

Applies to: *Faculty (including part-time, adjunct and visiting faculty), and staff employed by University of Southern California (“USC” or the “University”) and including those working for the University’s Health System (“USC Employees”). This policy continues to apply to individuals who are on sabbatical or other leaves, or who are visiting other institutions.*

Space Planning and Management

1. POLICY

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2. Policy Purpose

USC’s physical facilities, like its personnel and financial assets, are resources to be planned, managed and maintained in a manner which most contributes to the university’s dual missions of research and instruction. The goal of space planning, management and allocation is to make the best possible use of these physical assets and to plan for future needs.

3. Scope and Application

This policy applies to the space planning, management, and allocation of all of USC’s physical facilities

4. Definitions

N/A

5. Policy Details

To assess whether campus facilities are being used most efficiently and economically, principles governing space allocation have been developed. The seven principles below are interrelated and should be considered together.

Principles of Space Planning

1. Space is owned by the University and allocation decisions are ultimately the President’s responsibility. Donor restrictions on space usage will be honored.
2. Academic activities, classrooms, and research space have priority over administrative activities such as offices.
3. Space assignments that save money, enhance revenues, or encourage interdisciplinary interaction will be given priority.
4. Offices with high traffic from students, faculty or staff will be located as centrally and conveniently as possible.
5. Space allocations that satisfy long-range plans take precedence over more temporary accommodations.

6. Synergistic or like activities should be housed in proximity.
7. Because of the finite nature of the physical plant, the right to manage academic and administrative space is reserved to the Provost and Senior Vice President for Academic Affairs, Senior Vice President of Health Affairs and Senior Vice President for Finance, CFO to assure that the university fully maximizes its resources in providing top quality academic services to its students and a positive and productive working environment for its faculty and staff.
8. Space assignments will be reviewed periodically to assess how effectively current usage supports the university's evolving needs and priorities. These reviews may lead to the realignment of space within any division to address competing demands across the university. The decision to reallocate space based on these reviews is at the discretion of the Senior Vice Presidents mentioned above.

Discussion for Space Planning and Management

Although facilities are managed by the deans and vice presidents, the President retains ultimate responsibility for allocating and re-allocating space. In any space assignment, ownership is not implied by occupancy, nor should it be inferred.

The university has a fiduciary responsibility to respect a donor's wishes regarding land and facilities acquired by gifts. General classrooms and donor-restricted facilities will be considered separately but are not exempted from the space review process.

Instruction and research are the main functions of the university. Space will be allocated to instructional and research functions of the university optimally by making specific space decisions within the context of serving these primary functions.

Since instruction and research activities in the schools and departments are continually being added, discontinued, expanded, and contracted, space needs will also change over time. As administrative departments take on new responsibilities, downsize or acquire technology with different space requirements, their needs too are dynamic. This implies that no permanent optimal space allocation can be achieved.

Given the cost of remodeling and moving, it is not practical to attempt to maintain optimal space allocation at all times. Space should not be considered as available for reassignment, nor activities appropriate for moving, unless a reasonable minimum time commitment can be made; at least two years' occupancy if necessary. Exceptions might include displacement while space is brought up to code or safety problems are corrected (e.g., seismic retrofitting).

Because on-campus space is a fixed resource, periodic reviews of space will be made to ensure the best possible use of space. Leasing off-campus facilities should be a last resort.

Certain uses of space require specialized building systems. For example, computers and labs may have special air conditioning requirements. Building occupants may have similar needs. For example, faculty requires support staff. It may be more cost-effective and make future reassignment of space easier if contiguous blocks of space are for the same purpose or program (e.g., a group of faculty offices with support staff space).

6. Procedures

Procedures for Allocation of Space

The following procedures have been developed to assure that everyone knows where and how to make requests for space allocation needs and what the decision process entails.

1. Requests for new or changed space must be submitted by the appropriate dean or vice president in written form to the University Space Planning Committee in care of the Associate Vice President for Financial Services at least three months prior to the actual space being needed.
2. Requests must include an internal space audit that verifies that adequate space does not exist within the resources already available to the school, program, or department. This audit must be rigorous and must include shared space, storage space, etc. If you require help to complete the audit, contact the Space Management department.
3. When a new building comes online, justification needs to include release or reallocation of existing space.
4. Justification for the space requested must accompany the audit. It must include information about the new or expanded program that requires the space, the schedule, whether the requested space is temporary or permanent and funding for additional space.
5. All requests will be considered within the context of the Space Planning and Management policy and its seven principles by the University Space Planning Committee which is convened by the Provost and Senior Vice President for Academic Affairs, Senior Vice President of Health Affairs and Senior Vice President for Finance, CFO. The committee includes representatives from the offices of Financial Services, Budget and Planning, and the Provost Offices.
6. Requests will be acknowledged upon receipt.
7. Pro forma space adjustments of 500 sq. ft. or less will be handled in an expedited manner.

Guidelines for Space Needs Analysis, Assignment and Problem Resolution

Vice presidents, deans and directors are responsible for managing the space occupied by activities under their control, just as they are responsible for the management of staff and fiscal resources. Space administration may include redistributing, exchanging, or improving space.

As long as university offices are housed in off-campus leased space, there is potential savings in better use of on-campus facilities. Units may not stockpile unused or underutilized space, nor may they unilaterally lease it to another department. As schools, departments, and administrative units identify space in excess of current needs (either through program expansion, reduction, or redirection), they will relinquish such unused space back into the university's general space pool for reassignment. As space is returned for reassignment, the indirect costs associated with it will be assigned to the new occupant. Space costs for mid-year adjustments in space assignments will be determined by the Office of Budget and Planning.

Units may return unused space or request needed space on an ongoing basis. Underutilized space will be considered in the resolution of space needs. Although space may be returned whenever it is available, the annual space survey conducted by Space Management will assist units in identifying unused or underutilized space each year. The reallocation and potential renovation of vacated space will be coordinated through the Division of Financial and Business Services.

Space needs and the associated costs of space will be continuously reviewed by the Provost, the Senior Vice President of Health Affairs and the Senior Vice President for Finance, CFO. Space needs will be analyzed in the context of:

- Campus-wide priorities and applicable long-range space plans,
- Program type (for example, instructional and non-instructional),
- Type of space required (for example, office, storage, or laboratory),
- Length of need (temporary vs. permanent),
- Ability of the unit to pay for the space, and
- Interaction factors and the need for contiguous support facilities, or access to campus operations.

Procedures for Conducting a Space Audit

1. A detailed inventory of the department or division's space may be requested from the Space Management department. This will include room use, the type of activity associated with the room, net square feet totals and occupants.
2. The department or division should perform a physical walkthrough of its space to make sure all current space is being fully utilized.
3. If the department or division needs assistance in performing the space audit, it should contact the Associate Vice President for Financial Services who will arrange for a physical review of the space by their office and/or the Space Management department.
4. Forward the results of the space audit with a detailed description of the department/division's space needs to the department/division's dean or vice president for approval prior to the request being forwarded to the Associate Vice President of Financial Services.
5. Due to the shortage of space on campus, we may suggest the sharing of facilities or the reallocation of storage as an alternative to the allocation of new space.

7. Forms

N/A

8. Responsibilities

N/A

9. Related Information

N/A

10. Contacts

Please direct any questions regarding this policy to:

OFFICE	PHONE	EMAIL
UPC-Office of Associate Vice President for Financial Services	(213) 821-2111	rkennedy@usc.edu

HSC-Office of Associate Vice President for Strategic Health Initiatives	(323) 361-8425	Michele.Kipke@med.usc.edu
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