

Procedures Supplemental to University Policy 601.4, Integrated Space Management

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These Procedures Supplemental to University Policy 601.4, Integrated Space Management, establish standard processes for evaluating requests for Acquisition, Allocation, Use, Alteration, Renovation, and Construction of University Space.

A. Roles & Responsibilities

1. The administration of these Procedures is delegated to Facilities Management (FM) and is managed by the Director of Space Management.
 - a. The Office of Space Management will evaluate all requests for:
 - Space Acquisition;
 - Space Allocation;
 - Space Alteration;
 - Space Renovation;
 - Construction of new Space; and
 - Reallocation of Space between Divisions.
2. The Director of Space Management is authorized to make final decisions on Space Requests involving fewer than 1,000 assignable square feet (asf), (approximately 7-10 offices or a 40-seat meeting space, where all affected departments agree with the request. The Director of Space Management will make recommendations to the Associate Vice Chancellor for Facilities Management on any Space Request involving 1,000 asf or more.
3. The Associate Vice Chancellor for Facilities Management (AVC-FM) will make final decisions on all Space Requests involving 1,000 asf or more; and on any Space Requests involving fewer than 1,000 asf where affected departments do not agree with the Space Request.
4. Regardless of size, the Director of Space Management and AVC-FM will inform and consult with:
 - a. Division of Research on any research lab space requests located on the Millennial Campus as established by the UNC Board of Governors pursuant to NCGS 116.198.34(8b) and primarily administered by the Division of Research under University Policy 601.21, Acquisition and Disposition of Real Property by Lease.

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- b. Director of Research and Academic Space regarding all Academic Affairs space.
5. The Vice Chancellor for Business Affairs (VCBA) or their designee will be consulted as needed to resolve issues in which Divisions disagree with the AVC-FM's Space Allocation decisions.
6. The Space Management Working Group, chaired by the Director of Space Management, will review major Space Requests and Office of Space Management recommendations for advising and comment. This Working Group will meet regularly and consist of designated members from the following units:
 - Planning and Space Management
 - Business Affairs
 - Student Affairs
 - Academic Affairs
 - Division of Research
 - OneIT
 - Athletics, as needed
 - Other units, as needed
7. Divisions are responsible for:
 - a. Submitting Space requests through FM311 for any proposed change in use or Allocation of Space.
 - b. Designating a position as the point of contact for coordinating with Facilities Management regarding Space Use. This position will act as the department-level approver for all Space Requests submitted by their Division and, in the case of Academic Affairs and Division of Research, will meet twice yearly with Space Management to discuss space allocation requests associated with recruiting, hiring, grant proposals, new programs and other strategic initiatives.
 - c. Managing their Space allocation in compliance with the UNC Charlotte Space Standards and Planning Guidelines. [NOTE: currently under review; will add link once approved]
 - d. Exploring solutions within their own Space allocation prior to submitting a Space Request.

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Informing the Office of Space Management, for the purpose of updating records/appropriate reallocation, when Space is vacated due to new Space being allocated to the Division to accommodate an existing use that does not involve strategic expansion. Action to inform the Office of Space Management of the intent to vacate must be submitted via the “Intent to Vacate Form” found within the Space Request Form on the [Space Management website](#). Any allocation of new Space for an existing use results in the former Space becoming vacant and returned to unallocated status, at which time it becomes available to be reallocated by Facilities Management, based on University priorities, in alignment with the Space’s funding source and in conformance with [University Policy 601.4, Integrated Space Management](#). Within the Intent to Vacate Form, a Division may submit a supplementary request to repurpose the vacated Space for additional strategic use. Any such request will be reviewed in alignment with these procedures and weighed against other University priorities.

- e. Informing the Office of Space Management when they have chosen to reassign Space within their existing Allocation. Divisions have authority to make such decisions so long as the assignments meet the following parameters:
 - Are consistent with and do not violate any university policy
 - Do not change the original permitted use of the Space (for instance, converting a storage area into an office)
 - Do not impact instructional Space
 - Do not impact Space assigned to another Division
 - Do not require resources beyond the Division’s control
 - Do not interfere with any existing Space Use agreements or contractual relationships

8. The Office of Space Management is responsible for auditing Space Use and reporting information in accordance with UNC System Office requirements. Results from Space Use audits are communicated to key designees of each Division.

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B. Procedures for the review of Space Requests, Space Use, and Space Allocation

The procedures for communicating reassignment of Space, requesting acquisition or allocation of additional Space, construction of new Space, and alteration or renovation of allocated Space are outlined below.

1. Initiation of Review

a. Divisions:

- i. All Divisional Space requests must be documented using FM311.
- ii. Requests must be approved by the position responsible for Space Use as designated by the Division
- iii. Space requests must be submitted and approved before any alteration or renovation project can be initiated with FM Planning and Project Management.
- iv. All approvals for the Allocation of new Space must be supplemented by the immediate submission of an Intent to Vacate Form found on the Space Management website.

b. Facilities Management:

- i. Conducts audit or assessment, which may result in the decision to review the Space Use or allocation of a particular area of campus as it relates to institutional priorities as outlined in the Guiding Documents as stated in University Policy 601.4, Integrated Space Management.
- ii. Receives direction from the Chancellor's Cabinet to audit, assess, or review a prescribed area of campus or aspect of Space utilization.

2. Due Diligence Period

a. Divisions:

- i. Must provide a detailed explanation of the proposed use and the project's relationship to the overall operation of the unit. The information will form the basis of the initial analysis by the Office of Space Management. The Office of Space Management may, if needed, request additional information and/or clarification.

b. Facilities Management, Office of Space Management:

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- i. Consults with the requesting Division and those units directly affected by the request or review, to identify functional and Space needs, required attributes, and priorities.
- ii. Reviews Guiding Documents identified in University Policy 601.4, Integrated Space Management, as they pertain to the request.
- iii. Assesses, evaluates, and analyzes Space Use and utilization and presents findings to key designees within impacted Divisions.
- iv. Explores and evaluates potential solutions.
- v. Presents assessment and analysis findings and potential solutions to the Space Management Working Group for comment and advisement for requests impacting multiple Divisions, having widespread implications, or as deemed appropriate by the Director of Space Management.
- vi. Reviews analysis findings and potential solutions with the requesting Division and those units directly affected by the request or review and documents feedback.
- vii. May conduct multiple iterations of the due diligence process as necessary to develop informed decisions or recommendations.

3. Conclusion

a. Facilities Management:

- i. For all Space Requests involving fewer than 1,000 asf where all stakeholders are in agreement, the Director of Space Management is authorized to make final decisions. The Director of Space Management will forward these decisions to the AVC-FM for informational purposes.
- ii. For all Space Requests involving 1,000 asf or more, The Director of Space Management forwards recommendations to the AVC-FM for final decision-making. The AVC-FM reviews the recommendations and takes one of the following actions:
 - Approves the request as presented.
 - Denies the request; or
 - Recommends further study and development of

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- alternate solutions and recommendations.
- iii. The Office of Space Management will inform the requester of the action taken on the Space Request
- b. Divisions:
 - i. May request a review by the Vice Chancellor for Business Affairs in instances where they do not agree with Space Allocation decisions made by the AVC-FM. This request for review must be made in writing to the Director of Space Management. The request will be recorded within associated project files for record-keeping purposes.
 - c. Vice Chancellor for Business Affairs
 - i. May consult with other Vice Chancellors and the Chancellor as needed to resolve issues in which Divisions disagree with the AVC-FM's Space Allocation decisions.
 - ii. Will make considerations including but not limited to: timeline of request, alignment of requested use in relation to other building occupants/units, best and highest use of requested space and/or budget implications.
- 4. The Chancellor retains the authority for Space Allocations in Cato Hall.
- 5. The Director of Space Management is responsible for reviewing and updating these Procedures Supplemental to University Policy 601.4, Integrated Space Management and UNC Charlotte Space Standards Planning and Guidelines.