

Policy Advisory Council

Monday, March 6, 2017, 2:00 p.m.
Johnson Hall Conference Room

Agenda

1. Welcome.....Kelly Wolf/Bruce Blonigen
2. [Travel Policy](#) (New; Update Post Public Comment)Kelly Wolf
3. [571.023 Student Medical Leave](#) (Revise; Update Post Public Comment).....Kathie Stanley
4. [03.05.03 Nepotism](#) (Repeal).....Angela Wilhelms
5. [OUS 48 Space Use Objectives and Building](#) (Repeal).....Kassy Fisher
6. [04.00.08 Campus Planning](#) (Revise).....Kassy Fisher
7. [580.011.0045 Charging Administrative Costs to Auxiliary Enterprises](#) (Repeal).....Kassy Fisher
8. [580.060 Real Property, Facility and Campus Planning](#) (Revise).....Kassy Fisher
9. [OUS 28 Historical and/or Architectural Value, Properties of](#) (Repeal).....Kassy Fisher
10. [06.00.07 Return of Overhead Charges on Continuing Education and Designated Operations Activities](#)
(Repeal).....Kassy Fisher

Travel

GUIDING PRINCIPLES

- Faculty, staff, and student travel is necessary to support and enhance the university's mission
- Travelers are expected to be, and believed to be, reasonable and prudent utilizing university resources for travel
- Budget Authorities are accountable and responsible for appropriate use of university resources. Departments are free to create policies/limits that are more restrictive (but not less restrictive) than university-wide policies/limits
- University processes related to travel reimbursements should not be overly onerous so as to negatively affect travelers (including guests, visitors, recruits, etc.)
- Travel reimbursement processes should be clear, consistent, transparent, convenient, efficient, and compliant
- Travel reimbursements are for business-related expenses only, not for personal expenses of the traveler or any traveling companions

APPROVAL

Travel expenses will be reimbursed provided the trip and reimbursement request are approved by authorized campus personnel (generally the traveler's supervisor or designee). Travel authorizations may be verbal or written. Blanket authorization for a series of trips may be approved. Employees whose duties require frequent or continuous travel are considered to have approval when travel is within the usual limits of their duties.

PERSONS ELIGIBLE FOR TRAVEL-EXPENSE REIMBURSEMENT

[1] Employees

University of Oregon employees may be reimbursed for expenses incurred in connection with official travel.

[2] Employees on Leave

Travel expenses incurred during sabbatical leave may be paid/reimbursed when the travel was approved by Academic Affairs as part of the application for sabbatical leave. Payment/reimbursement for travel expenses while on other types of leave is warranted only in exceptional circumstances.

[3] University of Oregon Board of Trustees Members and Unpaid Members of university Advisory Committees

University of Oregon Board of Trustees members and unpaid members (non-university personnel) of university advisory committees may be reimbursed for actual and reasonable expenses, including mileage and gratuity.

[4] Prospective Employees

Travel expenses incurred in connection with prospective university employee interviews and recruitment are reimbursable when properly authorized.

[5] New Employees

New employees may be reimbursed for travel and moving expenses [as approved by the hiring authority and in accordance with Fiscal Policy Manual 66.200, Moving Expenses Policy.](#)

[6] Students

Students who travel as employees or officially-designated representatives of the university may be reimbursed for travel expenses.

[7] Non-Employees/Volunteer Workers/Independent Contractors

Individuals not listed above may only be reimbursed for travel expenses incurred in conjunction with providing a service to campus through a formal or informal contractual relationship.

TRAVEL-EXPENSE PAYMENT

Travel expenses may be paid either by reimbursement to the traveler or direct payment to a provider/merchant (e.g., airline ticket through a contract agency, direct billing from hotel).

Requests to reimburse travel expenses must be made via the campus travel reimbursement process. Requests for reimbursement must be accompanied by receipts, when required. Direct payments/reimbursements from the University of Oregon Foundation are subject to that organization's policies and processes.

Travel advance funds may be requested from and approved by Business Affairs.

When employees travel together, it may be expedient for one employee to pay and claim reimbursement for certain expenses of other employees. Reimbursement for multiple employees is only allowed when actual expenses are being reimbursed and are supported by receipts. Deductions are made from the per diem amounts for employees involved.

TAX TREATMENT

The university reimburses for travel expenses under an IRS Accountable Plan and in accordance with IRS Publication 463 (Travel, Entertainment, Gift, and Car Expenses) and IRS Publication 519 (U.S. Tax Guide for Aliens). [This includes the provision that expenses be accounted for within a reasonable period of time.](#)

Reimbursement of travel expenses for temporary assignments (less than one year in duration) are generally not taxable to the employee. If the assignment is indefinite, the employee is considered to have moved to the new work location. Reimbursement of expenses for indefinite travel is generally taxable to the employee.

STUDENTS, STUDENT GROUPS, AND TEAMS

[1] Student Travel

University policy on Traffic, Parking and Vehicle Safety (former OAR 580-40-0030) provides guidelines regarding transportation of students in a state owned, leased or controlled vehicle.

[2] Travel Expenses of Others

A university employee, such as a coach, athletic director, or group leader, may pay for the travel expenses of the team or group members, the following procedures apply when preparing the travel reimbursement request.

Keep non-employee travel expenses separate from those of employees.

Include an attachment that provides a detailed itemization of each employee's expenses.

Include an itemized vendor receipt for meals provided to team or group members. If no receipt is available, such as when individuals are provided cash to buy their own meals, a list of the individuals' names, their signatures, and the amounts disbursed is required. Refer to travel procedures for documentation requirements.

[3] One-Day Trips

Meal expenses for an athletic team or student group on a one-day trip may be reimbursed at actual cost (as opposed to per diem). An itemized receipt is required. University employees such as coaches, trainers, or group leaders who accompany and are responsible for the care, custody, or control of the team or group are also eligible for meal-expense reimbursement. The request for reimbursement must state that the expenses result from a trip by an athletic team or student group.

TRAVEL PAID BY OUTSIDE SOURCE

Outside entities may reimburse the campus, pay a service provider directly, or reimburse a university employee for travel expenses related to university business. The university will not pay or reimburse for any travel expenses that are also being paid by an outside source directly to the university employee.

MEAL AND INCIDENTAL EXPENSES

[1] General

Generally, meal and incidental expenses are reimbursed at a per diem rate. Meal and incidental expenses may be reimbursed only if the traveler qualifies for lodging-expense reimbursement, except as noted herein.

Travelers are eligible for 75% of the meal and incidental expenses per diem amount on the initial and final day of travel. Travelers are eligible for 100% of the meal and incidental expenses per diem on all other travel days.

For the day the traveler leaves on a trip, the per diem rate specified for where the traveler will spend the night is used. For the day the traveler returns from a trip, the per diem rate specified for the last location where the traveler stayed overnight is used.

Applicable meal and incidental expense per diem may not be claimed if a meal is provided and consumed as part of a hosted function (e.g., a conference registration fee includes a meal, meals are included with lodging rate) or included with a roomette/bedroom railroad rate or international flight. The per diem rate for a full day's meal and incidental expenses is apportioned as follows:

- breakfast: 25%
- lunch: 25%
- dinner: 50%.

Meal and incidental expense per diem is not apportioned for the initial and final day of travel (even if a meal is provided and consumed)

[2] Actual Meal-Expense Reimbursement

Reimbursement for meals at actual expense (including gratuity) instead of per diem rate is only allowed when hosting official guests and groups. (See Fiscal Policy 56.100 – Non-Travel Meals, Refreshments, and Hospitality Expenses). for athletic team and student group meal expenses, and for University of Oregon Board of Trustees members and unpaid members of university advisory committees. When actual meal expenses are reimbursed, an itemized receipt is required.

Commented [KW1]: The Fiscal Policy includes discussion or per-diem limits and receipt requirements. No need to reiterate here.

Athletic team meal expenses exceeding the per diem rate require documentation as to the reason for the excess and documented approval of the athletic director or the associate athletic director to whom the coach reports. Student group meal expenses exceeding the per diem rate require documentation as to the reason for the excess and documented approval of the department head.

[3] Meals on One-Day Trips

When a traveler departs and returns the same day, meal expenses are reimbursed only in the following cases:

- [a] When traveling as a University of Oregon Board of Trustees member or unpaid member of a university advisory committee
- [b] When a meal at a convention, conference, or meeting is part of the agenda and the cost of the meal has not previously been paid with the registration fee
- [c] When directed or required to attend mealtime business meetings, including community or public relations meetings
- [d] Trips by athletic teams and student groups (see STUDENTS, STUDENT GROUPS, AND TEAMS above)

Lunches on one-day trips will not be reimbursed except in circumstances [a] - [d] listed above.

The IRS considers breakfast and dinner allowances, figured on the basis of hours worked (such as those permitted under [e] [f] below, to be taxable to the employee. Breakfast and dinner allowances are not available to non-employees.

[e] When an employee leaves his/her official station two or more hours before his/her regular work shift, s/he will receive the breakfast allowance

[f] When an employee returns to his/her official station two or more hours after his/her regular work shift, s/he will receive the dinner allowance

[4] Incidental Expenses

Incidental Expenses are combined with meals into a single rate.

The university references IRS Publication 463 (Travel, Entertainment, Gift, and Car Expenses) for the definition of domestic-travel incidental expenses and the U.S. Department of State for the definition of foreign-travel incidental expenses.

LODGING

Lodging expenses are normally reimbursed when authorized campus personnel determine that the traveler would not reasonably be expected to return to his or her residence between work shifts. Generally, lodging is reimbursed at actual cost up to per diem rates. Exceptions to per diem maximum may be granted with appropriate justification. Common exceptions include:

- Conferences
- Traditionally high-cost locations (e.g., New York City; Washington, DC; San Francisco Bay Area; Boston; Seattle)
- Cities where a per diem hotel is not available within a reasonable distance [e.g., twenty (20) minute drive] of the primary business location

[1] Lodging Receipts Requirements

Receipts for lodging are required and must show the following:

- Traveler's name (or names)
- Date(s) occupied
- Itemization of Charges
- Room number
- Settlement in Full

[2] Taxes on Lodging

Lodging taxes at domestic locations are reimbursed as part of the actual lodging cost calculation, but are not included when determining if lodging cost has exceeded the per diem rate maximum. Lodging taxes at international locations are included as part of the per diem.

[3] Non-commercial Lodging

The intent of the non-commercial lodging per diem is to reimburse travelers using non-commercial facilities (e.g., travel trailer, motor home, or staying with friends or family members) and should result in an economic benefit for the university. For current rate, see [Link to per diem rates]

For purposes of reimbursement rates and per diem limits, lodging arranged through services such as Airbnb, VRBO, and HomeAway is considered Commercial Lodging.

In certain circumstances, alternate lodging arrangements (e.g., leased apartment) may be considered most appropriate. Contact the BAO Travel Office for additional information and consideration.

TRANSPORTATION

Transportation expenses incurred while traveling on official business may be reimbursed. Personal expenses, such as private vehicle repair and maintenance, may not. The following expenses may be reimbursed or paid directly:

- Common carrier fare
- Rental Vehicle charges
- Private-vehicle mileage allowance
- Taxi or shuttle service fare (including gratuity)
- Parking and garage fees

COMMON CARRIER FARES

Commented [KW2]: Reordered from most-common to least-common.

Transportation by common carrier is recommended when it is more appropriate and economical than travel by state or private vehicle. Common carriers are usually preferred for out-of-state travel. Actual cost is paid or reimbursed for airline, railroad and bus fares for travel.

[1] Airlines

All employees are encouraged to travel using routes, schedules, and airlines that provide the most cost-effective, efficient travel that meets the business purpose. Economy Plus and/or Business Class airfare are authorized for any leg of international flights where the elapsed time in-the-air is eight hours or greater. First Class airfare is not authorized.

Air travel paid from federal funds must conform to the Fly America Act.

[2] Taxis and Shuttle Services

Taxi and shuttle service is authorized between terminals, lodgings, and work stations.

[3] Railroads

All employees are encouraged to travel using routes and schedules that provide the most cost-effective, efficient travel that meets the business purpose. A roomette is allowed when sleeping accommodations are needed due to overnight travel. A bedroom is allowed if no roomette is available or if special accommodations are approved because of the trip's nature or the traveler's health. Applicable meal and incidental expense per diem may not be claimed if a meal is provided and consumed as part of the roomette or bedroom rate.

[4] Bus Lines

Scheduled or charter buses may be used.

[5] Travel Awards and Frequent Flyer Mileage

Because the cost of record-keeping outweighs any monetary benefit, the university will not recapture airline bonuses awarded employees for frequent flyer miles. Frequent flyer bonuses may be used by employees as they choose unless the terms of a grant or contract require otherwise. The university will not reimburse or trade tickets purchased using frequent flyer miles.

[6] Payment in Lieu of Air Travel

Common carriers (e.g., airlines, railroads) are usually preferred for out-of-state travel. An employee may choose to travel by private vehicle instead. In such a case, the employee may be reimbursed for

ground transportation expenses, including standard mileage, parking, and tolls, up to the cost that would have been incurred had s/he traveled by common carrier.

The following costs associated with air travel can be used as a basis for comparison:

- The cost of round-trip commercial air fare that would have been incurred. An online quote (i.e., Travelocity, Orbitz) should be obtained prior to the travel dates.
- Private vehicle mileage to and from the air terminal that would normally be used for departure.
- Lodging, meal, and incidental expenses that the employee would normally incur with air travel

PRIVATE VEHICLES

Private Vehicles may be utilized for business-related travel.

The per-mile reimbursement rate is determined by the Internal Revenue Service (IRS). Employees who receive a Car Allowance Stipend are not eligible for per-mile reimbursement.

Mileage for the most direct, usually-traveled route may be reimbursed.

[1] Highway mileage

Use standard mileage guides, odometer/tripometer readings, or online mapping tools (e.g., Mapquest.com). Substantial deviations from standard distances or usual routes must be justified. Mileage calculations generally start at the employee's official work station.

[2] Local mileage

Travel between work places and travel between lodging and restaurants for a traveler's sustenance, health, and comfort may be reimbursed if meals cannot be obtained at the temporary duty or lodging sites. Travel for personal reasons or entertainment may not be reimbursed.

Travel between the employee's home and official work station is considered commuting expense and may not be reimbursed.

Employees and agents authorized to use their privately owned vehicles for official business are required to have personal automobile liability insurance to provide the primary coverage for any accidents involving that vehicle. University-provided automobile liability coverage will apply on a limited basis after the employee's primary coverage limits have been used. The university does not provide physical damage, uninsured motorist and personal injury protection for personal vehicles. For additional information, contact the Office of Risk Management.

VEHICLE RENTAL

Vehicle rental expenses may be reimbursed. A car, boat, aircraft or other vehicle may be rented when it is the most cost-effective, efficient means of transportation that meets the business purpose. Receipts are required for vehicle rentals. Employees are encouraged to utilize State of Oregon contracts which provide discount rates, car upgrades, and insurance coverage. Employees are also encouraged to use their corporate travel cards when renting vehicles because of the primary Collision Damage Waiver (CDW) coverage provided.

[1] Insurance on Rented Vehicles

The university provides self-insurance coverage for rental vehicles if they are to be used exclusively for official business. A certificate of insurance may be obtained from the Office of Risk Management. If a rental vehicle is to be used for a mix of personal and business purposes, the university's self-insurance coverage is only applicable for the portion of travel applicable to official business. The employee or agent will want to check with his/her insurance agent regarding coverage for personal usage.

If the employee or agent plans to travel outside the United States, its territories and possessions, and Canada, the department should contact the Office of Risk Management for help in obtaining the appropriate coverage.

[2] Responsibilities After an Accident

The renter of a vehicle involved in an accident is responsible for immediately reporting the accident to the Office of Risk Management.

LOANED VEHICLES

Use of loaned vehicles may be authorized when it benefits the campus. Expense reimbursement is for use of the vehicle regardless of the number of passengers. Some companies may lend vehicles to campuses, departments, or individuals for specified purposes. The operator is reimbursed for actual out-of-pocket expenses arising from using the vehicle for official business.

[1] Insurance on Loaned Vehicles

The university provides coverage for loaned vehicles if the campus has agreed in writing to accept responsibility for any liability or damage to the vehicle. The loaned vehicle must be used for official business.

For additional information, including the loan agreement form, contact the Office of Risk Management.

STATE-OWNED VEHICLES

Motor pool vehicles may be used for official state business only. Use of a state vehicle is not authorized when costs are charged to Agency Funds, except for use by Campus Organizations or for other legitimate state business purposes as approved by authorized campus personnel. The department that authorizes a state vehicle's use is financially accountable for damages and all costs resulting from violations of policies relating to state vehicle use.

[1] Private Use Prohibited

Using a state-owned vehicle for private purposes or allowing another person to do so is prohibited (ORS 283.395) and punishable, upon conviction, by a fine (ORS 283.990).

[2] Vehicle Safety Including Authorized Drivers

University policy on Traffic, Parking and Vehicle Safety (former OAR 580-40-0030) provides safety guidelines regarding transportation in a state owned, leased or controlled vehicle.

[3] Overnight Parking at Employee's Residence

A state vehicle may be kept overnight at an employee's residence when doing so is approved in advance by authorized campus personnel.

MISCELLANEOUS EXPENSES

Necessary business-related travel expenses are normally reimbursed. Personal expenses are not reimbursed. The university establishes the definition of miscellaneous expenses. All miscellaneous expenses must be itemized.

Necessary miscellaneous business-related expenses are not reimbursed using a per diem; rather, if the traveler has incurred a miscellaneous business expense as outlined below, that expense is reimbursable at the actual cost.

[1] Checked Baggage

Up to two (2) standard-weight bags (standard weight as defined by the airline used)

Charges for the following may be reimbursed only when necessary for the business purpose and approved by authorized institution personnel (receipts required):

- additional baggage (more than 2 bags)
- overweight/oversize baggage

[2] Other Business Related Expenses Normally Reimbursed

- Telephone
- Fax
- Internet
- Postage
- ATM cash advance fees
- Materials and supplies purchased to meet an immediate business need
- Visa and passport expenses
- Parking
- Tolls
- Energy surcharge

PER DIEM RATE REFERENCES

Per diem rates for the continental United States are determined using the federal rate in the IRS's High-Low Substantiation Method.

Per diem rates for the non-continental United States and Territories (e.g., Alaska, Hawaii, Guam, Puerto Rico) are determined by the US Department of Defense

Per diem rates for foreign locations are determined by the US Department of State

OTHER RESOURCES

[Link to per diem rates (see next page)]

EXCEPTIONS

Upon consideration of documented extenuating circumstances, exceptions to these policy provisions may be granted by the Vice President for Finance and Administration (VPFA) or designee.

DRAFT

DOMESTIC PER DIEM RATES (AS OF 09/01/2016)

Note: Example only. This section will not be included within the formal policy.

Meals & Incidental Expenses	
Standard (low-cost) Localities	57.00
High-cost Localities	68.00

Proration of Meals & Incidental Expenses	Breakfast	Lunch	Dinner	IE
Standard (low-cost) Localities	13.00	13.00	26.00	5.00
High-cost Localities	15.75	15.75	31.50	5.00

Meals & Incidental Expenses (Initial and Final Day; No Proration)	
Standard (low-cost) Localities	42.75
High-cost Localities	51.00

Lodging	
Standard (low-cost) Localities	128.00
High-cost Localities	207.00

Standard non-commercial lodging	25.00
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Other	
Standard Tip/Gratuity Rate	15.00%
Travel by private vehicle	\$0.54/mile

High-cost localities per IRS high-low substantiation method:

State	Key City	County and Other Defined Location	Effective Dates
CA	Mammoth Lakes	Mono	12/1 - 2/29
	Monterey	Monterey	7/1 - 8/31
	Napa	Napa	5/1 - 10/31
	San Francisco	San Francisco	All year
	San Mateo, Foster City, Belmont	San Mateo	All year
	Santa Barbara	Santa Barbara	All year
	Santa Monica	City limits of Santa Monica	All year
	Sunnyvale, Palo Alto, San Jose	Santa Clara	All year
CO	Aspen	Pitkin	12/1 - 3/31 & 6/1 - 8/31
	Denver, Aurora	Denver, Adams, Arapahoe, Jefferson	All year
	Grand Lake	Grand	12/1-3/31
	Silverthorne/Breckenridge	Summit	12/1-3/31
	Steamboat Springs	Routt	12/1 - 3/31
	Telluride	San Miguel	12/1 - 3/31 & 6/1 -8/31
	Vail	Eagle	12/1 - 3/31 & 6/1 -8/31

DC	Washington D.C.	Washington D.C. (also the cities of Alexandria, Fairfax, and Falls Church, and the counties of Arlington and Fairfax in Virginia; and the counties of Montgomery and Prince George's in Maryland) (See also Maryland and Virginia)	All year	
FL	Boca Raton, Delray Beach, Jupiter	Palm Beach and Hendry	1/1 - 4/30	
	Fort Lauderdale	Broward	1/1 - 3/31	
	Fort Walton Beach, De Funiak Springs	Okaloosa and Walton	6/1 - 7/31	
	Key West	Monroe	All year	
	Miami	Miami-Dade	12/1 - 3/31	
	Naples	Collier	1/1 - 4/31	
IL	Chicago	Cook and Lake	3/1 - 11/30	
ME	Bar Harbor	Hancock	7/1 - 8/31	
	Ocean City	Worcester	6/1 - 8/31	
	Washington, D.C. Metro Area	Montgomery and Prince George's	All year	
MA	Boston, Cambridge	Suffolk, City of Cambridge	All year	
	Falmouth	City limits of Falmouth	7/1 - 8/31	
	Martha's Vineyard	Dukes	6/1 - 9/30	
	Nantucket	Nantucket	6/1 - 12/31	
MI	Traverse City/Leland	Grand Traverse/Leelanau	7/1 - 8/31	
NY	Lake Placid	Essex	7/1 - 8/31	
	New York City - including boroughs of Manhattan, Brooklyn, The Bronx, Queens and Staten Island	Bronx, Kings, New York, Queens, and Richmond	All year	
	Saratoga Springs, Schenectady	Saratoga and Schenectady	7/1 - 8/31	
PA	Hershey	Hershey	6/1 - 8/31	
	Philadelphia	Philadelphia	3/1 - 6/30 & 9/1 - 11/31	
RI	Jamestown, Middletown, Newport	Newport	6/1 - 8/31	
SC	Charleston	Charleston, Berkeley and Dorchester	3/1 - 11/30	
TX	Midland	Midland	All year	
UT	Park City	Summit	12/1 - 3/31	
VA	Washington D.C. Metro Area	Cities of Alexandria, Fairfax and Falls Church; counties of Arlington and Fairfax	All year	
	Virginia Beach	City of Virginia Beach	6/1 - 8/31	
	Wallop Island	Accomack	7/1 - 8/31	
WA	Seattle	King	All year	
WY	Jackson, Pinedale	Teton and Sublette	6/1 - 9/30	

Student Medical Leave

Reason for Policy:

This policy outlines matters relating to student medical leave.

Responsible Office:

For questions about this policy, please contact the Vice President for Student Life: (541) 346-1137.

Enactment & Revision History:

Technical revisions enacted by the University Secretary on September 3, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 571 Division 23.

Policy:

A. Definitions

(1) "Dean's Consultation" occurs when the Vice PresidentDean of Students convenes a group of professionals to recommend actions and strategies to respond to a student's failure to meet the University's Standards of Responsibility and Self Care.

(2) "Medical Leave" means leave during an academic term, resulting from a student's medical or mental health condition that requires the student to interrupt their enrollment.

(3) "Standards of Responsibility and Self Care" means that a student in the University community is experiencing a serious medical or mental health condition or emergency that substantially threatens the welfare of self or others and/or significantly disrupts the functioning of University operations.

(4) "Vice President" means Vice President for Student Life or successor or designee.

(5) "Dean of Students" means the Associate Vice President & Dean of Students or successor or designee.

B. Voluntary Medical Leave

A student who wishes to be placed on Voluntary Medical Leave from the University shall contact the Dean of Students and, if requested, shall present a recommendation to that effect from a physician or psychologist ~~to the Dean of Students~~.

The Dean of Students ~~will may~~ request the Executive Director of the University Health Center (if the request for leave is based on a medical condition) or the Director of the University Counseling and Testing Center (if the request for leave is based on mental health conditions) or both (if the Dean of Students believes information from both directors would be useful) evaluate the information provided.

~~Upon the affirmative written recommendation of the director conducting the evaluation, the Once the~~ Dean of Students ~~shall immediately~~ grants the student's request, they and will work with the student on a plan for return and plan for success upon such return, as appropriate, in accordance with Section I below, regarding Resumption of Student Status.

C. University Duties of Refund ~~and and Notification~~Other Academic Alternatives

If a student is placed on leave from the University pursuant to the provisions of UO Policy 571.023(B) or (G), the Dean of Students is authorized to instruct the University Registrar, when necessary, ~~-~~ to withdraw the student immediately and to initiate the appropriate tuition and fee refund according to the University refund schedule, or explore and/or implement alternative or additional reasonable accommodations, as may be warranted in the circumstances.~~-~~

D. Standards of Responsibility and Self Care

(1) A student in the University community who does not meet University Standards of Responsibility and Self Care, unless such a student elects voluntary leave, may be referred for a professional assessment or placed on Emergency Temporary Medical Leave or Mandatory Leave.

In evaluating whether a student does not meet University Standards of Responsibility and Self Care, the University will make an individualized and objective assessment of the student's ability to participate in the University's programs and activities, based on reasonable medical judgment or the best available objective evidence. The assessment will determine the nature, duration and severity of the risk, the probability that the potential harm will actually occur and, if a qualifying disability exists, whether reasonable accommodations can be implemented to mitigate the risk sufficiently to allow the student to continue to access University programs and activities.

The involuntary Emergency and Mandatory Leave processes are not a substitute for disciplinary action when there is a violation of the Student Code of Conduct, and the disciplinary process is separate from the process outlined here. Because conduct that gives rise to Emergency or Mandatory Leave might also result in Student Conduct sanctions, it is possible that a student who has met the designated conditions for reenrollment following an Emergency or Mandatory Leave may not be eligible for reenrollment based on the conduct sanction administered.

E. Emergency Temporary Leave

(1) The Dean of Students may take emergency action to place a student on Emergency Temporary Leave when necessary to secure the health or safety of the student or others. At the time that the emergency action takes place, the Dean of Students shall (A) inform the student of the reason for the emergency action, (B) give the student the opportunity to explain why emergency action need not be taken, and (C) inform the student that the meeting outlined in the Mandatory Leave Procedure section below will take place within three (3) business days of the Emergency Action if the student is available, or if the student is unavailable for medical reasons, within three (3) business days after the student becomes available.

(2) Mandatory Leave. If the Dean of Students believes a student's medical or mental health issues substantially threaten the welfare of self or others and/or significantly disrupts the functioning of University operations, the Dean of Students may place a student on mandatory leave after following the procedures identified in Section I.

F. Involvement of Family Members and Emergency Contacts

The Dean of Students may seek the cooperation and involvement of family members and/or the emergency contacts of students who are experiencing medical or mental health emergencies. Involvement may include requesting family members to assist in persuading the student to seek appropriate professional assistance, such as an evaluation from an appropriate mental health or medical professional. The decision to notify a student's family members and/or emergency contacts in the case of a medical or mental health emergency will be weighed carefully against the student's privacy rights and other relevant information and will be done consistent with the requirements of state and federal law and university policy.

G. Mandatory Leave Procedure

(1) If the Executive Director of the University Health Center or the Director of the University Counseling and Testing Center believes the standard for mandatory leave has been met by a student's behavior, the director will recommend that the Dean of Students initiate mandatory leave. In some instances, both the Mandatory Leave and Student Conduct procedures may be triggered by the student's conduct. The Student may also be placed on emergency temporary suspension by the Dean of Students or designee in the interim, pursuant to the Emergency Action provisions of the Student Conduct Code or the Emergency Temporary Leave provision, discussed above. The director may confer with any individuals the director believes can assist in making a recommendation.

(2) The Dean of Students will request the director prepare a report containing a summary of the steps already taken to respond to the student's medical or mental health issues, a list of individuals who have relevant information regarding the student's medical or mental health issues, and the basis for recommending mandatory leave.

(3) The director will set a date and time for a meeting with the student prior to making a final recommendation regarding Mandatory Leave and provide the student written notice. The notice shall include:

(a) The date, time and place of the meeting;

(b) That the purpose of the meeting is to consider if the student should be placed on Mandatory Leave;

(c) That the standards for making the final decision are whether the student's medical or mental health issues substantially threatens the welfare of self or others, or significantly disrupts the functioning of University operations; and

(d) That the student has the opportunity to attend, to participate in the meeting, and to be accompanied by a personally-selected representative. Should the student elect not to attend the meeting, the process will proceed without the benefit of the student's input, with the director's evaluation based on the information otherwise available.

(4) The director shall conduct the meeting in an informal manner that provides the director with an opportunity to gather information relevant to the final decision and provides the student with an opportunity, if the student wishes, to provide information the director or student believes will be useful in making a final recommendation. The student's opportunity to participate in the meeting shall include the opportunity to provide information from others who may have knowledge regarding whether the student's medical or mental health issues substantially threatens the welfare of self or others and/or significantly disrupts the functioning of University operations.

(5) If the director concludes that the student's medical or mental health condition does not substantially threaten the welfare of self or others, nor significantly disrupts the functioning of

University operations, the director will so advise the Dean of Students in writing. The Dean of Students will decide whether to enforce the mandatory leave and inform the student of the decision.

(e) If, following the meeting with the student, the director concludes that the student's medical or mental health condition substantially threatens the welfare of self or others, or significantly disrupts the functioning of University operations the director will so advise the Dean of Students in writing, and may recommend the student be placed on mandatory leave. The Dean of Students will decide whether to enforce the mandatory leave and inform the student of the decision.

(f) A student may appeal the Dean of Student's determination regarding Mandatory Leave or the conditions placed on the Student's return, pursuant to I below, to the Vice President. Such an appeal must be filed within 14 days. The Vice President shall review all available information provided by the Dean of Students and the affected student and may request an opportunity to request additional information from the Dean of Students and the affected student. The Vice President's decision is final.

H. Resumption of Student Status

(1) Prior to returning to the University or enrolling at the University, a student who has been placed on leave as a result of emergency procedures, voluntary leave, or mandatory leave must produce a plan in writing that delineates how the student will resume their status at the University.

(2) The plan must respond to the condition that gave rise to the need for the student's leave (i.e., need for ongoing psychological or medical care; ability to maintain a standard of responsibility and self care; ability to assume class participation.) If the student will reside in the residence halls, the plan must also state how the student will transition back into this community.

(3) The Dean of Students and counseling (for psychological conditions) or health (for medical conditions) center director or their designees will review the student's plan and meet with the student. The student will be asked to authorize the counseling or health center director or designee to consult with the student's recent/current mental health or medical providers about mental health issues relevant to the student's readiness to return to the University. After the Dean of Students and counseling or health center director have reviewed the student's plan, the Executive Director of the University Health Center (for behavior based on medical issues or emergencies) or the Director of the University Counseling and Testing Center (for behavior based on mental health issues or emergencies) or both (if the Dean of Students believes information from both directors would be useful) will make a recommendation to the Dean of Students, who will decide if the student's request to re-enroll at that time shall be granted or denied.

POLICY CONCEPT FORM INSTRUCTIONS AND GUILDELINES

All policy proposals – including new policy concepts, proposed revisions, or suggested repeals – must be submitted via this form to the Office of the University Secretary with appropriate supporting information and documents. Completed submissions are forwarded to the President's Policy Advisory Council (PAC), which ensures proper routing through the policy-making process. (See UO Policy I.03.01 for more information.)

Please keep the following definition of a university policy in mind as you develop your concept:

A University Policy ("Policy") is a policy that (1) has broad application or impact throughout the University community, (2) must be implemented to ensure compliance with state or federal law, (3) is necessary to enhance the University's mission, to ensure institutional consistency and operational efficiency, or to mitigate institutional risks; or (4) is otherwise designated by the Board [of Trustees] or the President [of the University] as a University Policy.

A policy establishes rights, requirements or responsibilities. Excluded from this definition are things such as, but not limited to, implementation guides, operating guidelines, internal procedures, and similar management controls and tools.

To help facilitate as smooth a process as possible, please consider the following:

1. Consult as many stakeholders as possible *prior to submitting* your concept. A primary role for the PAC is to ensure that appropriate offices, departments or groups are consulted.
2. Run your concept by the Office of General Counsel (OGC) *prior to submission*. OGC review is a required step in policy-making.
3. Please use the proper template for revisions or a new concept. The existing policy template (revisions) or a blank template (new concepts) can be obtained from the Office of the Secretary by emailing uopolicy@uoregon.edu.
4. A "redlined" version of your concept is required for proposed revisions.
5. Include any appropriate related resources. Links are preferred, but supplemental documents are of course acceptable for items not online. Examples include:
 - Other policies or procedures related to, overridden by, necessary as a result of, or otherwise affiliated with your concept
 - Statutory or regulatory citations
 - Necessary notations or a summary of changes if changes are numerous or not obvious when reading the submitted template

Please email uopolicy@uoregon.edu if you have any questions.

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Angela Wilhelms, University Secretary
Current Title/# (if applicable):	Nepotism – 03.05.03
Submitted on Behalf Of:	Nancy Resnick, Human Resources
Responsible Executive Officer:	Human Resources

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Kevin Reed, Bryan Dearinger

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

UO Policy 03.05.03 was enacted in 1985 and is no longer applicable to the UO given the governance transition to an institutional board and the updates to classified and OA staff policies and bargaining agreements.

<https://policies.uoregon.edu/policy/by/1/0305-employment/nepotism>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

This policy references by incorporation two former OARs, which are themselves now UO policy. When these OARs existed as OARs, a UO policy referencing them was necessary.

Now that they are UO policies directly (due to governance transition), a UO policy referencing them is unnecessary if not a waste of space.

1. Employment of more than one member of household – 580-022-0055
(<https://policies.uoregon.edu/employment-more-one-member-household>)
 2. Family relationships and employment – 571-004-0005
(<https://policies.uoregon.edu/family-relationships-and-employment>)
-

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

As noted above, this policy is no longer necessary. At one point in time it was likely necessary to have an institutional policy that cross referenced state administrative rules to ensure clarity and connection to the UO. The policy is no longer necessary as the OARs at issue are in fact now UO policies themselves. Further, the exec department policy listed is not applicable to UO staff, who are governed by UO policy and CBAs. This policy can be eliminated without impact.

AFFECTED PARTIES

Who is impacted by this change, and how?

None

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Nancy Resnick	CHRO/Human Resources	2/15/17
Kevin Reed, Bryan Dearinger	Office of General Counsel	2/16/17

Reason for Policy

To identify applicable rules and policies describing regulations in employment of family members or other relations.

Entities Affected by this Policy

Needs to be developed

Web Site Address for this Policy

<http://policies.uoregon.edu/policy/by/1/0305-employment/nepotism>

Responsible Office

Office of the Vice President of Finance and Administration: 541-346-3003, vpfa@uoregon.edu

Enactment & Revision History

02/08/2010 Policy number revised from 3.000 to 03.05.03

10/4/1985 Reviewed and Recommended by President's Staff

Policy

Consult Personnel Division of the Executive Department policy 4.14.1 in matters of personnel practices governing classified and officers of administration.

Consult University of Oregon Administrative Rules Division 4: Rights and Responsibilities: OAR 571-04-005 Family Relationships and Employment in matters of personnel practices governing faculty members, both officers of instruction and officers of administration.

The Oregon State Board of Higher Education has promulgated OAR 580-22-055 Employment of More than One Member of a Household which also describes official policy governing faculty members, both officers of instruction and officers of administration.

Related Resources

NA

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Christine Thompson, Manager of the Campus Planning Office in Campus Planning and Facilities Management
	Kassy Fisher, Assistant Vice President for Administration and Chief of Staff, Finance & Administration
Policy Title & Policy :	Space Use Objectives and Building
Submitted on Behalf Of:	Jamie Moffitt
Responsible Executive Officer:	Vice President for Finance and Administration
Current Policy # (if applicable):	Space Use Objectives and Building, OUS Board Internal Management Directive 48

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Submitted to Craig Ashford on February 1, 2017

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

To define the university's requirements with respect to space use. The Campus Planning Office in Campus Planning and Facilities Management, working with the Provost's Office, is responsible for establishing and managing space use objectives, standards, and procedures.

Link to policy: <https://policies.uoregon.edu/content/space-use-objectives-and-building>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Related to UO Real Property, Facility, and Campus Planning Policy

(<https://policies.uoregon.edu/real-property-facility-and-campus-planning>) as well as the UO Campus Planning Policy (<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>).

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

We recommend repealing the policy. A majority of the policy text, formerly OUS Board Internal Management Directive 48 (7.105), is obsolete and/or does not meet the definition of a policy. Remaining relevant policy text should be transferred to the UO Real Property, Facility, and Campus Planning policy (<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>).

AFFECTED PARTIES

Who is impacted by this change, and how?

Provost's Office; Campus Planning and Facilities Management; All entities occupying space that is owned and/or managed by the university.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Mike Harwood	Campus Planning and Facilities Management (CPFM)	1/31/17
Various Staff	Campus Planning, a unit of CPFM	1/31/17
Chuck Triplett	Provost's Office	1/27/17
Craig Ashford	Office of the General Counsel	2/1/17
Jamie Moffitt	VPFA/CFO	Feb 2017

Text of the complete policy, proposed for repeal, is appended below.

POLICY TEXT

Reason for Policy

Needs to be developed

Entities Affected by this Policy

Needs to be developed

Web Site Address for this Policy

Responsible Office

Office of the Vice President for Finance and Administration: (541) 346-3003, vpfa@uoregon.edu

Enactment & Revision History

Became a UO policy by operation of law July 1, 2014.
Adopted by the SBHE October 24, 1980.

Policy

As contemplated by Internal Management Directive 7.105, institutions and divisions shall follow the space use objectives and building planning standards adopted by the Board. Details of the current space use objectives and building planning standards, based upon Board action on October 24, 1980, are outlined within Chapter VIII of the "Planning and Procedures Handbook for Campus and Building Development" issued by the Board's office of Facilities Planning.

8.01 - Introduction

The purpose of Chapter VIII is to set forth standards and planning criteria to be used in the physical development, evaluation, and assignment of spaces of institutions in the System. The standards are flexible and must be interpreted consistent with the "mission" and "guidelines" of the institution. Physical requirements and limitations, such as the confines of existing spaces in remodeling, as well as outsize equipment which should be noted in programs and evaluations, may necessitate deviations from the standards.

8.02 - Space Standards

The facility needs of an institution are projected on the basis of the mission, the approved programs of an institution and enrollment projections. (Refer to Section 7.02)

Three biennia enrollment projections, which are used to project instruction related space, need to be reliable because the planning and construction of a facility typically has a lead time of at least five or six years. If appropriate, more than one enrollment projection for which assumptions and reliability are stated should be made to a target planning period. For facility needs, enrollment projections must be reconciled with enrollment ceilings established by the Board.

Facility needs of an institution that are not entirely dependent upon enrollment and staffing must be projected using appropriate unit sizes (room size, station size, etc.), program bases and relevant criteria. Examples are spaces for activities or functions such as research and public services, that are variable in relation to enrollment and partially related to staffing, spaces for physical education that should have at least a minimal size, spaces for libraries that are to a considerable extent dependent upon collection size, and spaces for the physical plant that are dependent primarily upon the area served as well as the character or amount of service rendered. The basic or unit size of space, below which the function cannot be served, may also be a determinant of space size.

Projection Standards - Projection standards are for use by the institution's planning office and Board's office of Facilities Planning in estimating total space needs of an institution and may not reflect an exact spatial configuration for any one category because it may vary depending on the special characteristics of the functions housed.

Design Standards - Design standards are for use by institutional personnel and planning consultants in identifying optimums of unit size and efficiency in the design of proposed facilities.

8.03 - Classroom Space Use Objectives

Classrooms are defined as general purpose instructional rooms with equipment suitable for lecture, discussion, and dry-demonstration formats. Rooms which are known as lecture halls, classrooms and seminar rooms are all expected to be subject to regular central assignment in order to achieve utilization at the maximum practical level. The objectives shall be to achieve at least the following minimum hours of scheduled occupancy of classrooms, and student stations as an average on an institution-wide basis:

<u>Classroom Scheduled Occupancy</u>	<u>Classroom Student Station Scheduled Occupancy</u>
33 hours per week	20 hours per week Which is a Classroom Student Station Occupancy of 60 percent for 33 hours per week of Classroom Scheduled Occupancy

Inasmuch as the University of Oregon Health Sciences Center is a special purpose institution with unique scheduling of classroom facilities for the medical, dental, and nursing schools, it is not expected that the standards applicable to the other institutions within the System will apply. However, the objective shall be to achieve utilization of classroom space at the maximum practicable level at the Center.

8.04 - Classroom Projection Standard

Classroom space needs will be projected on the basis of student stations in conformance with classroom space use objectives (Section 8.03). Area requirements will be determined utilizing a norm of 15 square feet per student station including related service areas (weighted mean derived from survey of the typical distribution of classroom sizes and related service areas).

8.05 - Classroom Design Standard

The number of square feet per station in general purpose classrooms will vary with the size of the room and the type of station, ranging from chairs around a table in a seminar room to a fixed-seat lecture hall. Additional square footage for special equipment may be required. Typical classroom sizes are:

<u>No. of Student Stations</u>	<u>Sq. Ft. per Student Station</u>	<u>Sq. Ft. Area of Room</u>
15	20	300
20	17.5	350
25	16	400
30	15	450
40	14.2	568
50	13.5	675
60	13	780
80	12	960
100	11	1,100
125	10	1,250
200	9	1,800

8.06 - Class Laboratory Space Use Objectives

Teaching laboratories are defined as rooms used by regularly scheduled classes which require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study.

The expected utilization of laboratory space at each institution shall be the maximum practicable level. The objective shall be to achieve at least the following minimum hours

of scheduled occupancy of laboratories and laboratory student stations as an average on an institution-wide basis:

	<u>Class Laboratory</u> <u>Scheduled Occupancy</u>	<u>Class Laboratory Student</u> <u>Station Scheduled Occupancy</u>
Lower Division	22 hours per week	18 hour per week Which is a Class Laboratory Student Station Scheduled Occupancy of 80 percent for 22 hours per week of Class Laboratory Scheduled Occupancy
Class Laboratory	<u>Class Laboratory Student</u> <u>Scheduled Occupancy</u>	<u>Station Scheduled Occupancy</u>
Upper Division	16 hours per week	12 hours per week Which is a Class Laboratory Student Station Scheduled Occupancy of 75 percent for 16 hours per week of Class Laboratory Scheduled Occupancy

Inasmuch as the University of Oregon Health Sciences Center is a special purpose institution with unique scheduling of class laboratory facilities for the medical, dental, and nursing schools, it is not expected that the standards applicable to the other institutions within the System will apply. However, the objective shall be to achieve utilization of class laboratory space at the maximum practicable level at the Center.

8.07 - Class Laboratory Projection Standard

Class laboratory space needs will be projected on the basis of student stations in conformance with laboratory space use objectives (Section 8.06). Area requirements will be determined by the character of special-purpose equipment, the number of students expected to be served, and the associated service area requirement.

8.08 - Class Laboratory Design Standard

The design standards for class laboratories vary with the academic discipline and must conform to the student station size, equipment, and service requirements. Examples of area allowances for some disciplines, including the student station and the ancillary service areas, are as follows:

Net Assignable Square Feet per Student Station

<u>Discipline</u>	<u>(fully developed academic program)</u>
Animal Science	160
Chemical Engineering	160
Electrical Engineering	110
Theater	100

Chemistry	68
Dairy Science	68
Geology	68
Physics	65
Plant Pathology	65
Anthropology	50
Zoology	50
Business Administration	32
Speech	32

8.09 - Other Instructional Facilities Standard

There are instructional spaces on most campuses that are used for instructional programs not included within the previously identified categories outlined in this chapter. These include spaces such as special class laboratories, music practice rooms, programmed-instruction study areas, individual study laboratories, drama facilities, museums, and galleries related to the instructional program. The justification of these facilities is related directly to the mission and guidelines for the institution, and the areas are determined by an analysis of the specific requirements.

Examples of groupings of disciplines are suggested below, but space entitlements for each institution must be justified by programmatic needs.

- Group I -** Disciplines suggested which have very little, if any, special instructional space needs: Economics, History, Sociology
- Group II -** Disciplines suggested which have minimal special instructional space needs: Business Administration, English, Political Science
- Group III -** Disciplines suggested which have moderate special instructional space needs: Applied Science, Entomology, Foreign Language, Vocational Training
- Group IV -** Disciplines suggested which have considerable special instructional space needs: Chemistry, Engineering, Health Sciences, Physics
- Group V -** Disciplines suggested which have extensive special instructional space needs: Art, Drama, Music, Zoology

8.10 - Office Projection Standard

An office is defined as a room or suite of rooms equipped with desks, chairs, files, bookcases, word processing equipment, etc., that is assigned to one or more persons primarily for the performance of administrative, clerical, or faculty duties, other than meeting classes. The projection standard includes active office service areas such as

reception-waiting areas, conference rooms directly associated with instructional and administrative offices, file rooms, and work rooms.

Office space needs will be projected at an institutional level based upon the number of FTE faculty and staff, the headcount of non-employed advanced graduate students, and FTE senior administrative staff. The projection standard, which will include the types of areas identified in the preceding paragraph, is 150 net assignable square feet per FTE faculty, staff, and non-employed advanced graduate students (three non-employed advanced graduate students headcount equals one FTE for purposes of office space projections), and 210 net assignable square feet per FTE senior administrative staff.

8.11 - Office Design Standard

The following office design standards will be used except where special equipment, such as pianos and drafting tables, require larger areas. When office sizes and lay-out are determined, it is important that flexibility be maintained so that assignments can be made without regard to rank for efficient functioning and ease of reassignment.

	Sq. Feet per Station
a. Faculty offices:	
Senior Faculty (Instructor-Professor)	100
Department Head	150
Graduate and/or Teaching Assistant	50
b. Administrative offices:	
Presidents	300
College Dean or Director	200
Administrative Assistant	100
c. Staff offices	
Secretary/clerk	75
Reception area	150
File Room space:	
with work space	10/file
without work space	6/file
d. Other:	
Advanced graduate student study space (multiple office)	50

8.12 - Library Standard

Libraries are defined as a room or group of rooms used for the collection, storage, circulation, and use of books, periodicals, manuscripts, and other reading or reference materials.

Libraries in the System are to be programmed to provide for the space outlined below. Stack space and non-book material space will be based on the estimated size of collections six years following the completion of a facility or facility addition. (Warehouse operations are not applicable.)

Library Reader Space - Reader stations are to be provided for 15 percent of the fall term FTE undergraduate students and 25 percent of the fall term FTE graduate students at all institutions. Reader station space will allow 25 square feet for each FTE undergraduate student and 30 square feet for each FTE graduate student.

Faculty Research Reader Space-Research space standards are outlined under Section 8.15 RESEARCH STANDARD. In addition, there is an entitlement of 15 square feet for carrel space in the library for each FTE faculty identified primarily in Groups I and II of Section 8.15 RESEARCH STANDARD, such as the humanities, social sciences, etc. There is an entitlement of three square feet of carrel space for each FTE faculty identified primarily in Groups III, IV, and V of Section 8.15 RESEARCH STANDARD, such as the life, physical, and behavioral sciences, agriculture, etc.

Stack Space-The following allowances, which reflect a higher percentage of bound periodicals at health science and law libraries will be used in providing stack space:

	<u>nasf/volume</u>	
	<u>HS & Law</u>	<u>All Others</u>
100,000 vols.	0.12	0.10
next 900,000 vols.	0.08	0.07
next 1,000,000 vols.	0.05	0.05

or by:

	<u>nasf/volume</u>	
	<u>HS & Law</u>	<u>All Others</u>
100,000 vols.	9	10
next 100,000 vols.	10	12
next 800,000 vols.	12	14
next 1,000,000 vols.	15	16

Non-Book Material—The following space allowances, which have been developed by measuring collections and the space required for storing, handling, and using non-book materials, will be used in projecting space needs.

<u>Item</u>	<u>Formula</u> <u>Items per Sq. Ft.</u> <u>of Floor Space</u> <u>Suggested Standard</u>	<u>Space To Be Allotted</u> <u>in Minimum Units</u> <u>of Square Feet</u>
Microcards	6,000	10
Microprints	1,400	10
Microfiche 4"x 6"	2,500	10
Microfiche 3"x 5"	6,000	10
Microfilm reels	60	10
Film strips	200	10
Slides	700	12
Transparencies	500	10
Motion picture reels	12	12
Video tape reels	3	10
Computer tape reels	9	10
Tape reels	30	10
Phonograph records	75	10
Picture files	500	10
Maps	50	30
Pamphlets	150	10
Test files	150	10
Multi-media kits	9	10
Government documents	50	10
Unbound periodicals	15	bibliographical units

Archives Space requirements for collection will be submitted by institutional librarian.

Manuscripts Space requirements for collection will be submitted by institutional librarian.

Library Services and Administration - An additional area equal to 25 percent of the space generated by the reader and stack space will be allotted for library services and administration.

8.13 – Computer Facilities

Computer facility needs beyond instruction and research vary at each institution and may or may not be separated into instructional, research and administrative components. Inasmuch as the amount of equipment may range from input/output terminals to centralized Systemwide components, space requirements will reflect the equipment housed and the size of the supporting staff.

Technological advances may reduce the area required for equipment or permit expansion of capabilities without increasing facilities.

8.14 – Special Service Facilities

In general, facility projection and space standards are associated with specific functions. Special and independently administered services such as printing, central duplicating, cafeterias independent of student unions and housing, and parking structures, which are not identified elsewhere in these standards, will be programmed in accordance with institutional needs.

8.15 – Research Standard

These standards recognize research as a creative inquiry. A number of factors unique to each institution must be identified and correlated to the needs of the institution in the application of research space standards. The mission of the institution, which is relatively constant, must be identified and only those standards that are consistent with the mission should be applied. Some research space requirements within the institution will vary from year to year and others will be relatively constant for a long period of time. It must be recognized that changes of entitlement to research space occur and that a process for an institutional review of space assignments needs to be identified and applied. Further, space needs must be differentiated by discipline and may be differentiated by the functional orientation of the discipline.

The use of research space standards for projecting institutional space requirements will utilize a composite methodology with the components identified hereafter.

The entitlement to the space by any one individual or department is responsive and flexible; it must relate to the extent of faculty involvement in research, the level of grant-funded research and the needs of the discipline. It is implicit that the appropriate administrator should promptly reassign underutilized research space.

Departments will be expected to share, as far as practical, specialized equipment as well as common and/or interdisciplinary support space. It is expected that the design and layout of research space will allow for maximum flexibility for reassignment.

The amount of space that is allocated to research for each institution and the allotments within each institution are dependent upon the following factors:

1. Consistency with the mission of the institution.
2. Level of involvement in research.
 - a. Consistency with teaching appointments for "instruction and related research."
 - b. Levels of grant-funded research in addition to that which can be integrated with research expected as a part of an instructional appointment.

The derivation of research space entitlements will require officials at each institution to develop a distribution of the programs associated with 1 and 2 above into the appropriate space projection group as outlined hereinafter. The space entitlement is a function of the number of FTE faculty, where FTE faculty is the sum of the full-time equivalent professors, associate professors, assistant professors, instructors, research assistants unclassified, research associates, graduate teaching and research assistants, as well as one-third of the advanced full-time graduate students (9 hr.) not included above. (Classified support personnel associated with research do not generate space but are accommodated by the proper group assignment of the FTE faculty.) (See also 8.12 LIBRARY STANDARD, Faculty Research Reader Space.) Office space associated with research appointments is provided for in office projections. (Refer to 8.10 OFFICE PROJECTION STANDARD.)

The discipline distribution (see following outline) is based upon functions required by the research undertaking. Groups II through V include those disciplines that require minimal to extensive amounts of laboratory, laboratory service, studio, and studio services space for research, while Group I includes disciplines with primarily library and office space needs only. The disciplines suggested for each group are subject to adjustment to a higher, lower, or intergroup level depending upon the substantiated differing character of the research.

Group I – Disciplines with primarily library and office associated space needs only.
Examples of disciplines suggested in this group are:

Business & Management
Economics
Languages & Linguistics
Literature & History
Math
Philosophy
Political Science & Administration

Group II – Minimal research space requirement. This group generates 30 square feet per FTE faculty. Examples of disciplines suggested in this group are:

Computer Science

Education

Fine & Applied Arts - primarily nonstudio

Social Sciences (General Psychology, Sociology, etc.)
Theoretical Studies (Public Affairs & Services, etc.)

Group III – Moderate research space requirements. This group generates 110 square feet per FTE faculty. Examples of disciplines suggested in this group are:

Architecture & Environmental Sciences
Communications & Theater (films, TV, etc.)
Home Economics - nonlaboratory setting
Music
Physical Education
Social/Physical Science (Anthropology, Geography, etc.)

Group IV – Considerable research space requirements. This group generates 300 square feet per FTE faculty. Examples of disciplines suggested in this group are:

Engineering (Industrial, General)
Fine & Applied Arts - studio
Home Economics - laboratory setting (Foods, Textiles, etc.)
Natural Sciences (Biology, Botany, Zoology, etc.)
Physical Sciences (Chemistry, Geology, Pharmacy, Physics, etc.)
Psychology - Experimental
Clinical Sciences - Medical
Dental

Group V – Extensive research space requirement. This group generates 360 square feet per FTE faculty. Examples of disciplines suggested in this group are:

Agriculture & Natural Resources (Crop Sciences, Animal Sciences, Forestry, etc.)
Engineering (Chemical, Civil, Mechanical and those not included in Group IV)
Basic Science

8.16 - Physical Education Recreation & Athletic Standard

Physical education activity and support areas are used frequently for recreation and also, to a lesser degree, by athletic teams. It is expected that many of the areas can be used for a full schedule of instruction and when not being used for instruction, be available for physical recreation and athletics, in contrast to having duplicate facilities for use by

physical recreation and athletics. Facility requirements from the three categories may be combined for translation into an overall facility program.

Physical education areas are those that are used principally by students and faculty for physical education instruction.

Recreation areas are those that are used principally for physical recreation activities.

Athletic team areas are those that are used principally for interinstitutional team sports.

Space projections shall be made on the basis of fall term FTE total undergraduate enrollment and 25 percent of fall term FTE graduate enrollment.

(It is acknowledged that larger institutions may experience somewhat more intensive use of facilities due to diversity factors.)

Projection Standards for physical education instruction with compatible use for physical recreation and athletics are:

- a. Indoor space is projected at 12 square feet per FTE student as defined above. This includes approximately nine square feet for the activity areas and three square feet for the ancillary services areas of lockers, showers, etc. The space allocation must be made in units of complete teaching stations/activity areas. The minimum facility should be projected on the basis of a 3,000 FTE student enrollment as defined above.

Approximately 55 percent of the activity area required high ceilings, such as 25 feet for basketball, and somewhat lower ceilings for court games such as handball and apparatus requirements of gymnastics. Another 30 percent of the area may have lower ceilings for combative activities, dancing and weight lifting, with an additional 15 percent for swimming and diving pools.

- b. Outdoor activity areas are projected at 100 square feet per FTE student as defined above. The space allocation must be made in units of complete teaching stations/activity areas for all types of field sports. The areas need to be convenient to lockers and showers, and those areas used for classes should be within a ten-minute walking distance from academic classrooms. The minimum total facility should be projected on the basis of a 3,000 FTE student enrollment as defined above.

Approximately 60 percent of the areas are sodded or turfed for games such as soccer, touch football, and softball. Another 15 percent is for courts, such as tennis and volleyball, with an additional 20 percent in specialized areas, such as for track and field, baseball, archery, and golf. An additional five percent is for related service areas.

Recreation and Athletic Areas - In addition to the indoor and outdoor physical education areas outlined in "a" and "b" above, provisions may allow for additional square footage in sports fields and buildings for use in intramural sports, varsity sports, and recreational uses as appropriate for the institution.

Design Standards should conform to recognized planning criteria such as those outlined in publications by the American Association for Health, Physical Education and Recreation, the National Recreation Association, and other standard sources.

8.17 - Student Health Services Standard

The type of health service facilities required is usually a matter of institutional policy as well as proximity to and working arrangements with local hospitals. They include such areas as examination rooms, treatment rooms, observation rooms, laboratories, reception-waiting areas, supply rooms, and infirmary facilities. The latter are appropriate primarily at larger institutions.

Space projections of this category should be based upon the number of people served, typically on the basis of one to one-and-a-half square feet per fall term FTE student. Office space for physicians and supporting staff is projected under Section 8.10 OFFICE PROJECTION STANDARD.

8.18 - College Union Standard

The functions that college union facilities house and the composition of the college community served may vary considerably from one campus to another but they exhibit an overall balance in relation to the size of the student body. College unions are institutional centers that provide services as required and/or desired by the users to complement those provided in the community.

A nominal level of college union facilities may include the following functions:

1. Organizational Activities

 Publications

 Rooms for meetings

 Organizations and interest groups - offices, workspace, and storage

 Broadcast - radio, television

2. Recreation

 Active - table tennis, bowling, etc.

 Passive - lounge, music listening, television viewing, etc.

 Hobbies - crafts, arts, etc.

(Extensive physical recreation facilities as well as some off-campus facilities may be considered outside the guidelines.)

3. Socio-Cultural

Galleries
Auditoria
Ballrooms
Etc.

4. Administration

5. Food Service

Cafeteria
Snack Bar
Dining Room
Service

6. Specialized Services

Bookstores
Concessions
Etc.

The area required for a college union must be responsive to the services expected to be provided and varies with size of the institution by the following approximation: Using fall term student FTE as a base, a straight line curve with a minimum of 14 NASF per fall term student FTE for institutions with 2,400 FTE enrollment to eight NASF per fall term student FTE for those with 20,000 or more FTE enrollment. An institution with fewer than 2,400 fall term student FTE may use the standard for 2,400 or provide a smaller amount of space as appropriate to the needs of the institution.

Nonassignable spaces, such as elevators and mechanical rooms, as well as work and storage areas necessary for the maintenance and custodial functions, are important to the operation of college unions and need to be included. In addition to the net assignable spaces noted above, the PHYSICAL PLANT AREA STANDARD is applicable. There usually are some additional unique needs dependent upon the activities housed in the union facilities; for instance, specialized and adequate storage is very important to service multipurpose spaces such as dining room/ballrooms.

8.19 - Residential Housing Standard

It is expected that institutions will provide a reasonable amount of residential housing to supplement living accommodations available within the community. While projections of need may be appropriate for an individual institution, diversity of student populations and campus locations do not lend themselves to Systemwide standards.

Residence housing areas may include food service, as well as central food storage, furniture storage, and maintenance as appropriate for the institution.

Design standards for residence halls are:

- a. For residence halls including kitchen and dining areas, either within the dormitory building or an allocable area in a different building, the gross area per student based upon the outside dimensions of a building would, in general, range of 215-235 square feet.
- b. For kitchen and dining facilities, included in the area referred to in item "a" above, regardless of the location thereof, the approximate gross area per resident would range of 30-40 square feet.
- c. For a typical two-student sleeping/study room included in item "a" above the net inside room area would be about 140-180 square feet.

8.20 - Physical Plant Service Area Standard

Areas required for the operation and maintenance of the campus physical plant are identified in two categories: for the support of (1) central service functions and (2) building custodial functions.

1. Central Service Functions—This encompasses all of the areas used for buildings and grounds operation and maintenance, including heating plants, service shops, garages, storerooms, and warehouses. Central and building area required for the delivery, pick-up, and holding/storage of materials should be included also and should be located in conjunction with custodial areas. The area is calculated at five percent of the net assignable square feet of the buildings fully served. It may or may not include various auxiliary enterprise areas and other areas such as agricultural facilities. If these are included, they should be in proportion to the amount of service rendered.
2. Building Custodial Functions—This encompasses all of the area used for regular custodial functions, including deliveries of supplies, collection, and pick-up of waste and materials for recycling within each building. The area is calculated as approximately 0.7 percent of the usable area of a building, excluding mechanical rooms. To allow for satisfactory and efficient use and storage of equipment and supplies, the basic custodial area should have the following minimal characteristics:
 - A. In buildings with elevators

1. An approximately 8x12' supply and equipment room close to the elevator on the main floor.
 2. An approximately 5x8' supply and equipment room close to the elevator on all other floors.
 3. For all floors with 15,000 usable square feet or more, an additional approximately 3x5' closet adjacent to washrooms.
- B. In buildings without elevators, custodial area should be provided as in A.1. above on each floor and A.3. above if applicable.

Related Resources

NA

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Christine Thompson, Manager of the Campus Planning Office in Campus Planning and Facilities Management Kassy Fisher, Assistant Vice President for Administration and Chief of Staff, Finance & Administration
Policy Title & Policy :	Campus Planning
Submitted on Behalf Of:	Jamie Moffitt
Responsible Executive Officer:	Vice President for Finance and Administration
Current Policy # (if applicable):	UO Campus Planning Policy UO 04.00.08

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Submitted to Craig Ashford 2/1/2017

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

To define the university's requirements with respect to physical development of university properties via the Campus Plan.

The Campus Planning Office in Campus Planning and Facilities Management is responsible for establishing and managing space use objectives, standards, and procedures.

Link to this policy: <https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Refer to the Campus Plan (<http://cpfm.uoregon.edu/campus-plan>). Related to the UO Real Property, Facility, and Campus Planning Policy (<https://policies.uoregon.edu/real-property-facility-and-campus-planning>).

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

No substantive changes. Recommend updating named references and integrating campus planning references from the UO Real Property, Facility, and Campus Planning Policy (<https://policies.uoregon.edu/real-property-facility-and-campus-planning>).

AFFECTED PARTIES

Who is impacted by this change, and how?

All entities engaged in activities related to the physical development of university properties.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Michael Harwood	Campus Planning and Facilities Management (CPFM)	1/31/17
Various Staff	Campus Planning, a unit within CPFM	1/31/17
Dean Livelybrooks	Professor and Campus Planning Committee Chair	2/1 /17 (submitted)
Craig Ashford	Office of the General Counsel	2/1/17
Jamie Moffitt	Office of the VPFA/CFO	Feb 2017

Current policy with redline edits

(Highlighted portion transferred from Real Estate, Space Use, and Facility Planning Policy)

Campus Planning

Last Updated:

11/14/2011

Effective Date:

11/14/2011

Responsible University Office And Contact Person

Campus Planning

Eleni Tsivitzis

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Reason for Policy:

To define the university's requirements with respect to physical development of university properties.

Entities Affected by this Policy:

All entities engaged in activities related to the physical development of university properties.

Website Address for this Policy:

Responsible Office:

For questions about this policy, please contact the Campus Planning Office at 541-346-5562.

Field Code Changed

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Enactment and Revision History:

11/14/11 - Campus Plan Policy approved by UO President. The current Campus Plan was approved by the President May 31, 2005 (as an update to the original 1991 version). Refer to the Campus Plan for an amendment history since 2005. <signed document>

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Portions of the requirement section from former Oregon Administrative Rule Chapter 580

Division 60.

Policy:

A. Definitions:

Campus Plan - UO document (including all related and approved subject plans) that defines the university's requirements with respect to physical development of university properties.

B. Policy Statement Requirements:

The University will maintain a long-range campus development plan (the Campus Plan) covering all real property under its control and management.

All physical development of university properties shall comply with the Campus Plan.

The Campus Plan contains a **policy** framework **and patterns** that describe the type and extent of campus development. The Campus Plan must **meet the requirements of OAR 580-060-0010 and** be consistent with other applicable law.

The Campus Plan is available online at: <http://cpfm.uoregon.edu/campus-plan> <http://cpdc.uoregon.edu/sites/cpdc1.uoregon.edu/files/Campus%20Plan%203rdEdition%202014%20with%20cover.pdf>

Proposed amendments shall be made in accordance with the process set forth in the Campus Plan. The amendment process set forth in the Campus Plan requires the President's approval following a recommendation from the Campus Planning Committee.

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The President or designee will approve revisions to the campus boundaries.

C. Exclusions and Special Situations:

Deviations from or changes to the Campus Plan may be directed by the President.

Forms/Instructions

Related Resources:

Refer to the Campus Plan. **The Contact Campus Planning and Real Estate Office in Campus Planning and Facilities Management is responsible for establishing and managing related standards, and procedures.**

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Who is Governed by this Policy:

All entities engaged in activities related to the physical development of university properties.

Who Should Know This Policy:

All entities engaged in activities related to the physical development of university properties.

Cross Reference to Related Policies:

Campus Plan

OAR 580-060-0010

Reviewed and Approved By:

Richard Lariviere, President

Date:

11/14/2011

Issued by:

Campus Planning and Real Estate

Date:

11/14/2011

Revision History:

11/14/11—Campus Plan Policy approved by UO President. The current Campus Plan was approved by the President May 31, 2005 (as an update to the original 1991 version). Refer to the Campus Plan for an amendment history since 2005. [signed document](#)

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Original Source:

UO Policy Statement

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Clean copy of revised text:

Campus Planning

Reason for Policy:

To define the university's requirements with respect to physical development of university properties.

Entities Affected by this Policy:

All entities engaged in activities related to the physical development of university properties.

Website Address for this Policy:**Responsible Office:**

For questions about this policy, please contact the [Campus Planning Office](#) at 541-346-5562.

Enactment and Revision History:

11/14/11 - Campus Plan Policy approved by UO President. The current Campus Plan was approved by the President May 31, 2005 (as an update to the original 1991 version). Refer to the Campus Plan for an amendment history since 2005. Portions of the requirement section from former Oregon Administrative Rule Chapter 580 Division 60.

Policy:**A. Definitions:**

Campus Plan - UO document (including all related and approved subject plans) that defines the university's requirements with respect to physical development of university properties.

B. Requirements:

The University will maintain a long-range campus development plan (the Campus Plan) covering all real property under its control and management.

All physical development of university properties shall comply with the Campus Plan.

The Campus Plan contains a framework that describe the type and extent of campus development. The Campus Plan must be consistent with other applicable law.

The President or designee will approve revisions to the campus boundaries.

The Campus Plan is available online at: <http://cpfm.uoregon.edu/campus-plan>

Proposed amendments shall be made in accordance with the process set forth in the Campus Plan. The amendment process set forth in the Campus Plan requires the President's approval following a recommendation from the Campus Planning Committee.

C. Exclusions and Special Situations:

Deviations from or changes to the Campus Plan may be directed by the President.

Related Resources:

Refer to the Campus Plan. The Campus Planning Office in Campus Planning and Facilities Management is responsible for establishing and managing related standards, and procedures.

POLICY CONCEPT FORM

Name and UO	Kassy Fisher, Assistant Vice President for Administration and Chief of Staff, Finance & Administration
Title/Affiliation:	Charging Administrative Costs to Auxiliary Enterprises
Policy Title & Policy :	
Submitted on Behalf Of:	Jamie Moffitt, VPFA & CFO
Responsible Executive Officer:	Vice President for Finance and Administration

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Missy Matella; Bryan Dearinger

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

Charging Administrative Costs to Auxiliary Enterprises, <http://policies.uoregon.edu/charging-administrative-costs-auxiliary-enterprises>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Also, proposed for repeal: Return of Overhead Charges on Continuing Education and Designated Operations Activities, <http://policies.uoregon.edu/policy/by/1/06-finance-and-business-affairs/return-overhead-charges-continuing-education-and-designa>

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

The university, in support of its operations, has a long-standing and transparent practice and process for determining, evaluating and assessing fees for overhead costs (such as administrative costs, utilities, etc.) to auxiliaries, continuing education and designated operations funds. We recommend repealing this policy which, formerly an OAR, states that the university engages in this practice. The practice of charging overhead need not be documented via a university policy.

AFFECTED PARTIES

Who is impacted by this change, and how?

Units with auxiliary funds and other non-General and education funds that are charged administrative overhead.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Stuart Laing	Budget and Resource Planning	Jan 2017
Brad Shelton	Office of the Provost and Academic Affairs	Jan 2017
Missy Matella, Bryan Dearinger	Office of the General Counsel	Jan 2017
Jamie Moffitt	Office of the VPFA/CFO	Jan 2017

Text of Current Policy: Recommended for repeal

Charging Administrative Costs to Auxiliary Enterprises

Reason for Policy:

This policy outlines the University's position with regard to charging administrative and physical plant costs to auxiliary enterprises run by the institution.

Entities Affected by this Policy:

Finance and Administration; auxiliary employees

Enactment & Revision History:

Technical revisions enacted by the University Secretary on September 2, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 580 Division 11, Section 0045.

Policy:

Charging of Administrative and Physical Plant Costs to Auxiliary Enterprises

(1) A proportionate share of the University's accounting, overhead and administrative costs are apportioned among the auxiliary enterprises in accordance with University policy. The basis for apportioning institutional accounting and administrative costs is determined by the University.

(2) In recognition of use of student centers, housing, food service buildings, recreational buildings and intercollegiate athletic facilities for instructional and public service programs, the University may fund

from education and general services resources a proportionate share of the physical plant costs of operating and maintaining these auxiliary enterprises. Such funding is generally apportioned according to use and space except that education and general services resources normally shall not be used to support such revenue-producing areas as food service, bookstore, barber shop, game room, housing and other similar areas that should be self-supporting. The basis for apportioning institutional physical plant operation and maintenance costs shall be determined by the University.

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Christine Thompson, Manager of the Campus Planning Office in Campus Planning and Facilities Management Kassy Fisher, Assistant Vice President for Administration and Chief of Staff, Finance & Administration
Policy Title & Policy :	Real Property, Space Use and Facilities Planning
Submitted on Behalf Of:	Jamie Moffitt
Responsible Executive Officer:	Vice President for Finance and Administration
Current Policy # (if applicable):	UO Real Property, Facility, and Campus Planning Policy; formerly OAR 050-580-060

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Submitted Craig Ashford on 2/1/2017, in full, and proposed department of record text reviewed by Bryan Dearinger 1/25/2017

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

This policy outlines matters pertaining to real property, facilities, property records, and authorities relating to these matters. The Campus Planning Office in Campus Planning and Facilities Management is responsible for establishing and managing real estate and space use objectives, standards, and procedures.

Link to policy: <https://policies.uoregon.edu/real-property-facility-and-campus-planning>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary.

Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Related to UO Procurement and Contracting Policy (<https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-9-purchasing-contracting/procurement-and-contracting>), UO Campus Planning Policy (<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>), and Space Use Objectives Policy (<https://policies.uoregon.edu/content/space-use-objectives-and-building>).

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

We recommend updating named references and shifting text, as appropriate, from and to related policies that are also under review: (1) integrating existing facility planning/space use references from the Space Use Objectives Policy (<https://policies.uoregon.edu/content/space-use-objectives-and-building>) and (2) transferring campus planning references to the UO Campus Planning Policy (<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>).

AFFECTED PARTIES

Who is impacted by this change, and how?

Finance & Administration; Campus Planning and Facilities Management; Provost's Office; all other university employees working within the matters described in the policy; and all entities occupying space that is owned and/or managed by the university.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Mike Harwood	Campus Planning and Facilities Management (CPFM)	1/31/17
Various Staff	Campus Planning and Facilities Management (CPFM)	1/31/17
Chuck Triplett	Provost's Office	1/27/17
Craig Ashford	Purchasing and Contract Services, Office of the General Counsel	1/23/17
Bryan Dearinger	Office of the General Counsel	1/25/17
Jamie Moffitt	Office of the VPFA/CFO	Feb 2017

Text of current policy with proposed edits—note that green highlighting indicates text to be transferred to the Campus Planning policy; yellow highlighting indicates text to be transferred from the Space Use Objectives policy.

Real Property, Space Use and Facilities, and Campus Planning

Reason for Policy:

This policy outlines matters pertaining to campus space use planning, real property, facilities, property records, and authorities relating thereto.

Entities Affected by this Policy:

Finance & Administration; Campus Planning and Facilities Management; Provost's Office; all other university employees working within the matters described above; and all entities occupying space that is owned and/or managed by the university.

Responsible Office:

Campus Planning Office in, Campus Planning and Facilities Management Design and Construction at 541-346-5562

Enactment & Revision History:

Technical revisions enacted by the University Secretary on September 3, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 580 Division 60.

Space Use Policy text from former OUS Board Internal Management Directive 48 (7.105).

Policy:

A. Authority

This policy establishes the procedures that will be followed by the University of Oregon (University) to acquire, receive, hold, control, convey, sell, manage, operate, lease, lend, improve, and develop all real property of the University under the control of the Board of Trustees (Board), herein referenced as "Real Estate."

B. Definitions

All definitions in this Policy capitalized terms in Policy 580.060 have the meanings set forth in the UO Procurement and Contracting Code Policy 580.061 (P&C Code") Section C unless the context requires otherwise or except as stated. Delegation of authority for real estate transactions is also described in the P&C Code.

C. Comprehensive Plan Coordination Space Use Planning

The university shall establish space use objectives and standards consistent with the university's mission. The objectives and standards shall ensure that space allocation and usage are consistent with other relevant university policies and in alignment with the university's strategic plans and goals. They shall apply to all university owned, leased, and managed properties.

The Campus Planning Office in Campus Planning and Facilities Management, working with the Provost's Office, is responsible for establishing and managing space use objectives, standards, and procedures.
The University will maintain a long-range campus development plan covering all real property under its control and management. University plans, and revisions thereof, will be approved by the University President or designee. The President or designee will approve revisions to the campus boundaries.

D. Records

The University will maintain the official records of all documents that affect real property under its control and management. Documents affecting real property include, but are not limited to, all instruments that acquire, transfer, sell, or alter the character of land.

E. Purchase of Real Property

- (1) All purchases of real property will be for the present or future development of the University.
- (2) Legal title to all real property purchased must be taken and held in the name of the State of Oregon **acting by and through the Boards of Trustees of the University of Oregon**.
- (3) The President is delegated the authority to execute conveyances for the purchase of real property after the following have been performed to satisfaction of the President:
 - (a) Obtain at least one appraisal by a licensed and experienced real estate appraiser estimating the fair market value;
 - (b) Complete an environmental assessment and determine that any risk associated with the real property is reasonable;
 - (c) Determine that sufficient ongoing revenues are available to operate and maintain the property
- (4) If the consideration for the purchase is \$5,000,000.00 or more, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.

F. Gifts of Real Property

- (1) Legal title to all real property gifted to the University must be taken and held in the name of the State of Oregon **acting by and through the Boards of Trustees of the University of Oregon**.
- (2) The President is delegated the authority to execute conveyances for the gift of real property after the following have been performed to satisfaction of the President:
 - (a) Complete an environmental assessment and determine that any risk associated with the real property is reasonable under the circumstances;
 - (b) Determine that sufficient ongoing revenues are available to operate and maintain the property.

G. Condemnation

Acquisition of real property by condemnation will be conducted in accordance with ORS Chapter 35 and must be approved by the Board.

H. Sale of Real Property

- (1) The President is delegated the authority to execute conveyances for the sale of real property after the following have been performed to satisfaction of the President:
 - (a) Obtain at least one appraisal by a licensed and experienced real estate appraiser estimating the fair market value;
 - (b) Verify whether any tax exempt financing was used to purchase or improve the property and, if any such debt remains outstanding, ensure continued compliance with IRS regulations.
- (2) If the consideration for the sale is \$5,000,000.00 or more, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.

I. Easements

- (1) The President is delegated the authority to execute easements and other nonpossessory interests in real estate.
- (2) If granting an easement, the President shall first verify whether any tax exempt financing was used to purchase or improve the property and, if any such debt remains outstanding, ensure continued compliance with IRS regulations.

J. Use of Board Property

(1) If the University intends to lease or license real property owned by the Board and either (a) the term of the lease or license exceeds 50 days in total or (b) the arrangement was not set at fair market value, then prior to the execution of the lease or license, the President or designee will confer with the University's **Controller's Division treasury operations unit** to determine compliance with bond restrictions.

(2) The President or designee will obtain prior approval of the Board or an appropriate standing committee of the Board for agreements permitting the construction on or renovation to Board-owned property if such improvements exceed \$5 million during the term of the agreement. To obtain approval from the Board or an appropriate standing committee of the Board, the University must specify where funding for operations and maintenance will come from.

(3) If the University permits construction on or renovation to Board-owned property, the University must approve all plans and specifications prior to the commencement of work and obtain record drawings upon termination of the agreement or completion of the work, whichever first occurs.

(4) The University normally will not make available University buildings and other facilities to individuals for essentially private use or to outside organizations, unless approved in University policy or required by law. Exceptions will be made only if the proposed use is consistent with University policies and missions and the individual or organization fully reimburses the University for all appropriate costs.

K. Leases

(1) The President is delegated the authority to execute leases of real property.

(2) If the consideration for the lease is ~~from \$5,000,000 or more to \$15,000,000~~ or the term of the lease is over 10 years ~~but less than 15 years~~, the President must receive the prior approval of the Board.

~~(3) If the consideration for the lease is over \$15,000,000 or the term of the lease is over 15 years, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.~~

~~(43) Prior to executing an amendment to a lease, the President must receive approval under subsection (2) or (3) based on the consideration or term of the amended lease.~~

Related Resources:

Related to UO Procurement and Contracting Policy and the UO Campus Planning Policy. The Campus Planning Office in Campus Planning and Facilities Management is responsible for establishing and managing real estate and space use objectives, standards, and procedures.

Clean Version**Real Property, Space Use and Facilities Planning****Reason for Policy:**

This policy outlines matters pertaining to space use planning, real property, facilities, property records, and authorities relating thereto.

Entities Affected by this Policy:

Finance & Administration; Campus Planning and Facilities Management; Provost's Office; all other university employees working within the matters described above; and all entities occupying space that is owned and/or managed by the university.

Responsible Office:

Campus Planning Office in Campus Planning and Facilities Management, 541-346-5562

Enactment & Revision History:

Technical revisions enacted by the University Secretary on September 3, 2015.

Became a University of Oregon Policy by operation of law on July 1, 2014.

Former Oregon Administrative Rule Chapter 580 Division 60.

Space Use Policy text from former OUS Board Internal Management Directive 48 (7.105).

Policy:**A. Authority**

This policy establishes the procedures that will be followed by the University of Oregon (University) to acquire, receive, hold, control, convey, sell, manage, operate, lease, lend, improve, and develop all real property of the University under the control of the Board of Trustees (Board), herein referenced as "Real Estate."

B. Definitions

All definitions in this Policy have the meanings set forth in the UO Procurement and Contracting Code Policy 580.061 (P&C Code") unless the context requires otherwise or except as stated. Delegation of authority for real estate transactions is also described in the P&C Code.

C. Space Use Planning

The university shall establish space use objectives and standards consistent with the university's mission. The objectives and standards shall ensure that space allocation and usage are consistent with other relevant university policies and in alignment with the university's strategic plans and goals. They shall apply to all university owned, leased, and managed properties.

The Campus Planning Office in Campus Planning and Facilities Management, working with the Provost's Office, is responsible for establishing and managing space use objectives, standards, and procedures.

D. Records

The University will maintain the official records of all documents that affect real property under its control and management. Documents affecting real property include, but are not limited to, all instruments that acquire, transfer, sell, or alter the character of land.

E. Purchase of Real Property

(1) All purchases of real property will be for the present or future development of the University.

- (2) Legal title to all real property purchased must be taken and held in the name of the State of Oregon.
- (3) The President is delegated the authority to execute conveyances for the purchase of real property after the following have been performed to satisfaction of the President:
 - (a) Obtain at least one appraisal by a licensed and experienced real estate appraiser estimating the fair market value;
 - (b) Complete an environmental assessment and determine that any risk associated with the real property is reasonable;
 - (c) Determine that sufficient ongoing revenues are available to operate and maintain the property
- (4) If the consideration for the purchase is \$5,000,000.00 or more, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.

F. Gifts of Real Property

- (1) Legal title to all real property gifted to the University must be taken and held in the name of the State of Oregon.
- (2) The President is delegated the authority to execute conveyances for the gift of real property after the following have been performed to satisfaction of the President:
 - (a) Complete an environmental assessment and determine that any risk associated with the real property is reasonable under the circumstances;
 - (b) Determine that sufficient ongoing revenues are available to operate and maintain the property.

G. Condemnation

Acquisition of real property by condemnation will be conducted in accordance with ORS Chapter 35 and must be approved by the Board.

H. Sale of Real Property

- (1) The President is delegated the authority to execute conveyances for the sale of real property after the following have been performed to satisfaction of the President:
 - (a) Obtain at least one appraisal by a licensed and experienced real estate appraiser estimating the fair market value;
 - (b) Verify whether any tax exempt financing was used to purchase or improve the property and, if any such debt remains outstanding, ensure continued compliance with IRS regulations.
- (2) If the consideration for the sale is \$5,000,000.00 or more, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.

I. Easements

- (1) The President is delegated the authority to execute easements and other nonpossessory interests in real estate.
- (2) If granting an easement, the President shall first verify whether any tax exempt financing was used to purchase or improve the property and, if any such debt remains outstanding, ensure continued compliance with IRS regulations.

J. Use of Board Property

- (1) If the University intends to lease or license real property owned by the Board and either (a) the term of the lease or license exceeds 50 days in total or (b) the arrangement was not set at fair market value, then prior to the execution of the lease or license, the President or designee will confer with the University's treasury operations unit to determine compliance with bond restrictions.
- (2) The President or designee will obtain prior approval of the Board or an appropriate standing committee of the Board for agreements permitting the construction on or renovation to Board-owned property if such improvements exceed \$5 million during the term of the agreement. To obtain approval from the Board or an appropriate standing committee of the Board, the University must specify where funding for operations and maintenance will come from.

- (3) If the University permits construction on or renovation to Board-owned property, the University must approve all plans and specifications prior to the commencement of work and obtain record drawings upon termination of the agreement or completion of the work, whichever first occurs.
- (4) The University normally will not make available University buildings and other facilities to individuals for essentially private use or to outside organizations, unless approved in University policy or required by law. Exceptions will be made only if the proposed use is consistent with University policies and missions and the individual or organization fully reimburses the University for all appropriate costs.

K. Leases

- (1) The President is delegated the authority to execute leases of real property.
- (2) If the consideration for the lease is from \$5,000,000 to \$15,000,000 or the term of the lease is over 10 years but less than 15 years, the President must receive the prior approval of the Board.
- (3) If the consideration for the lease is over \$15,000,000 or the term of the lease is over 15 years, the President must receive the prior approval of the Board or an appropriate standing committee of the Board.
- (4) Prior to executing an amendment to a lease, the President must receive approval under subsection (2) or (3) based on the consideration or term of the amended lease.

Related Resources:

Related to UO Procurement and Contracting Policy and the UO Campus Planning Policy. The Campus Planning Office in Campus Planning and Facilities Management is responsible for establishing and managing real estate and space use objectives, standards, and procedures.

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Christine Thompson, Manager of the Campus Planning Office in Campus Planning and Facilities Management Kassy Fisher, Assistant Vice President for Administration and Chief of Staff, Finance & Administration
Policy Title & Policy :	Historical and/or Architectural Value, Properties of
Submitted on Behalf Of:	Jamie Moffitt
Responsible Executive Officer:	Vice President for Finance and Administration
Current Policy # (if applicable):	Historical and/or Architectural Value, Properties of: OUS Board Internal Management Directive 28

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Submitted to Craig Ashford 2/1/17

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

This policy was intended to define what constitutes a property of historic architectural value.

The Campus Planning Office in Campus Planning and Facilities Management is responsible for managing standards and procedures related to historic preservation on the UO campus.

Link to policy: <https://policies.uoregon.edu/content/historical-and-or-architectural-value-properties>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Related to UO Campus Planning Policy

(<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>). Policy 7 of the Campus Plan (<https://cpfm.uoregon.edu/historic-preservation>) specifically addresses the University's commitment to historic preservation and processes for identifying and documenting historic landscapes and for making decisions about preferred preservation actions and future development. Policy 7 is appended below as a related resource for reviewers of this repeal proposal.

STATEMENT OF NEED

We recommend repealing this policy on the basis that all policy elements are covered within the UO Campus Planning Policy (<https://policies.uoregon.edu/policy/by/2/faculty/campus-planning>) and that the majority of this policy relays the findings of an ad hoc committee provided to the OUS board and then lists properties of historic value at former OUS institutions around the state, which are neither policy nor relevant to the university's mission, operations, etc.

AFFECTED PARTIES

Who is impacted by this change, and how?

All entities engaged in activities related to the physical development of historically significant university properties.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Michael Harwood	Campus Planning and Facilities Management (CPFM)	1/31/2017
Various Staff	Campus Planning and Facilities Management (CPFM)	1/31/2017
Craig Ashford	Office of the General Counsel	2/1/2017
Jamie Moffitt	Office of the VPFA/CFO	Feb 2017

POLICY TEXT

Text of this policy, proposed for repeal, is appended to this form.

RELATED RESOURCES

For members of the Policy Advisory Council and others who are reviewing this proposal, the policy from within the Campus Plan that addresses historic preservation is attached.

POLICY TEXT

Reason for Policy

Entities Affected by this Policy

Web Site Address for this Policy

Responsible Office

Office of the Vice President for Finance and Administration: (541) 346-3003, vpfa@uoregon.edu

Enactment & Revision History

Became a UO policy by operation of law on July 1, 2014.

Adopted by the Oregon State Board of Higher Education May 21, 1974.

Policy

Based upon the recommendations and the report of an ad hoc committee, the Board adopted guidelines applicable to properties of historical and/or architectural value in the facility planning of the various institutions governed by the Board. Specifically, it is expected that the buildings and other improvements rated "of prime significance" would be preserved. In the event consideration is to be given to the possible removal or major modification of such facilities in the future, such matters would be brought to the Building Committee and the Board for review and appropriate action. Similarly, with respect to structures rated "of secondary significance," they shall be considered in the future planning of the institutions and shall not be razed, relocated, or modified substantially without prior concurrence of the Board.

The recommendations of the ad hoc committee were as follows:

General Precepts

Since historical preservation emerged as a specialized discipline following the Second World War, certain basic precepts have governed the professional approach to management of historic structures.

- Historic structures enrich and illuminate the cultural heritage of the state and the nation. Accordingly, it is appropriate and desirable that they be made available for public use to the greatest extent applicable.
- In general, it is better to preserve than to restore, and better to restore than reconstruct. Preservation is a treatment designed to sustain the form and extent of a structure essentially as existing. It aims at halting further deterioration and providing structural safety but does not contemplate significant rebuilding. Restoration is the process of accurately recovering, by the removal of later work and the replacement of missing original work, the form and details of a structure or part of a structure, together with its setting, as it appeared at some period in time. Adaptive restoration is the treatment for structures that are visually important in the historic scene but do not otherwise qualify for exhibition purposes. In such cases, the facade or so much of the exterior as is necessary, should be authentically restored so that it will be properly understood from the public view. The interior, in these circumstances, is usually converted to a modern, functional use. The restored portion of the exterior should be faithfully preserved in its restored form and detail. Reconstruction is the process of accurately reproducing by new construction the form and details of a vanished structure, or part of it, as it appeared at some period in time. (Such treatment would not normally be applicable to the management of campus facilities.)
- Historic structures of prime significance bear an important relation to their sites, and, therefore, should be preserved in situ. Those of secondary significance may be moved when there is no feasible alternative for their preservation. In moving an historic structure, every effort should be made to reestablish its historic orientation, immediate setting, and general relationship to its environment.
- Modern additions, such as air conditioning and fire detection and suppression equipment, are appropriate in historic structures of prime significance to the extent that they can be concealed within the structure or its setting. Other modern construction may be added suitably to historic structures of secondary significance when necessary for their continued use. The new work should be harmonious with the old in scale, proportion, materials, and color. Such additions should be as inconspicuous as possible from the public view and should not intrude upon the important historic values.
- New construction, including structures, roads, and parking areas, should be designed in such a manner that the integrity and immediate setting of historic structures of prime significance may remain intact.

It is understood that certain of the oldest structures are in need of considerable work to bring them into conformance with requirements of the Occupational Safety and Health Act. In some cases the condition and significance of an historic structure are such that an extensive outlay for

preservation is perhaps unjustified. In no case encountered, however, is preservation or adaptive restoration believed to be technically infeasible. In certain notable cases, structures are considered of such primary importance that the costs involved in preservation or restoration are a lesser factor. In many cases, it is believed that adaptive restoration is a more economical course of action than replacement.

Specific Criteria

For purposes of evaluating properties owned by the State Board of Higher Education, a rating sheet was devised that bracketed properties in one of three categories for action, as follows:

- Of prime significance. Top priority for preservation or restoration, as appropriate.
- Of secondary significance. Recommended for consideration in future planning.
- Also noted.

Following are the specific criteria for evaluation:

- *Historical Associations*—Is the structure associated with the origins of the institution or the development of the community? Is it one of the original structures?
- *Stylistic Character*—Does the structure set or contribute to a stylistic pattern on the campus or define important space?
- *Symbolic Value*—Does the structure have high symbolic value? Has it become synonymous with the institution?
- *Representation of Type*—Is the structure a prime example of a stylistic or structural type?
- *Rarity*—Is the structure one of the last examples of its style and type remaining in the state?
- *Master Work*—Is the structure a work of an architect noted in the history of architecture in Oregon?
- *Integrity*—Has the fabric of the structure remained essentially as originally constructed?
- *Condition*—Is the general condition of the structure good?

- **Adaptability**—Is the structure suitable for adaptive restoration? Do its condition and relationship within or accessibility to the campus justify continued use?
- **Vulnerability**—Is the structure vulnerable to replacement or relocation by its location, size, or relative significance?

The Findings

The evaluations are listed below on a campus-by-campus basis. Brief supporting statements and illustrations are given only for those structures about which some question or controversy has been raised.

1. University of Oregon

On the University of Oregon campus, the ensemble grouping, or definition of spaces by related structures, is particularly noteworthy. If this quality is to be preserved, interrelationships of the older units of the campus should not be intruded upon. Those alterations or additions that are strictly necessary should be made to harmonize with the established organization.

The earliest and most historic campus unit, or ensemble, is formed by Deady Hall and Villard Hall. It is linked to Gerlinger Hall, Hendricks Hall, and Susan Campbell Hall, the second most connotative grouping, by Friendly Hall, the Faculty Club, and Johnson Hall. Structures in the Girls' Dormitory unit designed by Dean Ellis Lawrence were built through the support of the alumnae and public subscription before formation of the State Board of Higher Education. A third ensemble of note is that formed by the University Library and the Art Museum.

Of Prime Significance - Top Priority for Preservation or Restoration

Deady Hall	1876	W. W. Piper	Second Empire Baroque
Villard Hall	1885	W. H. Williams	Second Empire Baroque
Dads' Gates	1940-1941		
Faculty Club	1885-1886		Italian Bracketed

A good, late example of the Italian Bracketed, or Italian Villa Style. Occupies an important setting in the core of the campus. Built for faculty member George H. Collier and occupied by University presidents from 1896 through the 1930s. Recommended for preservation.

Art Museum	1930	E. F. Lawrence	Modernistic
University Library	1936		Modernistic
Gerlinger Hall	1921	E. F. Lawrence	"Georgian"
Hendricks Hall	1917	E. F. Lawrence	"Georgian"
Susan Campbell Hall	1921	E. F. Lawrence	"Georgian"

Of Secondary Significance - Recommended for Consideration in Future Planning

Friendly Hall	1893	"Jacobean"
Johnson Hall	1915	"Roman"
John Straub Hall	1929	"Georgian"
President's House	1923 (Acquired)	Norman Farmhouse
Chancellor's House	1938 (Acquired)	Craftsman Bungalow

Also Noted

Fenton Hall	1905	Renaissance Revival
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2. Oregon State University

The core of the Oregon State University campus is comprised of three major units or ensembles. The greatest concentration of early structures is found in the easterly unit surrounding Benton Hall, which is the symbol of the institution. Structures in this grouping that are more or less contemporaneous with Benton Hall share a common orientation toward the southeast. The other principal units are associated with quadrangles formed by (1) the Memorial Union-Home Economics Building, and (2) Kidder Hall-Kerr Library. New construction has been successfully integrated into the north side of the latter quadrangle, namely by the addition of the Milne Computer Center east of Kidder Hall.

Of Prime Significance - Top Priority for Preservation or Restoration

Benton Hall	1889	Second Empire Baroque
Fairbanks Hall	1892	Walter D. Pugh Renaissance Revival

A good example of the Renaissance Revival Style in wood construction by an architect who was, for a time, a leading architect in the capital city. Second oldest building on campus (contemporaneous with the Chemistry Building). An important anchor on the southwest corner of the prime quadrangle. Still commodious and functional if brought up to code. Recommended for adaptive restoration.

Memorial Union	1928	Thomas and Mercier
Mitchell Playhouse	1898	Queen Anne Revival

A rare example of the "Shingle Style" of the Queen Anne Revival. In a good state of preservation. Recommended for retention on original site.

Paleontology Lab	1892	Queen Anne Revival
Education Hall	1902	Burgraff

A typical example of the "Stick Style" of the Queen Anne Revival on a small scale. A suitable element in the immediate setting of Benton Hall. Recommended for restoration.

Of Secondary Significance - Recommended for Consideration in Future-Planning

Apperson Hall	1900	Edgar Lazarus	Romanesque Revival
Work of a noted Portland architect whose master work in masonry construction is Vista House at Crown Point on the Columbia River Highway. Originally Mechanical Hall. Third story later altered (see Figs. 13 and 14). An anchor on the north side of the Benton Hall ensemble. Recommended for preservation.			

Education Hall	1902	Burgraff
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An anchor on the south side of the Benton Hall ensemble combining elements of the Romanesque Revival and "Chateauesque" Style. Recommended for preservation.

McAlexander Fieldhouse 1911 Bennes and Hendricks

Also known as the Armory. A monumental structure recently upgraded for continued use. Interesting historic detail. Recommended for preservation.

Dads' Gates

Weatherford Hall 1928 Bennes and Herzog

Interesting example of academic architecture. A popular landmark on an important corner of the campus. Recommended for preservation.

Kidder Hall 1917 John V. Bennes

A good example of early academic, or Beaux Arts, architecture. A key element of one of the major ensembles of campus. Recommended for preservation.

Women's Gym 1926 John V. Bennes

An interesting example of academic architecture in the "Mediterranean" Style. Defines west side of the prime quadrangle. Recommended for preservation.

Also Noted

Waldo Hall 1907 Burgraff "Chateauesque"

A typical example of the "Chateauesque" Style with pleasing coloration and detail. Its location apart from the major ensembles and its state of disrepair make its position on the list of structures recommended for preservation marginal.

3. Oregon College of Education (now Western Oregon University)

The original building on the campus of Oregon College of Education, Campbell Hall, was enhanced by an ensemble of structures built within a few years' time and which set the pattern for later growth. Jessica Todd Hall, Senior Cottage, and Maple Hall, the old gymnasium, are a cohesive stylistic group framing an interior quadrangle. The Elementary School, which is of the same period of construction, forms a link to the newer additions of the campus.

Of Prime Significance - Top Priority for Preservation or Restoration

Campbell Hall 1871 (tower demolished Gothic Revival

October 1962)

1889 South Wing

1898 North Wing

Jessica Todd Hall 1917 A. E. Doyle "Tudor"

Work of a leading Portland architect of the early 20th century. Strongly supportive of Campbell Hall in scale, color, and texture. Defines a corner of the north entrance to campus. Recommended for preservation.

Senior Cottage 1917 A. E. Doyle Queen Anne Revival
A notable example of the "Shingle Style" of the Queen Anne Revival that reflects influence of the Arts and Crafts Movement. A complementary element adjacent to Todd Hall and pleasingly sited in the interior quadrangle. Recommended for preservation.

Maple Hall 1913 A. E. Doyle "Jacobean"
An anchor of good, period design on the west side of the main axis of campus. Opposite other prime buildings. Recommended for preservation.

Of Secondary Significance - Recommended for Consideration in Future Planning

Administration Bldg. 1936

A good example of Moderne architecture. Its color, texture, scale, and proportions are in sympathy with historic styles of the original campus buildings. Recommended for preservation.

4. Portland State University

Of Prime Significance - Top Priority for Preservation or Restoration

Fruit and Flower 1928 Fred Fritsch "Georgian"
Day Nursery

Of Secondary Significance - Recommended for Consideration in Future Planning

"Old Main" c. 1915 M. H. Whitehouse
(Lincoln High School)

The original campus structure by a noted Portland architect.

Howard (Robert S.) 1893 Queen Anne Revival
Residence

1632 S. W. 12th Avenue. Brick masonry, clapboard, and shingle cottage in the tradition of the Queen Anne Revival. Built for noted Louisiana banker-realtor R. S. Howard, who settled in Portland in 1891.

5. Southern Oregon College (now Southern Oregon University)

Of Prime Significance - Top Priority for Preservation or Restoration

Chappel-Swedenburg 1905 Frank Clark Colonial Revival
House

A good example of Colonial Revival architecture with unusually fine detail. A gracious complement to campus facilities. Recommended for preservation.

Of Secondary Significance - Recommended for Consideration in Future Planning

Churchill Hall 1925 John V. Benes
Peter Britt Estate, 1852
Jacksonville
Grubb Barn, Ashland 1860s

6. Eastern Oregon State College

Of Secondary Significance - Recommended for Consideration in Future Planning

Administration Bldg. 1929 John V. Benes

No recommendations are offered at this time concerning Oregon Institute of Technology, the University of Oregon Dental School, or the University of Oregon Medical School.

Related Resources

NA

RELATED RESOURCES

POLICY 7



ARCHITECTURAL STYLE AND HISTORIC PRESERVATION

POLICY 7

POLICY 7: ARCHITECTURAL STYLE AND HISTORIC PRESERVATION



Policy

The continuity and quality of the university's campus environment are materially affected by the character and architectural style of the buildings. Furthermore, the university's historic buildings and landscapes, which are important defining features of the campus, are artifacts of the cultural heritage of the community, the state, and the nation.

To preserve the overall visual continuity and quality of the campus and as a commitment to the preservation and rehabilitation of identified historic resources, all construction projects shall follow the policy refinements below.

Pattern Summary

(Refer to "Policy 11: Patterns" on page 61 for the complete pattern text.)

- Arcades
- **Architectural Style**
- Building Character and Campus Context
- Building Complex
- Campus Quadrangle and Historic Core
- **Connected Buildings**
- Family of Entrances
- Four-story Limit
- **Future Expansion**
- Good Neighbor
- Historic Landscapes
- **Main Building Entrance**
- Operable Windows
- Quadrangles and the Historic Core
- Site Repair
- Sustainable Development
- Wholeness of Project
- Wings of Light

Policy Refinements

Architectural Style

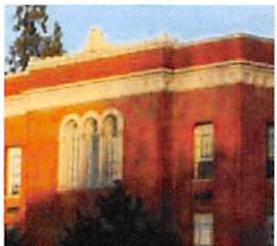
- (a) The design of new buildings and additions shall be compatible and harmonious with the design, orientation, and scale of adjacent buildings, though they need not (and in some cases should not) mimic them.
- (b) In order to create a cohesive campus, new buildings and additions should be responsive to the overall campus character and reflect the materials (e.g., brick) and composition of the Lawrence-era buildings. Emphasis should be placed on creating high-quality, human-scaled, and carefully detailed buildings. Address the campus characteristics described on the following page.

POLICY 7



Streisinger Courtyard

Campus Character:



Building Meets the Sky - Complex rooflines draw your eye upwards.



Composition - Buildings should be vertically composed of three parts: top, middle, and bottom. Provide distinction through the use of horizontal lines, such as banding, use of different materials, or variation in patterns and textures.



Main Building Entrance - Provide a clear sense of where to go, how to enter the building; a feeling of arrival, building presence, and weather protection.



Secondary Entrances - These are not as bold as a main entrance, but still easy to locate and with visual interest.

Rhythm of Windows - Repetition of windows break up the scale of the facade (e.g., openings separated by columns or other vertical elements or recessed windows). As a general (but not absolute) rule, avoid large, blank facades, large areas of glazing, or unbroken, horizontally oriented windows (ribbon windows).



Operable Windows and Window Details

- Allow fresh air and the ability to adjust personal environment. Window details can include change in material with banding, brick patterns, type and color of frame.



Details - Contribute to the richness of the campus character by giving each building a sense of individuality. Humanize buildings and integrate art.

POLICY 7

Historic Preservation

- (a) When altering buildings and landscapes listed in the National Register of Historic Places or as a City Landmark, projects must follow the *Secretary of the Interior's Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings*. (Refer to Appendix G for a copy of the standards.)
- (b) When altering interior or exterior resources that are listed or eligible to be listed in the National Register of Historic Places, the university, through the Campus Planning, Design and Construction, will consult with the State Historic Preservation Office as appropriate. (Refer to Appendix H for a description of historic resources.)
- (c) When federal funds are used, projects must comply with the federal historic review process (Code of Federal Regulations, Section 106).

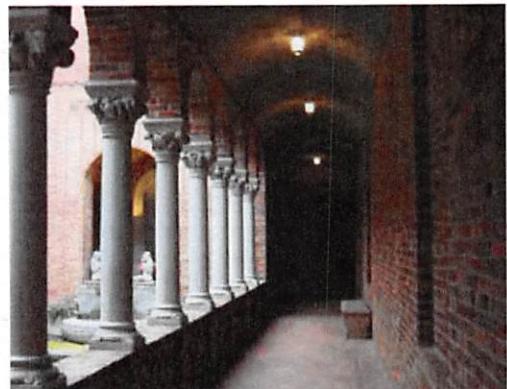
Historic Landscapes

These policy refinements address processes for identifying and documenting historic landscapes and provide a framework for making decisions about preferred preservation actions and future development. Refer to the Campus Heritage Landscape Plan, section "1.0 Landscape Preservation Guidelines and Description of Historic Resources" for further definition and a description of treatment approaches.

- (a) Protect and steward the campus's historic landscapes in the context of an evolving university. (Refer to Appendix H on page 132 for a description of historic landscapes.)
- (b) Identify, evaluate, and consider preservation treatment for all potential historic landscapes—designated open spaces and others.
- (c) Develop preservation treatment plans for open spaces determined to be historic.



Collier House (City Landmark)



Jordan Schnitzer Museum of Art (National Register)



Villard Hall (National Landmark)

POLICY 7

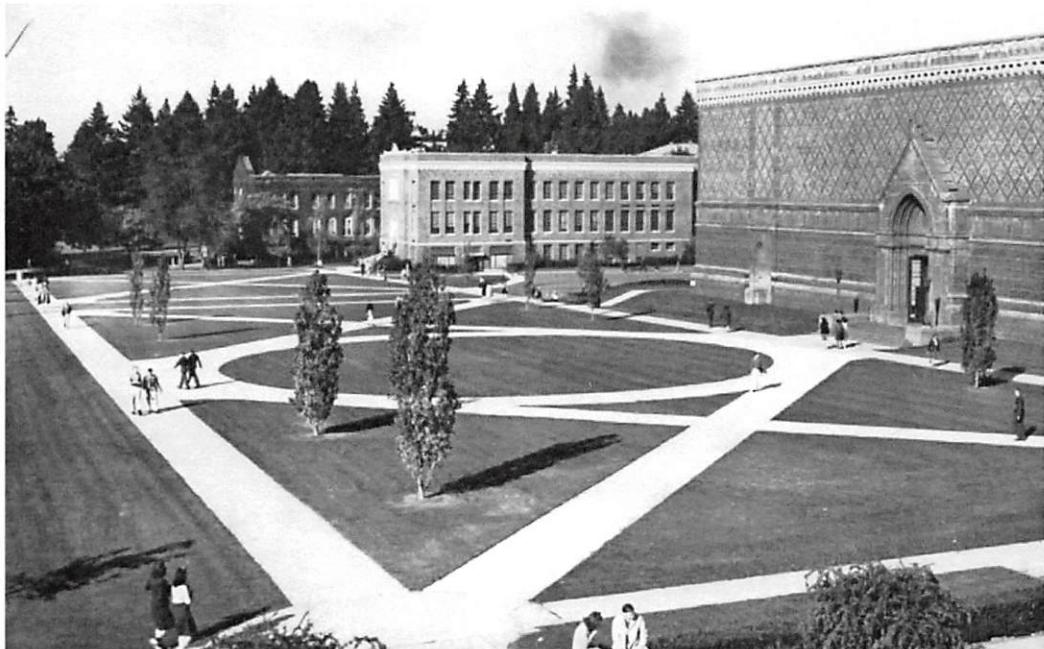
- (d) Select treatment approaches based upon significance, integrity, and contemporary goals for the space.
- (e) Manage and maintain historic landscapes.
- (f) Balance preservation and other contemporary needs of the university and region.
- (g) Integrate historic landscape characteristics into new elements and areas.
- (h) Document cultural landscape design interventions to leave a clear record of preservation and new design actions that will assist future preservation planning.
- (i) Communicate and educate about the historic qualities of the campus landscape so they become part of the values, culture, and intellectual resource of the university.
- (j) Integrate historic preservation goals into other related *Campus Plan* policies and subject-specific campus planning and maintenance documents.



Deady Hall Walk Axis, circa 1896 (National Landmark)



Dads' Gates (National Register)



Memorial Quad, circa 1945 (National Register)

POLICY 7

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Kassy Fisher, Assistant Vice President for Admin and COS, Finance & Administration
Policy Title & Policy :	Return of Overhead Charges on Continuing Education and Designated Operations Activities <u>06.00.07</u>
Submitted on Behalf Of:	Jamie Moffitt, VPFA & CFO
Responsible Executive Officer:	Vice President for Finance and Administration 

SELECT ONE: **New Policy** **Revision** **Repeal**

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: **Yes** **No**

If yes, which attorney(s): Missy Matella; Bryan Dearinger

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

Return of Overhead Charges on Continuing Education and Designated Operations Activities,
<http://policies.uoregon.edu/policy/by/1/06-finance-and-business-affairs/return-overhead-charges-continuing-education-and-designa>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Also proposed for repeal: Charging Administrative Costs to Auxiliary Enterprises,
<http://policies.uoregon.edu/charging-administrative-costs-auxiliary-enterprises>

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

We recommend repealing this policy which outlines a procedure that no longer is applicable given that the university, in support of its operations, has a long-standing and transparent practice and process for determining, periodically evaluating and assessing fees for overhead costs (such as administrative costs, utilities, etc.) to auxiliaries, continuing education and designated operations funds.

AFFECTED PARTIES

Who is impacted by this change, and how?

Units with auxiliary funds and other non-General and education funds that are charged administrative overhead.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Stuart Laing	Budget and Resource Planning	Jan 2017
Brad Shelton	Office of the Provost and Academic Affairs	Jan 2017
Missy Matella, Bryan Dearinger	Office of the General Counsel	Jan 2017
Jamie Moffitt	Office of the VPFA/CFO	Jan 2017

Text of Current Policy: Recommended for repeal

Return of Overhead Charges on Continuing Education and Designated Operations Activities

Last Updated:

07/01/2002

Effective Date:

07/01/2002

Reason for Policy:

To inform deans/directors/budget managers concerning overhead charges

Policy Statement:

All Continuing Education funds (both for-credit and not-for-credit in any fund group), and all Designated Operations funds will be assessed an 8 percent overhead charge. In special circumstances and upon the written request of the fund manager, the provost or appropriate vice president may reimburse or waive some or all of the overhead charge. The following criteria may be used in deciding whether or not to reimburse an activity.

If the activity primarily involves secondary students and has potential positive recruiting consequences for the University;

If the activity is planned to continue over some time, entails some risk in the undertaking, and will require expending funds for setup costs before significant income can be earned.

If the University is selected as the site of the annual meeting of a prestigious national professional association or otherwise hosts an event that brings additional distinction to the University.

The provost or other vice president will consult from time to time with the Associate Vice President for Budget and Finance concerning the effect of overhead collections decisions upon the university's income budgets.