UCSF Academic Senate

Report of Principles and Policies for Educator and Education Space

Educator and Education Space Policy Task Force

Educator and Education Space Policy Task Force

July 2018

Table of Contents

Acknowledgements

This report reflects the collective expertise, experiences, and contributions of the task force's work, compiled by:

I.   Overview

Introduction

Members of the Educator and Education Space Policy Task Force recognize the vital role of space to establishing a world-class health sciences institution and excellence in education.

Process

At the request of the UCSF Academic Senate Committee on Space, the Academic Senate Committee on Committees established an Educator and Education Space Policy Task Force in January 2018. Committee members were appointed in February and held five meetings between April and June 2018 to discuss principles and policies on educator and education space. An initial draft of principles was presented at the Academic Senate Committee on Space on April 4, 2018 and the Town Hall on Space on May 15, 2018. A subsequent iteration of the report with principles and policies was shared with the Academic Senate Executive Council, July 19, 2018. The report incorporates feedback from the Town Hall on Space and discussions with key stakeholders including David Teitel, Chair of the UCSF Academic Senate; Louise Walter, Chair of the Academic Space for Clinicians Policy Task Force; Chris Shaffer, University Librarian; and Sandrijn Van Schaik, MD, Director of the Kanbar Simulation Center.

The Task Force was charged with developing and recommending:

1. **Principles** underpinning the allocation of space for education purposes including teaching space and work space for teachers and their staff.

2. **Policies** that the administration would use for:

    o   Space design, from earliest stages such as Building Programming and the Basis of Design, to later stages such as the Furnishings, Fixtures, and Equipment phase;

    o   Space assignment during space planning;

    o   Oversight; and

    o   Governance during space utilization/management of assigned space.

II.   Background and Concerns

The ensuing principles and policies apply to design, assignment, oversight, and governance for *education space* (e.g. classroom, laboratory, simulation, auditorium, conference rooms, and multi-use clinical space) and *educator space* (e.g. faculty offices, faculty hotel spaces for educators who travel between and spend significant multiple sites to teach or mentor). The principles and policies outlined in this document apply to *learners in educational programs* within all health sciences schools (dentistry, medicine, nursing, pharmacy), the graduate division, post graduate programs (e.g. residencies, fellowships), and specialized training programs (e.g. self-supporting masters programs). *Educators* are faculty engaged in education (e.g. educational curriculum or program development, leadership, research, and teaching and/or mentoring) in any of the educational programs listed above. While the scope of this report does not explicitly focus on education administrative staff, their workspace needs are relevant to the education enterprise and are included in certain portions of this report.

III. Recommendations

Principles

Overarching Principles
1. As an academic health sciences center, all four parts of the academic enterprise (education, research, clinical care, and administration) will be taken into account when considering the assignment of space.
2. Newly built and renovated education space will include participation and input from educators throughout the entire process of design, assignment, building, furnishing, oversight, and management.
3. There must be ample and flexible education space for learners including classroom, laboratory, simulation, surgical skills laboratory, auditorium, and multi-use clinical learning space.
4. There must be ample educator space for faculty educators including faculty offices, faculty hotel office and other work spaces for educators who travel between and spend significant time amongst multiple sites to teach or mentor.
5. Educator and education space assignment should allow for reasonable physical proximity, communication, and community with educators' administrative staff, learners, and other educators.
6. Education space assignment, oversight, and governance will incorporate environmental sustainability.
7. Equity and inclusion are core and fundamental values to the design, assignment, and oversight of education and educator space.

Strategic Principles
1. Education space assignment for shared space across educational programs will consider the needs of all programs, involve collaboration on resource sharing and physical structure, and follow shared discussion and governance process for space utilization, timeline coordination, and decision making.
2. Education space designed to be shared across the professional schools should promote interdisciplinary educational and clinical experiences.
3. Space will be technology enriched with predictable and functional amenities and tools (e.g., teleconferencing hardware compatible with standard UCSF software such as Zoom, Wi-fi, smart boards) and technical support staff who guarantee availability and efficiency.

Qualities of Space to Optimize Education
1. In the design of new buildings or renovations of existing buildings, each project must incorporate the needs of faculty educators including space for teaching, workplace learning, and simulation.
2. Education space design should be responsive and adaptable to evolving advances in education, assess and map the potential educational activities as part of initial design, foster a sense of cohesiveness among educators and learners, and be adaptable to the needs of the individual educational programs as well as interprofessional education.
3. Education space will support learner needs for concentration and privacy/confidentiality.
4. Oversight and governance of space allocation and metrics for education space will address the needs of specialized training programs (e.g., self-supporting masters programs, non-

ACGME post-residency fellowship), which may not fit the standard school-based model of space negotiation, rent, and utilization.

Individual Educator Space
1. Educator space will be designed to meet needs for focused work as well as collaborative work; visual and auditory privacy needs; and confidentiality concerns such as HIPAA and FERPA.
2. Oversight and governance of space allocation, including metrics, will take account of how educator faculty's active use of the assigned academic workstation may vary because of clinical, teaching, research, or administrative work at other sites and include available dynamic workspace at all sites which faculty who are mobile can utilize.
3. Educator space design must account for the mobility of faculty including diverse work flows (i.e. how people operate and move through their space in the course of fulfilling their work responsibilities). This includes touchdown space at all sites with electrical charging, reliable UCSF Wi-Fi/ethernet ports, and temporary secure storage in addition to available private space for meetings, and quiet work and group space for collaborative work.

Policies

The Educator and Education Space policies below propose strategies of managing educator and education space in all phases of the space planning process. While the guiding principles articulated earlier underpin the design, assignment, oversight, and governance of education and educator space, the policies propose methods to enact these principles.

1. Educator and education spaces will be purposefully built into existing and future buildings on all UCSF campuses where educational activities are expected.

2. When designing new buildings or significant renovations at any UCSF campus or UCSF health sites, UCSF leadership will:
    a. Include educator and education spaces
    b. Consider flexibility in the use of those spaces in design
    c. Regularly maintain and update instructional technology and services

3. Each campus site will have suitable hotel work spaces (offices and workstations) for use by faculty and their education staff who spend significant time at campus sites other than where their primary academic office is located. These spaces will include:
    a. Reliable Wi-Fi/ethernet ports
    b. Portable charging stations
    c. Teleconferencing
    d. Secure space and storage
    e. Private space for meetings
    f. Private space for quiet work
    g. Common break area with facilities for food storage and consumption

4. Proximal simulation facilities maximize important practice time, which has been demonstrated to enhance patient outcomes. Since simulation education is often most effective if it occurs in or close to the workplace, facilities for simulation need to be

incorporated into the space design across campus sites where clinical education takes place. This is particularly important for those clinical environments for which simulation is an essential preparatory tool, for example, all inpatient environments in which learners acquire teamwork and resuscitation skills as well as surgery, anesthesia, and emergency medicine.

5. UCSF educators will be included in the membership on all UCSF space design, assignment, oversight, and utilization/management committees. The educators serving on the various space committees (heretofore referred to as "Education Space Liaisons") and will consist of educator faculty members and learners. Educator faculty members who serve as Education Space Liaisons will be those who spend a significant portion of their time in education in the health sciences schools (dentistry, medicine, nursing, and pharmacy), the graduate division, the post graduate programs, and specialized training programs; and will include representation from education from a variety faculty tracks and ranks.

Education Space Liaisons will represent and communicate about current and projected school, program, and departmental educational needs at a quarterly (or more frequently when needed) Education Space Liaisons meeting. Decisions or questions from the Education Space Liaisons meeting will be reported to the UCSF Academic Senate Space Committee and the (campus) Space Committee.

Education Space Liaisons will:
   a. Represent educational priorities across all campuses and schools (applicable phase: all).
   b. Seek input on the space needs of learners and educators within the school, program, and department they represent that will be housed in the new building/renovated facility (applicable phase: all).
   c. Liaise with colleagues and learners to ensure that the ongoing design meets their school, program, and department's educational needs (applicable phase: design).
   d. Play a leadership role in space design for new building/renovated facilities and provide input on design (applicable phase: design including furniture, fixtures, and equipment).
   e. Consider space assignment based on educational priorities of all UCSF educational programs (applicable phase: assignment).
   f. Contribute to creating a defined process and transparent objective criteria for space assignments and reassignments, with early engagement of relevant stakeholders (applicable phase: design, assignment).
   g. Assess and forecast present and future need for educator and education space every five years to respond to educational science and technological advances (applicable phase: all).
   h. Audit educator and education space based on need and use and adjust process and objectives based on changes at the UCSF and the external educational environment including advances in education science (applicable phase: assignment, oversight, utilization/management).
   i. Contribute to creating process and rules to resolve competing conflicts when there are more needs than education and educator space (applicable phase: all).
   j. Review space assignment and utilization/management annually through a formal evaluation process to determine whether space assignments are optimal (applicable phase: all). This responsibility will involve the Education Space Liaisons jointly:

- o Design of an evaluation system to measure and monitor ongoing utilization of space and satisfaction with the oversight processes. This will include but not be limited to the review of annual data on the use/cancellation of education and educator space including hotel-based space.
- o Review the performance of the department/school education and educator space by work environment to ensure that space is being used as prescribed. This review will focus on:
  - Current utilization including the extent to which the space use is aligned with the mission and goals of the unit as well as institutional priorities.
  - A system to match real needs with actual reservations in order to eliminate reserved but unused space.
  - Plans for future utilization and any anticipated or planned change.

6. Develop and implement a singular seamless transparent educator and education space reservation/real-time use/cancellations system that crosses campus and UCSF Health. The reservation system will provide detailed information on the capacity (e.g. teleconferencing, audio) of each space. The spaces will be secure and use of the space will be monitored through electronic individual access to the space. In addition, the reservation system will collect and report on data for the evaluation system to the UCSF Educator and Education Space Committee to make decisions about ongoing utilization of space and satisfaction of the oversight processes. Data from the reservation system in conjunction with decisions by the UCSF Educator and Education Space Committee will be used for ongoing curricular planning including:
   a. Coordination of dates throughout the year to 'broaden/flatten' demand, reduce peak competition periods.
   b. Develop cross-school sections of courses to maximize space utilization and to promote interprofessional education.

IV.   Conclusions

Educator and Education Space Policy Task Force developed principles and policies that apply to design, assignment, oversight, and governance for *education space* (e.g. classroom, laboratory, simulation, auditorium, multi-use clinical space) and *educator space* (e.g. faculty offices, faculty hotel office spaces for educators who travel to and spend significant other sites to teach or mentor). The principles and policies outlined in this document apply to *learners in educational programs* within all health sciences schools (dentistry, medicine, nursing, pharmacy, and physical therapy), the graduate division, post graduate programs (e.g. residencies, fellowships), and specialized training programs (e.g. self-supporting masters programs). *Educators* are faculty engaged in education (e.g. educational curriculum or program development, leadership, research, and teaching and/or mentoring) in any of the educational programs listed above.

The principles developed addressed overarching priorities for education and space, strategic values for aligning and sharing resources across the institution, the qualities of space that will optimize education, and priorities around educator space. The principles propose methods by which the principles described will be enacted in practice. These policies address advance education space planning, engage educators in every step of space planning from design to ongoing management, and propose the development of a singular seamless transparent educator and education space reservation system.

The ultimate goal of the taskforce UCSF was to ensure that UCSF is on the cutting edge of health sciences education globally and aims to recruit and retain faculty members with a passion for education to a world class institution where education is a top priority.