



## Planning Request Procedure

USG Procedure | Approved September 2021

### I. Purpose and Applicability

This procedure outlines the steps to request an office assignment, equipment, furniture, project, or space reallocation on the USG campus. This applies to all USG divisions as well as new and existing programs through USG's nine Institutional Partners.

### II. Definitions

- A. *Planning Advisory Group*: comprised of stakeholders from across the USG community including operations, student affairs, USM institutional partners, and/or students that advises on broader planning issues.
- B. *Reclassification*: converting a space from one specified use to another. I.e.: converting an office to a storage closet.
- C. *Project*: a temporary endeavor with defined start and end dates, undertaken to create a unique product, service or result. May include major or minor renovations, capital projects, furniture design, etc.

### III. Criteria for Decision Making

- A. USG will adhere to the guiding principles on space use as outlined in the [Space Use Policy 1 \(1.00\)](#).
- B. USG will first make every effort to meet space needs within existing allocated space to promote fiscal responsibility and sustainability. Department and enrollment impact, opportunities for collaboration, cost and relationship to USG's strategic planning imperatives will play an important role in the space allocation process.
- C. Planning requests will not be considered on historical grounds such as prior practices, informal discussions or past use.
- D. Facilities & Planning is charged with maintaining an accurate and complete inventory on the assignment and utilization of interior spaces with sufficient data to confirm compliance with space guidelines.

### IV. Procedure to Request Offices and Related Workspaces

- A. Supervisors must submit the [Workspace Assignment and Resource Access](#) form when an employee is hired, when employment ends, or when a modification to the workspace assignment needs to be made.
  - 1. For USG employees, the form will be submitted by the Office of Strategic Human Resources.
- B. Facilities Planning will evaluate the requested location, request additional information if needed and forward for implementation when approved.
  - 1. All requests for office space are subject to section VII. Office Use and Allocation of the [Space Use Policy 1 \(1.00\)](#).

## V. Procedure to Request Equipment, Furniture, Projects, or Space Reallocation



- A. Requests for equipment, furniture, projects, and space reallocations must be submitted via the online [Planning Request Form](#).
- B. Submitted requests are evaluated by Facilities Planning in consultation with other stakeholders including the Office of Information Technology, the Office of Strategic Partnerships, Environmental Health and Safety. Requests are evaluated for alignment with the Facility Master Plan and USG Strategic Plan and a conceptual budget is developed.
  - 1. The Planning Advisory Group may also be consulted for additional feedback or input as needed.
- C. The workgroup identifies requests that will move forward into the planning phase. Requests that are not selected to move forward, may be resubmitted at a future date.
- D. Facilities Planning will work with the requestor to finalize goals, establish a timeline, develop a cost estimate, and confirm funding source.
- E. Facilities Planning will work collaboratively with the Planning Advisory Group to provide yearly updates on the status of current projects, and planned projects under the Capital Improvement Plan,

## VI. Related Documents

- A. [Planning Request Form](#)
- B. [Space Use Policy 1 \(1.00\)](#)
- C. [Workspace Assignment and Resource Access Form](#)