CHARGE OF THE SPACE TEAM

The Space Team at WHOI is a group charged with reviewing space allocation and space issues on a rotating basis. The Space Team includes the Director of Facilities, as well as the rotating annual appointments of a Department Head, Department Administrator, and Staff member. The Director of Facilities and a representative Department Head serve as co-leads of the Space Team.

The Space Team is charged with executing the Annual Space Review process, facilitating space issues across campus, and coordinating updates/revisions to the Space Allocation Policy and supporting documents.

IMPLEMENTATION PROCESS

Most space allocation issues are resolved at the departmental level, typically coordinated among the department heads, department administrators and the facilities department. Typically, these issues are related to annual coordination of space requirements, or re-allocation of space to meet new institutional needs. The Space Allocation Guidelines encourage continued use of this model to assess and resolve space issues.

Occasionally, space issues are not resolvable at the department level. Such issues may include complex intra-department space needs, cross-department space use, longer-term space needs, space needs without explicit funding, and unforeseen “pop-up” issues that require immediate
resolution. These issues, as well as issues that require cross-institutional review or coordination, will be elevated to the Blue Box process.

**Blue Box Process**

The Blue Box process can be initiated by any department head if a space issue cannot be resolved at the department level. The Blue Box process is led by the DDVPR and includes department heads and the facilities director. The composition of the group for a given meeting will likely include additional stakeholders and/or department administrators based on the topic/issue and can be arranged in an ad hoc manner by involved Department Heads. The facilities department will develop a Blue Box program brief and distribute to Blue Box participants. Staff Council will receive the Blue Box program brief prior to the proposed meeting in order to provide an overview of the issues, as well as the action requested of the Blue Box group. Following a Blue Box decision, the DDVPR will provide a brief verbal update to Staff Council.

Figure 1: Space Allocation Review Process – Box 1A, 1B, and 3 reflect current practice, the Blue Box (Box 2) is a new element in the space allocation process. *Italicized* participants are optional as noted in each box.
In the event that an issue cannot be resolved at the Blue Box level, Staff Council and Senior Administration will be asked to make a determination relative to the highest-and-best-use of space resources to meet institutional space needs.

**Space Team**

To obtain an accurate view of increasingly complex space requirements, it is necessary to integrate science, engineering, education, and other institutional program planning; an annual review of space use will occur with each department head through a process led by the Space Team. This review will focus on an updated understanding of current space use, a look-ahead at capital budget requests, a forecast of upcoming retirements/attrition, major science projects (submitted/funded), building renovation strategies, and looming/lingering space issues.
ATTACHMENT A: BLUE BOX BRIEF

To: DDVPR  
Issued By: Department, or Individual  
Issued: Date  
Subject: Issue for Review

Overview

Background/Overview of Issue for Consideration

Planning and Construction

Overview of scope of work and requirements (timing, schedule, and proposed location(s)/impacts

Budget (Sources/Uses)

Outline of proposed funding sources (capital budget, grant, others), as well as the proposed uses associated with the initiative (including enabling costs)

Program Impacts/Benefits

Identify the potential impacts on current space occupants/users, as well as the potential benefits realted to the principles for space use

Action Requested

Summary of action requested by the Blue Box Committee

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