



DIRECTIVE
ON THE
ALLOCATION
OF
UNIVERSITY SPACE

SEPTEMBER 2021
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DIRECTIVE ON THE ALLOCATION OF UNIVERSITY SPACE

1. PURPOSE

The purpose of this directive is to ensure the effective, efficient and equitable allocation of University Space to and by University Units in a manner that promotes the McGill University mission statement and aligns with relevant McGill University strategic planning documents, the whole in compliance with all federal, provincial and local laws, regulations and codes.

To this end, the directive:

- defines University Space
- establishes a dynamic Space Allocation Process complete with a Space Inventory System and procedures and criteria for requesting, reviewing and approving space allocation, the whole in alignment with McGill University strategic planning and best practice
- defines the roles and responsibilities of all actors involved in the Space Allocation Process.

2. DEFINITIONS

“University Space” is defined, for the purpose of this directive, as any interior space or facility, which is owned, leased, or occupied by the University, and is allocated to University Units. This directive does not apply to exterior space; such space is under the joint stewardship of the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) and shall remain unallocated to University Units.

“University Unit” means a part or segment of the University that has a distinct function, operates as a separate division, and occupies a definite place on the Organizational Chart with a distinct “Organizational Code” (ORG Code) assigned by the Analysis, Planning and Budget Office of the Provost and Vice-Principal (Academic). The physical facilities currently occupied by each University Unit are considered the allocated space of that Unit. University Units do not in any way *own* the University Space they use and occupy.

“Space Use” refers to categories established by the Quebec Ministry of Education – *‘Ministère de l’Éducation, de l’Enseignement supérieur et de la Recherche’ (MES)*. Use(s) of rooms are identified by:

- the categories used for annual government space reporting submissions – *‘Système d’information sur les locaux des universités’ (SILU)*, version 8.0, July 2015, and
- the space norm categories defined by *MES* in its document *‘Cadre normatif des investissements universitaires’*, September 2003 (with latest amendments).

3. AUTHORITY, ROLES AND RESPONSIBILITIES

VICE-PRINCIPAL (ADMINISTRATION AND FINANCE) & PROVOST AND VICE-PRINCIPAL (ACADEMIC)

The Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) have joint final authority to approve, deny, modify or attach conditions to allocation requests, as well as to intervene in the current allocation of University Space.

The Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) may independently consult with relevant stakeholders in the exercise of this authority.

DIRECTOR, CAMPUS PLANNING AND DEVELOPMENT

The Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) delegate responsibility to the Director, Campus Planning and Development, for the administration of this directive and the Space Allocation Process established herein, including to oversee the development and management of the Space Inventory System.

Pursuant to this delegation, the Director shall, when required, prepare a report on activities related to this directive, including on progress related to its implementation, to the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic).

CAMPUS PLANNING AND DEVELOPMENT

Campus Planning and Development, under leadership of the Director, owns and manages the Space Allocation Process and related Space Inventory System, working closely with the Space Management Coordinators to be designated by each University Unit.

SPACE MANAGEMENT COORDINATOR

The Dean, Director or Head of a University Unit shall designate a Space Management Coordinator who is responsible for managing the Unit's allocated space and coordinating with Campus Planning and Development in the Space Allocation Process, including in the collection and management of data for the related Space Inventory System.

4. SPACE ALLOCATION

4.1 PRINCIPLES

University Space is a resource and is allocated to University Units based on an assessment that considers University priorities, program needs, cost, available alternatives, and benefits, as well as the historical, architectural and other related significance of a University Space.

The environment and the health and safety of members of the McGill Community are paramount and supersede all other considerations in the allocation of University Space.

Academic and research needs have first priority in the allocation of University Space. Other priority considerations include allocations:

- that are cost effective, and/or that enhance or generate new revenue
- that meet long-term planning goals
- that encourage interdisciplinary interaction

Space allocation and assignment considerations must be taken prior to:

- the creation and expansion of new academic, research or administrative programs

- the decision to appoint or hire new academic, research, or administrative staff
- the inception of construction and renovation projects

University Units may (re)assign their allocated University Space within a given Space Use category to Unit constituents, but shall do so based on an assessment that also considers the principles described above, and that complies with the Space Allocation Process described below.

4.2 SPACE ALLOCATION PROCESS

All space requests must be submitted to Unit-appropriate Space Management Coordinators who shall process requests and determine whether they are “Routine” or “Complex”.

ROUTINE SPACE REQUEST

A Routine Space Request involves a new or modified requirement for an existing University Unit and may be resolved through (re)assignment of space within a Unit’s existing space allocation within a given Space Use category. University Units are authorized to approve routine requests without higher review or approval and must track and report resulting changes to Campus Planning and Development.

The Space Management Coordinator shall mediate any conflicting requests for space assignment for their Unit. However, if the Space Management Coordinator determines that a resulting space request:

- may involve a change of Space Use,
- may involve or in any way impact parties from different and multiple University Units,
- may appropriate University Space allocated to another University Unit,
- may appropriate University Space allocated for centrally scheduled classrooms, student study spaces and student association spaces, or
- may encroach on non-University Space, e.g., public space or other service spaces,

he or she must flag the request to the Dean, Director or Head of the University Unit and forward it to Campus Planning and Development for management and review.

COMPLEX SPACE REQUEST

A Complex Space Request involves

- a change in Space Use,
- new or modified requirements for multi-occupant, multi-use and inter-Unit spaces, or
- new University Unit requirements (academic, research or administrative).

If the Space Management Coordinator determines that a request for space is “Complex”, he or she must duly inform the Dean, Director or Head of the University Unit and forward it to Campus Planning and Development for management and review.

Campus Planning and Development shall work closely with the University Unit in assessing the Complex Space Request and preparing a recommendation to the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic).

More detailed information about the objectives, guidelines, and prescribed process can be found in the [Allocation of University Space: Objectives, Guidelines and Process](#).

4.3 SPACE INVENTORY SYSTEM

A Space Inventory System is key to the implementation of the Space Allocation Process. The Space Inventory System ensures data on University Space is accessible and transparent.

OBJECTIVES

The objectives of a Space Inventory System are:

- to collect and maintain data that informs and enables optimal allocation of University Space
- to collect and maintain data that informs decision-making for classroom scheduling
- to collect and maintain data that supports construction projects requiring swing spaces
- to collect and maintain data that supports planning efforts
- to benchmark against future growth of the University
- to improve the accuracy of the annual submission to the Quebec Ministry of Education – *‘Ministère de l’Éducation, de l’Enseignement supérieur et de la Recherche’ (MES)*.

5. SPACE MONITORING

Space monitoring is key to the development and management of a Space Inventory System.

5.1 UNIVERSITY SPACE VERIFICATIONS

The Space Management Coordinator shall conduct regular verifications and reporting of their Unit's existing space allocation in terms of occupancy and use to Campus Planning and Development.

5.2 UNIVERSITY SPACE MONITORING

To ensure data integrity, Campus Planning and Development shall monitor, with cooperation of University Units, the reported status of the space occupancy and use.

At the request of a University Unit, Campus Planning and Development may, if feasible, conduct a comprehensive audit of the Unit's allocated space with the aim to:

- find opportunities to create space through the reorganization of existing space allocation
- resolve disputes between University Units on the use of existing space allocation

A comprehensive space audit would include building data findings such as:

- underused spaces
- application of outdated and disproportionate space norms
- suitability of space for user or function
- discrepancies between capacity and room size

6. REVIEW

This directive shall be reviewed periodically, or at the request of the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic), by Campus Planning and Development who shall recommend any revisions for the joint approval by the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic).

The Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) may at any time jointly revise the directive of their own accord as they consider necessary or appropriate.

Duly approved revisions shall be promptly communicated to the University community on behalf of the Vice-Principal (Administration and Finance) and Provost and Vice-Principal (Academic) by Campus Planning and Development with the assistance of Space Management Coordinators.

7. RELATED DOCUMENTS

McGill Masterplan, Campus Planning and Development Office. Approved by the Board of Governors, May 23, 2019.

https://www.mcgill.ca/campusplanning/files/campusplanning/mcgill_university_master_plan_20190813-compressed.pdf

Organization Table, Analysis, Planning and Budget Office of the Provost and Vice-Principal (Academic).

<https://www.mcgill.ca/apb/unit>

Allocation of University Space, objectives, guidelines and process

https://www.mcgill.ca/facilities/files/facilities/02_space_allocation_process_web_version.pdf