Space Survey Training
March/April 2015
Agenda

• Introductions
• Why conduct a space survey?
• Overview of process
• What do the functional categories mean?
• Frequently asked questions
• What’s new at Facilities and Services
Why conduct a space survey?

• The space survey is required to fulfill reporting requirements for the university such as:
  – Calculating the university’s facilities and administrative (F&A) rate
  – Space utilization and analysis
  – Work order requests
  – Emergency response
Overview of process

• Space Survey Training will be provided annually
• Space Surveys will be emailed to the Major Administrative Units (MAU)
• Space Surveys are reviewed, completed and submitted by MAU to Facilities Space Planning
• Space Surveys are reviewed by Facilities Space Planning
  – Space Surveys will be sent back to MAUs if incomplete, errors are found, or verification of data is required
• Facilities Space Planning will compile all data and submit final compiled space report to Cost Accounting and Reporting
Certification

• Space Survey will be reviewed by the MAU’s Business Officer/Manager
• MAU’s Vice President/Dean/Director will certify the information is true and correct to the best of his/her knowledge
• Electronic certification will be verified using the Signature Authority Database
Space Survey 2015 Timeline

• Space Survey Training
  – March 31\textsuperscript{st} 10:30-11:30am CC, Senate Gallery (304)
  – April 1\textsuperscript{st} 1:30-2:30pm CC, Senate Chambers (302)
• Space Survey Distribution to Major Administrative Units (MAU)
  – Beginning April 15\textsuperscript{th}
• Space Surveys Due Back to Facilities Space Planning
  – June 30\textsuperscript{th}
• Facilities Space Planning Review and Requests for Verification
  – July through August
• Space Survey – Final Report Due to Cost Accounting & Reporting from Facilities Space Planning
  – September 15\textsuperscript{th}
Space Survey Format

• Section 1 – Facility Information
  – BR_Link, campus name, building name, building number, room number, FICM, NASF, Banner location code & building gross square footage

<table>
<thead>
<tr>
<th>BR_Link</th>
<th>Campus Name</th>
<th>Building Name</th>
<th>Building Number</th>
<th>Room Number</th>
<th>FICM</th>
<th>NASF</th>
<th>Banner Location</th>
<th>Building GSF</th>
</tr>
</thead>
</table>

• Section 2 – Occupant Information
  – One line for each occupant of the space
  – Aggie ID, occupant name, position number, room use description, department, F-level org number

<table>
<thead>
<tr>
<th>Aggie ID</th>
<th>Occupant Name</th>
<th>Position Number</th>
<th>Room Description</th>
<th>Department</th>
<th>F-level Org</th>
</tr>
</thead>
</table>
Functional Use Categories

• Instruction (INS)
  – Description: All space used for teaching/training activities whether for credit or non-credit courses. Includes sponsored instruction and training activity established by a grant or contract. Departmental research and development activities that are not separately budgeted and accounted for are also classified as instruction.
  – Examples: Classrooms, Teaching Laboratories
Functional Use Categories

• Sponsored Research (SR)
  – Description: Space used for all research and development activities of the University that are separately budgeted and accounted for. This includes sponsored research activities that are externally funded. Research and development activities that are sponsored by the University and that are separately budgeted and accounted for by the institution under an internal application of institutional funds are also included. Activities involving the training of individuals in research techniques shall be included in this classification.
  – Examples: Research Laboratories
Functional Use Categories

• Public Service (PS)
  – Description: Non-instructional and non-research activities related to programs and projects sponsored by federal or non-federal sources. This includes activities such as community service programs, public service projects and other service activities. Any of these activities undertaken by the institution without external support should be classified as other institutional activities (OIA).

  – Examples: Community services, Cooperative extension, Public broadcasting
Functional Use Categories

• Departmental Administration (DA)
  – Description: Includes all space used for the administrative and supporting services that benefit common or joint departmental activities in the academic deans' offices, academic departments and divisions. This category includes areas for deans, departmental administrators, clerical staff, departmental libraries, conference rooms, and storerooms. Also includes areas of support staff not directly identifiable to sponsored research, instruction, or other sponsored projects.
  – Examples: Academic Departmental Administrative Space
Functional Use Categories

• General Administration (GA)
  – Description: Includes all space devoted to general executive and administrative offices that serve or benefit the entire University. This includes executive management, fiscal operations, personnel, purchasing, business office, etc.
  
  – Examples: Executive management, Fiscal operations, General administrative and logistical services, Administrative computing services
Functional Use Categories

• Sponsored Projects Administration (SPA)
  – Description: All space which is used exclusively as administrative support for sponsored projects.
  – Examples: SPA, OGC

• Library (LIB)
  – Description: Branson and Zuhl Libraries. This category does not include departmental libraries.
Functional Use Categories

• Plant Operation and Maintenance (POM)
  – Description: All space used for the administration, supervision, operation, preservation and protection of the physical plant. This includes janitorial services, grounds maintenance, utility services and other physical plant facilities except Motor Pool. Also included in this classification are safety and security facilities such as the Safety Office, Fire and Police Departments.
  – Examples: Physical plant administration, Building maintenance, Custodial services, Utilities, Landscaping and Grounds
Functional Use Categories

• Student Services (SS)
  – Description: Space used for the administration of student affairs and for services to students, including admissions, registrar, counseling and placement, student advisors, student health services, catalogs, and commencements and convocations.
  
  – Examples: Student services administration, Social and cultural development, Counseling and career guidance, Financial aid administration, Student admissions, Student records, Student health services
Functional Use Categories

- **Service Center (SC)**
  - Description: Space related to internal service centers which charge for their services such as Motor Pool, Computing & Networking, Printing & Duplicating and Telecommunications.
  - Examples: An operation that provides services or products for a fee to users principally within the institutional community.
Auxiliary Enterprises (AUX)

- Description: This space includes all of housing, food services, snack bars, special events, conference services and certain athletic facilities. These areas exist to provide a service to students, faculty or staff and are managed essentially as a self-supporting unit.

- Examples: Provides goods and services for a fee to students, faculty, and staff - Food Service and Housing
Functional Use Categories

- **Other Institutional Activity (OIA)**
  - Description: Includes space for public service activities conducted by the University which are not externally sponsored. This also includes athletics, student clubs and associations, and independent operations. This classification should include all other activities not defined above.
  - Examples: Athletics, Student Clubs, and Independent Operations

- **Non-Institutional (NI)**
  - Description: Areas that are controlled or operated by outside agencies but are housed or otherwise supported using University facilities.
  - Examples: Arrowhead
Functional Use Categories

• Unoccupied Space (VAC)
  – Description: Vacant space
  – Example: All space vacant at the end of the fiscal year. The space is still assigned to the Department/Position (position number required) however, all space assignments are at the discretion of the Space Committee

• Unassignable Space (UNAS)
  – Description: Space that is not assigned to a department/unit.
  – Example: Restrooms and Hallways
# F-level Org Numbers

![Excel Sheet screenshot](image)

<table>
<thead>
<tr>
<th>Summary Organization</th>
<th>Home Organization</th>
<th>Employee</th>
<th>Age</th>
<th>First Name</th>
<th>Last Name</th>
<th>Phone</th>
<th>Job Title</th>
<th>Org Number</th>
<th>F-Level Org Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALCC Alamogordo CC</td>
<td>ALCC ABE</td>
<td>1</td>
<td>41</td>
<td>Arthur</td>
<td>Gong</td>
<td>353</td>
<td>Teacher</td>
<td>EC200</td>
<td>F0100</td>
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<tr>
<td>ALCC Alamogordo CC</td>
<td>ALCC ABE</td>
<td>2</td>
<td>42</td>
<td>Rebecca</td>
<td>Weseman</td>
<td>354</td>
<td>Teacher</td>
<td>EC200</td>
<td>F0100</td>
</tr>
<tr>
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<td>ALCC ABE</td>
<td>3</td>
<td>43</td>
<td>Jose</td>
<td>Flores</td>
<td>355</td>
<td>Teacher</td>
<td>EC200</td>
<td>F0100</td>
</tr>
<tr>
<td>ALCC Alamogordo CC</td>
<td>ALCC ABE</td>
<td>4</td>
<td>44</td>
<td>John</td>
<td>Gómez</td>
<td>356</td>
<td>Teacher</td>
<td>EC200</td>
<td>F0100</td>
</tr>
</tbody>
</table>

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Checks and Considerations

• Examples of illogical pairing of functional activities
  – Non-academic departments with DA space
  – A room with both VAC and with any other function type
  – A room with both GA and DA functional space
  – A room with both SR and AUX, LIB, SPA, GA, POM, OIA, PS

• Review all areas coded as 100% SR
  – If homework is done in the space (grad student offices/desks, work on thesis) or used for class presentations/teaching, then space can’t be 100% SR
  – Startup funding and departmentally funded research (non-grant funded) are not SR
  – Space can have more than one use, staff or activity therefore it’s important to note percentage of use for each occupant. Add lines to the survey as needed
Frequently Asked Questions

• Where do I find F-level Org information?
  – A report containing MAU, F-level org’s and position numbers will be supplied to you with the space survey. F_LEVEL_ORGS.xlsx

• If I have any questions or concerns with the space survey, who should I contact?
  – Facilities Space Planning at 646-7734 or space-mgt@nmsu.edu
  – Email Distribution:
    • Greg Walke, University Architect
    • Steve Self, Manager Facilities Space Planning
    • Suzanne Montes, Facilities Space Planner
Frequently Asked Questions (cont.)

• Why do we have to complete this every year?
  
  – The completed space survey must be reviewed and certified in its entirety each year to comply with federal requirements and to ensure an auditable format
  
  – We are working towards a perpetual space inventory to document space changes in real-time by tracking office moves and relocations
  
• Increase efficiency of the survey and accuracy of the data
• Reduce the annual burden on the Colleges and Departments
• Reduce the time spent each year completing the survey, compiling the data and reporting
Facilities and Services
What’s New at Facilities Space Planning

Check out our website at
http://space.nmsu.edu/

New Space Request Process
Space Committee Information
Office Staff and Contact Information