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A guide to Shared Spaces in Municipalities

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A GUIDE TO SHARED SPACE IN MUNICIPALITIES

RIKKE BRINKØ



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Guide to shared space in municipalities

1. Edition

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Introduction

Shared space is an initiative focused on getting more out of one's square meters, but before work begins, there are a number of issues in relation to the support base to be clarified.

First of all, the organisation's maturity in relation to the topic must be clarified:

- How and where is the ownership of the properties in the municipality anchored?
- Is there political support for shared space?
- Is there a property strategy / portfolio strategy that support shared space?

Once these questions are answered the next step is to clarify the motivation, since this is the starting point for any project and can influence how the various steps in establishing shared space should be approached.

- Is the motivation to save money on property sales and operation / maintenance of these?
- Is the motivation a desire to create a portfolio with more modern, for example pedagogical provisions, which may be financed through the sale of unprofitable, unsuitable or unused properties?

Finally, it is important to establish a strategy for interacting with users before moving ahead with the project; a topic that will be discussed in the following pages. But what it comes down to is the importance of making it clear to the user that he / she is part of the process, and visualise the potential gain that will come of it, so they have an interest in working with the project instead of against it. If this is not dealt with in a sufficient manner, it will be a difficult political process moving forward.

The following pages will introduce shared space as a concept, as well as a number of aspects of working with shared space that must be addressed along the way from identification of potential at the portfolio level to the evaluation of the completed project. The guide concludes with a brief glossary and a few references to additional literature.

Shared space

Shared space is a collective term for space and facilities that are shared between people from different organisational context and it can lead to a number of positive aspects for the stakeholders involved. A user for example, will be able to access a facility without having to own it, and instead use a room of facility for free or for a fee. From a building owner perspective, who has the task of ensuring proper operation and maintenance of a particular building, room or facility, shared space can contribute to optimising the use of the square meters, thus minimising the cost of having empty or underutilised facilities that still needs to be operated and maintained. From a societal perspective, shared space has the potential to help create more vibrant and attractive urban environments that can stimulate cultural and economic innovation, attracting more and different types of users at different times of the day. So there are several different motivations that may lie behind the decision to establish a shared space, and among these are:

Optimised use of square meters

Optimised use of fewer facilities and buildings will allow for fewer buildings in total in the portfolio, and will therefore be able to contribute to an overall space optimisation.

SHARED SPACE

Shared space is a topic within space management and portfolio management that deals with the sharing of buildings and spaces between multiple users. Shared space is defined as:

Several individuals / groups / organizations / companies, organisationally independent of each other, making use of the same space, either simultaneously or serially.

Cost reduction

Optimised use of fewer facilities and buildings will mean fewer buildings to be maintained and operated, allowing for a release of funds to be used elsewhere.

Synergies

If the focus in addition to space optimisation and reduction of costs also is on gathering users who could benefit from each other, it is possible to create a situation that allows for synergies to develop between the users and thereby achieve an additional benefit of shared use.

Sustainability

Intensified use has on an overall level the potential to contribute to increased sustainability in the building stock. If multiple users are moved to one building instead of several buildings are left empty much of the time, but still have to be maintained and operated, it can have a positive effect on the overall sustainability, despite the increased use resulting in a greater load on the specific building.

Flexibility in the portfolio

The possibility of, for example, launching a new initiative in an existing building or room provides the opportunity to assess the viability of the initiative before a permanent space is assigned. This represents just one of the ways in which shared space can contribute to flexibility in a portfolio.

Potential for shared space

Overall there are two different approaches to identifying the types of users that will be able to interact successfully in a shared space. The first is identifying users in need of the same type of building, premises or facility, either at different times of the day or the same time if the amount and type of use permits this. The second approach is to identify different types of users who will be able to complement each other in their use of a given building, room or facility, thereby utilising a building optimally without getting in the way of one another due to their needs being complementary without overlapping. It is therefore important to consider the functional overlap / match between different functions, user groups and organisations before selecting a location for shared space. For a municipal real estate portfolio, the following could be examples to consider:

- **Co-location** of schools, youth clubs and after school activities, as the functional requirements of these buildings and facilities is comparable, used by the same group of users but at different times of the day.
- **Co-location** of offices and / or administration buildings for different departments or groups.
- **Co-location** of functions such as libraries, community centers and other 'open' functions serving the local area.

Practical considerations

In addition to the functional overlap / match between uses, there are a number of practical considerations to make when working with shared space:

- **Time of use:** Should the sharing take place simultaneously or in succession, and should the sharing be equal or should one or more users have "priority rights"? Should there be a central booking system and should it be possible to monitor the actual use ratio?
- **Security / Access:** If the sharing is not available to all, but only pre-approved groups or individuals, how then should the access control be managed? ID cards, keys, passwords etc.? Furthermore, if a building for example, must be available to certain users at odd times of the day, how should the security be handled?
- **Differences in functions and needs:** If the different users of a space have different needs in relation to, for example, interior and storage how should this be handled?
- **Legislation:** If a building needs to be shared by for example a school and a day-care, there will be different regulatory requirements in relation to the two user groups which must be considered in the planning and design of the buildings and premises. A similar dilemma could also arise if the sharing is taking place between a public and a private party and is important to consider in the planning.
- **Cleaning and maintenance:** When you have many different users of a building, room or facility, there is always a chance that 'everyone's room is nobody's responsibility'. Who is responsible if something breaks? Who is responsible for cleaning? Who has ownership of furniture and the like? What to do if the space is a mess when you arrive? etc. etc. etc. These are aspects of shared space that are necessary to have a plan for in advance.

Process recommendations for shared space


Working with shared space results in addition to the benefits of course also in a number of challenges and specific requirements to the development process. It is human nature to want to have "one's own" and sharing space goes against this, meaning that depending on *how*, and *how much* is shared, a number of conflicts can occur that must be dealt with, namely territoriality, involvement and practicalities:

Territoriality

Territoriality deals with the emotions and reactions that arise when transitioning from a situation of having one's own space to a situation with shared space, and the consequent loss of control following this transition. Several factors affect the degree of territoriality that will occur, and thus also the amount of time and energy that should be allocated to deal with it. Above all territoriality depends on the degree of sharing taking place; the more you have to share, the more likely it is for territoriality to occur, and the more important it will be to have a plan for how to cope with it. In addition to this, a pre-existing relationship with the other parties participating in the sharing plays a big role; the better you know the other parties the easier the transition to shared space will be. Another factor playing an important role is the location itself. The longer time spent at a given location, the stronger the feelings of territoriality are likely to be, and the more important it will be to address them. Last but not least, an essential factor in sharing is whether it is forced or voluntary and whether users feel ownership of the process, which leads directly to the next theme.

Involvement

Following the issue of territoriality, there is the matter of user involvement. As described above, there is a big difference between sharing with people you know and people you do not know, and in addition to this there is a significant difference between being "forced" to share and to be "participatory" in the decision to share. Engaging the individuals or groups having to change habits from having their own to having to share, can contribute to a greater understanding of each other, something which will have a positive effect in itself, but it can also create a feeling of having a say in the matter even if you have not had influence on the actual decision process.



There are countless ways in which users can be involved in the process, and the key is to identify which of these methods is best suited to a given situation and a given purpose, depending on the type of input and collaboration that is desired. Common for all these methods is that it is important to make it clear for users that they are a part of the process, and to communicate clearly what they can influence and what they cannot, in the different phases of the project.

Practicalities

There are a large number of practical aspects to be considered when working with shared space. Unlike traditional use, shared space involves multiple users from several different organisations, each with their administration, financial situation, etc. A large part of these practical considerations are discussed in the previous section and will therefore not be described in depth here, but there are a few additions.

There are basic logistics in relation to all aspects of ensuring that a building and its users function as optimal as possible. It is relevant for example in the project phase where the focus will be on the logistics of handling inventory and users in a possible transition phase, offering alternatives during renovations, providing information about the project and the process. After this initial phase, it will be relevant in relation to for example providing booking systems, planning availability and use, maintenance, etc., when the room or the building is in use. There are considerations about cleaning, maintenance, administration, security, access etc., and all these must be met and dealt with to get from idea to realisation.

What shape these problems of territoriality, involvement and practicalities take on depends on a variety of factors, such as what is shared, how it is shared and who it is shared with. A thorough user involvement process can contribute positively in relation to reducing conflicts caused by territoriality, whereas practicalities is more about careful consideration and planning of the various processes involved in establishing a shared space as described above.

Shared space step-by-step

When you have been through the above considerations and have identified both the location, type of use and the users, there is still a long series of steps to be carried out before, during and after the establishment of a shared space. This guide is aimed at the development of shared space in a municipal building portfolio, and is constructed around four basic elements, representing an idealised process which in practice will inevitably happen more fluid with different parts overlapping. The guide contains a number of tasks / items to be carried out during the development process, from identification of location at portfolio level, to creating a specific project and last evaluation of the final result. The four elements can be seen below, and will be described more in-depth in the following section:

- Portfolio Analysis
- Pre-project
- Project
- Post-project

Purpose with the different elements

Portfolio level

The first step in the process concerns the identification of potential locations for shared space at the portfolio level. For this step to be performed, it is necessary to collect quite a bit of information concerning each building in the portfolio, and if the information is already present, it is necessary to make sure that it is up to date. The purpose of this is to create an overview of the property available, where they are located and in what condition they are in, after which a decision on which locations have a potential for shared space can be made on an informed basis.

The overall focus is thus on collecting general knowledge of the buildings in a given portfolio, and on what information is needed in order to identify potential for shared space.



Pre-project

In this next step in the process, the decision to develop a shared space in a specific building or group of buildings has been made, and the pre-project can begin, meaning the phase in the process where the framework for a specific project is decided. The purpose of this part of the process is to prepare a detailed description of the framework for the project by performing an in-depth study of the needs of users, buildings and organization to ensure an optimal situation for the transition to shared space. It is very important in this stage to be clear on what the motivation behind the project is, meaning whether economic or area optimisation is the immediate priority, or if the focus lies more on the use and functions.

The overall focus is therefore on describing the basic project framework and to ensure a clear objective before establishing a shared space

Project

After the basic framework of the project is decided, the next part of the process begins; the main project. This is where the transition to shared space is realised.

The overall focus is therefore on what activities are needed to ensure that the planned project is being implemented in a satisfactory manner.



Post-project

After completion of the main project and the shared space is realised, there still lies a task in evaluating if the purpose of the project and the desired outcome have been achieved as intended. The focus of this part of the process is to evaluate the measures undertaken and to examine whether the final shared space live up to expectations formulated for the project. Furthermore, it is also important in this phase to evaluate the lessons learned along the way so these can be incorporated in future projects in order to further optimise the process.

The overall focus of this part is therefore on the stage after the project is completed, and on how to ensure that the intended use is realised and maintained.

Continuous focus on anchoring and communication at the political level

Portfolio analysis

Users	Buildings	Organisation
<p>Who are the users?</p> <ul style="list-style-type: none"> • Perform requirement analysis – overall level • Perform stakeholder analysis – overall level • Obtain relevant working environmental data 	<p>Which buildings do we have and what is the condition?</p> <ul style="list-style-type: none"> • Develop a plan for FM platform and data collection • Examine demographics and location • Map m2 • Perform building inspection if necessary • Examine operating costs and property values • Examine suitability in relation to current use • Examine flexibility, needs for modernisation & degree of utilisation 	<p>Which authorities / organisations play a role?</p> <ul style="list-style-type: none"> • Describe Planning Act authority • Describe regulatory requirements • Describe the organisational structure • Examine contracts, tenants • Examine economy

Output: Identification of location for development of shared space

Continuous focus on anchoring and communication at the political level

Pre-projekt

Users	Buildings	Organisation
<p>Who are the users and what is their need?</p> <ul style="list-style-type: none"> • Perform requirement analysis – user level • Perform stakeholder analysis – user level • Define clear terms. What is fixed and what can the users influence • Identify key people / ambassadors who can follow the project from start to finish • Map existing features, environment & culture • Communicate what is expected to be shared vs own m² • Investigate what can be changed and what must be respected and maintained 	<p>What, and how much, work must be done?</p> <ul style="list-style-type: none"> • Map number of m2 involved. What should be shared, what is 'own' and what is potential new • Perform analysis of the immediate area. Proximity to public transportation and the like 	<p>How should the organisation and administration be done?</p> <ul style="list-style-type: none"> • Appoint steering committee / project organization • Identify the purpose of the project • Set frames • Formulate communication strategy • Define responsibilities • Formulate realistic project proposal / scenarios • Initiate political involvement and decision-making • Initiate authority process • Perform quality assurance of the financial framework (buying, selling, renting) • Initiate interdisciplinary administrative work • Initiate consultative process

Output: The business case / project proposal for the project

Continuous focus on anchoring and communication at the political level

Projekt		
Users	Buildings	Organisation
<p>How should the users be involved and informed?</p> <ul style="list-style-type: none"> • Define a clear vision and core values • Perform user involvement via workshops, open public meetings etc. • Focus on ensuring users' feeling of ownership of the buildings • Ensure frequent communication and only promise what is sure to be kept • Use concrete proposals, and show examples of previous successes • Celebrate milestones • Establish a response function 	<p>What should be shared and what should be private?</p> <ul style="list-style-type: none"> • Formulate clear guidelines for the use of the building • Design and decorate the building so that it supports shared use • Include flexibility in the design 	<p>How should the project be realised and managed?</p> <ul style="list-style-type: none"> • Formulate an effective project schedule • Plan the administration of the building • Plan implementation of the project to the operating team

Output: Handover of the space with instructions for use

Continuous focus on anchoring and communication at the political level

Post-projekt		
Users	Buildings	Organisation
<p>Is the building/premises being used as expected?</p> <ul style="list-style-type: none"> • Check if the good environment & community has continued in the new framework • Check whether the users are satisfied • Check if more users have joined • Check if new synergies / new features have been established 	<p>Does the building support the use optimally?</p> <ul style="list-style-type: none"> • Perform observations of utilisation • Perform evaluation of the building – comply with the expectations? • Check if there is something that needs to be adapted 	<p>Does the daily administration work as intended?</p> <ul style="list-style-type: none"> • Evaluate the project's final economy • Evaluates the administration and operation of the new place • Maintain clear guidelines for the use of the building

Glossary

Requirement analysis

What is meant by 'requirement analysis', is an analysis of what needs the existing functions/ users in a given building have, and how these match with the physical environment.

Stakeholder analysis

What is meant by stakeholder analysis, is an analysis of which parties in any way, shape or form could have an interest in a given location or project, that being the local community, users etc.

FM platform

What is meant by FM platform is that it is recommended to have an FM IT platform with which to collect and store the vast amount of data that is collected and generated in relation to buildings and their use. Furthermore, it is important that this data is kept up to date and a strategy is formulated regarding the use and maintenance of the data.

Analysis of immediate area

What is meant by analysis of the immediate area is a detailed review of the features / characteristics that exist around the location being examined.

It might be trains, buses, parking facilities, transportation options in general, other addresses in the area, parks and other things that can have either a positive or negative impact on the attractiveness of a given location.



Key people / ambassadors

A key person / ambassador is one person who follows the project from start to finish and represents a clear point of communication for any query related to the project. The person may be from the project organisation but can also be a user representative; the key purpose is just to have one person possessing the necessary information being available to users and stakeholders throughout the project cycle.

User involvement

User involvement is an essential part of developing a shared space as it changes the way a given location is used. There are many different methods that can be used, among which are:

- Workshops
- Reference groups
- Etc.

Additional Literature

Shared space

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Sundararajan, A. (2016). *The Sharing Economy. The End of Employment and the Rise of Crowd-Based Capitalism*. MIT

Shared space is a new and different approach to the way we use our buildings and spaces, and only our imagination sets the limits for how and for what it can be used. Cultural centres, sports facilities, office- and classrooms and many more can be the framework for completely different, and more versatile, functions than we are used to seeing in the building stock. Because in essence, shared space is a collective term for space and facilities that are shared between people from different organisational contexts, and the concept can contribute to a new and optimised way of utilising space and facilities, while at the same time facilitating the creation of new functions, relationships and collaboration opportunities.

The guide presented in this booklet is based on knowledge of shared space from the PhD project "Sharing space in the knowledge city" presented in the dissertation titled "Realising the potential of shared space in facilities management", and is developed in collaboration between researchers and partners from both municipalities and the private sector. The result is an introduction to the topic and a practical guide for the development of shared spaces in a municipal building portfolio, with a set of tangible steps to be implemented in the different phases of a project, from identification of potential at portfolio level to evaluation after the space or building has been taken into use.

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