Space Allocation Plan

Purpose

On the Oregon State University Hatfield Marine Science Center (HMSC) campus in Newport, Oregon, space is a critical yet limited resource. The HMSC Space Allocation Plan (SAP) creates a mission driven, transparent, and consistently applied procedure and policy to optimize productive space use in advancing the HMSC mission and strategic priorities. The HMSC SAP was adapted from, and operates in conjunction with, the Oregon State University’s (OSU or University) Space Management Policies (11-17-2016). It was also informed by feedback and input from the HMSC Community and it updates the existing 2006 HMSC Space and Assignment Policy. The HMSC SAP is meant to be a living document; please check the HMSC website for the most current version.

Sections

The HMSC SAP includes:

A. Core Principles
B. HMSC Space
C. Space Type Inventory
D. Space User Groups
E. Space Allocation Process
F. Space Allocation Standards
G. Space Use Priority
H. Space Requests
I. Space Use Policies
J. Space Use Inventories

A. Core Principles:

- HMSC space is a shared and limited resource that is actively managed.
- All OSU space on the HMSC campus is owned or leased by the University and is not the property of any college, institute, department (here on referred to as Units), or current occupant.
- Space will be allocated according to the HMSC’s mission, strategic priorities, and overall needs while meeting all OSU policies.
- The responsibility for decisions regarding new or reallocated space assignments resides with the HMSC Director.
- Space allocation will be transparent and applied consistently to all users.
- Units will be provided with adequate quality workplaces that support program operations while maximizing use of valuable HMSC space.
- Any space vacated by relocation or program changes is allocated back to the HMSC.
- Any space maybe reallocated to optimize productive use at any time.
• The HMSC Director’s office will conduct periodic space use inventories and allocation reviews to ensure optimum utilization of the assigned spaces, track changes in space use, and provide data for planning purposes.

B. HMSC Space

The HMSC campus (Fig. 1) includes 13 buildings, a student housing complex, several outbuildings, pump house, research docks, roads, walking trails, and parking lots (Table 1). HMSC leases the 49 acres that make up the campus grounds from the Port of Newport. A few of the buildings that make up the HMSC campus are owned and/or operated by state and federal agencies: Oregon Department of Fish and Wildlife (ODFW), US Environmental Protection Agency (EPA), US Fish and Wildlife Service (USFWS), and National Ocean and Atmospheric Administration (NOAA) (see map below). Most other structures on campus are owned and operated by the University. HMSC has space use agreements (MOUs) with several campus partners including NOAA (for OSU use of federal space) and with Oregon Sea Grant, USDA, and the Oregon Coast STEM hub (for use of space within the HMSC OSU-owned buildings). For the purposes of this Space Allocation Plan, OSU’s Ship Operations facilities are not included.

Figure 1. Map of the OSU Hatfield Marine Science Center campus
C. Space Type Inventory

Table 1. Space inventory of the HMSC campus.

<table>
<thead>
<tr>
<th>Space type</th>
<th>Number of rooms (OSU)</th>
<th>Square footage (OSU)</th>
<th>Number of rooms (in federal MOU)</th>
<th>Square footage (in federal MOU)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibition hall</td>
<td>1</td>
<td>10294</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auditorium</td>
<td>1</td>
<td>1827</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offices</td>
<td>48</td>
<td>9342</td>
<td>15</td>
<td>3681</td>
</tr>
<tr>
<td>Classrooms-dry</td>
<td>5</td>
<td>2236</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classrooms- saltwater</td>
<td>4</td>
<td>4506</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting rooms (Library)</td>
<td>3</td>
<td>1851</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conference room (West Wing)</td>
<td>1</td>
<td>258</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library*</td>
<td>1</td>
<td>17403</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labs with sinks</td>
<td>18</td>
<td>6452</td>
<td>8</td>
<td>3444</td>
</tr>
<tr>
<td>Dry labs</td>
<td>3</td>
<td>810</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saltwater labs</td>
<td>4</td>
<td>5177</td>
<td>8</td>
<td>7939</td>
</tr>
<tr>
<td>Covered tank space</td>
<td></td>
<td>750</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoor tank space</td>
<td></td>
<td>4270</td>
<td>1</td>
<td>9120</td>
</tr>
<tr>
<td>Student housing complex</td>
<td></td>
<td>9548</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cold rooms</td>
<td>3</td>
<td>487</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walk-in freezers</td>
<td>2</td>
<td>266</td>
<td>1</td>
<td>134</td>
</tr>
<tr>
<td>Research storage</td>
<td>3</td>
<td>1547</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shop/workrooms</td>
<td>4</td>
<td>3115</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lounges</td>
<td>2</td>
<td>1254</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pump house</td>
<td>1</td>
<td>300</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lactation room</td>
<td>1</td>
<td>183</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total= 80,876</td>
<td>Total= 24,318</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Library includes offices, open space, storage, bathrooms and office carrels. The sq ft of the three meeting rooms has been removed from the total.

D. Space User Groups

HMSC has four distinct user groups:

1. **HMSC Resident**
   OSU faculty, staff, or students that are assigned to the HMSC campus full time and their main office and research space are located on the HMSC campus.

2. **HMSC Non-Resident**
   OSU faculty, staff, or students that utilize the HMSC campus but their main office and research space are located on the main OSU campus in Corvallis.
3. **HMSC Emeritus and Courtesy Faculty**
   OSU Emeritus and Courtesy Faculty utilizing the HMSC campus.

4. **HMSC Visitor**
   HMSC Visitors are HMSC non-resident or non-OSU faculty or students that need access to space on the HMSC campus seasonally, episodically, or for a one-time use for less than one year at a time. Typically, HMSC Visitors will not make permanent changes to the space.

E. **Space Allocation Process**

   The responsibility for decisions regarding new or reallocated space assignments resides with the HMSC Director. Space will be allocated according to HMSC’s mission, strategic priorities, and overall needs while meeting all applicable OSU safety and space policies. Separate space allocation procedures exist for different user groups based on proposed project duration of use and room type.

   Spaces may be assigned to a Unit, lab or an individual researcher. However, these spaces shall be considered temporarily assigned, as the space belongs to OSU-HMSC, not to the occupant, Unit, or college. Any space vacated by relocation, retirement, or program changes is allocated back to HMSC. Any space may be reallocated to optimize productive space, to improve campus flow, or to redistribute underutilized space at any time with advanced notice to the current occupant.

   The maintenance of the assigned space is the responsibility of the Unit. The maintenance of the building and its infrastructure remains the responsibility of HMSC. All cost of discretionary renovation or modification of the assigned space is the responsibility of the Unit but shall be coordinated with and approved by the Director’s Office to maximize the long-term flexibility of the space and ensure compliance with regulatory requirements. Upon vacating, any built-in alteration of the space becomes part of HMSC or may need to be removed at the Unit’s expense.

   Any common space, including but not limited to shared lab space, touchdown lab space, meeting rooms, student housing, and campus grounds remains the responsibility of HMSC for maintenance and are managed by the HMSC Research Facility, Room Booking, and Housing Coordinators.

   HMSC spaces will be assigned or reallocated in a consistent and transparent manner taking into account the space allocation standards, team size, duration of use, external grant support, and equipment needs. Exceptions to the standards will be made for existing building configurations, particular Unit use, special cases, HMSC strategic plans, or overall HMSC space constraints at the discretion of the Director. Space allocation and space use agreements such as MOUs will be considered on an as needed basis.

F. **Space Allocation Standards**

   The space allocation standards provide a guideline for how space will be allocated based on type of use. All standards may be adjusted to accommodate the configuration of existing buildings. When allocating space in existing buildings, it may not be feasible to fully implement these standards. For example, a building with preexisting space outside of the standards established in this document might not be remodeled if the cost/benefit for HMSC and/or the user is not adequately demonstrated. The HMSC SAP outlines space allocation standards only for office and lab spaces.
Office Spaces
As characterized in the OSU Space Management Plan, “An office is defined as a room or suite of rooms equipped with desks, chairs, files, bookcases, computers, etc. that is assigned to one or more persons primarily for the performance of administrative duties other than meeting of classes.” HMSC office space allocation standards are based on room size and function. Office types are described in Table 2.

Table 2. Office Types on the HMSC campus

<table>
<thead>
<tr>
<th>Office Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Private</td>
<td>Large office for one person that requires high levels of privacy and meeting room for several individuals, ~120-300 sq. ft.</td>
</tr>
<tr>
<td>Small Private</td>
<td>Small office for one person that requires high levels of privacy, ~100-120 sq. ft.</td>
</tr>
<tr>
<td>Shared Private</td>
<td>Office that ranges in size to accommodate 2 to 3 individuals that can use separate meeting rooms to meet privacy needs</td>
</tr>
<tr>
<td>Private Open Desk Space</td>
<td>Desk surrounded by cubicle walls in an open room</td>
</tr>
<tr>
<td>Open Desk Space</td>
<td>Open room with 4 or more desks</td>
</tr>
<tr>
<td>Library Office Carrels</td>
<td>Small office for one person off the common room of the library, ~50 square feet</td>
</tr>
</tbody>
</table>

Research Lab Spaces
Spaces characterized by special purpose equipment or research activity are lab spaces including but not limited to labs with sinks, saltwater labs-indoor and outdoor, dry labs, coldrooms, walk-in freezers, shops, work areas, or HMSC grounds. HMSC lab space allocation standards are based on duration of proposed use. Lab types are described in Table 3.

Table 3. Lab Types on the HMSC campus

<table>
<thead>
<tr>
<th>Lab Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Lab Spaces</td>
<td>Lab space assigned for long term use (greater than one year)</td>
</tr>
<tr>
<td>Shared Labs</td>
<td>Lab space assigned for short term use (less than one year)</td>
</tr>
<tr>
<td>Touchdown Labs</td>
<td>Lab areas used by multiple approved Units for a few hours at a time</td>
</tr>
</tbody>
</table>

G. Space Use Priority

All Units working on the HMSC campus will be provided with adequate quality workplaces that support program operations while preserving valuable HMSC space. To accomplish this goal, each space type has been assigned a priority user group with secondary, and at times, tertiary user groups identified depending on space availability.

Priority Use by User Group
- **HMSC Resident** faculty, staff, and students have first priority for offices and standard lab space use. The space assigned will be based on the priority use by space type outlined in the next section.

- **HMSC Non-Resident** faculty, staff, and students may request a second office or additional lab space on the HMSC campus if there is a true demonstrated need. These requests may be filled utilizing open offices and/or shared lab space and equipment. The HMSC Director will periodically reevaluate any space assigned as a second office or lab space.
• **HMSC Emeritus and Courtesy faculty** provide valuable contributions to the HMSC mission. Due to space constraints, however, space for emeritus and courtesy faculty maybe limited. Thus, not all requests for space by this user group can be granted. Any requests that are approved, cannot adversely affect the quantity or quality of space provided for HMSC Residents, may be seasonal in nature, and/or involve sharing space or equipment. The HMSC Director may use the following criteria to guide space allocation of this user group. The HMSC Emeritus and Courtesy faculty space requests criteria were adapted from [http://fa.oregonstate.edu/space-management/osu-space-standards/office-facilities/office-space](http://fa.oregonstate.edu/space-management/osu-space-standards/office-facilities/office-space) on 11-17-2016. Successful requests for assignment of dedicated space should demonstrate clear benefits to HMSC. Examples of contributions that may warrant assignment of space include:
  - Instruction of at least one regularly scheduled course, as assigned by the Unit administrator;
  - Being a principal investigator or substantive co-investigator on a research grant(s) that provides financial support to HMSC/Unit in an amount at least roughly equivalent to NIH Indirect Cost Guidelines;
  - Current formal advising and mentoring of graduate students based at HMSC.
  - Current supervision of undergraduate research at HMSC.
This user group should see the HMSC Director for possible space options. The HMSC Director will periodically reevaluate any space assigned to emeritus and courtesy faculty against these criteria. At this time, the emeritus and courtesy faculty may be asked for supporting documentation of their contributions to the HMSC community.

• **HMSC Visitors** may request shared or touchdown lab space, open desk space, or library office carrels.

**Priority Use by Space Type**

- **Classroom and Classroom Lab Space**
  HMSC academic programs have priority use of all classroom and classroom lab spaces on the HMSC campus. These spaces may be utilized by HMSC staff and campus partners when not in use by academic programs. On occasion, classrooms can be booked by outside HMSC mission-related visiting groups depending on availability. These spaces are managed by the Academic Program Manager in conjunction with the Room Booking Coordinator.

- **Communal Use Areas**
  These spaces are used freely by staff and students and are not assignable space. The staff lounge and library are examples of common use areas.

- **Federal and state workspaces are allocated by agency leadership.**

- **Housing**
  Housing requests are made using an online form. Housing assignments are made at the discretion of the Housing Coordinator in compliance with housing policies.

- **Lab Space**
  **Standard Labs**: Long term use of any standard research lab space, including basic labs with sinks, dry labs, and saltwater labs, are assigned at the discretion of the HMSC Director. Requests from Units will be given priority in the allocation of these spaces.

  **Shared and Touchdown Labs**: These spaces are typically available for short term projects, OSU student work, visiting researchers, and short proof of concept projects. The Research Facility Coordinator supports the Director in managing these spaces.
• Meeting Rooms

HMSC academic programs have priority use of all meeting rooms. When available, HMSC Residents may book meeting rooms on a first come first serve basis. Co-located partners (ODFW, USFWS, NOAA, MOP-P, USDA, USGS and EPA) may request rooms for mission-related activities on a space available basis. Occasionally meeting rooms may be rented by outside groups for mission-related activities with approval of the Director’s office. These spaces are managed by the Room Booking Coordinator in conjunction with the Research Facility Coordinator.

• Office Space

A variety of office space is available within the HMSC buildings. Office spaces are assigned by the HMSC Director; however, some spaces are managed by members of the Director’s Office or Library staff.

Large Private Office: Assigned to HMSC Resident Unit directors.

Small Private Office: Assigned to HMSC Resident faculty and managers. Maybe assigned to HMSC Non-Residents faculty on a case by case basis.

Shared Private Office: Assigned to HMSC Resident support faculty and staff. HMSC Residents have priority use but shared offices may also be assigned to HMSC Non-Residents faculty or staff.

Private Open Office Space: Assigned to HMSC Resident postdoctoral scholars (postdocs) and Unit administration staff. Several private open office spaces are located across campus for Unit administrators. There is also one private open office area for postdocs (6 desks). Full time HMSC Resident postdocs have priority use of this space. The postdoc office may also be used by visiting postdocs or HMSC staff needing temporary office space. This space is managed by the Research Facility Coordinator. Staff and faculty should make the coordinator aware of an incoming post doc as soon as possible. If the coordinator is not made aware, a desk space may not be available. Upon arrival, post docs must check in with the Research Facility Coordinator to be assigned a desk space.

Open Office Space: Primarily assigned to HMSC Resident graduate students. There are three HMSC student desk areas in open office spaces; Ed Wing grad loft (14 desks), Modular bullpen (10 desks), and NAL grad loft (16 desks). These spaces are assigned to full time HMSC Resident graduate students without desk space in Unit labs or on main campus. With an approved application, students may choose which of the three spaces is the best fit for their needs as space allows. The NAL grad loft is only available for students with federal security clearance. Temporary HMSC graduate students, visiting post docs, and visiting graduate students have second priority use of these spaces. HMSC graduate students with other desk space and part time HMSC graduate students may also use this space as space allows. These spaces are managed by the Research Facility Coordinator. Staff and faculty should make the coordinator aware of an incoming student or visitor as soon as possible. If the coordinator is not made aware, a desk space may not be available. Upon arrival, students and visitors must check in with the Research Facility Coordinator to be assigned a desk space.

Library Office Carrels: Assigned to HMSC Visitors and emeritus or courtesy faculty. The Guin Library has 18 private office carrels that can be reserved for temporary use. Requests for a library carrel are based on availability and managed by the library staff. HMSC Visitors have priority use of these spaces upon request of the Research Facility Coordinator. The HMSC Director can also request a library carrel for temporary use by emeritus professors and courtesy faculty.
Space allocated to emeritus professors and courtesy faculty will be reevaluated periodically by the HMSC Director. If a carrel is not available, a desk in the modular bull pen may be provided. Year-round HMSC graduate students in the final thesis writing phase may also request this space. A carrel can only be requested for this use by the graduate students’ advisor and the student must meet the requirements outlined by the library staff. Graduate student use of Library office carrels will be reevaluated quarterly, with the expected use not to exceed three to six months. All other students, interns, research staff, and affiliate faculty should use the library common areas for work space.

- **Storage**
  Office and/or lab spaces are assigned assuming 10 percent of the space may be used for storage. Extremely limited storage is available at the discretion of the Director in outside storage lockers and for vehicles or boat storage in the boat yard. Storage is not allowed outside assigned areas including the hallways, outdoor sidewalks, or anywhere on the HMSC grounds. Units are responsible for any additional offsite storage necessary to support program needs.

### H. Space Requests

All OSU spaces on the HMSC campus must be assigned to the user by the Director’s Office. A separate space allocation procedure exists for different user groups based on proposed duration of use and room type. For housing and meeting room requests, please use the online forms available on the HMSC website. To request an office or lab space, please visit the space request link on the HMSC website. Below is a summary of the key components to the office and lab space request process for the two different user group types.

**Space requests from HMSC Resident, Non-Resident, or Emeritus and Courtesy Faculty for long term office or lab space use (greater than one year):**

1. Requests for new or altered space must be submitted by the Unit director to the HMSC Director as soon as the need is known. Faculty and leadership are strongly encouraged to plan strategically with the HMSC Director, so space needs can be evaluated before a position is posted or a new employee is hired. **If any space is required to fulfill grant activities, the HMSC Director must sign off on the proposal before it is submitted to the grantor. Failure to do so will incur substantial risk of space not being available, even if the proposal is funded.**
2. Request documentation must include a detailed description of the required room characteristics. Required details may include square footage, equipment, ideal location, occupation timeline, and justification of new space needs.
3. Requests will be reviewed on a case by case basis, negotiated, and approved or denied by the HMSC Director following policies and procedures outlined in the HMSC SAP.
4. Once a space request has been approved, an offer letter detailing the agreement will be signed by the HMSC Director, Unit head and the user.
5. Space cannot be occupied or reallocated without explicit permission of the Director, and requests for space are not guaranteed.
6. Space approvals will be periodically reviewed.

**Space requests from all HMSC Visitors and HMSC Residents for short term office or lab space use (less than one year):**

1. A space request application must be submitted to the HMSC Research Facility Coordinator for the short-term use of a desk (outside of the supporting Units’ assigned areas) or shared/touchdown lab space.
2. For lab space, applications must include a project proposal, detailed description of the space required, and a timeline of space use.
3. Requests will be reviewed and approved or denied by the HMSC Research Facility Coordinator following policies and procedures outlined in this HMSC SAP.
4. Once a space request has been approved, a Use Contract outlining the approved project will be signed by the Research Facility Coordinator and the user.
5. Desks and shared or touchdown lab spaces cannot be occupied without explicit permission from the Directors Office, and requests for space are not guaranteed.

I. Space Use Policies

The users of an assigned space are responsible for following all relevant OSU and HMSC space use policies. HMSC space use policies are available at the links below.

- HMSC Meeting Room Policies
- HMSC Space Use Policies - under development

J. Space Use Inventories and Allocation Reviews

Space needs are expected to change over time as academic and research activity for each Unit is expanded, reduced, or even discontinued. Evolving research goals and changing technologies will also alter space requirements. An adaptable management process is necessary to optimize space use at any given time. The HMSC Director’s office will conduct periodic space use inventories and allocation reviews to ensure optimum utilization of the assigned spaces, track changes in space use, and provide data for HMSC campus wide planning. HMSC campus-wide detailed space inventories will include percent of room use, activity type, and the occupant’s needs, in addition to room attributes like square footage, fresh water and/or saltwater access, hoods, and other built-in equipment. Detailed space inventories will consist of both physical inspections of space and space user interviews. The product of a space inventory will result in a digital space inventory, space use summary table, and space use report. Allocation Reviews are similar to the detailed space inventories except conducted at the Unit level. The timeline for allocation reviews will be negotiated at the time of space allocation.

Exceptions to this HMSC SAP and any HMSC space use policies are at the discretion of the HMSC Director.

For more information, contact:
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