

# Space Change Procedure

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## 1 Purpose

This document outlines the procedure for making changes to the allocation, configuration or use of University spaces. It applies to all spaces owned or occupied by the University. It does not apply to routine maintenance activities.

The document is structured as follows:

- Section 2 (below) sets out the objectives of the procedure
- Section 3 contains an overview of the procedure
- Section 4 contains detailed guidance for each step
- Section 5 contains guidance on handling exceptional circumstances

## 2 Objectives

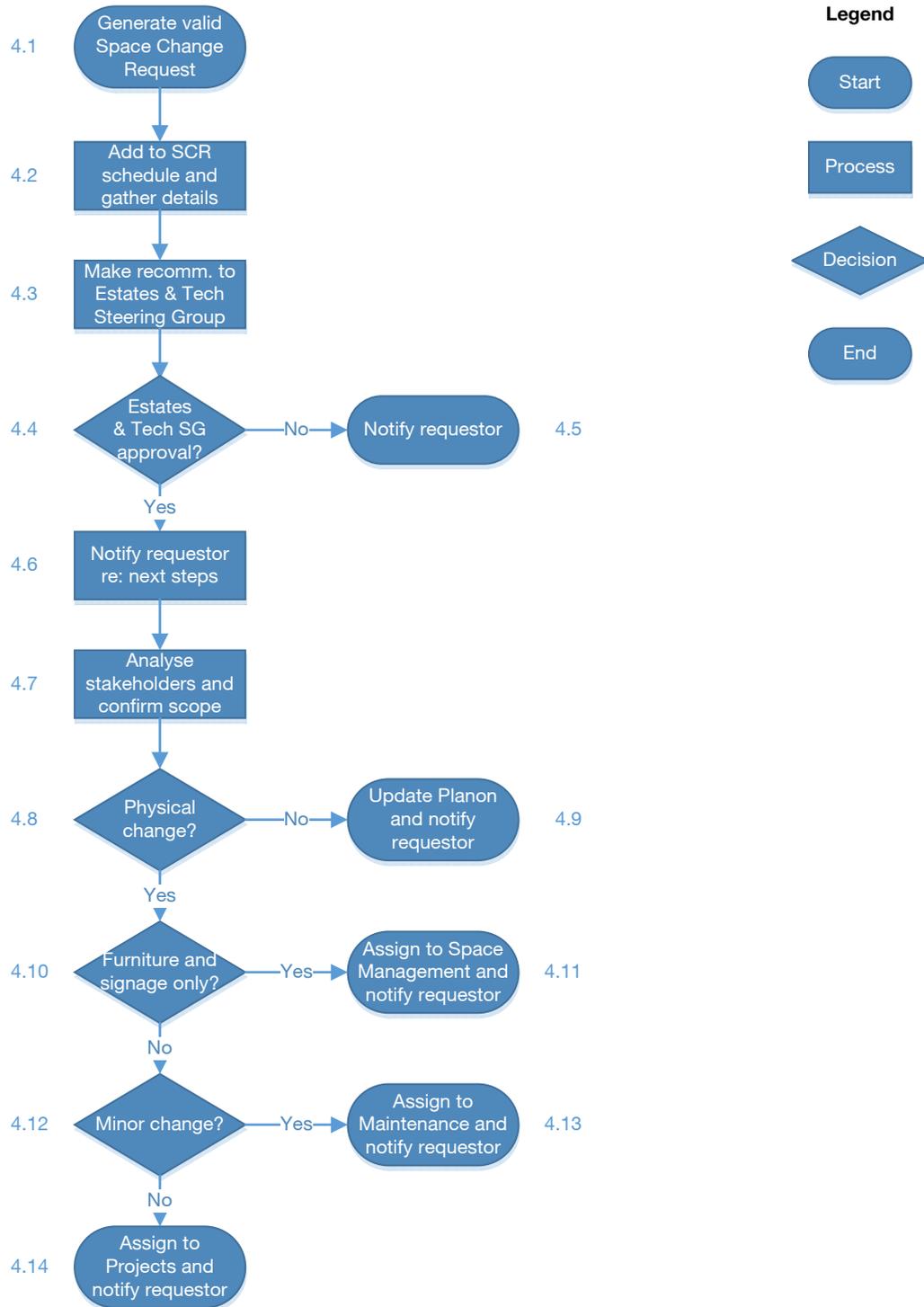
This procedure is intended to:

- 2.1 Ensure compliance with the University's Space Management Policy, which states that "all requests to change the allocation, configuration or use of space must be submitted to the Space Management team within Estates & Campus Services, who will present them to Estates & Technology Steering Group for consideration."
- 2.2 Support University-wide compliance with HSE guidance including Approved Code of Practice L24 and other University procedures including ECS31 (Maintenance of Fire Safety within Buildings)
- 2.3 Ensure consultation and communication with the relevant stakeholders for each space change request
- 2.4 Minimise bureaucracy and wasted work both for requestors and for support departments

### 3 Overview

An overview of the procedure is shown in Fig. 1 below. Each step is described in detail in section 4 overleaf.

Fig. 1 – overview of procedure



## 4 Detailed Guidance

This section contains detailed guidance for each step within the procedure (refer to flowchart Fig. 1 above).

### 4.1 Create valid Space Change Request

The Space Manager or nominee creates a Space Change Request, either in response to a verbal or written request from a colleague, or in response to an identified spatial requirement or opportunity.

A valid Space Change Request must include the following:

- 4.1.1 What is proposed
- 4.1.2 Which spaces are affected
- 4.1.3 Benefits of proposed change (with any supporting information)

The Space Manager or nominee should establish the following:

What are the benefits of the proposed change in the context of the University's current Strategic Plan?

What evidence is there that making this change will deliver these benefits?

- 4.1.4 Start date (date from which the change is required)
- 4.1.5 End date (either a defined date or until further notice)
- 4.1.6 Estimate of space charging implications by Space Management team

For existing spaces being reallocated – referring to Planon and / or the Space Usage Report, the cost per annum of the spaces is calculated and shared with the approver prior to approval.

- 4.1.7 Approval by one of the following:
  - i. For requests from a College: the relevant Head of College, College Director of Operations or College Manager
  - ii. For requests from a professional service area: the relevant Head of Service or SMT representative

### 4.2 Add to SCR schedule

- 4.2.1 The Space Manager or nominee adds the SCR to the SCR schedule.
- 4.2.2 The Space Manager or nominee notifies the requestor and the Head of Strategy & Communications that the SCR has been added to the schedule.

4.3 **Make recommendation to Estates & Technology Steering Group**

4.4 The Head of Strategy & Communications assesses the request and, if sufficient information is available, presents it in writing to the University's Estates & Technology Steering Group, together with a recommendation to approve or reject it.

4.5 **[Decision] Estates & Technology Steering Group approval?**

4.5.1 Estates & Technology Steering Group approves or rejects the request.

*Note: approval at this stage is in principle only. Space change decisions in general, and capital investment decisions in particular, are subject to further approvals appropriate to the nature of the proposed change.*

4.5.2 The Head of Strategy & Communications notifies the Space Manager of the outcome.

4.6 **Notify requestor (if rejected)**

4.6.1 The Space Manager or nominee notifies the requestor by email that the SCR has been rejected. An example communication is below.

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Dear \_\_\_\_\_

Your Space Change Request no. \_\_\_\_\_ (to \_\_\_\_\_) was considered by Estates & Technology Steering Group on \_\_\_\_\_.

Unfortunately, your request was not approved because \_\_\_\_\_.

If you would like to discuss this further, please let me know.

Kind regards

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4.7 **Notify requestor re: next steps (if approved)**

The Space Manager or nominee notifies the requestor by email. An example communication is below.

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Dear \_\_\_\_\_

*I am pleased to inform you that your Space Change Request no. \_\_\_\_\_ (to \_\_\_\_\_) was approved in principle by Estates & Technology Steering Group on \_\_\_\_\_.*

*The next steps are as follows:*

1. X
2. Y
3. Z

*If you would like to discuss this further, please let me know.*

*Kind regards*

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#### 4.8 **Analyse stakeholders and confirm scope**

4.8.1 The Space Manager or nominee physically inspects the space(s) to be changed.

4.8.2 The Head of Strategy & Communications, the Space Manager and (optionally) one or more Space Planning Officers meet to discuss the SCR and agree stakeholders for consultation.

4.8.3 The Space Manager or nominee completes the Outline Brief and sends it to the Head of Strategy & Communications for approval. For smaller changes, this may take the form of an email; for larger changes, the Strategic Brief template will be used.

4.8.4 The Head of Strategy & Communications approves the Outline Brief.

#### 4.9 **[Decision] Physical change**

The Outline Brief describes whether any physical changes are required. Physical changes include:

- Any changes to building fabric, for example: walls, windows, doors, floors, ceilings, roofs, fittings, finishes, signage
- Changes to loose furniture and equipment
- Reconfiguration of electrical or mechanical systems e.g. floor boxes, power and data ports, cabling, lighting, access control hardware

#### 4.10 **Update Planon and notify requestor**

If no physical changes are required, the Space Manager or nominee updates Planon and notifies the requestor by email that their space change request has been fulfilled from the effective date.

4.11 **[Decision] Furniture and signage only?**

The Head of Strategy & Communications will consider the nature of the changes required; specifically, whether they are limited to furniture and / or signage.

4.12 **Assign to Space Management and notify requestor**

If the required changes are limited to furniture and / or signage, the request will normally be assigned to the Space Management team, subject to workload and other management considerations.

The assigned member of the Space Management team will contact the requestor to progress fulfilment of the request.

4.13 **[Decision] Minor change?**

The Head of Strategy & Communications will consider the nature of the changes required; specifically, whether they are minor in nature.

Minor changes will typically have few stakeholders, low complexity and risk, and be below £100k in value.

4.14 **Assign to Maintenance and notify requestor**

If the required changes are minor in nature, the request will normally be assigned to the Maintenance team, subject to workload and other management considerations.

The assigned member of the Maintenance team will contact the requestor to progress fulfilment of the request.

4.15 **Assign to Projects and notify requestor**

If the required changes are not minor in nature, the request will normally be assigned to the Projects team, subject to workload and other management considerations.

The assigned member of the Projects team will contact the requestor to progress fulfilment of the request.

## 5 Exception handling

### 5.1 The nature of the request changes after Estates & Technology Steering Group approval

If a request changes materially at any time following Estates & Technology Steering Group approval, ECS may return it to the relevant stage of the process.

For example:

If a request initially appears to involve furniture and / or signage changes only, it will normally be assigned to the Space Management team. However, if it transpires that more substantial changes are required, ECS will return the request to step 4.7 (Analyse stakeholders and confirm scope of works) for reassessment.

If a request initially involves the reallocation of four spaces and it later transpires that five spaces are required, ECS will take the additional space requirement to step 4.1 (generate valid Space Change Request) and seek Estates & Technology Steering Group approval.

### 5.2 A request is submitted after a change has been made

If a request is submitted after the requested change has been made, ECS will notify Estates & Technology Steering Group that the request is retrospective and proceed as normal.

### 5.3 There are insufficient resources to progress a request

If a request is approved by Estates & Technology Steering Group but there are no resources available to develop it, ECS should proactively communicate this to the requestor. An example communication is below:

*Dear \_\_\_\_\_*

*I am writing with regard to your Space Change Request no. \_\_\_\_\_ (to \_\_\_\_\_) which was approved in principle by Estates & Technology Steering Group on \_\_\_\_\_.*

*Unfortunately, the Estates & Campus Services team is unable to develop your request further at this time due to the department's current workload.*

*We expect the situation to improve by \_\_\_\_\_ and will contact you then to progress this request.*

*If you would like to discuss this further, please let me know.*

*Kind regards*

## 6 Revision history

<b>Version</b>	<b>Approved by</b>	<b>Approved on</b>	<b>Summary of changes</b>
1.1	Head of Strategy & Communications	24.10.2016	Programme Steering Group renamed to Estates & Technology Steering Group
1.0	Head of Strategy & Communications	22.09.2016	First approved version