

# SPACE PLANNING POLICY AND PROCEDURES

## For Commonwealth of Virginia Departments, Agencies and Institutions

---

1. **PURPOSE:** This policy provides guidelines and procedures for analyzing tenant needs and determining building space requirements for state departments, agencies and institutions seeking leased facilities. The policy replaces Section 5 and Appendices C and I of the *Real Property Management Manual, Chapter One: Acquisition by Lease* dated December 15, 1993. This revision updates the space guidelines to support current practices designed to reduce the amount of space leased by state agencies. In particular, the 1993 guidelines allowed a maximum of 250 square feet per person, whereas the guidelines issued herein allow a maximum of 210 square feet per person.
2. **AUTHORITY:** Virginia Code §2.2-1149 and §4-5.07 of Chapter 4, 2004 Acts of the Virginia General Assembly (Appropriation Act) and subsequent Acts.
3. **RESCINDED POLICIES:** Section 5 and Appendices C and I of the *Real Property Management Manual, Chapter One: Acquisition by Lease* dated December 15, 1993.
4. **EFFECTIVE DATE:** June 1, 2006
5. **POLICY ADMINISTRATION:** This Policy is administered by the Division of Real Estate Services of the Department of General Services (DRES). Required documents and materials should be submitted to DRES at the following address:

Division of Real Estate Services  
1111 East Broad Street, 7<sup>th</sup> Floor  
Richmond, Virginia 23219  
Telephone: (804) 225-3874  
FAX: (804) 225-4673
6. **APPLICABILITY:** Departments, agencies and institutions of the Commonwealth shall follow these guidelines in the acquisition of leased building space.
7. **DEFINITIONS:**

**Agency:** Any department, agency or institution of the Commonwealth of Virginia subject to Va. Code §2.2-1149.

**DGS:** The Department of General Services

**DRES:** The Division of Real Estate Services, a division of the Department of General Services.

*Standard Method for Measuring Floor Area in Office Buildings, ANSI/BOMA Z65.1-1996* – Standards adopted jointly by the American National Standards Institute and the Building and Owners Managers Association to provide a method of measuring building floor space that is commonly understood by landlords and tenants. The standards specify

## SPACE PLANNING POLICY AND PROCEDURES

### For Commonwealth of Virginia Departments, Agencies and Institutions

---

how space is to be measured (e.g., from the inside face of a wall, the outside face or the center) and it distinguishes between space under the control of tenants and other space the tenants require in common.

- Usable Space generally describes the space under the control of the tenant such as offices and circulation space among offices. Restrooms that are under the control of the tenant may be included. Typically referred to as usable square feet or USF.
- Rentable Space generally describes the entire space enclosed within a building, less any vertical floor penetrations (such as elevator shafts and stairwells). Tenants pay a pro rata share of the common use spaces that include such areas as entryways and lobbies, hallways, elevator lobbies, mechanical rooms, and common use restrooms. Typically referred to as rentable square feet or RSF, this is the space on which tenants pay rent.

Landlords often predetermine the ratio of usable space to rentable space, expressed as a percentage and sometimes called a “core factor”. The area leased by a tenant is increased by the core factor to convert from usable square feet to rentable square feet.

#### 8. POLICY:

Virginia Code §2.2-1149 provides that no state department, agency or institution shall acquire real property by gift, lease, purchase or any other means without following the guidelines adopted by the Department of General Services and obtaining the prior approval of the Governor. Section 4-5.07 of the current Appropriation Act (See Appendix B) provides that Agencies shall not acquire property by lease until the Agency certifies to the Director of the Department of General Services that the volume of space conforms to space planning procedures developed by the Department of General Services and approved by the Governor. The space planning procedures are provided herein.

The Space Guidelines set forth in Appendix A are provided to assist Agencies in determining floor space needs. The allowable usable square footage set forth in the Space Guidelines are the maximum allowed and do not constitute an upward goal to be achieved. Agencies shall prepare the Office Space Questionnaire (OSQ) to provide for the most efficient use of space that fulfills program needs, with the goal of minimizing the amount of floor space. The aggregate space **shall not exceed 210 usable square feet** (USF) per authorized FTE without approval of the Division of Real Estate Services (DRES). *Exceptions to these guidelines will be considered only with adequate justification from the user agency.*

As new transactions are contemplated for any reason, including lease expiration, establishment of new programs or relocation of current programs, DRES will work with Agencies to, 1) identify the space requirements of the specific Agency program(s) to be housed; 2) determine how the space will be procured, including whether to utilize tenant brokerage services; and, (3) determine whether to utilize independent space planning services.

## **SPACE PLANNING POLICY AND PROCEDURES**

### **For Commonwealth of Virginia Departments, Agencies and Institutions**

---

The Space Guidelines presented in Appendix A, establishing the amount of usable space allowed for particular functions, are incorporated into the Space Planning Policy and Procedures. Agencies shall adhere to these procedures for all new leases, for renewal of existing leases and for adding space in existing leased facilities. In instances where an Agency occupies and wishes to remain in non-conforming space, DRES will work with the Agency to determine the feasibility and impact of remaining in the existing space, reconfiguring the space, or relocating.

Actual leased areas will differ from the amounts determined through the OSQ due to the difference between usable and rentable area and the fact that floor configurations of existing buildings typically are not sized to perfectly accommodate user space needs. However, it is imperative for Agencies to select space that most closely conforms to the Space Guidelines while meeting the Agency's needs at the most competitive cost. Build to suit facilities should be constructed to accommodate the Space Guidelines to the extent possible.

# Space Guidelines for State Agencies Leasing Real Estate

Appendix A

The following guidelines are to be used when preparing an Office Space Questionnaire (OSQ) for leased space. A blank OSQ Template (Form Number DGS-50-505) in Microsoft Excel format can be found on the DRES website.

[http://forms.dgs.virginia.gov/eo51/dgs\\_formdetails.asp?record=DGS-50-505](http://forms.dgs.virginia.gov/eo51/dgs_formdetails.asp?record=DGS-50-505)

Your DRES contact can assist with questions concerning these guidelines and the OSQ template.

| <b>OFFICE SPACE</b>  | <b>MAXIMUM AREA<br/>(Usable Sq. Feet)</b> |      |
|--|---|------|
| <b>1. PERSONNEL SPACE</b>  | Private                                   | Open |
| Agency or Department Director (position must require confirmation by the General Assembly)   | 196                                       |      |
| Agency or Department Director  | 150                                       |      |
| Asst. Director and Confidential Staff  | 120                                       |      |
| Professional Staff Supervisor  |   | 96   |
| Professional Staff and Support Admin. Supervisor   |   | 64   |
| Contractors/Auditors   |   | 48   |
| Field Staff, Floating Staff, Receptionist and Support Admin.   |   | 48   |
| <ul style="list-style-type: none"> <li>▪ Agencies requesting private offices for Confidential Staff must submit a description of the position and explain why private office space is needed.</li> <li>▪ Field office personnel who are routinely out of the office 50% or more of the normal work week shall be restricted to open workstation space and may be considered as 1/2 of an FTE position for the purposes of determining office space requirements. Exceptions may be considered by DRES with appropriate justification of the nature of the position.</li> <li>▪ Personnel who “float” between locations shall not be considered more than 1/2 of an FTE at any location where they occupy space.</li> </ul> |   |      |
| <b>2. SUPPORT SPACE</b>  | <b>MAXIMUM AREA<br/>(Usable Sq. Feet)</b> |      |
| A. RECEPTION AREAS (excluding receptionist) - 1-5 visitors (peak*)   | 144                                       |      |
| Over 5 Visitors add (per additional visitor, peak*)  | 10  |      |
| B. CONFERENCE ROOMS (per chair, peak*) – First 10  | 25  |      |
| Plus sq. feet for each person over 10  | 15  |      |
| * Peak is defined as the highest number of users at any one time on a frequent (typically 4 to 5 times per week) basis during a weekly period  |   |      |
| C. FURNITURE/EQUIPMENT (Except in personal offices)  |   |      |
| Copier (freestanding)  | 25  |      |
| Copy Room (including copier)   | 80  |      |
| Plan/Flat File   | 25  |      |

*Continued on Next Page*

## Space Guidelines for State Agencies Leasing Real Estate

Appendix A

| 2. SUPPORT SPACE <i>(continued)</i>  | MAXIMUM AREA<br>(Usable Sq. Feet) |
|--|-----------------------------------|
| Lateral File (typically 30", 36", or 42" wide, 13 3/4", 16 3/4" or 19 1/4" deep)   | 10                                |
| Vertical File (letter) (typically 15" wide by 25", 26 1/2", or 28 1/2" deep)   | 7                                 |
| Vertical File (legal) (typically 18 1/4" wide by 25", 26 1/2", or 28 1/2" deep)  | 8                                 |
| Fax Machine  | 10                                |
| Scanning Station (w/ chair)  | 24                                |
| <ul style="list-style-type: none"> <li>▪ <i>In planning for file rooms, all agencies are required to comply with records retention requirements established by the Library of Virginia.</i></li> <li>▪ <i>For filing needs not listed above (such as high density systems or use of shelving for file rooms, indicate the appropriate information on the OSQ for review by DRES.</i></li> </ul>  |                                   |
| D. LOUNGE/BREAKROOMS   |                                   |
| Standard kitchen equipment   | 60                                |
| Seating (Per chair, as determined below)   | 15                                |
| <ul style="list-style-type: none"> <li>▪ <i>Lounge/Breakrooms should be requested when there is a demonstrated need, such as a location where no building facilities or local facilities are available.</i></li> <li>▪ <i>To determine seating space, use 20% of the FTE, times 15 SF, plus 60 SF for equipment (example: 24.5 FTE * 20% = 4.9 * 15 SF = 73.5 SF + 60 SF = 134 SF rounded).</i></li> </ul>   |                                   |
| E. OTHER SUPPORT SPACE NOT LISTED ABOVE  |                                   |
| <ul style="list-style-type: none"> <li>▪ <i>This includes general storage areas, computer room, restroom facilities (if exclusive to the Agency's space requirement), or other unique spaces.</i></li> <li>▪ <i>Submit detailed information on the space requirement and how the size was determined.</i></li> </ul>   | As approved by DRES               |
| 3. "SPECIAL" SPACE REQUIREMENTS  | MAXIMUM AREA<br>(Usable Sq. Feet) |
| A. INTERVIEW AREAS   | 80                                |
| B. TESTING, TRAINING OR HEARING ROOMS (per chair, peak)  |                                   |
| Seminar Seating  | 15                                |
| Auditorium Seating   | 10                                |
| C. EXAMINING/MEDICAL ROOMS   | 100                               |
| D. OTHER "SPECIAL" SPACE TYPES NOT LISTED ABOVE  |                                   |
| <ul style="list-style-type: none"> <li>▪ <i>This includes specific client service areas, urinalysis or blood screening areas, courtrooms, client "holding rooms," or other spaces that are considered unique to the Agency's program.</i></li> <li>▪ <i>Submit detailed information on the space requirement and how the size was determined.</i></li> <li>▪ <i>DRES has identified certain agencies and institutions having special space requirements that may cause the overall USF to exceed the 210 USF/FTE standards. DRES recognizes that additional special space requirements may be identified and considered as programs grow and change over time. We encourage agencies and institutions to work with DRES to identify and justify any new special space needs so that the appropriate course of action can be determined.</i></li> </ul> | As approved by DRES               |

## Space Guidelines for State Agencies Leasing Real Estate

|  |                            |
|--|----------------------------|
| <p><b>4. CIRCULATION</b> (to compute total Usable Square Feet)<br/> <b><u>Unless otherwise directed by DRES:</u></b></p> <ul style="list-style-type: none"> <li>• If the # of private offices is &gt; the # of open/modular workstation spaces, add 30% to the total of all Personnel, Support and Special space for circulation. <b>OR</b></li> <li>• If the # of private offices is &lt; the # of open/modular workstation spaces, add 35% the total of all Personnel, Support and Special space for circulation.</li> </ul> <p><b>NOTE: THE AGGREGATE USABLE SQUARE FEET (USF) SHALL NOT EXCEED 210 USF PER FTE WITHOUT THE PRIOR APPROVAL OF DRES.</b></p> |                            |
| <p><b>5. WAREHOUSE/STORAGE, RETAIL, SERVICE (I.E., DMV BRANCHES, RESIDENTIAL, LAND AND OTHER TYPES OF SPACE NOT LISTED)</b></p>  |                            |
| <p><i>An OSQ may not be required if the Agency submits appropriate documentation of the space need, including a detailed description of the space required and its contemplated use.</i></p>   | <p>As approved by DRES</p> |

**Additional Information:**

The following additional information shall be considered as applicable to assist in determining how to provide for various functions within your Agency’s offices. Consider the Agency’s functionality preferences and/or problems with current space.

**Conference room(s)** - Describe how conference rooms are used the majority of the time in the office. Conference rooms are not typically sized for full staff meetings. Indicate if audio visual equipment and/or storage space is needed, or other amenities needed for the particular use(s) of the room. Completion of the table below will assist in determining how the room should be sized.

| Hours Used/Wk | 4-10 People Present | 11-15 People Present | 16-20 People Present | 20+ People Present |
|---------------|---------------------|----------------------|----------------------|--------------------|
| 1-5           |                     |                      |                      |                    |
| 6-10          |                     |                      |                      |                    |
| 11- 20        |                     |                      |                      |                    |
| 21-30         |                     |                      |                      |                    |
| 30+           |                     |                      |                      |                    |

**Reception Area** - Define typical use, peak occupancy and frequency of use per week at peak occupancy. “Peak” is defined as the highest number of users at any one time on a frequent (typically 4 to 5 times per week) basis during a weekly period.

**Storage Area(s)** - List the types of items stored (such as paper storage, office supplies, surplus computers/furniture, etc.). If state surplus property is being stored, please indicate how often it is purged.

**File Storage** – File storage is an area where Agencies may be able to save money by evaluating their filing practices. High density storage options and/or purging records on a regular basis may significantly reduce the amount of real estate needed over time. Filing cabinets contained in

## **Space Guidelines for State Agencies Leasing Real Estate**

Appendix A

Private and Open Personnel space are not considered as a separate space requirement and are accommodated in the Personnel Space USF amounts in #1 above.

**Security Needs** - List the types of security provisions required for the office, such as card entry for personnel, secured room(s), specific construction (and/or wiring) requirements between clients and personnel, etc.

**Work Unit Adjacencies** - If there are work units that are best placed adjacent to each other, this should be included in the OSQ. Include the priority, if necessary.

**§4-5.07 LEASE PAYMENTS**

- a. Agencies shall not acquire real property by lease until the agency certifies to the Director, Department of General Services, that (i) funds are available within the agency's appropriations made by this act for the cost of the lease and (ii) the volume of leased space conforms with the space planning procedures for leased facilities developed by the Department of General Services and approved by the Governor. The Department of General Service shall report to the Chairmen of the Senate Finance Committee and House Appropriations Committee by September 1 of each year on real property leases that are in effect for the current year, the agency executing the lease, the amount of space leased, and the cost of the annual lease.
  
- b. Agencies acquiring personal property in accordance with [§2.2-2417](#), Code of Virginia, shall certify to the State Treasurer that funds are available within the agency's appropriations made by this act for the cost of the lease.



### **Why do I need to prepare an OSQ?**

Preparation of the OSQ is an integral part of the space planning procedures established in compliance with state law. However, this is also the Agency's opportunity to determine whether its program is being adequately served in the existing leased space and if any cost savings can be realized by reconfiguring the space, downsizing, or relocating to new space.

### **Why did the space standards change?**

The revised guidelines grew out of a study commissioned by DGS. The research indicated that the federal government, many other state governments and the private sector provide for 150-200 USF per employee. The DGS standard was reduced to 210 USF/FTE from 250 USF/FTE to reflect these trends. The new Space Guidelines promote efficiency and flexibility in space planning so that the programmatic goals of the Agencies can be met with the least amount of fixed occupancy costs.

### **What if the Agency occupies space that was built out under old space guidelines?**

You will be asked to submit a new OSQ with the current (funded) staffing levels. If possible, DRES will tour the occupied space or may ask for photographs. DRES will consider 1) whether programmatic needs are being adequately met in the occupied space; 2) if any improvements and/or reconfigurations could be made; and 3) what the cost/benefit would be of any physical changes to the space.

The new Space Guidelines are part of the Governor's Real Estate Initiative, established in Executive Order 75, and therefore an analysis of the currently occupied space versus what would be necessary under the new space standard (210 USF/FTE) is an important part of the real estate strategy determination.

### **Our Agency provides a number of different client programs at this leased location and we believe our space needs are special and should be treated differently than administrative agencies. Does DRES consider this?**

Yes, we continually assess Agencies' space needs and rely heavily on the Agency to provide the information needed to make this determination. In order to provide your Agency with good customer service, we require your help in understanding your Agency's unique business processes and client needs.

### **How do I fill out the OSQ?**

The OSQ format is an Excel spreadsheet and already contains many formulas. Begin with the currently funded personnel in the facility to be accommodated and be sure to note the % of time they are in the office. If a full-time employee "floats" between offices, the amount of time in the subject facility should be noted along with the locations of the other facilities where he or she works.

Determine the support spaces that are needed at the facility. Your Agency's DRES contact is available to assist in this process. Return the OSQ to your DRES contact electronically for review.

### **If DRES does not approve the OSQ as submitted, is there an appeal process?**

If there is additional information that can be submitted to further support the original request, send it to the DRES contact and it will be considered at the appropriate level.

### **Can our Agency provide for future growth in the OSQ?**

If the Agency has specific instances where there is a reasonable assurance that a particular program will grow and the lease procurement cycle has begun (or will soon begin), then you may add a separate category to the OSQ and provide your justification for a growth area to DRES for review. This would include instances where your Agency has made specific funding requests for new FTE and/or new programs in a particular location. DRES will consider the request and work with you to resolve space issues in these instances.

Providing for a non-specific "future growth" area in new leases is not recommended. DRES encourages Agencies to plan for expansions through additional space options with landlords (right of first refusal on adjacent space) and by providing for unique and flexible space planning (e.g., modular units whenever possible).