Here we go!

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John Holcombe - CPSM
Amanda Jones - CPSM

Sponsors: Howard Wertheimer
Sandy Mason
What is the Space Survey?

1) Process of functionalizing assignable square footage in accordance with 2 CFR Part 200 classifications

2) To ensure Federal Tax code compliance for non-qualifying Tax-Exempt purposes
Why a Space Survey?

Documentation in support of F&A proposal
FY16 is the base year for the FY18 F&A rate proposal to the Office of Naval Research (ONR)

Identify research performed in buildings
Scientific research performed in tax exempt bond financed buildings must meet IRS requirements for Safe Harbors
Timeline

Space Survey Training                    March 14-15
Departments Complete Survey             May 31
Quality Review by CPSM and G&C          June 14
Surveyor Corrections Due                June 30
Certifications Due                      October 31
F&A Proposal Due                        December 31
Space Survey Tool Kit

- Training with INSITE
- Access to Floor Plans
- Functional Definitions
- Grants List - Excel
- Employee List
- Personal Knowledge
- Financial Managers

FY16 Space Survey
Data Review

- **Room Demographics** - room number, square footage
- **Use Code** - room use should be confirmed or modified as appropriate
- **Station Count** - Number of workstations in labs and offices, or number of seats in classrooms, conference rooms and meeting rooms appropriate number of occupant that can occupy a space
- **Occupants** - employee names required for all faculty, professional staff, and Post-Doc offices
- **Principal Investigator** - PD/PI employee name required for all lab, lab service, and similar space
- **Functionalization** - required for all lab, lab service, and similar space
- **Grant** - required for all lab, lab service, and similar space with any space functionalized as Organized Research
Functional Definitions

• OR - Organized Research
• IDR - Instruction & Departmental Research
• OSA - Other Sponsored Activities
• OIA - Other Institutional Activities
• OTH - All Other (Vacant)

Primary GIT Functions
Organized Research (OR)

- **Sponsored Research** – Externally funded and separately budgeted research and development projects; including research training

- **University Research** – Internally funded and separately budgeted research and development projects
  - “Committed” Cost Sharing Projects – Funded from GTF, GTRC, State (non-sponsored) funds
  - Other projects derived from similar sources through a competitive application and award process
Instruction / Departmental Research (IDR)

- **Instruction** - Standard Teaching and Training activities

- **Departmental Research** - Internally funded General Research
  - New Faculty Start-Up Funds
  - GTF projects (research gifts) not used as cost-share
  - Other projects derived from internal sources provided on a non-competitive basis
Other Sponsored Activities (OSA)

Externally funded projects for activities other than instruction and organized research.

This includes sponsored public service projects and community service programs that provide non-instructional services to external individuals or groups.

- EII Field Offices, other economic development activities
- Conferences, institutes, general advisory services, reference bureaus, radio and television
- Consulting and similar non-instructional services to particular sectors of the community
Other Institutional Activities (OIA)

All activities EXCEPT for:

1) Organized Research,
2) Instruction & Departmental Research,
3) Other Sponsored Activities
4) all facilities & administrative (indirect) support functions:
   (building/equipment maintenance, libraries, and general/departmental administration)

OIA does include:

- Auxiliary Services
- Service/Cost Centers
- Space used by external entities
# Required Data

<table>
<thead>
<tr>
<th>Room Use</th>
<th>Req’d Info-1</th>
<th>Req’d Info-2</th>
<th>Req’d Info-3</th>
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<tr>
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<td>PI Name</td>
<td>Function %’s</td>
<td>Grant(s) -OR</td>
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<td>Occupant Name</td>
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</table>
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?
Example 1:

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?

* Function Info: N/A
* Use Info: Confirm “ACADOF Academic Office”
* Occupant Info: Burdell, George P (from menu)
* Grant Info: N/A
Example 2:

Professor Burdell’s research lab is used as follows:

- 75% for NIH research grants,
- 15% for general research supported by GTF (gift) funds,
- 10% for research “cost-sharing” supported by GTRC.

How should this room be coded in INSITE?
Example 2:

Professor Burdell’s research lab is used as follows:

- 75% for NIH research grants,
- 15% for general research supported by GTF (gift) funds
- 10% for research “cost-sharing” supported by GTRC

How should this room be coded in INSITE?

* Function Info: 85% OR 15% IDR
* Use Info: Confirm “RESLAB-Research Lab”
* PI Info: Burdell, George P (from menu)
* Grant(s) Info: R3837 NIH Grant assigned to Burdell
Example 3:

Room 202, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, John Harris.

How should this room be coded in INSITE?
Example 3:

Room 202, previously a “Graduate Student Office”, is now occupied by the Department’s Financial Manager, John Harris.

How should this room be coded in INSITE?

* Function Info: N/A
* Use Info: Update to “NACDOF Non-Academic Office”
* Occupant Info: Harris, John D - 571454 (from menu)
* Grant Info: N/A
Example 4:

Room 205 “Research Lab” is currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?
Example 4:

Room 205 “Research Lab” is currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

* Function Code: “OTH” (100%)
* Use Code: No change required (RESLAB-Research Lab)
* Grant: N/A
* Room Comments: “Vacant Space Under Renov - Service”
Review Points:

Office Space

1. Confirm and/or Update Use Code
2. Select Occupant Name for Faculty, Staff, and Post-Doc offices - **REQUIRED**
3. Occupant names are not required for Graduate Student Offices
4. Function Codes are not required
5. Grant(s) are not required
6. Office service rooms located within enclosed offices should be coded to match the applicable office (occupant name)
Lab and Lab Service Space

1. Confirm and/or Update Use Code
2. Select PI Name(s) - REQUIRED
3. Enter functions and percentages for activities performed in the room - REQUIRED
4. Select Grant(s) activity performed in the room. REQUIRED for OR
5. Lab service space supporting a specific lab should be coded to match the applicable lab (PI names, functions, and grants)
Review Points (Cont’d.):

Conference Rooms and Other “Common” Space

1. Confirm and/or Update Use Code
2. No additional information is required IF used/open for ALL departmental activities
3. If used for specific activities, it may be “functionalized” by selecting functions and percentages
4. If functions are selected......
   - Indicate Faculty/PI Name(s)
   - Use Comments Field to provide additional information
Review Points (Cont’d.):

Vacant Space

1. Lab Space – Code based on primary FY activities or as “OTH”

2. Office Space – Use Room Comments Field to indicate…..
   - Transitional Space
   - Employee Name not listed (enter name)
   - Under Renovation (indicate if serviced by utilities, HVAC)
Academic Space Assessment

- **Starting Point** – Space Survey Data reported by Colleges & Schools

- **How was the data used?**
  - Grant $/SF – currently calculated at the School or College level
  - Number of Offices – compared to number of faculty/staff
  - Station Count – used for Departmental Classrooms and office spaces to assess utilization
Academic Space Assessment
Lessons Learned

- **Dispersed data collection leads to inconsistent results**
  - Assigning Appropriate Use Codes
  - Consistent Organization Assignments

- **Office Occupant** – For F&A Rate Study, the office space is functionalized based on occupant’s salary structure

- **Outstanding Issues**
  - Recording IRI space
  - Recording core lab space
  - Employing consistent and transparent metrics

- **Empowering the Decision Makers** – INSITE data can become a tool for School Chairs and Deans to assess their own space utilization
INSITE Space Survey Module

- **New Version** since last survey – Screens reorganized into tabs.

- **No login required** – but your computer’s IP address must be in the access list.

- **You will receive an email with your survey link** – You may forward this to others who will assist you with the survey, but their IP address will also need to be added to the access list.

- **The following slides can be used as a reference** while you are filling out your survey.
Create Excel spreadsheet of survey list

Send email to survey administrators

Quick filter

Floor plans

Record counts

Survey list filters

Click pencil icon to review and update room for the space survey

Use checkboxes to update multiple rooms at a time with the same data

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<th>Facility</th>
<th>Floor</th>
<th>Room</th>
<th>Organization</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
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Showing 1 to 50 of 581 records

Click to expand main display
Individual Room Display

- **Click on name (or select under Tools) to return to Survey List**
- **Move to next or previous room. Use these AFTER saving any changes for the current room**
- **Click to save, but NOT submit space (You still want to review or make additional changes later)**
- **Click to save AND submit space; then moves to next room (This means you are finished updating this space)**
- **NOTE: You can still update rooms even after you have submitted them**
- **Click to view floor plan with this room highlighted in blue. *NOTE – If the floor plan has changed, contact John Holcombe for assistance.**
- **Tabs for different groups of information regarding this room**
- **Click to expand main display**
- **Original values**
- **Click to save, but NOT submit space (You still want to review or make additional changes later)**
- **Click to save AND submit space; then moves to next room (This means you are finished updating this space)**
- **“GT” Help buttons**
Individual Room Display
Room Info Tab

Confirm Room number and organization assignment

If room does not belong to your organization, indicate here and click "Reassign Survey Record"

Click "New Use Assignment" Box and select from Use List to change room type

Use "Room Comments" to clarify room type or to indicate situations such as vacant spaces under renovation.

Enter seat or workstation count for classrooms, conference rooms, labs, offices, etc.

Grants & Contracts Accounting
Capital Planning & Space Management
FY 2016 Space Survey

https://site.gatech.edu/NetFM/survey/survey
Individual Room Display

Function Info Tab

Click “Function Change” Box, select from Function List, and click >> or << to add or remove room function(s) – Update percentages as needed.

* NOTE – Function comments required for all rooms functionalized as “OTH”

* NOTE – Function(s) required for all lab and lab service rooms
Individual Room Display
Occupancy Info Tab

Click “Occupancy Change” Box, select from Person List, and click >> or << buttons to add or remove occupant names(s) – Update percentages as needed.

GT Department specification for occupant

* NOTE – If you can’t find the occupant in the person list, specify details here

* NOTE – Occupant name(s) required for all Faculty, Staff, & Post-doc Offices
Individual Room Display
PI Info Tab

* NOTE – PI Name(s) required for all labs and lab service rooms

Click “PI Change” Box, select from Person List, and click >> or << buttons to add or remove PI names(s)

GT Department specification for PI

* NOTE – If you can’t find the PI in the person list, specify details here

* NOTE – PI Name(s) required for all labs and lab service rooms
*NOTE – Grants are listed by employee name

*NOTE – Grant(s) required for any lab or lab service rooms functionalized as Organized Research

Click “Grant Change” Box, select from Grants List, and click >> or >> buttons to add or remove grant(s)

GT department specification for grant
After making changes to a room
Update or Submit?

- **Click on name (or select under Tools) to return to Survey List AFTER saving any changes**

- **Click to save, but NOT submit space** (You still want to review or make additional changes later)

- **Click to save AND submit space; then moves to next room** (This means you are finished updating this space)

**NOTE:** You can still update rooms even after you have submitted them

Move to next or previous room. Use these AFTER saving any changes for the current room.
Advanced Usage - Multiple Room Update
Select Rooms to Update

First, use any combination of filters to reduce list, then select all rooms needing the same updates.

Then click “Update Selected Spaces”
Advanced Usage - Multiple Room Update
Specify Fields to Update for the Selected Rooms

Select items to change

Then complete fields as appropriate and when finished, click “Update Selected Records”
More Advanced Usage
Copy Values from this Record...
More Advanced Usage
Copy values into selected rooms

Select items to copy

Use filters to narrow list of rooms

Use check boxes to select rooms to receive copied items

Click “Copy Values” when ready
# FY 2016 Space Survey

## Grants & Contracts Accounting

## Capital Planning & Space Management

### Survey List

#### After updating spaces

<table>
<thead>
<tr>
<th>Organization</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>ME - Mechanical Engineering</td>
<td>Academic Office (100%)</td>
<td>KAULINDI, SURYA</td>
<td>1 OR (90%), 2 IDR (10%)</td>
<td>CAROLINA, LAURENT (50.0%), CHEN, XIAOYU (50.0%)</td>
<td>NATIONAL SCIENCE FOUNDATION/GENERAL ROSS</td>
</tr>
<tr>
<td>ME - Mechanical Engineering</td>
<td>RESLAB</td>
<td>XIAO, SHUHAN</td>
<td>1 OR (90%), 2 IDR (10%)</td>
<td></td>
<td>US DEPT OF COMMERCE/NATL INST OF STD &amp; TECH RESE, LOS ALAMOS NATIONAL LABS ALAMOS NATIONAL SECURITY (LANL)</td>
</tr>
<tr>
<td>ME - Mechanical Engineering</td>
<td>OFF RR</td>
<td>KAULINDI, SURYA</td>
<td>1 OR (5%), 2 IDR (20%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME - Mechanical Engineering</td>
<td>ACADEO</td>
<td></td>
<td></td>
<td>KALANDI, SURYA</td>
<td></td>
</tr>
<tr>
<td>ME - Mechanical Engineering</td>
<td>NAACO</td>
<td></td>
<td></td>
<td>CHAE, HAN</td>
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<tr>
<td>ME - Mechanical Engineering</td>
<td>NAACO</td>
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</tr>
</tbody>
</table>

#### Record counts

- **Blue “check mark” icon** indicates updates have been made, but not submitted.
- **Changes highlighted in yellow**

- **Green “thumbs up” icon** indicates record has been submitted.
Use checkboxes and filters as needed to display records that you are ready to submit...

Click checkboxes to select spaces to submit...

Click here after selecting spaces to submit...
Green “thumbs up” icons mean room updates are complete and have been submitted.

New Submitted count
**Survey List**

**Goal – All Rooms Submitted**

Green “thumbs up” icons mean room updates are complete and have been submitted.

<table>
<thead>
<tr>
<th>Room</th>
<th>Use</th>
<th>Principal Investigator</th>
<th>Functions</th>
<th>Occupants</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>086</td>
<td>113</td>
<td>Academic Office (100%)</td>
<td>KALIDINDI, SURYA</td>
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<tr>
<td>086</td>
<td>165</td>
<td>RESLAB</td>
<td>XIA, SHUAN</td>
<td>1 OR (50%), 2 OR (10%)</td>
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<tr>
<td>086</td>
<td>175</td>
<td>RESLAB</td>
<td>KALIDINDI, SURYA</td>
<td>1 OR (75%), 2 OR (20%)</td>
<td></td>
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<tr>
<td>086</td>
<td>191A</td>
<td>OFF RR</td>
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<tr>
<td>086</td>
<td>192</td>
<td>ACOAOF</td>
<td>KALIDINDI, SURYA</td>
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</table>

All rooms are submitted! You are done.
Issues:

- Coding 100% Organized Research in all research labs
- Old Comments/ Functions of non lab space
- Use Room Comments Field when possible
- Grant Info- Multiple Grants in a Room? Grant assigned to multiple spaces?
- Co-PIs – Grants List
- Vacant Space
  - Labs – May be functionalized based on the activities performed during the period of use if utilized during the majority of the fiscal year
  - Offices – Use Comments Field to indicate status
- Professional judgment is the key – Consult with Unit Financial Officer
- Space Survey requires Certification and subject to Audit
Questions?

gcspacesurvey@lists.gatech.edu

Key Contact

Floor Plans  John Holcombe /
Room Numbers  Amanda Jones
Room Organization Assignment

Function Definitions  Jonathon Jeffries
Space Survey Requirements

Funding of research  Unit Financial Officer
performed in Lab

Slides posted at grants.gatech.edu >Policies and Procedures>
  Manuals and Notices> G&C Manuals