Learning Outcomes

• Leverage your existing organizational hierarchy to **develop a space portfolio structure** with each lead taking charge of sub-portfolios (e.g., schools roll up to colleges, and colleges roll up to the provost.).

• Establish a partnership between portfolios and your central planning office to legitimize the portfolio process, **providing informed feedback** about academic, research, and administrative needs for building space.

• Make space and staffing **data available and transparent** and leverage data visualization tools and regular reporting as part of your space management process.

• Develop space **planning tools that are adaptive** to your various portfolio partner's needs.
Georgia Institute of Technology

Vision
Georgia Tech will define the technological research university of the twenty-first century. As a result, we will be leaders in influencing major technological, social, and policy decisions that address critical global challenges. "What does Georgia Tech think?" will be a common question in research, business, the media, and government.

Mission
Technological change is fundamental to the advancement of the human condition. The Georgia Tech community - students, staff, faculty, and alumni - will realize our motto of "Progress and Service" through effectiveness and innovation in teaching and learning, our research advances, and entrepreneurship in all sectors of society. We will be leaders in improving the human condition in Georgia, the United States, and around the globe.
Georgia Institute of Technology

<table>
<thead>
<tr>
<th>ACADEMIC</th>
<th>RESEARCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Colleges</td>
<td>Georgia Tech Research Institute (GTRI)</td>
</tr>
<tr>
<td>Business</td>
<td>11 Interdisciplinary Research Institutes (IRIs)</td>
</tr>
<tr>
<td>Engineering</td>
<td></td>
</tr>
<tr>
<td>Computing</td>
<td></td>
</tr>
<tr>
<td>Liberal Arts</td>
<td></td>
</tr>
<tr>
<td>Design Sciences</td>
<td></td>
</tr>
<tr>
<td>28 Schools</td>
<td></td>
</tr>
</tbody>
</table>

**STUDENT BODY**
- Undergraduate: 16,047
- Graduate: 16,675
- Online: 529 + 9,403
- Total: 32,722

**FULL-TIME WORKFORCE**
- Instructional Faculty: 997
- Research Faculty: 2,215
- Staff: 4,419
- Total: 7,631
Georgia Tech Growth: Space & Campus Population

Graph showing the growth of space and population from 1997 to 2018.

- **SPACE**: Linear increase from 1997 to 2018.
- **PEOPLE**: Steeper increase from 1997 to 2018.
GT Capital Planning and Space Management

Mission
Guiding the strategic use and development of Georgia Tech’s campus environments

Vision
Defining the framework for effective utilization and adaptation of Georgia Tech’s campus environments to support the motto of “Progress and Service” through academic innovation, research advancement, and entrepreneurship.
Origins of a Portfolio Partnership
Origins of a Portfolio Partnership
Origins of a Portfolio Partnership

• Academic Space Assessment 2015
• SPARSE Working Group  
(Strategic Planning for Academic & Research Space Effectiveness)
  • Desired Results:
    • Informed, timely decisions
    • Transparent space reporting

USG & Institute Goals

**Strategic Plan: Goal 5** - Relentlessly Pursue Institutional Effectiveness

**University System, Comprehensive Administrative Review** - Leverage the strengths of a delegated management model while providing accountability and measure in the context of institutional goals and priorities
Origins of a Portfolio Partnership

SPARSE (Strategic Planning for Academic & Research Space Effectiveness)
Who Constitutes A Space Portfolio Partnership?

SPARSE (Strategic Planning for Academic & Research Space Effectiveness)
Who Constitutes A Space Portfolio Partnership?

- President
  - Research
    - VP
      - Director
    - VP
  - Provost
    - Dean
      - Chair
    - Dean
      - Chair
    - Dean
      - Chair
  - A&F
    - VP
      - Dir
    - VP
      - Dir
    - VP
      - Dir

SCHOOL
Who Constitutes A Space Portfolio Partnership?
Who Constitutes A Space Portfolio Partnership?

President

Research

VP
  Director
  Director
  Director

VP
  Director
  Director
  Director

EXECUTIVE

Provost

Dean
  Chair
  Chair
  Chair

Dean
  Chair
  Chair
  Chair

Dean
  Chair
  Chair
  Chair

A&F

VP
  Dir
  Dir
  Dir

VP
  Dir
  Dir
  Dir

VP
  Dir
  Dir
  Dir
Who Constitutes A Space Portfolio Partnership?
Navigating the Process

PORTFOLIO PARTNER

R Receive Request
R+A Prioritize

CENTRAL PLANNING UNIT

C Conduct Analysis
R Verify and Reconcile

SUB-PORTFOLIO PARTNER

C Study Options
R Review Recommended Solutions

Responsible Accountable Consulted Informed
Dean Smith,

We need 3 faculty offices for new hires.

Sincerely,

Professor McProfessorface
Example – Prioritize
Example – Conduct Analysis
Example – Conduct Analysis

<table>
<thead>
<tr>
<th>Work Department</th>
<th>Job Title</th>
<th>Title Category</th>
<th>Planning Module - G7 Min SF</th>
<th>Planning Module - G7 Max SF</th>
<th>Planning Module - 38 Standards SF</th>
<th>Planning Module - 38 Standards Max SF</th>
<th>Planning Module - 6573 SF</th>
<th>Planning Module - CDDA</th>
<th>Planning Module - CDDA Max SF</th>
<th>Planning Module - Average SF</th>
<th>Planning Module - Average Tower SF</th>
<th>Planning Module - Average SF</th>
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<td>Planning Module - CDDA Max SF</td>
<td>Planning Module - Average SF</td>
<td>Planning Module - Average Tower SF</td>
<td>Planning Module - Average SF</td>
<td>Planning Module - Average Max SF</td>
</tr>
</tbody>
</table>

Responsible
Example – Verify & Reconcile

```
<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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</tr>
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<tbody>
<tr>
<td>4,543</td>
<td>3,837</td>
<td>4,951</td>
<td>4,510</td>
<td>5,365</td>
<td>3,889</td>
<td>4,583</td>
<td>6,314</td>
<td>4,406</td>
<td>4,876</td>
</tr>
<tr>
<td>Surplus / Deficit</td>
<td>706</td>
<td>(408)</td>
<td>33</td>
<td>(822)</td>
<td>654</td>
<td>(40)</td>
<td>(1,771)</td>
<td>137</td>
<td>(333)</td>
</tr>
</tbody>
</table>
```

Count Summary:
- Workstations: 8
- Private Offices: 20
## Example – Study Options

### Space Needs

<table>
<thead>
<tr>
<th>Priority</th>
<th>Unit Name</th>
<th>Portfolio</th>
<th>Planned or Conceived Destination Location</th>
<th>Sum of SF ROM</th>
</tr>
</thead>
<tbody>
<tr>
<td>S1</td>
<td>School of This</td>
<td>Provost</td>
<td>Building 1</td>
<td>8200</td>
</tr>
<tr>
<td>S4</td>
<td>College of That</td>
<td>Provost</td>
<td>Building 2</td>
<td>1200</td>
</tr>
<tr>
<td>S3</td>
<td>Department of Departments</td>
<td>Administration</td>
<td>Building 3</td>
<td>14200</td>
</tr>
<tr>
<td>S2</td>
<td>Campus Unit</td>
<td>Research</td>
<td>Building 4</td>
<td>5000</td>
</tr>
</tbody>
</table>

### Space Available

<table>
<thead>
<tr>
<th>Building Number</th>
<th>Building Name</th>
<th>Portfolio</th>
<th>Units</th>
<th>Timeline</th>
<th>Proposed Use</th>
<th>Sum of ASF</th>
</tr>
</thead>
<tbody>
<tr>
<td>158</td>
<td>Building A</td>
<td>Research</td>
<td>Research Group</td>
<td>2Q 2020</td>
<td>?</td>
<td>17500</td>
</tr>
<tr>
<td>120</td>
<td>Building B</td>
<td>Administration</td>
<td>Unit This</td>
<td>1Q 2021</td>
<td>Campus Center Swing</td>
<td>1975</td>
</tr>
<tr>
<td>800</td>
<td>Building A</td>
<td>Provost</td>
<td>School That</td>
<td>4Q 2019</td>
<td>?</td>
<td>3930</td>
</tr>
<tr>
<td>211</td>
<td>Building B</td>
<td>President’s Report</td>
<td>Organization Organization</td>
<td>1Q 2021</td>
<td>?</td>
<td>4862</td>
</tr>
</tbody>
</table>

**Grand Total**

|                      |               |             |             |                      |               | 28,267      |

- **Study Options**
Example – Study Options
Example – Study Options

Existing Space

Existing Space – Furniture Optimized

Legend
- Private Office
- Shared Office
- Meeting

Study Options

Responsible
Consulted
Example – Study Options

- **Existing Space**
- **Existing Space** – Furniture Optimized
- **Renovated Space** – Fully Optimized

Legend: **Private Office**, **Shared Office**, **Meeting**
Example – Review Solutions

Legend
- Private Office
- Shared Office
- Meeting

Responsible
Accountable
Consulted

Example – Review Solutions
Example – Review Solutions

Legend

- Private Office
- Shared Office
- Meeting

Further examples of Responsible + Accountable and Consulted.
Navigating the Process

**Portfolio Partner**
- **R** Receive Request
- **R+A** Prioritize

**Central Planning Unit**
- **R** Conduct Analysis
- **C** Verify and Reconcile
  - **C** Study Options
  - **R** Review Recommended Solutions

**Sub-Portfolio Partner**
- **R** Receive Request
- **R+A** Prioritize

**Responsible**  **Accountable**  **Consulted**  **Informed**
Takeaways

• A clear space portfolio reporting structure

• Space needs are **effectively addressed** via portfolio partnerships

• Space management process is informed by **transparent and accessible data**

• Program specific needs are addressed via **adaptive planning tools**
Questions?

Jennifer Herazy
Chief Administrative Officer
Academics and Research

Jimmie Hardin
Data Scientist
Capital Planning & Space Management

Amanda Jones
Senior Planner
Capital Planning & Space Management

Jarrett Muncy
Senior Planner
Capital Planning & Space Management

thank you