renovation Request Form and initiate process with Facilities Management.

A Space/Renovation Request Form would **not** be required for the following:

1. Scope with a total budget<sup>5</sup> less than \$35,000 that the School, College, department or unit will self-fund.

*Note that any scenario where the total project budget exceeds \$35,000 is required to go through the Space/Renovation request process, followed by completion of the capital improvement approval process.*

2. Per UCOP Guidelines, there is a special exception for Painting: All painting projects over \$25,000 require a formal bid process to be administered by Facilities Management.

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<sup>5</sup> The total project budget includes all design fees, construction management/administration, and construction costs.

## Attachment 2: Charters

As described below by Capital Program Management:

### Rationale:

- Project Charters are intended to provide our clients/customers with a very quick, rough idea of “how long” and “how much” a project may cost BEFORE significant time, money, and energy are expended.
- They also serve as a means of informing Campus leadership of the project and its Need, Intended Goals, and Objectives.

### Purpose:

- A Decision-Making tool for potential projects
- Fast, loose, Rough Order of Magnitude (ROM) guesstimate for Cost and Schedule for capital projects with a defined scope, i.e., space, location, program, etc.
- Cost and Schedule are expressed as ranges – from low to high probability.
- Charters provide the projected “investment” required to develop the design documents- typically thru Design Development.
- At completion of Design Development, a detailed cost estimate and project budget will be prepared, memorializing the actual projected cost and schedule for the project and validating assumptions on Code, Capacities, and Conditions, etc.

### Use:

- Initial requests are funneled through RMP Sr. Director portal and are evaluated for content.
- Triaged requests will be forwarded from RMP Sr Director to FM/CPM (depending on size and complexity) where a project manager will be assigned to develop a Project Charter.
- Charters should typically be developed and returned to requestor within two to four weeks from date of assignment – depending on size. Complexity, and quality of information.
- The Charter with its stated assumptions becomes the project parameters for scope, schedule, and cost.
- ALL requests for “Scope” additions to the Charter require Vice Chancellor approval before incorporation into the Charter, or if significant a new Project Charter.
- “Discovery” issues that add time or money also require Vice Chancellor approval
- All Charters must be approved/signed by the responsible Vice Chancellor

### Charters are not:

- Defined/Detailed Cost Estimates
- Feasibility Studies or Option Studies – These must be accomplished PRIOR to the development of the Charter thru “seed monies” provided by the respective VC’s office. The entity managing these initial efforts (CPM, RMP, FM, CPD) is dependent on size, complexity, and scope.

## Attachment 3

### Capital Improvement Approval Process

The capital approval process is a UC Systemwide requirement. Refer to UCOP Facilities Manual, Volume 2, Chapter 7 for guidelines:

<https://www.ucop.edu/facilities-manual/manual/volume-2/index.html#chapter-7-capital-planning-real-estate-approvals>

Campus Planning works with project managers and stakeholders to prepare approval documents and administer the approval process. Refer to their website for the most current thresholds.

<https://plandesignbuild.ucsd.edu/planning/capital.html#Capital-Process>

#### Project Approval Thresholds

Approvals vary depending on the project budget. See the chart below for a quick overview:

Classification	Budget	Level
Minor ( <a href="#">Form</a> PDF)	>\$35K – \$1M	Campus Building Official
Mini Major	>\$1M – 10M	Chancellor
Delegated Campus	>\$10M – 70M	Chancellor with UCOP Endorsement
Regental	Over \$70M	Regents



### III. Fixtures, Furnishings & Equipment (FF&E)

Fixtures, Furnishings and Equipment (FF&E) are considered part of the total project budget and should be included in the Capital Improvement Budget (CIB).

During development of the project budget, the Director of Space & Capital Planning for Academic Affairs will review the proposed FF&E budget with the project manager assigned to the project and a representative (or representatives) from the stakeholder group to confirm requirements.

Once the project has full budget, scope and design approval, the FF&E portion of the budget will be established under the Academic Affairs Financial Unit and managed by the Director of Space & Capital Planning<sup>6</sup> in collaboration with the lead representative from the stakeholder group.

The Space and Capital Planning (SCP) Team will coordinate with the lead representative from the stakeholder group and the furniture vendor(s) to evaluate and finalize furniture layouts; identify and select furniture (including colors, finishes, etc.) and place orders using the campus procurement system. This work includes coordination between the construction team, Campus ITS staff, and the furniture vendor to ensure the correct rough-in locations for floor boxes or other electrical, audio-visual, ethernet, etcetera, that will be integrated with selected furniture.

Selection of FF&E will be overseen by the AAFA SCP Team in coordination with stakeholders to ensure the following:

- Furnishings selected are equitable and meet current campus standards across similar instructional spaces, student support, and administrative units;
- Standardized furnishings can be redeployed in the future and as needed across similar instructional spaces, student support, and administrative units;
- Preferred purchasing rates and economies of scale in alignment with Campus and UCOP preferred vendor selection;
- Furniture vendors provide the required CAD files with furniture layouts to be uploaded to Tririga;
- Campus and UCOP procurement procedures are followed.

The FF&E budget will be reviewed and reconciled monthly to ensure accuracy. Upon project completion, the SCP Team will work with the stakeholders to confirm receipt of all furniture and related invoices and will work with the accounting and business office teams to pay all outstanding and validated invoices and to close the FF&E account.

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<sup>6</sup> In rare circumstances, and most often for housing projects, Capital Program Management (CPM) may manage some or all of the FF&E budget for the project.