

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

Report Outline

1. Executive Summary
2. Background
3. Assessment Tool
4. Summary of Administrative & Support Staff Survey Comments
5. Decisions and Implementation
6. Time Line

1. Executive Summary

Space is an important resource that helps support the instruction and research mission of the University. It is allocated on the basis of programmatic need, academic priorities and institutional priorities. Ownership of all UC Merced facilities, regardless of the original source of construction or funding rests with The Regents. Responsibility for the assignment or allocation of all UC Merced space, including off-campus leased space, rests ultimately with the Chancellor. Not all UC Merced functions can be accommodated on campus.

Campus Space Guidelines and Space Standards are posted on the [Capital Planning and Space Management](#) web pages. Issues for consideration of current and future space assignments include: growth; program adjacencies; accessibility and convenience; ways of conducting business, cost of doing business, and optimal space utilization. This report documents the completion of a campus-wide administrative and support space self assessment. It summarizes the data submitted as part of the assessment and publishes decisions made to address space needs over the next three years.

2. Background

In October 2011, Chancellor Leland announced an initiative to address critical space needs associated with administrative and support space for the growing UC Merced campus. A website was launched seeking input from the campus community regarding the proposed criteria for the prioritization of administrative and support space. Approximately 100 comments were received (almost all favorable in support of the effort):

Criteria for Allocating Limited On-Campus Space

“There is insufficient space on campus to accommodate all administrative units and functions. The space shortage will grow more severe in the near future as additional faculty and staff are hired to serve our growing student population. Until funding for construction of new on-campus facilities catches up with this growth, some individuals, units, or functions will need to be housed in off-campus leased space. This means that we will need to make some difficult decisions related to the allocation of available space on campus.” - Chancellor Leland, October 2011

There was general agreement that priority for on-campus space should be given to faculty and other instructional personnel, and to administrative and support-staff whose jobs require frequent face-to-face, on-campus interactions with faculty and students or who are otherwise frequently required to be on-campus for the maintenance of buildings and grounds, public safety and other critical services. Respondents also agreed that the following factors should be considered in determining whether to locate a unit or functions off campus:

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

1. Service delivery will be minimally compromised if delivered from an off-campus location.
2. There is suitable off-campus space for the person, unit or function.
3. Costs of off-campus relocation are low in comparison to the costs of relocating other persons, units or functions.
4. The frequency of need to commute to campus is low in comparison to the frequency of other persons, units or functions.
5. The importance of physical proximity to coworkers with respect to efficiency, effectiveness and collegiality will be taken into consideration when possible.

At the request of the Chancellor, the office of Capital Planning and Space Management created the Administrative and Support Space – Self Assessment Tool in two parts. Part one asked units to identify how much growth of what kind is planned to occur over the next three years. Phase two asked units to identify which employees were essential to be located on the campus. A number of related questions about program synergies and improved operations were also included in the survey (see following list)

3. Assessment Tool

Department; Employee; Building & Room – Capital Planning and Space Management provided each unit with data from the official campus space inventory web-based application known as [Facilities Link](#). Each unit was asked to verify information in Facilities Link and was given an opportunity to update building and room information and space assignments regarding their space prior to completing the survey.

Candidate for Off-Campus – Each unit was asked to indicate whether their employees or functions could be moved to an off-campus location.

Percentage of Time in Direct Support (0% - 100%) – Each unit was asked to provide the estimated percentage of the employee/function duties spent in direct support of students, faculty, instructional personnel, on-campus research functions or on-campus facilities.

Other Justification – Each unit was given the opportunity to explain special circumstances for personnel or functions to be located on campus not evident in the criteria.

Candidate for Telecommuting – Units were asked to specifically consider telecommuting and to list employees who do or could telecommute.

Travel to Campus Each Week – Each unit indicated the required number of weekly trips from campus (or other off-site locations) that the employee/function would need to make if located off-campus. (Units were asked to assume that suitable conferencing software and other electronic means of communication would be made available).

Interacting with Off-Campus Units – Units were asked to identify the required number of weekly trips from campus (or other off-site locations) that employees would need to make to interact with this employee/function if located off-campus. (Units were asked to assume that suitable conferencing software and other electronic means of communication are available)

List Required Unit Adjacencies – Units were asked to list other units who, if collocated or located near the unit under consideration, would create efficiencies for the campus or unit.

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

4. Summary of Administrative & Support Staff Survey Comments

Schools

Engineering, Natural Sciences, Social Sciences Humanities and Arts, and the Graduate Division all responded that their administrative and support space must reside on campus proximate to the Deans, faculty and students, as well as student support units.

Library

The Library responded, that while the amount of current space that it is allocated will support its programs and function for the next several years, that it remains essential that Library space remain on campus in direct support of faculty and student research and use.

Information Technology

Information Technology reported an immediate need to provide additional space at Castle for current and planned staff during the next three years. Information Technology (via the EVC/Provost) confirmed the need for the CIO, instructional services and some technical support space (personnel and equipment) to remain on campus.

Division of Student Affairs

Resulting from the nature of most of their work, the Division of Student Affairs is one the most affected by the shortage of on-campus space. As noted in their responses to the requests for information, Student Affairs has a large number of their employees working in spaces that were designed to accommodate fewer employees than they currently house and/or spaces that were not designed for employee work spaces (conference rooms, storage rooms, narrow tables pushed against walls/windows).

Given the high-level of interaction with our student population, there is a large and growing need for space that allows for private conversations with students regarding confidential information. A similar comment was provided by Student Business Services/Campus Cashier.

Student Affairs reports that it has challenges with to provide tutoring due to a lack of campus space and that tutoring is tied directly to student success. There is a lack of space for student employees (for example, the Bright Success Center, which has 100+ student workers and no place assigned for work space). The small size of the Campus Store has produced periodic long lines for textbooks. Additionally, Student Affairs reported that the lack of administrative and support space negatively affects grant-writing as there is no space for additional employees to work if grants are funded.

Division of Administration

High priority on-campus space was identified by the Division of Administration for units such as public safety and environmental health and safety. Administration reports a severe lack of space for Student Business Services in the Student First center area of the ground floor of the Library.

A large number of administrative functions are already located off-campus particularly at the Mondo Building and the Promenade in the City of Merced. Some of these existing units are reported as growing

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

and would require additional space in the next three years off campus, such as Business and Financial Services.

While many administrative programs are currently housed off-campus, there were additional units identified as candidates for relocation off campus in response to the criteria. Administration reported that synergy among administrative functions is essential and units should remain collocated when possible. It was suggested that there could be new synergies created by collocating some administrative and academic affairs functions together off campus, such as payroll functions.

Finally, the Division of Administration commented that the campus consider long-term strategies for off-campus space beyond the three year planning horizon associated with the self assessment and that careful consideration be given to the designation off-campus space assignments with a particular focus on geographic proximity to the campus and the continued provision of support services to the campus population, or example the location of Human Resources.

Office of Research and Division of Graduate Studies

The Office of Research identified multiple candidates for possible off-campus location; however, there also was a recommendation to consider functions carefully with respect to clients served, as several of the units would continue to require a high frequency of interactions with faculty and professional research staff. As such, there would need to be available hotel space or other accommodation on campus for meetings and interaction with the faculty in particular. Graduate Division space on the second floor of KL was identified as the best location for its programs and activities and the synergy with other programs such as Graduate Student Life.

Executive Vice Chancellor & Provost

As noted in their responses, the Office of the EVC and Provost believes there are potential efficiencies to be captured by collocating some of their academic administrative functions with their counterparts in the Division of Administration – an example being the collocation of the academic payroll function with the administrative payroll unit.

Development & Alumni Relations

The recent reassignment to the Office of the Chancellor of units previously embedded within Development & Alumni Relations (Communications and Governmental Relations most notably) result in relatively little functional shift within the reorganized University Relations unit. Many Development & Alumni Relations functions are already located off-campus and therefore Development & Alumni Relations anticipates only keeping a limited number of their senior executives, as well as those development functions that work directly with on-campus constituents on the Merced campus.

Office of the Chancellor

Given the nature of the Office of the Chancellor, it is critical that nearly all functions directly associated with the Chancellor's Office be located on-campus. Therefore, with the exception of a sub-set of the Communications staff, recently restructured to report to the Office of the Chancellor, there are no significant functional units proposed as candidates for off-campus relocation.

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

Observations on Administrative and Support Staff Survey Responses

Application of Campus Space Standards

A number of respondents noted that the existing shortage of on-campus space has resulted in their units having to place employees in workspaces that fall short of campus space standards. In addition to the comments from unit heads, a number of spot checks appear to confirm that, in some instances, employees are working with less space than is recommended for an efficient employee workspace. Additional study will be required to determine the frequency of such staff placements, and it is expected such work will continue through 2012, but this issue should be monitored as space is released and space reassignments are made.

Increased Use of Intake Locations for Off-Campus Units

As additional units are located off-campus, the use of intake locations could be increasingly effective. Currently, the Desktop Support Services unit within Information Technology uses such a model to serve campus clients. Campus employees with desktop computing related issues can take their issue to on-campus IT employees (currently located within the Classroom & Office Building) who can provide first-level support but often escalate the service issue to Desktop Support employees located at off-campus sites. Such a model might be highly-effective for delivering additional administrative and support services to campus clients while preserving as much on-campus space as possible.

Potential for the Creation of Shared Service Centers and/or Collocated Cross Unit Functions

Increasingly higher-education institutions are developing shared service centers in order to capture efficiencies without completely centralizing services. Over the last year, a number of UC campuses including Berkeley, Los Angeles, Davis and others have launched shared service center initiatives in order to maximize campus efficiency. As Merced considers potential long term clustering off of administrative and support staff units, consideration should be given to the creation of one or more shared service centers.

Additionally, a number of units that were identified as needing to remain on campus for operational reasons as outlined by the Chancellor, were open to the idea of relocating those employees whose focus is on back-end business processes to off-campus sites. It appears that some units conduct similar day-to-day business processes and they could benefit from being collocated.

Increased Need for On-Campus Collaborative Spaces

The lack of on-campus space, combined with the rapid growth of the campus has resulted in many on-campus spaces intended for collaborative use being repurposed for administrative offices. The most significant need is for conference room space, with at least one-third of the staff conference rooms in the Kolligian Library having been converted to work spaces. It is to be expected that when some units move off-campus that the demand for on-campus conference rooms may increase.

Need for Education Related to Campus Facilities Inventories

The administrative and support space exercise revealed some gaps in data maintenance within the campus' facility inventory of record - the web-based Facilities Link database. While Capital Planning and Space Management (CPSM) is the official custodian of Facilities Link, CPSM's primary areas of ongoing

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

responsibility are current and upcoming capital projects and maximizing the capabilities of the Facilities Link application.

Unit Management Services Officers (MSOs) are charged with the responsibility of updating and maintaining their individual unit records as employees are hired, separated, reassigned and/or as work spaces are added, removed or reconfigured. If MSOs update Facilities Link records as changes occur then the application would be extremely reliable in real time. It is recommended that Capital Planning and Space Management provide increased education about Facilities Link for campus stakeholders.

A consolidated facilities inventory standardized in the Facilities Link (or similar) platform has significant advantages for record keeping and reporting and accurate measurement of efficiency metrics. If the campus has a well-maintained and broadly-utilized space inventory system, it would also allow for the development of unit-level incentives to increase the efficient use of scarce on-campus space.

As of Fall 2011, all on-campus administrative and support space has been assigned. Additionally, nearly all space that can be repurposed or reconfigured to provide additional such space – spaces such as break rooms, conference rooms, even portions of hallways and planned open spaces - has also been fully-utilized. It is estimated that the campus will need to add approximately 150 FTE administrative and support staff to accommodate planned enrollment growth through 2013-14. Using current campus space standards, the campus would require approximately 25,000 ASF to accommodate the growth in staff and, based on the results of the assessment it is expected that approximately 7,000 – 9,000 ASF of that total will be needed for growth in on-campus positions (with the remaining 16,000-18,000 ASF of need to be located off-campus).

At the start of the 2011-12 AY, only six functional units had significant portions of their employee base located off-campus:

- Admissions (Castle);
- Information Technology (Castle);
- Physical Planning, Design & Construction (Promenade);
- Human Resources (Mondo);
- Business and Financial Services (Mondo) and
- Development & Alumni Relations (Mondo).

Using the campus criteria for administrative and support space, division heads identified at least seven additional functional units that could be potential candidates to move significant portions of their operations to off-campus locations.

- Division of Student Affairs: Admissions (approximately 17 FTE)
- Division of Administration: Capital Planning and Space Management (approximately 3 FTE)
- Budget (approximately 3 FTE)
- Administrative Resources (approximately 4 FTE)
- Office of Research (approximately 3 FTE)
- Sponsored Projects (approximately 6 FTE)
- Responsible Conduct (approximately 2 FTE)
- Office of the EVC/Provost: Institutional Planning & Analysis (approximately 7 FTE)
- Academic Payroll/Personnel (approximately 5 FTE)
- Office of the Chancellor: Communications (approximately 6 FTE)

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

These ten functional units, along with a small number of individuals from units slated to remain on campus, currently represent approximately 60 on-campus FTE and would release approximately 4,200 ASF of on-campus space.

5. Decisions and Implementation

Based on this analysis, and guided by the principles outlined in the [Chancellor's October campus update](#), campus Senior Leadership team unanimously agreed to a series of space moves that will occur in the coming months. The space moves agreed to will provide units, both those moving off-campus as well as those remaining on-campus, with much needed space, or improved space to more efficiently operate and develop their functions as the campus continues to grow.

The Mondo Building and the Promenade (or very near-by) will operate as the main off-campus hubs for administrative and support functions for the next three years. The Castle facilities and Tri-College will continue to play a lesser yet still vital role in the overall organization of administrative and support space during the same period, particularly for Information Technology and Admissions.

The Physical Planning, Design and Construction unit has the majority of its personnel located at the Promenade in the City of Merced near the campus. Over the next two months, there will be a series of administrative space moves into newly leased space at the Promenade. It is planned that Academic Payroll; Administrative Operations; Budget; Capital Planning; Human Resources; and Institutional Planning and Analysis will relocate to the Promenade.

Three units currently reside in the Mondo building in downtown Merced. They are: Business and Financial Services; Human Resources; and a portion of Development, University Relations and Communications.

By relocating Human Resources along academic payroll and administrative operations new synergies will be created and business operations should benefit. The same is true for Physical Planning Design & Construction, Capital Planning and Space Management, Budget Office, and Institutional Planning Analysis locating together at the Promenade.

Sponsored Projects and Research Compliance will relocate to Mondo and new synergies will be created with proximity to Business and Financial Services.

The Admissions unit will relocate from campus to the Castle facility providing much needed released space in Kolligian Library for Student Affairs and Student Business Services/Campus Cashier. Several direct student support units will be able to relocate to KL 222 providing space for the Bright Success Center, Graduate Student Life and student employment. Career Services and the Bookstore will have much needed released space for their operations.

Not all space requests and needs are addressed in this step one of space assignments, however, the result is expected to be a significant improvement in campus operations. The campus Senior Leadership will continue to assess the remaining space needs identified in the self-assessment and will identify opportunities to address them – with at least an annual review of critical administrative and support space needs. Information will continue to be shared with the campus on a regular basis.

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

Detailed Space Assignments

Kolligian Library (KL)

- Chancellor, Vice Chancellors – Immediate Offices and associated AVCs/Directors
 - Space assignments will be made in KL
- Government Relations – Executive Director
 - Space assignment will be made in KL
- Communications – Executive Director
 - Space assignment will be made in KL
- CIO – Immediate Office
 - Space assignment will be made in KL
- Student Business Services/Campus Cashier - staff growth
 - Space assignments will be made KL
- Student Affairs – direct student service units (space assignments made KL)
 - Bright Success Center - near Career Services
 - Campus Store - near Campus Cashier
 - Career Services Center - near Bright Success Center
 - Financial Aid and Scholarships - near Student First Center, Registrar and Student Business Services/Campus Cashier
 - Graduate Division - near Schools, near Student Affairs units
 - Graduate Student Services - near Vice Chancellor for Research
 - Registrar - near other Student Affairs units
 - Student Life - near students and near ASUCM
 - Students First Center - near other Student Affairs units

Located on Campus

- Center for Research on Teaching Excellence (Academic Office Trailers)
- Communications – Public Information Reps/Video Team (identify alternate space on campus)
- Academic Personnel - near Provost and Academic Senate (remain KL)
- Academic Senate - near Academic Personnel (remain KL)
- Counseling and Psychological Services - near Disability Services and Health Services (future)
- Department of Public Safety - staff growth expected (future)
- Environmental Health and Safety - staff growth expected (future)
- Health Services - near Counseling and Psychological Services, growth expected (space assignments associated with Recreation Center North and J. E. Gallo Recreation Center)
- Library (adequate)
- SNRI (future)
- I.T. – instructional services (Classroom and Office Building)
- International Office (future)
- Vice Provost for Undergraduate Education (future)

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

Desirable on Campus but could be located off campus

- Admissions (Castle)
- Student Affairs Administrative Services - collocation desired, growth expected (future)
- Communications – subset (Campus and Mondo)
- Development and Alumni Relations (Campus and Mondo)
- Information Technology - MSO (Castle)

Off Campus or Candidates for Off Campus

- Academic Payroll (Promenade)
- Administrative Operations (Promenade)
- Budget Office - staff growth (Promenade)
- Business and Financial Services – staff growth (Mondo)
- Capital Planning & Budgeting - staff growth (Promenade)
- Center for Educational Partnership – staff growth (future)
- Fresno Center Liaison (future)
- Human Resources - staff growth (Promenade)
- Information Technology (expansion space at Castle)
- Institutional Planning & Analysis (Promenade)
- Development (Mondo)
- Physical Planning Design & Construction - staff growth (Promenade)
- Research Compliance – near Sponsored Projects (Mondo)
- Small Business Development Center (adequate in Fresno Center)
- Sponsored Projects - near BFS and Research Compliance (Mondo)
- Technology Transfer (KL)

6. Time Line

February/March 2012

- Promenade Suites A/B
 - Human Resources (from Mondo)
 - Academic Payroll (from Campus)
 - Administrative Operations (from Campus)
 - Capital Planning and Space Management (from Campus)
- Admissions can move to Castle – the space is available
- Space Planning for Chancellor's Office and Graduate Division

UC MERCED Administrative and Support Space - Self Assessment (Jan. 2012)

Capital Planning and Space Management

March/April 2012

- Promenade Suite D
 - Institutional Planning & Analysis (from Campus)
 - Budget Office (from Campus)
- Mondo – reconfigure for BFS, Sponsored Projects, Research Compliance
- Relocate subset - Public Information Reps/Video Group from KL 3rd Floor to alternate campus location
- Various KL reassignments – 3rd Floor

Summer/Fall 2012

- Information Technology renovations in Classroom and Office Building complete
- Information Technology Trailers at Castle installed
- KL 222 available for Student Affairs units and Graduate Student Life