Space Survey Training
2023: General
Who are we & What do we do?

- **Space Planning & Management**
  Andrew Bolling – Director
  Alaina Replogle – Application Support Manager
  Erin McKinnis – Sr. Data Analyst

- **Vision**
  Space Planning & Management will contribute to the educational, research, and public service goals of the University by providing comprehensive strategic planning and administration of space assignments and policies.

- **Mission**
  Space Planning & Management is responsible for managing one of the University’s most limited resources – space. The management of space includes planning, tracking, assignment, auditing, analyses, and reporting of current and future needs based on the strategic and research goals of the institution while maintaining proper alignment with the Master Plan. Space Planning & Management is the central governing office of all space on campus.
WHAT is the space survey?

The Space Inventory Survey is a module of the FM:Interact Space Management System accessible through a web interface and based on CAD floor plans which track space on the Denton & Frisco campuses.

- 180 buildings
- 24,121 rooms
- Just over 8M square feet
WHY must we do the survey?

- Impacts UNT’s Legislative State appropriations
- Determines amount of HEF received (Higher Education Funds)
- Qualifies UNT for TRBs (Tuition Revenue Bonds) for new buildings
- F&A (Facilities and Administrative) Federal funding for research space
  - UNT is currently in the process of negotiations for reimbursement percentage with the federal government by assessing current research space usage
WHY must we do the survey?

- Required by State & Federal Government
- Required by UNT Policy
  - Policy, 11.002 – Space Management & Assignment Policy
  - Policy, 11.011 – Research Space Policy

“All units on campus are responsible for accurately reporting assigned rooms according to State and federal codes, regulations, and laws on an annual basis and is administered by OSMP” – Policy, 11.002
WHO must do the survey?

**ALL** academic **AND** non-academic departments/units on campus, including auxiliary and athletics

- **Respondent**
  (e.g., space representative)
- **Approver**
  (e.g., department chair, dean, director, VP)
- **Certifier**
  (SPM and UNT President)
WHEN is the survey due?

- Survey will open **Wednesday, March 1st**
- Survey is due **Friday, March 31st**
  - Delinquent surveys are reported to the VP of the division as well as the President
- Resist procrastination & allow plenty of time!
  - Collect Data
  - Enter Data room-by-room
  - Approval Process
- VPN
  - You **MUST** be connected to VPN to access the survey
WHERE can the information be found?

- Floor Plans (CAD drawings)
- Faculty, Staff, & Lab Managers (grants, occupants, specialized research equipment)

Survey Resources:
- SPM Website (https://space.unt.edu)
- Survey link
- User’s Guide
- CIP Codes (Classification of Instructional Programs)
- Space Use Codes (e.g., office, lab, conference room, etc.)
- Function Codes (e.g., instructional, research, student services, administrative, etc.)
- Faculty Workload
Required Survey Data

- **Department Correct?**
  - “Yes” or “No”

- **Space Use Correct?**
  - Reference Space Use Codes List under the “Space Use Codes” tab in your binder or on our website at [https://space.unt.edu/file/61](https://space.unt.edu/file/61)
  - “Yes” or “No”
  - Coded as an office (310)...being used as an office?

- **Room Dimensions Changed**
  - “Yes” or “No”

- **Capacity**
  - Enter total capacity # for the space
  - If capacity is “0”, you **MUST** enter “0”
Required Survey Data Continued

- **Functional Category Codes to Rooms**
  - **Function Codes**
    - Reference Function Codes List under the “Function Codes” tab in your binder or on our website at [https://space.unt.edu/file/67](https://space.unt.edu/file/67)
    - How is the room used?
      - (e.g., instructional, administrative, research, auxiliary, etc.)
      - May have up to 3 Function Codes per room but must total 100%
  - **CIP Codes (Classification of Instructional Program)**
    - Reference CIP Codes List under the “CIP Codes” tab in your binder or on our website at [https://space.unt.edu/file/121](https://space.unt.edu/file/121)
    - Which department/unit is the room assigned?
      - (Biology, Financial Aid, Food Services, etc.)
    - Be as detailed as possible
      - (e.g., Biology, Biomedical, Biochemistry, Molecular Biology, etc.)
    - May have up to 3 CIP Codes per room but must total 100%
**Occupants**
- EmplID, First Name, or Last Name
- Only Exception: Multiple student employees occupying a space with turnover each semester

**Principal Investigators (PIs) to Rooms** (if applicable)
- Employee ID
- Department
- CIP Code
- Grant Award ID
- Research Type (Organized/Non-Organized)
- Grant Percent
- Lab Type (Dry/Wet)

**Room Amenities**
- Choose from a dropdown list if applicable to your research space

**Specialized Equipment**
- Research equipment purchased with grant funds
- Enter tag number and description
Defining Research Space

- Research Space defined by Space Type
  - 250 – Research/Non-Class Lab
  - 255 – Research/Non-Class Lab Service

- Research Space defined by Function Code
  - 21 – Institutes & Research Centers
  - 22 – Individual or Project Research
  - 31-34 – Public Service
  - 48 – Academic Personnel Development
Required Survey Data for Research Space

- All research space **MUST** be prorated by:
  - Grant/Project #
  - Principal Investigators (PIs)
  - Function & CIP Codes

- All research space **MUST** include specialized research equipment if applicable
Space Survey and the F&A Proposal

The Federal Government requires the university to have a current and accurate space survey for developing the Facilities and Administrative (F&A) Cost Proposal.

- The Space data is one of the most important factors in determining the F&A rate.
- University facility costs are primarily allocated to the University functions, instruction, public service and research, based on how that University space is used or functionalized.
- Those are the percentages you are charged with determining.
- A 100% allocation to the research function for a lab space is highly unlikely.
- A Federal Cost team will visit UNT to negotiate the F&A agreement. During that visit, it will tour some of your departments to test the research percentages that you have included in your space survey.
Research Space by Function

Is the space \textit{really} 100%?
Labs at 100% = \textcolor{red}{red flag}

- Function should be determined by aggregate activity for the fiscal year
- Estimate percentages based on users, funding and activities
Questions to Ask:

- Who are the users of the space? Faculty, students, etc.?
- Is there funding associated with the user’s activities in the space?
- What are the students doing? Checking email, preparing for class, grading papers? These are instructional activities (Function 11) which would mean the space is **NOT** 100% research.
- Are the Faculty working towards or waiting for a grant award? This is departmental research (Function 48).

**Student space – Graduate bullpens, offices, etc.**

- Are these students working on research, homework etc? Prorate the function accordingly.

**Research Service space**

- Used only by funded researchers? Shared with others who may not have funding?
Survey Checklist Report

- This report will show you any mistakes, issues, or missing items among the data you have entered. *Please note, if you have suggested a change, it will show on this report.

- You may run the report for your entire space survey or, if you have multiple Dept. ID’s, you may run the report per Dept. ID.

- Download the report to excel for easier access and maneuverability.
Survey Checklist Report Cont’d

Problems: This box contains all of the potential problems or issues that may be on your survey. You can run the report for all categories at once or run it for each individually.

- Incorrect % for Function Codes
- Incorrect % for Principal Investigators
- Wrong Department.
- Wrong Space Use
- Record Not Reviewed
- No Space Use Code
- Missing Student Capacity
- No Department Code
- No Account for Organized Research
- More than 3 Function Codes Assigned to Room
Demonstration