What We Heard: Space Management Policy Review Consultation

January 24, 2025

UNIVERSITY
OF ALBERTA

Table of Contents

Territorial Acknowledgement

The University of Alberta, its buildings, laboratories and research stations are primarily located on the territory of the Néhiyaw (Cree), Niitsitapi (Blackfoot), Métis, Nakoda (Stoney), Dene, Haudenosaunee (Iroquois) and Anishinaabe (Ojibway/Saulteaux), lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of all First Nations, Métis and Inuit nations.

To acknowledge the territory is to recognize the longer history of these lands. The acknowledgement signifies the University of Alberta's commitment to working in Good Relations with First Nations, Métis and Inuit peoples as we engage in our institutional work, uplifting the whole people, for the university for tomorrow.

Introduction

This document summarizes what was heard during the consultation on the Space Management Policy that occurred from September to December 2024. For ease of reference, the feedback and information that was gathered have been organized under key headings that align with the proposed structure of the updated Space Management Policy. Also included is a section that identifies areas of input that are more appropriately addressed at the procedure level.

This document is not a detailed report, but rather a summary of the feedback we heard that will inform and guide our work in updating the policy.

Engagement Process

To prepare for the drafting of the updated Space Management Policy, a Space Management Policy Working Group was formed to provide strategic guidance and input into the revised policy and to support the consultation process. Working group members provided guidance in the development of the consultation plan, attended town halls, led roundtable discussions and co-authored this report. The Space Management Policy Working Group received directions and guidance from the Space Optimization Oversight Committee (EOC).

Membership on the Space Management Policy Working Group included the following positions:

University Services, Operations and Finance
- Associate Vice-President, Infrastructure Planning Development and Partnerships, **Ashley Bhatia** (Chair)
- Director, Strategic Infrastructure Planning and Partnerships, **Joanne Bortnick**
- Head, Strategic Infrastructure Planning, **Jacqueline McLeod**
- Manager, Space Planning and Stewardship, **Tracy Johnson**
- Director, Facility Services, **John Benson**
- Senior HR Service Partner, HRHSE Partnerships, **Annette MacPherson**

Research and Innovation
- Portfolio Initiatives and Administration Officer, **Lucia Secchia**

College General Managers
- College General Manager, College of Health Sciences, **Christine Ma**
- Campus General Manager, Augustana, **Alexis Anderson**

Research Representatives
- Associate Vice President, Innovation and Knowledge Mobilization, **Darren Fast**
- Manager, Faculty Infrastructure, Faculty of Engineering, **Kelly Anderson** (representing CNAS)

Space Contact Representatives
- Business Services Officer, Alberta School of Business, **Nadine Badry**
- Faculty General Manager, Faculty of Native Studies, **Sara Horseman**

Other Team Members
- Associate General Counsel, Office of General Counsel, **Jax Oltean**
- External Relations, **Spencer Murray**
- Senior Partner, Communications & Marketing, **Julie Keyser**
- Office of the Registrar, **Anna Hughes**
- Manager, Student Affairs, Office of the Dean of Students, **Katherine Zwicker**
- General Manager, University of Alberta Students' Union, **Marc Dumouchel**
- Executive Director, Graduate Student Association, **Lewie Moodley**

Town Halls

Two town halls were held virtually in September 2024 and were attended by approximately 200 participants via Zoom and YouTube. The first town hall occurred on September 24 and the second on September 26. The sessions were recorded and are located on the Space Management Policy webpage. Each session provided an overview of the Space Management Policy, described what is under review and addressed how changes may impact space management and distribution across the university. The same information was presented at both events, followed by a Q&A discussion.

Roundtables

Four topic-based virtual roundtables occurred between October 31, 2024, and November 18, 2024. Opening remarks were provided by Ashley Bhatia and sessions were led by various Space Management Policy Working Group members.

Roundtable #1 - Student Experience - October 31, 2024. 18 people attended.
Roundtable #2 - Administrative Oversight - November 5, 2024. 16 people attended.
Roundtable #3 - Modifications to Space - November 5, 2024. 17 people attended.
Roundtable #4 - Teaching and Learning Spaces - November 18, 2024. 10 people attended.

Additional Engagement

Three additional engagements occurred in November 2024. Infrastructure Planning, Development and Partnerships (IPDP) met with the following committees.

November 1, 2024: EDI Leads Network - Topic: policy connection to Equity, Diversity and Inclusion Action Plan. 28 people attended.

November 13, 2024: Indigenous Advisory Council - Topic: policy connection to Braiding Past, Present, and Future. 14 people attended.

November 29, 2024: University Research and Innovation Advisory Committee: - Topic: Research Labs. 30 people attended.

The opportunity to submit written feedback was made available to all town hall, roundtable, and additional engagement participants as well as the broader university community through the email address: sipp@ualberta.ca. 5 emails were received.

What We Heard

Authority

Clarity, transparency, and engagement emerged as key themes during the roundtable discussions, most notably in the sessions on Administrative Oversight and Modifications to Space which included a focus on authority and decision-making.

Clarity on Roles and Responsibilities

- The need for clearly defined authority and decision-making roles and responsibilities was consistently highlighted throughout the roundtable discussions.
- The importance of a consistent approach to how decisions are made was emphasized, however, we also heard from some that maintaining a degree of flexibility within the colleges, stand-alone faculties, administrative portfolios, faculties, and departments is desirable.
- Some participants felt the *Interim Guidance Memo on Space Management* did not take into account the capacity or functional expertise of the colleges and stand-alone faculties to make informed space decisions and exercise their decision-making authority.

Ongoing Consultation and Engagement

- In both the town halls and roundtable sessions we heard that, in addition to being identified as an important core principle, early and ongoing engagement with interest-holders, in particular the users of the space, is key to supporting the role of decision-makers and ensuring a collaborative, transparent, effective, and informed decision-making process.

Feedback to be Considered for the Associated Procedure

- While the policy will address overarching decision-making authority and guidance, several roundtable participants recommended that appropriate levels of authority should be defined for space-related requests so that not all requests are escalated to the highest levels of authority.
- Similarly, it was suggested by some that escalation protocols to address conflicting space interests or priorities could help streamline the decision-making process.

Principles

The roundtable sessions were the primary source of the feedback we received on the policy principles. We began each roundtable session with a discussion on principles that set the foundation for the conversation and encouraged participants to approach the discussion with institutional goals and values in mind. In all engagements, participants emphasized inclusivity, shared stewardship, and the importance of balancing space optimization and efficiency with the diverse needs of the campus community.

Principles with Purpose

- Many roundtable participants expressed that the principles should be explicit, actionable, and meaningfully inform and guide the procedures of the policy and implementation of space management practices.
- Alignment with the university's strategic plan, *SHAPE*, and other institutional strategic plans, was noted by several participants as key to ensuring that space management principles will support the core institutional mandates of education, research, and community engagement, as well as other institutional priorities. In particular, driving space related decision-making in alignment with institutional goals such as enrollment growth and student experience and with the One University model. Similarly, this feedback was echoed in consultations with the Indigenous Advisory Council and the EDI Leads Network.
- Members of the Indigenous Advisory Council emphasized the importance of principles that are clear, strongly connected to *Braiding Past, Present and Future*, and that support and drive action towards Indigenization and decolonization. There was also a suggestion to incorporate the practice of pipe ceremony in the policy principles to set the intention and commitment to begin and practice our work in a good way.
- Feedback from the EDI Leads Network included a recommendation that equity, diversity, and inclusion[1] related principles are explicit, reflect the diverse needs of the campus community, and cascade through procedures, planning documents, and implementation. To further emphasize the importance of EDI in space management, it was also suggested that an EDI lens be applied to the policy as a whole.
- Ensuring consistent use and definitions of terms related to equity, diversity, and inclusion in the policy and across all planning documents was highlighted.

---

[1]Following the completion of consultation with the broader University community, there was a shift in language from equity, diversity, and inclusion to access, community and belonging. The policy and all associated procedures will be drafted to align with the updated terminology as appropriate.

Principles that Resonated

- The principles that resonated most with participants across the roundtable discussions were those with a focus on shared stewardship; equity, diversity, and inclusion; transparent and fair decision-making; and effective and efficient space utilization.
- Accessibility was emphasized across all roundtable discussions and spanned a range of related topics including principles that support the creation of safe and inclusive spaces; balancing physical access and security with providing welcoming campus spaces; and reasonable access to and distribution of quality shared spaces across each campus.
- Many participants agreed with and welcomed the principle of shared stewardship to promote efficient space use, interdisciplinarity and collaboration, and adaptability, however, it was also acknowledged that, for many, this represents a new approach to space and necessitates a culture shift.
- Consideration for the whole student experience was a consistent theme throughout consultation.

Acquisition and Disposition of Space

Acquisition and disposition of space was primarily discussed during the Modifications to Space roundtable session and in consultation with the University Research and Innovation Advisory Committee (URIAC). The key themes that emerged from the feedback include clarity, agility, and strategic alignment.

Clarity on Roles, Decision-making, and Agreements

- Stronger language is needed to address decision-making authority for the acquisition or disposition of space, most notably as it relates to external entities or groups.
- Some participants questioned how space optimization and growing within our existing campus footprints aligns with acquisition of space. They stated that decisions to acquire or dispose of space should demonstrate alignment with institutional strategic priorities.

Agility

- Allowing for leasing agility was suggested as a way to facilitate and accommodate specialty space and research needs, especially when the right type of space is not readily available on campus and the need is short term.

Indigenous Perspectives

- Discussion with the Indigenous Advisory Council emphasized that land acquisition and ownership practices are a product of colonialism and that it should be acknowledged that this differs significantly from the way Indigenous peoples view and develop relationships with the land.

Feedback to be Considered for the Associated Procedure

- Several participants noted challenges with enforceability when external groups have been granted use of university space, highlighting that the absence of established terms or agreements often leads to a sense of entitlement among the groups, making it difficult for the university to reclaim or manage the space effectively.
- Clear parameters for the use of the space, a defined agreement term, and expectations for the condition of the space when it is vacated are needed.

Modifications to Space

The topic of Modifications to Space was discussed in several roundtable sessions and also featured as a dedicated session of its own. Key themes that emerged include equity, responsibility, consultation, and accessibility.

Equity and Responsibility

- Participants emphasized the need for the policy to clearly define responsibility for the upkeep and maintenance of spaces. Additionally, they highlighted the importance of clear parameters to guide modifications, ensuring alignment with institutional goals and regulations, while considering long-term lifecycle costs and the impact on future operations.
- Equity issues related to the costs of space modifications also emerged as a concern, particularly with regard to faculties that may not have the financial resources to make necessary updates. Some participants pointed out that areas with smaller budgets may struggle to implement changes that could significantly benefit students and researchers. A more equitable approach to funding space modifications was suggested to ensure that all faculties have the opportunity to create spaces that support learning and research.

Communication

- A consistent theme in the discussions centered on the importance of communication with users when modifying spaces. Participants emphasized

that engaging users early in the process—particularly those who use or work in or around the spaces being modified—ensures that their needs and concerns can be addressed.

Accessibility

- The importance of consultation during the modification process, particularly to ensure that spaces remain or become accessible, was reiterated by many participants throughout the consultation process. Several participants highlighted that accessibility should be a key consideration when planning changes, with users of diverse needs involved in discussions to ensure modifications enhance, rather than hinder, accessibility.
- The topic of modifications to historically significant or landmark buildings was also raised, with participants noting that clear parameters should be set for what changes can be made to such buildings, ensuring both accessibility and preservation of their historical or cultural significance.

Feedback to be Considered for the Associated Procedure

- Flexibility was recognized as essential in accommodating different needs across campus, but it was also noted that the scale and impact of proposed modifications should be carefully considered. It was emphasized that clear guidelines for decision-making would help manage priorities, ensure that modifications support both functionality and inclusivity, and limit confusion around naming or space use changes. This includes considering the long-term lifecycle costs of building modifications and their impact on future operations and maintenance.

Use of Space

The topic of Use of Space was discussed at several of the roundtable events and the feedback echos that in the Principles section: equity, accessibility, and effective management of shared spaces. Participants emphasized the importance of transparency, inclusivity, and clear guidelines to address challenges in the allocation and utilization of spaces across campus. Much of the discussions were focused on procedural elements.

Equity and Accessibility

- Many of the comments in the roundtables centered around the location, proximity, and distribution of unique and accessible spaces. When these spaces are perceived to be owned by a faculty, students from other areas of study don't

feel welcome to use the space. This fosters a feeling of inequity among programs.

- Accessibility concerns were identified as critical for inclusive use of spaces. Comments ranged from the need for better accessible furniture to barrier-free paths of travel, including the location of DATS pick-up spots that are only accessible from the perimeter of our campuses.

Transparency and Shared Use

- Reluctance to share spaces and resistance to change were highlighted as cultural barriers. "Cultural" refers to the culture of a faculty or area of study. Although there is a willingness to share spaces such as research labs, principles and clear guidelines are required, along with a dedicated coordinator with authority to administer the shared use.
- Transparency in space usage and transitioning scheduling from faculty control to central booking was identified as critical to maximizing space utilization and encouraging shared use between faculties. However it was also noted that an alternate approach to managing shared use or booking of unique spaces that exist within faculties may be needed.

Effective Space Planning and Utilization

- Planning should balance unique, purpose-built spaces with flexible, shared-use areas. Policies should address security considerations while maintaining a welcoming environment for diverse individuals.
- Walkability between classes and acceptable adjacency of scheduled spaces were emphasized to avoid logistical challenges.
- Technology, particularly for hybrid teaching environments, needs consistent integration across campus spaces.

Feedback to be Considered for the Associated Procedure

- Centrally scheduled teaching spaces were recommended, with clear booking priorities and timelines. Utilization of time blocks outside of typical prime time hours (e.g., 8–9 AM and after 2 PM) could improve space efficiency.

Other Notable Areas of Input

The following includes other notable areas of input that are not directly related to the Space Management Policy but will be shared with the relevant project teams for their consideration.

Space Standards and Planning

- Concerns that space standards do not adequately address unique or specific functional space requirements and may also overlook equity, diversity, and inclusion considerations.
- The ability to accommodate growth and implement space standards within existing space footprints, especially in older buildings.
- Acceptable adjacencies and appropriate location, distribution, and access to student spaces.
- Space entitlements and guidelines including the impact of work from home on space assignments.

Maintenance and Renovation

- Perception that deferred maintenance costs are being borne by research grants.
- Clarification of responsibilities for costs related to base building systems and equipment and program related systems and equipment.
- Financial responsibility for costs associated with moves or renovations.

Administration, Operation, and Maintenance of Shared Spaces

- Processes for managing the booking and maintenance of shared spaces vary across faculties and departments.
- Visibility of the availability of shared spaces via a shared or central booking system.
- Availability of shared and consistent technology in shared spaces.

Conclusion

The valuable insights gathered during the consultation process has highlighted several key considerations that will shape the development of the Space Management Policy, ensuring that it is both effective and reflective of the diverse needs of the university community as we work towards improving campus infrastructure utilization and space optimization in alignment with institutional strategic priorities.

Feedback and suggestions that are procedural in nature will inform the updates to and development of the associated procedures, further supporting the implementation of the Space Management Policy. In addition, feedback received that may be relevant to other related policies and procedures will be forwarded to the appropriate units for consideration (see Appendix I).

The first draft of the Space Management Policy, accompanied by this report, will advance through the governance process for review and feedback in early 2025. Following any edits, the final draft of the Space Management Policy will be submitted to governance for recommendation and Board of Governors approval in Fall 2025.

Appendix I

During the Space Management Policy consultations several other related topics were mentioned that are out of scope for the Space Management policy. Where current policies and procedures exist that address these topics, Infrastructure Planning Development and Partnerships (IPDP) recommends that they are reviewed and updated and, where appropriate, align with the revised Space Management Policy. For topics that are not currently addressed in policies or procedures, feedback collected during the consultation will be shared with the appropriate areas of responsibility to consider creating new policies, procedures, or guidelines that will further support guidance and clear direction.

Existing Policies and Procedures

Signage Policy

Ensures a consistent approach to determining location, scale, design, and installation of signage; a consistent approach to signage across the institution that contributes to a safe, well-maintained, and interoperable (cohesive) environment; all permanent signage meets current standards, practices, and applicable policies and procedures.
Related procedure: Posting Announcements, Notices, and Banners Procedure
Review and update by: Office of the AVP, IPDP

Functional Naming of Physical Entities Procedure

(Parent policy: Naming Policy)
Outlines the steps that must be followed in the functional naming or renaming of a physical entity.
The Naming Policy is currently under review. Procedural updates are recommended to occur following the policy update to ensure alignment.
Review and update by: Office of the AVP, IPDP

Lands and Buildings Security Policy

Maximize the safety of the university community and protect the assets of the institution. Manage the costs associated with safety and security measures.
Related procedure: Lock Changes, Key Request, and Key Control Procedure
Review and update by: Office of the AVP, Utilities and Asset Management and Operations (AMO)

Canvassing and Solicitation Policy

Sets out the position of the University on canvassing and solicitation by non-student and non-university affiliated persons or groups.
Related procedure: Canvassing and Solicitation Procedure
Review and update by: Office of the VP, USOF

Equipment and Furnishings Asset Management Policy

Ensures the university maintains and enhances the appropriate asset management environment including: compliance with applicable legislation; maintaining registration systems and internal controls; strategic plans for assets requirements, maintenance, and replacement; efficient asset utilization; and appropriate equipment retirement and disposal.
Related procedure: Furniture Repair Procedure
Review and update by: Office of the AVP, Finance, Procurement and Planning and Office of the AVP, IPDP

New Policies and Procedures for Consideration

Research Laboratory Utilization Procedure

Procedure that supports efficient research laboratory utilization through assessment of research revenue, alignment of research personnel to assigned areas, and establishing shared support spaces.
Create by: Office of the Vice-President, Research and Innovation

Research Equipment and Facilities Use Procedure

Procedure that supports sharing of equipment and related space between researchers and faculties to reduce space and infrastructure, and operating costs.
Create by: Office of the Vice-President, Research and Innovation

Alternative Workplace Criteria

Criteria that help support the new approach to undertaking work at the university with an opportunity to re-evaluate policies and procedures to support remote working.
Create by: Office of the AVP, Human Resources, Health, Safety and Environment (HRHSE)