

# SPACE POLICY

## Hotchkiss Brain Institute and Cumming School of Medicine

This policy outlines principles for effective, equitable, and transparent space utilization, emphasizing optimization, adherence to design intent, and regular evaluation. Responsibilities are defined across key leadership roles, ensuring space is managed as a shared institutional resource based on programmatic needs and research productivity.

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## Hotchkiss Brain Institute Policy Overview

Space assignment and usage at the University of Calgary is governed by the institution's **Space Allocation Policy**. The UCalgary policy defines the university's space, maximizes efficiency of use of space and outlines the responsibilities of the allocation and assignment of space. The Dean of the Cumming School of Medicine (CSM) is responsible for adhering to this policy and is accountable for space management of the Health Sciences Centre (HSC), Heritage Medical Research Building (HMRB), Health Research Innovation Centre (HRIC), and Cal Wenzel Precision Health Building (CWPHB). The CSM space policy outlines the principles and priorities of the management of space assigned to the faculty (see the CSM space policy at the end of this doc). The Director of the Hotchkiss Brain Institute (HBI) is responsible for adhering to the UCalgary and CSM policies and is accountable for space management of the HBI footprint. The HBI space policy outlines the principles and priorities of the management of space assigned to the HBI.

Space is a limited and valuable resource since there is little likelihood that additional space will be added at the HBI's footprint any time soon. It is the goal of the HBI to optimize the use of space according to the HBI's strategic goals and priorities.

Space allocation within the HBI reflects the importance of supporting the research endeavors of individual faculty members, core facilities and administrative operations.

This policy document seeks to clearly articulate the strategic objective, priority, and transparent means that are used to assign laboratory, office, teaching and administrative space within the HBI, relating to the HSC, HMRB, HRIC, CWPHB (Foothills campus).

# 1. Hotchkiss Brain Institute Space Policy

## 1.1 Foundational principles

Space assignments are governed by the following foundational principles:

1. Space is assigned according to the strategic objectives and priorities of the HBI.
2. Space is a limited resource and will be used effectively and efficiently as per its design intent.
3. Space assignments are not to be regarded as permanent.
4. Space assignment procedures are transparent, and affected stakeholders are always consulted.
5. Space assignments should be made with principles of equity in mind.
6. Contiguous space will be considered where there are programmatic needs.

The HBI Infrastructure Director is responsible for the daily management and assignment of its space with the following understanding:

- a. Space is not owned by current occupants, even when these units have contributed to development, re-development or fit-out costs.
- b. The Dean's Office has ultimate and complete accountability and authority over all space assignments and usages.

Underutilized space within the HBI's footprint will be reviewed at regular intervals and can be reallocated by the HBI for higher priority/strategic space needs. This includes consideration of faculty or employees who are working hybrid. **Those who are working less than three days a week onsite will not be given an office. They will be assigned shared or touchdown space for the days they are onsite.**

The HBI Infrastructure Director will be responsible for maintaining an accurate record of who is using a specific space. The HBI Infrastructure Director will be informed of requests and changes as they occur and will relay them to the CSM Space Committee. Random walk-throughs by members of the Infrastructure Director's Space Committee may be conducted to verify occupancy and use data.

## 1.2 Space Management Responsibilities

1. The HBI Director has overall accountability and oversight of all spaces assigned within the HBI Footprint.
2. The HBI's Space Committee will have representatives from each of the 4 buildings (HSC, HMRB, HRIC, CWPHB - Foothills campus), the HBI Research Director and Space Support Staff. The committee will provide recommendations to the HBI Infrastructure Director (Chair) on space related requests and issues, who will relay them to the HBI Director and Deputy Director as well as communicate with the relevant Department Head(s).
3. All requests for space renovations must be accompanied by a budget that includes decanting costs and potential sources of funds.
4. Space-related requests should be made to the Infrastructure Director who will bring them forward to the HBI Space Committee for review and recommendation.
  - Senior Associate Dean of Research is responsible for laboratory and office space assignment in all space that is part of the footprint allocated to the seven Cumming School of Medicine Institutes, Center for Advanced Technologies, and the Office of the Associate Dean Research.
    - Where space has been assigned to the HBI, the HBI Director should make space assignment recommendations to the Associate Dean of Research Infrastructure.
    - Requests for additional office, laboratory space or renovations within the HBI footprint should be vetted by the Infrastructure Director and HBI Space Committee, prior to submission to the Associate Dean of Research Infrastructure.

## 1.3 Space Allocation Guidelines

### 1.3.1 Office Space

1. Office spaces are located within the HBI's footprint. Assignment of the office space is made by the Infrastructure Director in consultation with the Director and Deputy Director. Should disagreement occur and not be amicably resolved, the issue or request should be elevated to the relevant Senior Associate Dean and raised to the CSM Space Committee for a decision.
2. **Faculty and employees working a hybrid model will not be given a dedicated office if they are working less than three days a week onsite. They will be assigned shared or touchdown space for the days they are onsite.**
3. Historically, full-time (GFT) members have been assigned their own office space. If their office space is underutilized, reallocation of their office is not a breach of the collective agreement if:
  - a. Their contract letters do not contain these specific terms
  - b. They are provided flexible office space

Should there be changes to a current faculty member's space assignment, there needs to be a conversation with the individual academic with a proposal to work out any concerns they may have regarding placement and storage of specific office content such as teaching items, books, files, etc; there needs to be some consideration as to how the space is used, for example: would they reserve the space when they need it, so there is no conflict when two academics need the space at the same time for student meetings, etc.

4. UCMG Major Clinical faculty members are guaranteed a shared office under the following conditions:
  - a. Their office allocation will be either in AHS or CSM space. This is at the discretion and agreement between the SAD of Faculty Affairs, department head, and AHS leadership.
  - b. Office space within the UCMC clinic area (HMRB 1410 and adjacent) may be allocated to either GFT or Major Clinical faculty members provided they are UCMG members.
5. Other staff are located in space available on the understanding that they may have to be relocated as circumstances change.
6. In general, the hierarchy for office assignment is:

- Full Time (GFT) faculty
- Major Clinical faculty – those with more than 50 per cent clinical workload may have to share offices
- Research faculty
- HBI administrative support staff
- Emeritus professors who continue to have a major role with 3 days or more onsite in the CSM

The following categories may be assigned cubicle touchdown space if office space is not available:

- Research associates
  - Postdoctoral fellows
  - Advanced Clinical fellows who cannot be accommodated in AHS space
  - Graduate students
  - Fixed Term – admin/tech staff
  - Residents
7. Faculty members are only entitled to one office, be that in an AHS facility or in the CSM; those with an office in an AHS facility are not then eligible for another office within the CSM footprint. Alternatively, if they prefer to have their office in the CSM (HBI) footprint for academic purposes (close to lab, education portfolio, etc.), they will be asked to relinquish their AHS office.
  8. Changes in allocation of administrative support space require the approval of the CSM's Senior Director. Space for support staff must be incorporated into all space plans, including research institute space plans. Administrative assistant space is normally shared with other administrative assistants and maybe cubicle space.

### 1.3.2 Laboratory and Institute Space

1. The HBI should update their space assignments within their footprints every two years.
2. Spaces must be used for their designed purposes in accordance with all university policies and procedures and all regulatory requirements.

3. Space allocation cannot be based on the need to accommodate a lifetime collection of materials and research equipment. Occupants are expected to manage the accrual and disposal of these items over time.
4. The level of current research funding, research productivity, and evidence of the need for the specific space requirement will be important factors in determining the amount of laboratory space allocated to the Principal Investigator. These decisions should be at the discretion of the HBI Director or the Infrastructure Director and should be reviewed on a regular basis by the institute.
5. The HBI shall give priority to relocating their primary members who are in the footprint of other institutes.
6. If a faculty member resigns their membership in the HBI or changes their primary institute affiliation, the faculty member shall not automatically be required to relocate from within the institute footprint. Rather, under such circumstances, it is expected that the relevant institutes and faculty members will work together collegially to ensure their continued academic success. However, normally the laboratory and office space will remain part of the footprint allocated to the institute.

### 1.3.3 Administrative Support Space

1. Administrative Services is responsible for oversight and management of the central administrative support staff who are assigned to support GFT and UCMG Major Clinical faculty located in CSM space.
2. Best efforts are made to locate the administrative staff in the vicinity of the faculty member they support.
3. Administrative staff can be in institute or operational unit footprints. The operational leads must discuss potential moves with the admin manager. If consensus cannot be reached, the admin manager will elevate the request to the Senior Director and the Space committee. If required, the Space Committee will do a walk-through to assess the request and decide.



#### 1.3.4 Communal Space

The HBI will ensure that they comply with the Environmental Health and Safety regulations, including the fire code.

#### 1.3.4 Named Spaces

The HBI will follow UCalgary and CSM policies on named spaces.

## Cumming School of Medicine Policy Overview

Space assignment and usage at the University of Calgary is governed by the institution's **Space Allocation Policy**. The UCalgary policy defines the university's space, maximizes efficiency of use of space and outlines the responsibilities of the allocation and assignment of space. The Dean of the Cumming School of Medicine (CSM) is responsible for adhering to this policy and is accountable for space management of the Health Sciences Centre, Heritage Medical Research Building, Health Research Innovation Centre, and Cal Wenzel Precision Health building. The CSM space policy outlines the principles and priorities of the management of space assigned to the faculty.

Space is a limited and valuable resource since there is little likelihood that additional space will be added at the Foothills campus in the near future. It is the goal of the CSM to optimize the use of space according to the faculty's strategic goals and priorities.

Space allocation within the Foothills campus reflects the importance of the strategic priority areas in education, research, and administrative operations. Allocation of space reflects the academic priorities, strategic opportunities, availability of financial resources, and sustainability within the school. This CSM Space Policy does not apply to leased space.

This policy document seeks to clearly articulate the strategic objective, priority, and transparent means that are used to assign laboratory, office, teaching and administrative space within the CSM, primarily relating to the Foothills campus.

- Foundational principles
- Responsibility for space assignments
- Space allocation guidelines for:
  - Office Space
  - Laboratory and Institute Space
  - Administrative Support Space
  - Communal Space
  - Named Spaces

## 2. Cumming School of Medicine Space Policy

### 2.1 Foundational principles

Space assignment is governed by the following foundational principles:

1. Space is assigned according to the strategic objectives and priorities of the CSM.
2. Space is a limited resource and will be used effectively and efficiently as per its design intent.
3. Space assignments are not to be regarded as permanent.
4. Space assignment procedures are transparent and effected stakeholders are consulted.
5. Space assignments should be made with principles of equity in mind.
6. Contiguous space will be considered where there are programmatic needs.
7. Space is assigned to departments, institutes, and units who are responsible for the daily management and assignment of the space with the following understanding:
  - a. Space is not owned by departments, institutes, units or current occupants, even when these units have contributed to development, re-development or fit-out costs
  - b. The Dean's Office has ultimate and complete accountability and authority over all space assignments and usages.
8. Underutilized space will be reviewed at regular intervals and can be reallocated by the Dean's Office for higher priority/strategic space needs. This includes consideration of faculty or employees who are working hybrid. Those who are working less than three days a week onsite will not be given an office. They will be assigned shared or touchdown space for the days they are onsite.
9. Each unit with assigned spaces will maintain an accurate record of who is using a specific space. The CSM Space Committee will be informed of requests and changes as they occur. Random walk-throughs by members of the Space Committee may be conducted to verify occupancy and use data.

## 2.2 Space Management Responsibilities

1. The Dean has overall accountability and oversight of all spaces assigned to the faculty.
2. The CSM Space Committee is represented by senior leaders in the faculty to provide recommendations to the Dean and the Dean's Executive Council on space related requests and issues.
3. All requests for space renovations must be accompanied by a budget that includes decanting costs and potential sources of funds.
4. Space-related requests should be made to the appropriate DEC leader who will then bring forward to the CSM Space Committee for review and recommendation.
  - a. Senior Associate Dean of Research is responsible for laboratory and office space assignment in all space that is part of the footprint allocated to the seven Cumming School of Medicine Institutes, Center for Advanced Technologies, and the Office of the Associate Dean Research.
    - i. Where space has been assigned to an institute, the Institute Director should make space assignment recommendations to the Associate Dean of Research Infrastructure.
    - ii. Requests for additional office, laboratory space or renovations within an institute footprint should be vetted by the appropriate Institute Director, or their delegate, prior to submission to the Associate Dean of Research Infrastructure.
  - b. Senior Associate Dean of Faculty Affairs will recommend office space for Clinical Full-time and Major Clinical faculty. Decisions regarding the site of the office assignment for clinical faculty will be made jointly with the Zone Medical Director, AHS, and will take into consideration the location of their primary activities based on time.
  - c. Senior Associate Dean of Education is responsible for teaching space and office assignments for the educational units. This includes:
    - i. Requests for additional education space or renovations.
    - ii. Educational and meeting space will be allocated according to the room booking policy.

- iii. All spaces designated for instructional purposes must be used in accordance with the university policy on *Instructional Scheduling and Space Utilization*.

The Senior Director is responsible for all Cumming School of Medicine administrative space (administrative services, support services, communications, fund development, etc.).

## 2.3 Space Allocation Guidelines

### 2.3.1 Office Space

1. Office spaces are located in various areas including within institute footprints and operational units. Assignment of the office space falls under that institute or unit's purview. Should disagreement or request for additional space be made, the issue or request should be elevated to the relevant SAD (Senior Associate Dean) and raised to the CSM Space Committee for a decision.
2. Faculty and employees working a hybrid model will not be given a dedicated office if they are working less than three days a week onsite. They will be assigned shared or touchdown space for the days they are onsite.
3. Historically, full-time (GFT) members have been assigned their own office space. If their office space is underutilized, reallocation of their office is not a breach of the collective agreement if:
  - a. Their contract letters do not contain these specific terms
  - b. They are provided flexible office space

Should there be changes to a current faculty member's space assignment, there needs to be a conversation with the individual academic with a proposal to work out any concerns they may have regarding placement and storage of specific office content such as teaching items, books, files, etc; there needs to be some consideration as to how the space is used, for example: would they reserve the space when they need it, so there is no conflict when two academics need the space at the same time for student meetings, etc.

4. UCMG Major Clinical faculty members are guaranteed a shared office under the following conditions:

- a. Their office allocation will be either in AHS or CSM space. This is at the discretion and agreement between the SAD of Faculty Affairs, department head, and AHS leadership.
  - b. Office space within the UCMC clinic area (HMRB 1410 and adjacent) may be allocated to either GFT or Major Clinical faculty members provided they are UCMG members.
5. Other staff are located in space available on the understanding that they may have to be relocated as circumstances change.
6. In general, the hierarchy for office assignment is:
  - Full Time (GFT) faculty
  - Major Clinical faculty – those with more than 50 per cent clinical workload may have to share offices
  - Research faculty
  - Administrative support staff are not normally housed in CSM offices, but there are exceptions. The Senior Director and the CSM Space Committee are involved with these decisions.
  - Emeritus professors who continue to have a major role with 3 days or more onsite in the CSM

The following categories may be assigned cubicle touchdown space if office space is not available:

- Research associates
- Postdoctoral fellows
- Advanced Clinical fellows who cannot be accommodated in AHS space
- Graduate students
- Fixed Term – admin/tech staff
- Residents

### 2.3.2 Laboratory and Institute Space

1. Institutes are allocated a footprint that will be periodically reviewed by the space committee and adjusted based on the priorities of the CSM and the research activities and productivity of the relevant institute according to generally agreed principles.
2. Institutes should update their space assignments within their footprints every two years.
3. Spaces must be used for their designed purposes in accordance with all university policies and procedures and all regulatory requirements.

4. Space allocation cannot be based on the need to accommodate a lifetime collection of materials and research equipment. Occupants are expected to manage the accrual and disposal of these items over time.
5. The level of current research funding, research productivity, and evidence of the need for the specific space requirement will be important factors in determining the amount of laboratory space allocated to the PI (principal investigator). These decisions should be at the discretion of the institute director or their delegate and should be reviewed on a regular basis by the institute.
6. Institutes shall give priority to relocating their primary members who are in the footprint of other institutes.
7. If a faculty member resigns their membership in an institute or changes their primary institute affiliation, the faculty member shall not automatically be required to relocate from within the institute footprint. Rather, under such circumstances, it is expected that the relevant institutes and faculty members will work together collegially to ensure their continued academic success. However, normally the laboratory and office space will remain part of the footprint allocated to the institute.
8. Not all research space will be allocated to institutes. This includes but is not limited to core research facilities, such as the Health Sciences Animal Resource Centre (HSARC), IMC, etc. These spaces are managed by the Associate Dean of Research Infrastructure.

### 2.3.3 Administrative Support Space

1. Administrative Services is responsible for oversight and management of the central administrative support staff who are assigned to support GFT and UCMG Major Clinical faculty located in CSM space.
2. Best efforts are made to locate the administrative staff in the vicinity of the faculty member they support.
3. Administrative staff can be in institute or operational unit footprints. The operational leads must discuss potential moves with the admin manager. If consensus cannot be reached, the admin manager will elevate the request to the Senior Director and the Space committee. If required, the Space Committee will do a walk-through to assess the request and decide.

#### 2.3.4 Communal Space

1. Corridor space is monitored by various CSM and university units and strict controls will be applied. Institutes must ensure that they comply with the Environmental Health and Safety regulations, including the fire code.
2. Requests pertaining to other communal space such as the food services area, atrium and library should be raised to the Senior Director for discussion.

#### 2.3.4 Named Spaces

1. The naming of physical entities is governed by the University Board of Governors policy with authority delegated to central Fund Development.
2. The naming of activities, facilities, and units, etc. that are based in the CSM must be discussed in advance with the relevant Senior Associate Dean who will seek the input of the Dean's Executive Committee before a final recommendation is made to central Fund Development.
3. Ordinarily, rooms, laboratories, and offices are named in perpetuity, unless the function of the space changes or a definite timeline for naming is specified in the gift agreement with the donor.
4. If a named space is affected by a space reallocation or change in function, the name may be retained at the original location, transferred to a new location, or discontinued.
5. To ensure compliance with gift agreements, the Development Office must also be consulted before a decision is made regarding transferring, retaining, or discontinuing the naming.