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 | 972-883-2249).

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 Specialist.

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 SpaceIventory@utdallas.edu or by phone at (972) 883-2249. 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 Specialist will let you know when you receive access to your department's survey(s).

Floorplans (PDF's) will also be included in each department's Box.com folder. While completing the survey, if discrepancies are found on the floorplan, please submit a correction utilizing the floorplan PDF's or contact the Space Inventory Specialist.

Completing the Survey

The survey will open to the list of rooms specific to your department, and will display information such as building, room numbers, area (in square feet), department code, space use code, 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 name, floor number, room number and Area (in s.f.). All subsequent columns contain information pertaining to the room identified in the 3rd column (Column C). 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).

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

Review Space Survey Spreadsheet

1

Your annual Space Survey will be sent by the Space Inventory Specialist as an Excel spreadsheet containing rooms currently assigned to your department. 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.

Review Coding Documents

2

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.

Tour Your Space

3

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:

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

Update & Submit Survey Spreadsheet

4

Use your walkthrough notes to enter additional updates in the "Comments" column of the Space Survey Spreadsheet. It is acceptable to submit elaborated notes or edited floorplans in other formats (doc, pdf, jpg, etc.)

Once your survey is completed, email them to SpaceInventory@utdallas.edu. Be prepared to answer any follow-up questions the Space Inventory Specialist has regarding your submittal.

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Figure 1.

Visual example of the Space Survey spreadsheet headings. <u>Note:</u> The columns are for SICs to update utilizing their preferred method, unless otherwise noted in Table 1.

Building Code	Floor	Room Number	Area (s.f.)	Department Code	Space Use Code	Space Use	Function Code	Survey Function	Survey	CIP Code	Survey CIP	CIP%	Seat Capacity	Comments

Table 1.

Assistance table for updating your Space Survey spreadsheet.

Excel Column	Code Type	Description / Notes
A	Building Code	**Description:** The code of the building the room is located in. **Note:** This code is only for reference and not to be changed
B	Floor	**Description:** The floor number of the building the room is located in. **Note:** This code is only for reference and not to be changed

Table 1. Continued

Excel Column	Code Type	Description / Notes	Ask Yourself…	If Answer = Yes	If Answer = No
C	Room Number	**Description:** The room number associated with the space. **Note:** Reported room numbers should match the posted signage outside the door.	Is this room on the floorplan <u>and</u> displayed in the building?	Leave Column E blank.	If you found the room using the floorplan but the signage displayed in the building is missing or incorrect, notify the Space Inventory team. 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 reflect somehow in the sheet that the room was added.
D	Area (s.f.)	**Description:** The rooms area in square feet.	-	-	-
E	Department Code	**Description:** Code of the rooms assigned department.	Does this coding represent the department that is currently using the room?	Leave Column E blank.	Enter the correct department code and/or name in Column E.
F	Space Use Code	**Description:** The THECB code representing the room's exclusive or predominant design or use. Refer to the <u>Space Use Code reference sheet</u> for a listing of Space Use Codes and Descriptions. **Note:** A space can only have one Space Use Code associated with it.	Does this Space Use Code best represent how the room is currently designed and/or used?	Enter the correct Space Use Code in Column F	Update the correct Space Use Code in Column F
G	Space Use	**Description:** The THECB description of the code representing the room's exclusive or predominant design or use.	-	-	-

Excel Column	Code Type	Description / Notes	Ask Yourself…	If Answer = Yes	If Answer = No
H	Function 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.). Refer to the Function Codes reference sheet for a more detailed description and complete listing of codes. **Note:** Each space can have up to three different Function Codes associated with it. This column is for the room's *Primary* Function code. Assign additional Function codes as needed. Every room must be assigned at least one Function code; therefore, this column cannot be blank.	Does this Function code accurately represent the activity occurring in the room? [When evaluating, consider Survey CIP codes and if any adjustments to their proration should be made]	Enter the appropriate Function Code	Enter the correct Function Code for this *Primary* AND in any added *Secondary* and *Remaining* rows.
I	Survey Function	**Description:** A description of the assigned Function Code	-	-	-
J	Survey	**Description:** The description noting a *Primary*, *Secondary* or *Remaining* CIP. This column is for the room's *Primary* CIP code. Assign additional CIP codes as needed.	Does this space serve several purposes or uses?	Insert a new row and Indicate Primary, Secondary or Remaining	Primary is the default for a single CIP assignment
K	CIP 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. Refer to the CIP Codes reference sheet for a more detailed description and complete listing of codes. Every room must be assigned at least one CIP code; therefore, this column cannot be blank.	Does this CIP code accurately represent the type of program or service housed in the room? AND Does room have several Purposes or Uses?	Enter the Correct Primary CIP Code	Enter the Correct Primary CIP Code. Add additional rows if Secondary and Remaining CIP codes need to be added.

Excel Column	Code Type	Description / Notes	Ask Yourself…	If Answer = Yes	If Answer = No
L	Survey CIP	**Description:** A description of the assigned CIP Code	-	-	-
M	CIP%	**Description:** The percentage prorated according to the percent of time the space is used for each CIP and Function code. **Note:** Each space can have up to three pairings of Function and CIP Codes associated with it. This column is the percentage for the *Primary* CIP code. Reported based on *time spent* 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).	Does this percentage reflect the amount of time the room is used for the CIP and Space use codes entered?	If the room use is 100% then *Primary* is the default	Assign the correct percentages according to the Survey designations
N	Seat Capacity	**Description:** The number of occupants an applicable room is designed to accommodate (desks, table spaces with chairs, etc.) by actual count. **Note:** This count is only required for the following Space Use Codes: ▪ **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	Does this number represent the amount of occupants the room is designed to accommodate? <u>AND</u> Does the correct Space Use Code for this room **require** a seat capacity to be reported?	Enter the correct seat capacity	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 If the number of your survey is incorrect and the Space Use Code of the room does not require a capacity, enter 0. The number listed is tracked for internal purposes.
O	Comments	**Description:** To enter any comments or updates as you deem necessary to convey changes. Please contact SpaceInventory@utdallas.edu with any questions.	-	-	-