



County of Santa Barbara Countywide Policy Manual

Subject/Title: Space Management Policy	Number: 1
Responsible Department: General Services	Dept. Reference: 063
Approved by: Board of Supervisors	
Original Policy: N/A Revisions:	
Meet and Confer Obligations: All recognized employee organizations	
Scope of Application: This policy replaces and supersedes all other County and department policies regarding space management and office space allocation. County departments may develop department specific implementation/ supplemental procedures that align with this policy.	

Purpose

The purpose of this policy is to promote the most effective use of the County's physical facilities and to ensure that the General Services Department is providing responsive, equitable treatment to the County and public in all transactions involving real property. The County operates with limited resources. Space is a limited resource and space management is one way of minimizing surplus or poorly utilized space so that funds can be reallocated to meet other critical needs.

Background

All County physical facilities are assigned to a special district or department. Current users or occupants of the facilities do not own the space but may have control as delegated by the County Executive Officer ("CEO"). The amount of space occupied by departments or special districts is an important measure that is utilized for various cost allocation purposes. As a result, Santa Barbara County Code Section 2-71(e) provides that assignment of all work areas and space planning are the responsibility of the CEO. Any change of use, or major modification to County space by Departments or Special Districts, must be requested through General Services Real Property Division who will then process the request and involve the CEO's office and General Services' Facilities Maintenance Division as necessary.

Management of the County's space is needed to ensure that:

- Departments are allocated the correct proportion of all costs that are based on square footage occupied;
- Staff are made available an appropriate workstation at their primary County work location;
- Available space is allocated equitably and appropriately among all users;
- Use and occupancy of space is continuously maintained and updated and any unauthorized use is highlighted and re-allocated appropriately;
- Surplus or poorly utilized facilities are closed and possibly disposed of to reduce maintenance and operating costs;
- Occupancy is consolidated and rationalized to maximize utilization and minimize energy, maintenance, and other operating costs;
- Space standards, as much as possible, reflect use of Building Owners and Managers Association International (BOMA) standards;
- New buildings and facilities are constructed only if needed;
- Leased space outside of County owned buildings is minimized whenever possible.

These efforts also emphasize the optimization of our existing physical buildings to ensure efficient utilization, recognizing the increasing trend of remote work among employees, thereby potentially allowing for consolidation and reduction of space requirements.

The General Services Department is responsible for planning and managing efficient and equitable space utilization, providing professional real estate services, and promoting consolidation, collocation, and efficiency of County owned and leased spaces. The Capital Projects Division is responsible for developing standards, planning, ensuring maximum space utilization, and performing related activities to support the County's strategic objectives.

The Real Property Division is charged with handling all negotiations for the purchase, acquisition, sale, or lease of real property, maintaining an inventory of County-owned and leased real property, and managing requests from County departments for additional space, reconfiguration of space, vacation of space, and purchase of land for the purpose of constructing new County facilities.

Policy

Entering into Lease or Occupancy Agreement: Prior approval must be obtained from General Services and the CEO's Office. All new leases by County Departments, must be approved by the County's Debt Advisory Committed (DAC).

Senior Management Support of Space Standards: County Senior Management facilitates the fulfillment of the space principles and goals contained herein. All new space requests and changes to existing space, utilizing the Real Property Intake Form, are to be routed through the appropriate Department Head or designee (Department Director or Assistant Director) and then submitted to the Director of General Services or designee (Assistant Director). Requests are to be forwarded only after appropriate alternatives have been considered within the existing space available to the Department. In general, a department should have no more than one workspace for each full-time employee (FTE), or less if a portion or all of their staff are working remotely. For space management purposes, an FTE is defined to include permanently funded, as well as approved contract, temporary, extra help, and alternatively funded positions.

Remote and Hybrid Work: Recognizing that the County has a hybrid-remote work Policy, the County must balance providing all FTE adequate workspace at a County work location, with efficiently utilizing limited space. In striking this balance, employees who work less than three days per week from their primary County work location should not expect, and departments should not plan for, a dedicated County workspace. Instead, employees who work less than three days per week from

their primary County work location will have access to flexible or shared County workstations on an as-needed basis. However, department directors may seek exceptions from the CEO's office to this aspect of the policy for reasons that support employee productivity, necessity of work groups to be in close proximity, or other business-related reasons that justify the need.

Workstation Allocation: All County employees shall have access to an adequate workstation at their primary County work location. This workstation may be designated as either a dedicated or non-dedicated workspace depending on office availability and the employee's in-office work schedule as discussed in the immediately preceding section of this Policy. Workstations will be equipped with essential office supplies, technology, and furniture necessary to carry out job responsibilities.

Space Functionality and Productivity: The objective of long-term space planning is to establish contiguous space for departments and provide all staff an optimal work environment. Space management decisions will aim to minimize the number of serviced and supported locations based on employee choices and department allowance for hybrid work schedule at any given time, thereby reducing expenses and departmental duplication costs for LAN connectivity, mail services, copiers, etc. Consideration will be given to the need for collaboration between departments/divisions when considering requests to relocate from a given facility. Space decisions will strive to facilitate maximum functionality and productivity within and among departments/divisions.

Department Management of Space: Departments may redistribute space assigned to them by the General Services Department as long as the redistribution complies with the goals and principles outlined herein. If a department determines that assigned space will not be used for the upcoming fiscal year, the department shall notify and coordinate with General Services and CEO to ensure efficiencies and reduce costs, or the unused assigned space may be returned to the Space Management Inventory for redistribution.

Development and Enforcement of Space Standards: General Services utilizes the standards outlined in the latest version of the Building Owners and Managers Association (BOMA) occupancy standards to determine gross, net/usable and rentable square footage calculations for tenants or departments within a given County-owned building. General Services must be notified of all relocations, office reconfigurations, or significant rearrangement of space as discussed in the section above. This is done by completing the [Real Property Intake Form](#). Departments are responsible for funding any costs associated with modifications that they request.

Balancing Owned Space and Leased Space Costs with Flexibility and Efficiency: In general, decisions related to space will have as a priority, minimizing rental expenses paid for space outside of County owned buildings. Outside lease costs will be weighed against the need for flexibility in managing space. Every effort will be made to reduce overall lease cost liability so as to minimize space occupancy costs. As an example, if the relocation of staff would result in the "freeing up" of space from a lease funded by the General Fund, then every effort will be made to accommodate the space request/relocation, and notice will be given to reduce the external lease obligation, if the lease permits.

IT Server Rooms: Whenever possible, the Information Technology Department (ITD) will provide appropriate server space that is accessible to appropriate department personnel, with proper air handling systems, increased security, and state-of-the-art server racks and connections. Unless departments have made specific arrangements with ITD, servers should be relocated to such locations.

Hoteling: It is the intention of General Services to facilitate "Hotel" spaces throughout the County where feasible. A docking station, monitor, mouse, keyboard, telephone, and small table or desk will be provided in many County facilities for this purpose.

Requests for Real Property: Requests for acquisition, disposal, or any other transfer of ownership, or lease (County as lessor or lessee) of real property are to be submitted in writing to the Real Property Division for analysis using the [Real Property Intake Form](#). The General Services Department will be responsible for taking requests to the Board of Supervisors to seek approval as needed, and will support the requesting Department at Debt Advisory Committee meetings for approval of the lease. Miscellaneous departmental needs, such as requests for rough “ball-park” estimates of value, landlord services, estimates of time needed to perform various types of projects, etc., may be requested by contacting the Real Property Division.

Real Property Purchase Requests: All acquisition of real property (including easements) will be managed by the Real Property Division who will arrange for appraisals to provide estimates of property values and other costs upon written request. Real Property will require a review of the request for conformity with the General Plan of the area.

Office or Warehouse Space Lease: If leased space is required, the department head or designee must submit a [Real Property Intake Form](#). The Real Property Division will consider whether: (1) additional or alternate space is required; (2) existing County-owned or leased space is available to satisfy the need; and (3) where leasing or renting space is recommended, they will work with the department to determine if funding exists to support the lease payments, pay for tenant improvements where needed, as well as relocation. The Real Property Division will inform the Capital Projects Division of all major leasehold improvements that may be needed. Upon receipt of the approved Real Property Intake Form, the Real Property Division working with the requesting department, will identify options and submit the request to lease to the Debt Advisory Committee and ultimately the Board of Supervisors for authorization if appropriate.

Request for Landlord Services: The Real Property Division is to be advised of all problems related to leased space necessitating landlord action, including requests for repairs, maintenance, noncompliance with lease terms or conditions, building modification, etc. Real Property is responsible for creating all formal notices regarding contractual non-compliance with the lease agreement. In the event of emergencies or health and safety matters that require the landlord’s immediate attention, the department occupying the leased space may notify the landlord directly and then notify the Real Property Division.

Sale/Transfer of County-owned Real Property: The Real Property Division continually identifies surplus County-owned real property for disposal as appropriate. The inventory of surplus property is periodically updated by requesting that County departments and districts advise the Real Property Division of any real property under its jurisdiction that is surplus to its present or future needs. If real property becomes surplus to a department’s needs prior to the update, the department shall notify General Services along with any known party that might have an interest in acquiring the property. Barring a discovery of other current or future County need for the property, the matter will be taken to the Board of Supervisors by General Services with a recommendation that the property be declared surplus and disposed of in a manner approved by the Board and in accordance with applicable statutes.

Lease of County-owned Real Property to Others: If a County department identifies real property under its administration for which there is, or may be, a demand to secure a lease for purposes which are compatible, or not inconsistent, with County operations, the matter shall be brought to the attention of the Real Property Division, along with pertinent information including whether it is known, or anticipated, that more than one prospective tenant would be interested in the lease opportunity. After appropriate analysis of the proposed leased opportunity, the Real Property Division shall either submit the matter to the Board of Supervisors with recommended actions, or provide written findings and recommendations to the proposing department.

Non-Profit Use of County Real Property: A non-profit organization that requests to lease County-

owned real property shall first identify a responsible County department as a sponsor, which would otherwise provide or benefit from the delivery of the non-profit organization's services. A County department shall first determine that it will sponsor the non-profit organization prior to a request of the County's Real Property Division for further review and processing. The Sponsoring Department must certify that the non-profit organization's services support a core County purpose and provide services that are linked to the Sponsoring Department's mission. If sponsorship criteria is met, the lease terms shall be based on the fair market value of leased property.

If a Sponsoring Department is obtained, the non-profit shall work through the Sponsoring Department to submit a formal request for County-owned space to the Real Property Division. In addition to the [Real Property Intake Form](#), the request must include an executive summary outlining the non-profit's space needs, desired location, renovation requirements and name of Sponsoring Department; scope of services that shall be provided in County facilities, including citizens served; demonstrate that services support a core County service; program goals and objectives; and organizational points of contact. The Sponsoring Department will attach a brief memo to the formal request detailing their support of the request.

Demolition or Removal of County Structures: If a department head determines that demolishing or moving a County structure is needed, a written request is submitted to the General Services Department. The request shall include the justification for such demolition or removal (e.g., structurally unsafe, needed at another location, etc.). The General Services Department will prepare an evaluation of the proposed request in coordination with the County Executive Office for submission to the Board of Supervisors, along with a report as to the intended action. The above procedure is not required when a structure is being demolished or removed as part of an approved capital project. The General Services Department will be responsible for securing any necessary permits prior to initiation of an approved project and completing and filing the required forms with the Auditor-Controller and County Clerk after the demolition or transfer of any County structure.

Costs

- Due to the budget impact, requests for new or increased leased space and the purchase of property must be approved by the CEO's office prior to Real Property negotiating a lease or purchase.
- When County departments request the relocation of staff to new space, the requesting department pays all costs associated with that move including reconfiguration of the space to be occupied. Terms for paying costs associated with a relocation or move and any renovations, are to be agreed to in advance by all parties. All renovations of the space must be approved by the Director of General Services and will be managed by the Capital Projects Division.

Policy Scope

The policy and procedures herein apply to all departments, offices, and special districts of the County of Santa Barbara.