

Space Survey Guide

This is reference guide for departmental Space Inventory Contacts (SICs) in completing their annual Space Surveys.

Contact Space Inventory with questions concerning this guide:
(SpaceInventory@utdallas.edu | 972-883-6201).

Purpose

All public higher education institutions in the State must submit annual facility inventory reports to the Texas Higher Education Coordinating Board (THECB). The UT Dallas Facilities Management Space Inventory division is currently responsible for submitting these reports.

The amount, type, and use of physical campus spaces reported by UTD influence:

- The institution's funding, both current and projected.
- Federal Facilities and Administration rate negotiations for research grants and for federal reporting of associated research space.

Conducting an annual Space Survey is the tool used to ensure the information submitted to the THECB is correct and current

Introduction

As your department's designated **Space Inventory Contacts (SICs)**, you are responsible for completing the annual Space Survey accurately and within the designated time frame. This involves a review of THECB codes, occupant information, and other characteristics unique to each room assigned to your department or unit.

Only designated SICs who have completed Space Survey training will be sent the Space Surveys by the Space Inventory team.

If you are not currently a SIC and need to become one, please contact Space Inventory to request authorization. This may be done via email at SpaceInventory@utdallas.edu or by phone at (972) 883-6201. You may also complete the [SIC Change Form](#) online. Approval by your dean, VP, or department head is required.

Survey Details

Space Surveys will be formatted in Microsoft Excel and accessible via Box.com. The Space Inventory team will let you know when you receive access to your department's survey(s).

Floorplans will also be included in each department's Box.com folder. If, while completing the survey, discrepancies are found on the floorplan, please submit a [Report a Floorplan Discrepancy](#) form online.

Completing the Survey

The survey will open to the list of rooms specific to your department, and will display information such as building and room number, space use code, area (square feet), department, etc. **Only those rooms that are currently assigned to your department or unit will appear in your survey.**

The survey consists of room information that is displayed horizontally. The first four columns of your survey will list the building code, building name, floor number, and the room number. All subsequent columns contain information pertaining to the room identified in the 4th column (Column D). See [Figure 1](#) for a visual that shows how the information on the Space Survey is displayed.

Please allow sufficient time to complete your review prior to or by the closing date. There is an entry for every room assigned to your department or unit, and each space can take a few seconds to a few minutes to complete.

SIC Deputies (SIDs)

Space Inventory Contacts (both primary and secondary) are responsible for making sure their survey is completed by the established deadline. If needed, SICs can 'deputize' others in their area to assist them with completing the survey. Deputizing others may be a good option for departments that oversee several sub-departments/programs or own a large volume of spaces.

Once a SIC has a deputy(ies), they can share data and information needed to complete the survey with their deputy(ies).

We suggest following the steps below to complete your annual Space Inventory Survey:

1



Review Space Survey Spreadsheet

Your annual Space Survey will be sent by the Space Inventory team as an Excel spreadsheet containing rooms currently assigned to your department. Take a minute to look over the spreadsheet and get acquainted with the different types of data attributed to each room.

Refer to [Figure 1](#) for a visual example of how the spreadsheet is formatted.

2



Review Coding Documents

The THECB has coded and defined all campus spaces. After looking over your department's Space Survey spreadsheet, familiarize yourself with the codes that are referenced. This will help eliminate confusion as you tour your space and identify codes that are missing.

Refer to the reference documents for coding definitions and hints.

3



Tour Your Space

Now it's time to conduct a walkthrough of your space! Walk around your area with your Space Survey and floorplans in hand and take notes of any updates that need to be made. Keep an eye out for the following:

- Room numbers on signage
- What the rooms are being used for & who is using them
- Seat capacities (if required for space type)
- Discrepancies on floorplan
- Rooms that belong to your department but aren't on your survey

4



Update & Submit Survey Spreadsheet

Use your walkthrough notes to enter updates in the "Revised" columns highlighted yellow in the Space Survey Spreadsheet. Refer to [Table 1](#) for assistance in updating values in each column.

Once your survey is completed, fill out and submit the [Space Survey Submittal Form](#) with your completed spreadsheet attached. Be prepared to answer any follow-up questions the Space Inventory team has regarding your submittal.

Figure 1.

Visual example of the Space Survey layout. Note: The yellow columns are for SICs to enter updates and will remain blank unless changes need to be made to the corresponding codes.

General Room Information													1 st CIP, Function, and Percentage					2 nd CIP, Function, and Percentage					3 rd CIP, Function, and Percentage							
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE
BLD Code	BLD	Floor	Room Number	Revised Room Number	Dept Code	Dept Name	Revised Department	Space Use Code	Space Use Description	Revised Space Use	Seat Capacity	Revised Seat Capacity	CIP1	Revised CIP1	Function1	Revised Function1	Percent 1	Revised Percent 1	CIP2	Revised CIP2	Function2	Revised Function2	Percent 2	Revised Percent 2	CIP3	Revised CIP3	Function3	Revised Function3	Percent 3	Revised Percent 3

Table 1.

Assistance table for updating your Space Survey spreadsheet. Rows are colored according to the format listed in Figure 1 above.

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
A	Building Code	<p>Code Description: The code of the building the room is located in.</p> <p>Note: This code is only for reference.</p>	-	-	-
B	Building	<p>Code Description: The name of the building the room is located in.</p> <p>Note: This code is only for reference.</p>	-	-	-
C	Floor	<p>Code Description: The floor number of the building the room is located in.</p> <p>Note: This code is only for reference.</p>	-	-	-

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
D	Room Number	<p>Code Description: The room number associated with the space.</p> <p>Note: Reported room numbers should match the signage (i.e. posted numbers outside the door, if any).</p>	Is this room on the floorplan <u>and</u> displayed in the building?	Leave Column E blank.	<p>If you found the location of the room using the floorplan but the signage displayed in the building does not match Column D in the spreadsheet, record the displayed number. Enter the correct room number in Column E (Revised Room Number) and submit a Report a Floorplan Discrepancy form online to have the floorplan updated.</p> <p>If you found the room number without the floorplan because it was missing or incorrect, make a note on the floorplan and submit a Report a Floorplan Discrepancy form online.</p> <p>If the room number is missing on the floorplan and you can't find it, notify the Space Inventory team.</p> <p>If a room number is missing from your spreadsheet and you know it belongs to your department, add a new row to your spreadsheet. Fill out all the required room information and make a note somewhere on the sheet that the room was added.</p>
E	Revised Room Number	Note: This column is used to note updates for the value in Column D.	-	-	-
F	Department Code	Code Description: The code of the department the room is assigned to.	Does this coding represent the department that is currently using the room?	Leave Column H blank.	Enter the correct department code and/or name in Column H.
G	Department Name	Code Description: The name of the department the room is assigned to.			
H	Revised Department Name	Note: This column is used to note updates for the value in Columns F and G.	-	-	-

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
I	Space Use Code	<p>Code Description: The THECB code representing the room's exclusive or predominant design or use.</p> <p>Refer to the Space Use Code reference sheet for a listing of Space Use Codes and Descriptions.</p> <p>Note: A space can only have one Space Use Code associated with it.</p>	Does this Space Use Code best represent how the room is currently designed and/or used?	Leave Column K blank.	Enter the correct Space Use Code in Column K.
J	Space Use Code Description	<p>Code Description: The THECB description of the code representing the room's exclusive or predominant design or use.</p>			
K	Revised Space Use Code	<p>Note: This column is used to note updates for the values in Columns I and J.</p>	-	-	-
L	Seat Capacity	<p>Code Description: The number of occupants an applicable room is designed to accommodate (desks, table spaces with chairs, etc.) by actual count.</p> <p>Note: This count is only required for the following Space Use Codes:</p> <ul style="list-style-type: none"> ▪ 110 Classroom ▪ 210 Class Laboratory ▪ 220 Special Class Open Laboratory ▪ 350 Conference Room ▪ 410 Reading/Study Room ▪ 430 Open-Stack Study Room ▪ 610 Assembly ▪ 680 Meeting Room 	<p>Does this number represent the amount of occupants the room is designed to accommodate?</p> <p><u>AND</u></p> <p>Does the correct Space Use Code for this room require a seat capacity to be reported?</p>	Leave Column M blank.	<p>If the number on your survey is incorrect <u>AND</u> the Space Use Code of the room requires a capacity, enter the correct seat capacity of the room in Column M.</p> <p>If the number of your survey is incorrect BUT the Space Use Code of the room does not require a capacity, leave Column M blank. The number listed may be tracked for internal purposes.</p>
M	Revised Seat Capacity	<p>Note: This column is used to note updates for the value in Column L.</p>	-	-	-

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
N	CIP1	<p>Code Description: The Classification of Instructional Programs (CIP); a taxonomic coding scheme of both instructional programs and non-instructional services used at Texas higher education institutions. This code is used to describe the type of program/service the room is attributed to.</p> <p>Refer to the CIP Codes reference sheet for a more detailed description and complete listing of codes.</p> <p>Note: A space can have up to three different CIP Codes associated with it. This column is for the room's 1st ("primary") CIP code. Assign additional CIP codes as needed.</p> <p>Every room must be assigned at least one CIP code; therefore, this column cannot be blank.</p>	<p>Does this CIP code accurately represent the type of program or service housed in the room?</p> <p>[When evaluating, consider CIP codes listed for Columns N, T, and Z and if any adjustments to their proration should be made]</p>	Leave Column O blank.	Enter the correct CIP Code in Column O.
O	Revised CIP1	<p>Note: This column is used to note updates for the value in Column N.</p>	-	-	-
P	Function1	<p>Code Description: The Functional Category Code; a program-oriented code that profiles the actual function of a room and helps determine its type of space (e.g., education, research, student services, etc.).</p> <p>Refer to the Function Codes reference sheet for a more detailed description and complete listing of codes.</p> <p>Note: Each space can have up to three different Function Codes associated with it. This column is for the room's 1st ("primary") Function code. Assign additional Function codes as needed.</p> <p>Every room must be assigned at least one Function code; therefore, this column cannot be blank.</p>	<p>Does this Function code accurately represent the activity occurring in the room?</p> <p>[When evaluating, consider Function codes listed for Columns P, V, and AB and if any adjustments to their proration should be made]</p>	Leave Column Q blank.	Enter the correct Function Code in Column Q.
Q	Revised Function1	<p>Note: This column is used to note updates for the value in Column P.</p>	-	-	-

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
R	Percent1	<p>Code Description: The percentage prorated according to the percent of time the space is used for each CIP and Function code.</p> <p>Note: Each space can have up to three pairings of Function and CIP Codes associated with it. This column is the percentage for the 1st (“primary”) CIP and Function codes entered in Columns N and P.</p> <p>Reported based on <i>time spent</i> on each room activity. Overall, the total percent of use/proration for primary, secondary, and remaining use must always total 100 percent (usually expressed in estimates, such as 60-40, 55-45, 30-70).</p>	<p>Does this percentage reflect the amount of time the room is used for the CIP and Function codes entered in Columns N and P?</p> <p><u>AND</u></p> <p>Does the total of percentages entered into Columns R, X, and AD equal 100?</p>	Leave Column S blank.	Enter the correct percentage in Column S (as a value between 1 and 100).
S	Revised Percent1	Note: This column is used to note updates for the value in Column R.	-	-	-
T	CIP2	<p>Code Description: See code description for Column N.</p> <p>Note: A space can have up to three different CIP Codes associated with it. This column is for the room’s 2nd (“secondary”) CIP code.</p> <p>If you need to prorate different Function codes for a given room, your 2nd CIP code can match your 1st and/or 3rd CIP codes.</p>	[Refer to Column N]	Leave Column U blank.	Enter the correct CIP Code in Column U.
U	Revised CIP2	Note: This column is used to note updates for the value in Column T.	-	-	-
V	Function2	<p>Code Description: See code description for Column P.</p> <p>Note: Each space can have up to three different Function Codes associated with it. This column is for the room’s 2nd (“secondary”) Function code.</p> <p>If you need to prorate different CIP codes for a given room, your 2nd Function code can match your 1st and/or 3rd Function codes.</p>	[Refer to Column P]	Leave Column W blank.	Enter the correct Function Code in Column W.

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
W	Revised Function2	Note: This column is used to note updates for the value in Column V.	-	-	-
X	Percent2	<p>Code Description: See code description for Column R.</p> <p>Note: Each space can have up to three pairings of Function and CIP Codes associated with it. This column is the percentage for the 2nd (“secondary”) CIP and Function codes entered in Columns T and V.</p> <p>Reported based on <i>time spent</i> on each room activity. Overall, the total percent of use/proration for primary, secondary, and remaining use must always total 100 percent (usually expressed in estimates, such as 60-40, 55-45, 30-70).</p> <p>If no 2nd CIP or Function code is assigned: leave this field blank.</p>	[Refer to Column R]	Leave Column Y blank.	Enter the correct percentage in Column Y (as a value between 1 and 100).
Y	Revised Percent2	Note: This column is used to note updates for the value in Column X.	-	-	-
Z	CIP3	<p>Code Description: See code description for Column N.</p> <p>Note: A space can have up to three different CIP Codes associated with it. This column is for the room’s 3rd (“remaining”) CIP code.</p> <p>If you need to prorate different Function codes for a given room, your 3rd CIP code can match your 1st and/or 2nd CIP codes.</p>	[Refer to Column N]	Leave Column AA blank.	Enter the correct CIP Code in Column AA.
AA	Revised CIP3	Note: This column is used to note updates for the value in Column Z.	-	-	-

Column	Code Type	Description / Notes	Ask Yourself...	If Answer = Yes	If Answer = No
AB	Function3	<p>Code Description: See code description for Column P.</p> <p>Note: Each space can have up to three different Function Codes associated with it. This column is for the room's 3rd ("remaining") Function code.</p> <p>If you need to prorate different CIP codes for a given room, your 3rd Function code can match your 1st and/or 2nd Function codes.</p>	[Refer to Column P]	Leave Column AC blank.	Enter the correct Function Code in Column AC.
AC	Revised Function3	<p>Note: This column is used to note updates for the value in Column AB.</p>	-	-	-
AD	Percent3	<p>Code Description: See code description for Column R.</p> <p>Note: Each space can have up to three pairings of Function and CIP Codes associated with it. This column is the percentage for the 3rd ("remaining") CIP and Function codes entered in Columns Z and AB.</p> <p>Reported based on <i>time spent</i> on each room activity. Overall, the total percent of use/proration for primary, secondary, and remaining use must always total 100 percent (usually expressed in estimates, such as 60-40, 55-45, 30-70).</p> <p>If no 3rd CIP or Function code is assigned: leave this field blank.</p>	[Refer to Column R]	Leave Column AE blank.	Enter the updated percentage in Column AE (as a value between 1 and 100).
AE	Revised Percent3	<p>Note: This column is used to note updates for the value in Column AD.</p>	-	-	-