University of Alberta

FDC Learning Spaces
Subcommittee Report

2012
FDC Learning Spaces Subcommittee (FDC LSS)  
Final Report July 2012

A. Introduction

A learning space is any space that provides for formal and/or informal learning. Our campus consists of many types of learning spaces, ranging from traditional classrooms and seminar space, to library and study space, to student community space, to learning spaces in residences. An overarching goal in the development of space should be harmonization of design and function.

All space on campus is University space. That is, a student studying in one faculty has access to buildings associated not only with their home faculty, but to all learning spaces on campus. The quality of learning spaces on our campus is central to the academic experience, and thus the overall university experience, of both learners and instructors. Institutions have opportunities when designing and constructing new buildings or renovating older spaces to ensure that spaces that are designated as either formal or informal learning spaces maximize and enhance the potential for learning. Furthermore, well designed learning spaces signal to the population of students, faculty, and staff that they are part of a world class institution – in that way, well designed learning space can help to promote the reputation of a University, just as poor learning spaces can detract from institutional reputation. A properly designed learning space can serve to attract and retain talented people, and inspire those people in their learning and discovery activities. Thus, it is important for us to have processes in place for the design and development of new and renovated learning spaces.

Over the past 20 years, Facilities and Operations has been a leader in Canada in the development and identification of best practices and principles around how the institution constructs, repurposes and renovates facilities and spaces. As the campus has changed and evolved, principles and practices for the design and development of learning spaces have been periodically reviewed and refreshed by both the institution and government. These reviews involve a variety of processes like design charettes, peer reviews and literature reviews. However, despite the excellent work, the wider academic community has not been aware, for the most part, of the processes that were used in designing new spaces. There was increasing interest expressed within the wider campus community about the quality of institutional learning spaces and about the design processes used in the development of these spaces. Two standing committees of GFC, the Committee on the Learning Environment (CLE) and the Facilities Development Committee (FDC), agreed that the process for development of learning spaces should be reviewed. In 2010, the Chairs of FDC and CLE agreed that a subcommittee be created (the Learning Spaces Subcommittee) that would identify and enhance current processes to aid in the planning and design of formal and informal learning spaces across all campuses.

After consultation with GFC CLE, the Teaching, Learning and Technology Council (TLAT), and the Strategic Initiatives Group (SIG), it was deemed appropriate for such a subcommittee to be within the jurisdiction of FDC under GFC Policy (Appendix 1). At the GFC FDC meeting of February 23, 2010, the formation of a GFC FDC Subcommittee on Learning Spaces (FDC LSS) was approved.
At its meeting of October 28, 2010, FDC approved terms of reference and composition of the FDC Learning Spaces Subcommittee (Appendix 2), which established D. Marshall, Deputy Provost and FDC Chair, and B. Becker, Associate Vice-President, Facilities and Operations, as co-chairs of the Subcommittee.

The following tasks were identified for the subcommittee:

1. Identify principles for development and design of learning spaces that stimulate learning, discovery, creativity, and engagement.
2. Review and discuss current processes used for the planning and design of learning spaces on campus.
3. Identify gaps in current processes.
4. Identify barriers to principles identified in Task 1 that prevent the University from achieving optimal learning spaces.
5. Identify strategies to address gaps and barriers in the current process.
6. Identify recommendations.

The FDC LSS met 8 times during December, 2010 and June, 2011:

December 7: Review tasks and establish timelines to final reporting. At this meeting, the Subcommittee received a detailed review of the Space Management Manual which outlines standards for space allocation and management at the UofA. This manual applies to both existing and new space, and is a tool that is used by Facilities and Operations to ensure consistency in approach to the design and development of space across all campuses. The space categories in the Space Management Manual that are germane to this exercise were identified as being the following:

- Category 1: Classroom, Lecture and Seminar Space – Introduction
- Category 6: Library and Study Services Space
- Category 11: Student and Staff Housing Space
- Category 13: Student Community Space

January 27: Development of activities and timelines; review of current process for space planning (see Appendix 3: Planning and Design – Capital Projects through Approval Stages)

March 2: Setting the stage (Lisa Givens, Ben Louie reviewed literature and design principles); discussion of principles (design/operational) for the development of learning spaces

March 22: “Day in the life” exercise (exercise describing a typical day – followed by an ideal day - in the life of students, faculty and staff on campus related to learning spaces)

April 13: Design charette (using the Katz-Rexall atrium as the space)

April 27: Tour of Edmonton Clinic Health Academy (ECHA) and Centennial Center for Interdisciplinary Sciences (CCIS), followed by discussion of key principles for design and development of learning spaces

May 30: Review of preliminary recommendations

June 7: Review of draft report
June 30: Approval of Final Report

The discussions of the FDC LSS highlighted that learning happens everywhere on campus – classrooms, labs, faculty offices, residences, SUB, and other areas. This report, however, is limited to discussions related to those learning spaces outlined in the space management manual, categories 1 (classrooms), 6 (Libraries), 11 (student housing), and 13 (student community space), as highlighted above.

B. Principles for Planning and Design of Learning Spaces

The FDC LSS affirms, following a literature review, processes examined over the past 6 months, and debates and discussion, the following principles for design of learning spaces:

- **Space on campus is shared learning space** – we want a unified campus that encourages a sense of community rather than one which is territorial in nature.

- **Inclusivity and Accessibility** in order to create a sense of community and connectivity on campus. Building design should present an invitation and opportunities to explore the wider campus and should encourage cooperation and collaboration among disparate groups.

- **Safety and security** to promote a sense of well being in spaces. Special attention is required in design, including flooring, lighting, and attention to privacy considerations including locks, protocols/hours of operation.

- **Comfort and convenience** that encourage interaction with the environment and a balance between form and function. Important considerations include air quality, light, cleanliness, natural features, finishes, ergonomically friendly furniture, power sources, and appropriate work surfaces.

- **Spaces should be flexible** to adapt to a variety of pedagogical and learning styles. Flexible spaces should include furniture that is moveable and learning technology that is current and can accommodate various configurations.

- **Spaces should be organized into zones of operation** that allow for user choice and self-regulation, e.g., quiet/study space; meeting space; eating space; office space.

- **Attention should be paid to environmental stewardship by incorporating sustainable features** into the design of learning spaces (e.g., the terrazzo flooring in CCIS; wood paneling in ECHA; sustainable features within Triffo Hall).

- **Aesthetics are important** – buildings need to be functional, but spaces should inspire creative and innovative ideas.
• Every classroom on campus should have established **minimum standards for learning technology.**

• Spaces need to be designed to encourage **ease of day-to-day maintenance** and operation. Operation includes, but is not limited to, cleaning, waste management, utility consumption, and access.

Whether space is new, renewed, or repurposed, the incorporation of these planning and design principles will ensure that students, staff and faculty realize they are at a world class institution.

C. Current Processes used in Planning and Design of Facilities

The FDC LSS spent a considerable amount of time discussing current process used by Facilities and Operations in the planning and design of learning spaces. We highlight below each aspect of the current process (Appendix 3):

1. Facilities and Operations have developed a **Space Management Manual** that **outlines standards** for space on campus.

2. Each unit develops a **General Space Program (GSP)**, in consultation with Facilities and Operations and in accordance with the standards of the Space Management Manual. The GSP is a 5-7 year forecast of space needs for a unit.

3. Space is **planned and designed for a single unit or multiple units.** Space is planned and designed in accordance with the GSP of each unit.

4. Building planning and design, whether for new, expansion or repurposed buildings, aims to **support formal and informal learning.**

5. The goal of planning and design is to **align best practice and principles with available funding.** Value engineering is used to balance all needs within a prescribed budget.

6. **Users are consulted** early in the design process. Users are empowered to express needs that allow for optimal usage, balancing all program needs. Where it is not possible to meet with all users of space, user representatives are consulted and they are in turn to consult with those whom they represent.

7. Design process, where possible, include a **mock-up/virtual simulation** of the space designed to scale so that user feedback is maximized to address issues early. Where not possible, tours of other “like spaces” on campus occur.

8. Once a facility has been built there is an **ongoing stewardship processes** to ensure that the building is operating and being used as originally conceived. This stewardship process does allow for changes as required for immediate functional concerns, but a “break-in” period is established for users to acclimatize themselves on how best to work in the new
space. During this time, issues, concerns, and complaints are registered and reviewed in accordance with current university practices. Faculties, through the assigned individual responsible for building operations, work with Facilities and Operations to address concerns raised.

D. Gaps in Current Process

- Users do not appear to know that a space management manual exists on campus.

- There are some concerns relative to the consultation process in the planning and design of learning spaces. The challenge is gathering information from a variety of stakeholders who are often represented by a single individual or a smaller subset of people. In particular, it is important in the planning and design of learning spaces to ensure the student voice is heard.

- Operational principles and user education for common learning spaces should be developed in the facility planning and design phase. These should be revisited once the building is open.

- There is a lack of understanding on the purpose of value engineering and the changes that result, which if not communicated, may result in unmet expectations.

- There is a lack of “trickle down” communication from the project committees to the end users during all project phases, regardless of whether facilities are new, renewed, or repurposed.

- There is a lack of change management processes for those that may have to change their work practice or have a different work experience within the space as they move into new, renewed, repurposed space. Where possible, simulated or mocked space should be used as part of the planning process.

- Although there are informal tools, there is lack of a formal tool/program that captures lessons learned from one project that can then be passed on to future projects.

- Ensuring lessons learned from the Faculty or unit level are passed up to the design team for consideration on other and future projects.

- There is a lack of contingencies within budgets to allow for issues mitigation during the “break in” period of a new facility. Recently, this practice has been incorporated and accepted by government as a direct project cost on larger-scaled projects.

- The established process that allows faculties/departments/units to signal that there are issues with facilities in the planning and design phase is not managed consistently across the various faculties.
E. Barriers to Addressing Gaps

- Limited capital funding for new, renewal and repurposing projects.
- Although it is recognized that value engineering provides important budgetary options during the course of a project, the original design of learning spaces should be preserved whenever possible.
- There are two barriers with lessons learned – one is the lack of a formalized data base to capture lessons learned, and the second is the perceived failure to acknowledge or accept lessons learned.
- Lack of understanding of the different processes being used to identify representatives and communication methods across the institution - making sure we get the right people at the table
- Lack of change management procedures around personal work processes, where a change in work habits may be required as new or altered space is developed.
- The dynamic nature of the University with long construction time frames that result in new and different needs that often arise after move-in.

F. Strategies to Address Gaps and Barriers

1. Continue to promote the principle highlighted in the Comprehensive Institutional Plan that the academic enterprise drives capital, human and financial resources. Use this principal with funders, including government and private philanthropists to encourage increased levels of funding.

2. Continue to plan and design facilities during tough financial times, so that when money is available, we are ready with proposals for submission.

3. Formalize the process for collecting, recording and communicating lessons learned, so that project, faculty, staff, student and user issues are captured along with the corrective measures that were taken to resolve issues.

4. Establish project contingencies in budgets that can be allocated for change management. There should be adjustment factors based on type and complexity of space, as well as level of work process changes - not just as a percentage of project cost.

5. Work with Student Associations to develop a process that ensures student input at every stage of planning, design, and construction, as well as during the “break-in” period.

6. Maintain close liaison between Facilities and Operations and the Provost’s office to create awareness and maintain the capacity to find compromise. Both portfolios should work together to handle issues so that Facilities and Operations are not disconnected from academic program discussions.

7. Formalize a process/plan that would assess and prioritize every learning space on campus over a 10-year period. In the short term – develop a comprehensive list of learning spaces
and their relative condition; in the longer term – manage the list to bring all learning spaces across the institution to a minimum standard, as funding becomes available.

8. Utilize a variety of methods and time frames to survey users on functionality and utilization of learning spaces on campus.

9. To illustrate design and plans for end users use tours, mockups, and virtual simulations wherever possible.

10. To aid communication, consider an annual report from Facilities and Operations to FDC highlighting new space that has opened in that year, existing space that was renewed or repurposed, and number of learning spaces that have changed as a result. The report should also address the quality of learning space.

11. Develop a utilization and functionality metric to assist in evaluation of quality of space. This metric would balance usage with functionality and aesthetics.

G. Recommendations

**Short Term (less than 3 years)**

1. Any planning and design projects related to learning spaces should incorporate the principles in this document. Responsibility: Facilities and Operations. Timeline: immediate
   a. Build in flexibility in new spaces that allow for future developments in pedagogy and learning to be incorporated.
      Responsibility: Faculty, staff, students and administration of unit(s) undergoing facility improvements, in conjunction with Facilities and Operations.
   b. Evaluate power supply required to support future learners.
      Responsibility: academy and Facilities and Operations
   c. Consider development of variety of types of space in new or repurposed buildings.
      Responsibility: academy and Facilities and Operations
   d. Focus on welcoming spaces in design (e.g., use of finishes such as wood, stone, etc)
      Responsibility: Facilities and Operations
   e. Maximize use of natural light in design of spaces; where this is not possible, pay careful attention to lighting.
      Responsibility: Facilities and Operations
   f. Encourage incorporation of special features into design of space that enhance creativity and reputation.
      Responsibility: academy and Facilities and Operations

2. There should be coordination of effort in the planning and design of learning spaces, and this effort should extend to education of and communication with users.
   Responsibility: Provost’s Office, Facilities and Operations, Faculty administration.
   Timeline: immediate.
3. Continue and expand education and communication around current policy and procedures on space planning and development.
   Responsibility: Provost’s Office, Facilities and Operations
   Timeline: 1 year

4. Evaluate the current stewardship process that occurs post-construction to ensure that the building is functioning as originally planned, while adapting to program changes. Operation/oversight committees must be diligent in listening and relaying the voices of the users they represent.
   Responsibility: Unit, Facilities and Operations, Provost’s Office.
   Timeline: 1 year

5. Develop minimum standards for technology in learning spaces on campus.
   Responsibility: academy and AICT
   Timeline: 1 year

6. In addition to renewal and repurposing of existing facilities and building of new facilities, there should be periodic review of existing learning spaces on campus to ensure that learner needs are being met.
   Responsibility: Facilities and Operations, FDC
   Timeline: 2 years to develop the initial inventory

7. Establish a change management process for end users as part of the facility planning and design process.
   Responsibility: unit with Facilities and Operations.
   Timeline: on-going.

Long Term (greater than 3 years)

1. Renew or repurpose existing learning spaces in accordance with the 10 year plan that Facilities and Operations develops, as funding becomes available.
   Responsibility: Facilities and Operations, FDC
   Timeline: continuous

2. Identify common learning spaces that share functionality, including the type of pedagogy used in the space.
   Responsibility: Provost’s Office, CLE, Centre for Teaching and Learning
   Timeline: 3 years

3. Assess processes for planning and design of learning spaces not captured within this report (e.g., laboratories, faculty offices, residence living quarters, and other areas).
   Responsibility: FDC subcommittee
   Timeline: 4-5 years

4. Review processes for the development of learning spaces.
Responsibility: FDC subcommittee.
Timeline: every 5-7 years
APPENDIX 1 – GFC FDC Jurisdiction

1. **Post-Secondary Learning Act (PSLA):** The PSLA gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs (Section 26(1)) and provides that GFC may make recommendations to the Board of Governors on a building program and related matters (Section 26(1) (o)). Section 18(1) of the PSLA give the Board of Governors the authority to make any bylaws “appropriate for the management, government and control of the university buildings and land.” Section 19 of the Act requires that the Board “consider the recommendations of the general faculties council, if any, on matters of academic import prior to providing for (a) the support and maintenance of the university, (b) the betterment of existing buildings, (c) the construction of any new buildings the board considers necessary for the purposes of the university [and] (d) the furnishing and equipping of the existing and newly erected buildings [...]” Section 67(1) of the Act governs the terms under which university land may be leased.

2. **GFC Facilities Development Committee (FDC) Terms of Reference – Section 3. Mandate of the Committee:** “[...]

Delegation of Authority: Notwithstanding anything to the contrary in the terms of reference above, the Board of Governors and General Faculties Council have delegated to the Facilities Development Committee the following powers and authority:

**A. Facilities**

1. To approve proposed General Space Programmes (Programs) for academic units.

2. (i) To approve proposals concerning the design and use of all new facilities and the repurposing of existing facilities and to routinely report these decisions for information to the Board of Governors.

(ii) In considering such proposals, GFC FDC may provide advice, upon request, to the Provost and Vice-President (Academic), Vice-President (Facilities and Operations), and/or the University Architect (or their respective delegates) on the siting of such facilities. (GFC SEP 29 2003)

**B. Other Matters**

The Chair of FDC will bring forward to FDC items where the Office of the Provost and Vice-President (Academic) and/or the Office of the Vice-President (Facilities and Operations), in consultation with other units or officers of the University, is seeking the advice of the Committee.

**C. Studies**

In light of the academic priorities set by General Faculties Council, to initiate studies,
and respond to requests for studies, opinion, and information within the purview of its
general responsibilities and make reports and recommendations to the appropriate
office or committee. (GFC 29 Sep 2003)

D. Sub-Delegation

To appoint such subcommittees, and to delegate to such subcommittees or to the
Vice-President (Facilities and Operations) such of its powers, duties and functions, or
any part thereof, including the power of sub-delegation and subject to such conditions
as it deems necessary. (GFC 29 SEP 2003)”

3. UAPPOL Space Management Policy and Space Management Procedure: The
respective roles of GFC FDC and the Vice-President (Facilities and Operations) with regard
to institutional space management are set out in this Board-approved Policy and
attendant Procedure. To access this policy suite on line, go to: www.uappol.ualberta.ca.
APPENDIX 2

GFC Facilities Development Committee (FDC)
Learning Spaces Subcommittee
Terms of Reference

Purpose:

To identify new, and enhance current, processes to aid in the planning and design of formal and informal learning spaces across all campuses.

Definition of Learning Space:

A learning space can be any space that provides for formal and/or informal learning. The Facilities and Operations Space Categories and Relationship Matrix is part of the Space Management Manual and is used for space distribution on campus and includes the following categories related to learning spaces:

- Category 1 (Classroom, Lecture and Seminar Space – Instruction)
- Category 6 (Library and Study Services Space)
- Category 11 (Student and Staff Housing Space)
- Category 13 (Student Community Space)

The Space Management Manual is a set of guidelines, standards and benchmarks to aid in the management, evaluation, planning, and design of all campus building spaces. All but one of the space categories align with those used in Alberta Infrastructure’s Post-Secondary Space Classification System – Clinical Space has been added to accommodate the University’s specific needs. The categories selected (1, 6, 11 and 13) are those related specifically to the terms and reference of the FDC Learning Spaces Subcommittee. (See Attachment 1 - Facilities and Operations Space Categories and Relationship Matrix for all categories and definitions):

Tasks:

7. Identify principles for development and design of learning spaces that stimulate learning, discovery, creativity, and engagement.
8. Review and discuss current processes used for the planning and design of learning spaces on campus.
9. Identify gaps in current processes.
10. Identify barriers to principles identified in Task 1 that prevent the University from achieving optimal learning spaces.
11. Identify strategies to address gaps and barriers in the current process.
12. Identify recommendations.

Potential Strategies for Committee:

- Design Charette on learning space
- Literature search
- Dialogue/debate
- Focus groups
- Facility tours
- Presentations

Outcome:

Recommendations to GFC Facilities Development Committee for renewing of current, and design and development of new formal and informal learning spaces.

Subcommittee Composition*:

<table>
<thead>
<tr>
<th>Co-Chairs</th>
<th>ex officio</th>
<th>D. Marshall, Deputy Provost B. Becker, Associate Vice-President, Facilities and Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLE Member</td>
<td>Lisa Given</td>
<td></td>
</tr>
<tr>
<td>FDC/CLE Member</td>
<td>Frank Nargang</td>
<td></td>
</tr>
<tr>
<td>FDC Member</td>
<td>Jose da Costa</td>
<td></td>
</tr>
<tr>
<td>TLAT Member</td>
<td>Trevor Woods</td>
<td></td>
</tr>
<tr>
<td>GSA Representative</td>
<td>Nima Yousefi Moghaddam</td>
<td></td>
</tr>
<tr>
<td>SU Representative</td>
<td>Zach Fentiman</td>
<td></td>
</tr>
<tr>
<td>Undergraduate Student-at-large</td>
<td>Amanda Lim/Bryanna Rousselle</td>
<td></td>
</tr>
<tr>
<td>Graduate Student-at-large</td>
<td>Vikki Northrup</td>
<td></td>
</tr>
<tr>
<td>NASA Representative</td>
<td>Russell Eccles</td>
<td></td>
</tr>
<tr>
<td>University Architect</td>
<td>Ben Louie</td>
<td></td>
</tr>
<tr>
<td>Learning Services</td>
<td>Ernie Ingles</td>
<td></td>
</tr>
<tr>
<td>Academic Information and Communication Technology (AICT) Representative</td>
<td>Trevor Woods</td>
<td></td>
</tr>
<tr>
<td>Ancillary Services Representative</td>
<td>Dima Utgoff</td>
<td></td>
</tr>
</tbody>
</table>

*The Subcommittee may engage individuals who are not members to assist on an ad hoc basis with specific tasks or strategies.
<table>
<thead>
<tr>
<th>Assignable Space Categories</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Classroom, Lecture and Seminar Space - Instruction</td>
<td>Assignable space primarily used for scheduled instruction that is not tied to a specific subject or discipline due to equipment or configuration; includes tiered and non-tiered rooms, related service spaces and break-out rooms; may include spaces for interD student learning and collaboration. To the maximum extent possible, Category 1 space is centrally scheduled.</td>
</tr>
<tr>
<td>2. Laboratory, Shop and Studio Space - Instruction</td>
<td>Assignable space used for instruction that requires special purpose equipment, furnishings and/or room configuration that ties the instruction to a specific curriculum component or discipline(s); activities include student participation, experimentation, observation or practice in a field of study; includes related service spaces and may include specialty spaces such as teaching clinics, animal facilities and greenhouses; excludes staff offices. Most Category 2 space is scheduled although some types are used on a more informal basis such as studios, workrooms and practice rooms.</td>
</tr>
<tr>
<td>3. Research Space - Laboratories, Shops, Project Space and Other Research Space</td>
<td>Assignable space used primarily by Faculty, graduate students and research staff for laboratory experimentation, research or training in research methods, professional research and observation, interD and collaborative research, or structured creative activity with a research purpose; includes related service spaces and may include specialty spaces such as animal facilities and greenhouses; excludes staff offices. Most of the University’s farm space is reported under this category as its prime use is for research.</td>
</tr>
<tr>
<td>4. Academic Offices and Related Services Space</td>
<td>Assignable office space (individual, multi-person, workstation, etc.) used for academic and research staff, academic department leadership and direct administration, and graduate students; may be dedicated or shared (i.e. hotelling); includes agencies, centres or institutes that are linked to University core instruction or research function; includes related services spaces and program/ discipline-specific libraries, meeting rooms, teleconference and videoconference rooms that are non-instructional, and non-public lounges; may also include ‘informal’ interD and collaboration space for academic and research staff and graduate students.</td>
</tr>
<tr>
<td>5. Administrative Offices and</td>
<td>Assignable office space (individual, multi-person, workstation, etc.) used for staff in central administration units, non-</td>
</tr>
<tr>
<td>Assignable Space Categories</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Related Services Space</td>
<td>academic and student support service units (i.e. all office space not included under Academic or Ancillary); may be dedicated or shared (i.e. hotelling); includes related services spaces as well as meeting rooms, teleconference and videoconference rooms that are non-instructional, and non-public lounges.</td>
</tr>
<tr>
<td>6. Library and Study Services Space</td>
<td>Assignable space used for the acquisition, processing, storage, circulation, and study of multiple forms of library holdings, learning resource materials, digital information and media; includes areas for study and accessing technology, including those enclosed in a library facility and those distributed throughout the campus; Note: CAFM includes library offices and related service spaces.</td>
</tr>
<tr>
<td>7. Athletic Space</td>
<td>Assignable indoor space used by students, staff and/or public for athletic, physical education or wellness activities; includes related service spaces; excludes outdoor athletic fields.</td>
</tr>
<tr>
<td>8. Farm Space</td>
<td>Assignable indoor space for animal handling or shelter or for handling, storage or protection of agricultural products, materials, supplies, vehicles or implements; includes related farm operation service areas; excludes farm space, animal care and greenhouse space used primarily for instruction or research purposes (included under Categories 2 and 3); excludes outdoor purposes (included under Categories 2 and 3); excludes outdoor fields, gardens, plots, etc.</td>
</tr>
<tr>
<td>9. Central Support Services Space</td>
<td>Assignable space for the physical and logistical services/departments/units essential to the operation of the University but not directly involved in a public service or University core instruction or research function; includes services that generally are centralized/campus-wide such as: materiel management storage and warehousing, central mail, computing and telecommunications, environmental testing and monitoring, physical plant maintenance, printing/duplicating/binding, security, shipping/receiving, vehicle shops/storage, etc.</td>
</tr>
<tr>
<td>10. Assembly and Exhibition Space</td>
<td>Assignable space for large assemblies or exhibition and display, that is not tied to a program or research function but is part of the University learning experience and/or community service role; includes theatres, auditoria, chapels, presentation areas/pavilions and similar spaces, as well as general-use museums, galleries, planetariums and exhibition areas not used primarily for instruction or research; includes related service spaces. Assembly and exhibition space primarily accessed by non-University users is classified as 12.</td>
</tr>
<tr>
<td>Assignable Space Categories</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>11. Student and Staff Housing Space</strong></td>
<td>Assignable space used for student or staff housing that is owned or leased by the University; includes non-residential areas directly serving the housing.</td>
</tr>
<tr>
<td><strong>12. Ancillary Operations Space</strong></td>
<td>Assignable space allocated to revenue generating operations that serve the internal and external constituencies of the University and not used for the delivery or support of University core instruction or research functions; includes spaces such as: conferencing and related service facilities, day care facilities, food and related service facilities, merchandising and related facilities, and space allocated on a lease or grant basis to non-University users and affiliates of the University involved in research and development, commercialization and applied innovation.</td>
</tr>
<tr>
<td><strong>13. Student Community Space</strong></td>
<td>Assignable indoor space allocated primarily for student socialization, quality of life and personal/community activity such as: lounge, leisure and game facilities and related service spaces, and student association facilities. Similar space that is part of student/staff housing is reported in Category 11. Excludes outdoor quads.</td>
</tr>
<tr>
<td><strong>14. Unclassified Space</strong></td>
<td>Assignable space that is unavailable for allocation such as areas that are inactive, out-of-service, under renovation, in transition, shell space, etc.</td>
</tr>
<tr>
<td><strong>15. Parking Space</strong></td>
<td>Assignable space such as stand-alone parkades, attached parkades and parking areas located within building envelopes form part of the University’s GFA. Portions of the space allocated to other uses are reported in the appropriate category. Surface parking lots are part of site.</td>
</tr>
<tr>
<td><strong>16. Clinical Space</strong></td>
<td>Assignable space, owned or operated by the University, that is used primarily for diagnosis, consultation, treatment or other similar services to patients or clients. Clinical space may include the attributes of teaching, research and/or public service and is typically associated with the Health Sciences faculties but may extend to other faculties such as Education.</td>
</tr>
</tbody>
</table>
APPENDIX 3

Planning and Design – Capital Projects through Approval Stages

Capital Project Governance and Review Flow Chart

Outline future growth of faculty/admin group

General Space Programming (GSP)

FDC

Business Case

Project Identification & Needs Assessment

EPC

FDC

Concept Plan

Scopes of Project Defined

FDC

Project Team

Project Team

Project Team

Project Team

EPC/BOG

EPC/BOG

EPC/BOG

Schematic Design

FDC

Project Team

Project Team

Project Team

Construction occurs

Tender and Construction

Occupancy & Warranty

Budget Refined Throughout Design

Project Team – Faculty Sponsor, Facilities and Operations, Consultants, End Users
FDC – Facilities Development Committee
EPC – Executive Planning Committee
BFPC – Board Finance and Property Committee
BOG – Board of Governors

Approval Points