

Presenters: Jonathon Jeffries - Grants

John Holcombe - CPSM

Amanda Jones – CPSM

Christina Phillips - Grants

Sponsors: Deborah Greene

Sandy Mason

What is the Space Survey?

 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

FY18 is the base year for the FY20 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 13&15

Departments Complete Survey May 11

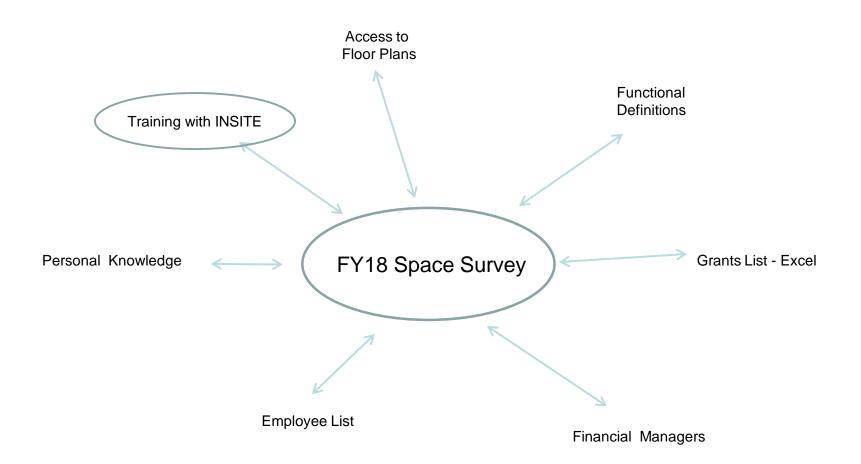
Quality Review by CPSM and G&C May 18

Surveyor Corrections Due June 1

Certifications Due September 28

F&A Proposal Due December 31

Space Survey Tool Kit



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 occupants 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 grad offices
- Function required for all labs and lab service areas
- Grant required for all labs, lab services, and similar space with any space functionalized as Organized Research

INSITE Coding Updates

- Changes recommended in 2014 Academic Space Assessment & Utilization Study
- Formal recommendation by the Academic & Research Space Advisory Working Group to the Space Committee
- Changes to Space Coding
- Enhancing the Space Database Update Process
- Future planning efforts begin with data analysis; team with Portfolio Partners

INSITE Coding Updates

- New code for Maker Space Lab
- Added distinctions under Research Lab, Class Lab, and Open Lab
 - Wet Lab
 - access to utilities (compressed air, gases, water, waste)
 - laboratory benches (typical)
 - exhaust or containment of hazardous materials or chemicals
 - Dry Lab
 - open floor environment, collaborative space, or space with laboratory benches/tables
 - power and data only
 - High Bay Lab
 - open floor space with a high ceiling
 - direct access to a loading dock or exterior for moving large equipment
- Added PI code for Core Labs

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" <u>Cost Sharing Projects</u> 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 <u>non-competitive</u> basis

Other Sponsored Activities (OSA)

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

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

- Ell 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

If undertaken by the Institute without outside support, then OIA

Other Institutional Activities (OIA)

All activities EXCEPT for:

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

OIA includes:

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

Georgia Tech

Required Data

Room Use	Req'd Occupant / PI	Req'd Function	Req'd Grant	Req'd Station Count
Research/Open Lab & Service	PI Name	Function %s	Grant(s)-OR	Workstation Count
Class Lab	N/A	N/A	N/A	Workstation Count
Acad / Non- Acad Office	Occupant Name	N/A	N/A	Workstation Count
Post Doc Office	Occupant Name	N/A	N/A	Workstation Count
Grad Office	PI Name	N/A	N/A	Workstation Count
Conference / Meeting Rooms	N/A	N/A	N/A	Seat Count
Classrooms / Lecture Halls	N/A	N/A	N/A	Seat Count

Example 1:

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

How should this room be coded on your survey list?

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- * Room Info: Confirm "ACADOF Academic Office"
- * Function Info: N/A
- * Occupancy Info: Burdell, George P (from person list)
- * PI Info: N/A
- * Grant Info: N/A

Example 2:

Professor Burdell's biology 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.

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- * Use Info: Change to "RSLBWET-Research Lab Wet"
- * Function Info: 85% "OR" & 15% "IDR"
- * Occupancy Info: N/A
- * PI Info: Burdell, George P (from person list)
- * Grant(s) Info: R3837 NIH Grant assigned to Burdell

Example 3:

Room 212, previously a "Graduate Student Office", is now occupied by the Department's Financial Manager, John Harris.

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- * Use Info: Update to "NACDOF Non-Academic Office"
- * Function Info: N/A
- * Occupancy Info: Harris, John (from person list)
- * PI Info: N/A
- * Grant Info: N/A

Example 4:

Room 4202 "Research Lab" is a computational lab currently under renovation but is serviced by utilities & HVAC.

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Room 4202 "Research Lab" is a computational lab currently under renovation but is serviced by utilities & HVAC.

- * Room Info: Change Use to RSLBDRY-Research Lab Dry
- * Room Comments: "Vacant Space Under Renov Service"
- * Function Info: 100% "OTH"
- * Occupancy Info: N/A
- * PI Info: "PI,UNSPECIFIED" (from person list)
- * Grant Info: N/A

Example 5:

Room 119 "Research Lab" is a shared (wet) core lab, used by several PIs.

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Room 119 "Research Lab" is a shared (wet) core lab, used by several Pls.

- * Room Info: Change Use to RSLBWET-Research Lab Wet
- * Function Info: 100% "IDR"
- * Occupancy Info: N/A
- * PI Info: "PI, FOR CORE LAB" (from person list)
- * Grant Info: N/A

Review Points:

Office Space

- Confirm and/or Update Use Code
- Select Occupant Name for Faculty, Staff, and Post-Doc offices -REQUIRED
- 3. Occupant names are not required for Graduate Student Offices, but PI is required
- 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)



Review Points (Cont'd.):

Lab and Lab Service Space

- 1. Update all Use Codes to new designations
- Select PI Name(s) <u>REQUIRED</u>
- 3. Enter functions and percentages for activities performed in the roomREQUIRED
- 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
- No additional information is required IF used/open for ALL departmental activities

Review Points (Cont'd.):



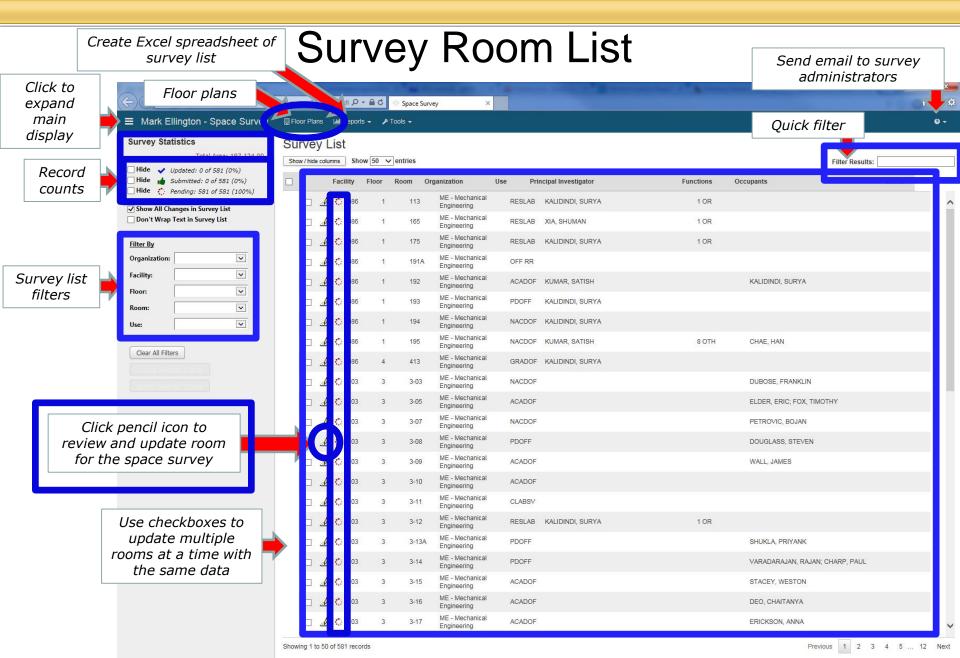
Vacant Space

- 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)

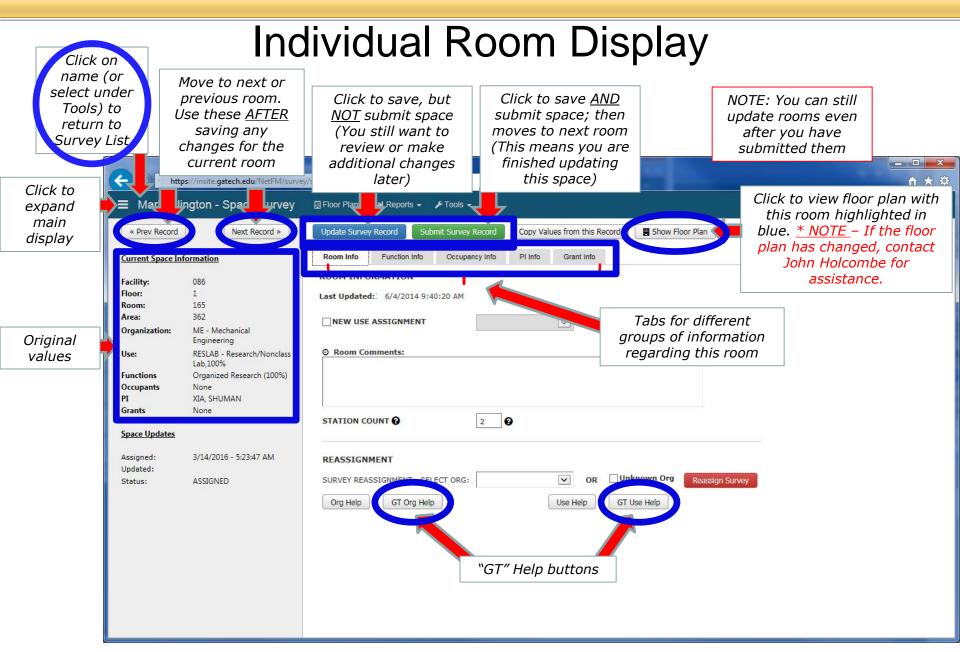
INSITE Space Survey Module

- Basic operation is the same as last survey but some new rules:
 - Station count required for certain use codes
 - PI is required for certain use codes, including GRADOF
 - A special PI "person" record should be used to indicate Core labs
 - New lab use codes
- You will receive an email with your survey link You may forward this to others who will assist you with the survey.
- No login required but each computer's IP address must be in the access list. (Net-FM users already have access.)
- Additional slides in the on-line handout can be used as a reference while you are filling out your survey.









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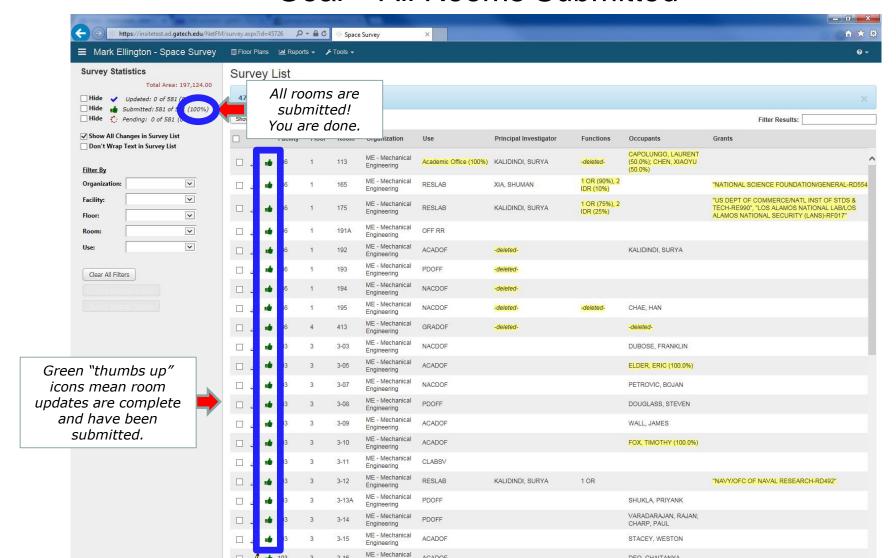
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- * Grant Info: N/A



Survey List Goal – All Rooms Submitted ••



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-Pls 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

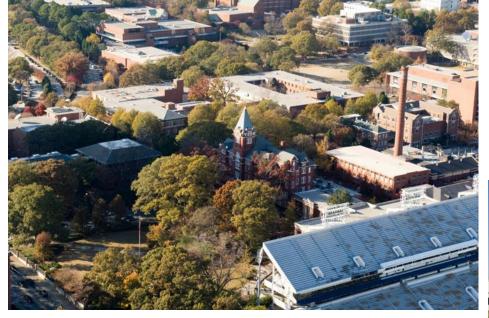
Function Definitions Jonathon Jeffries

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

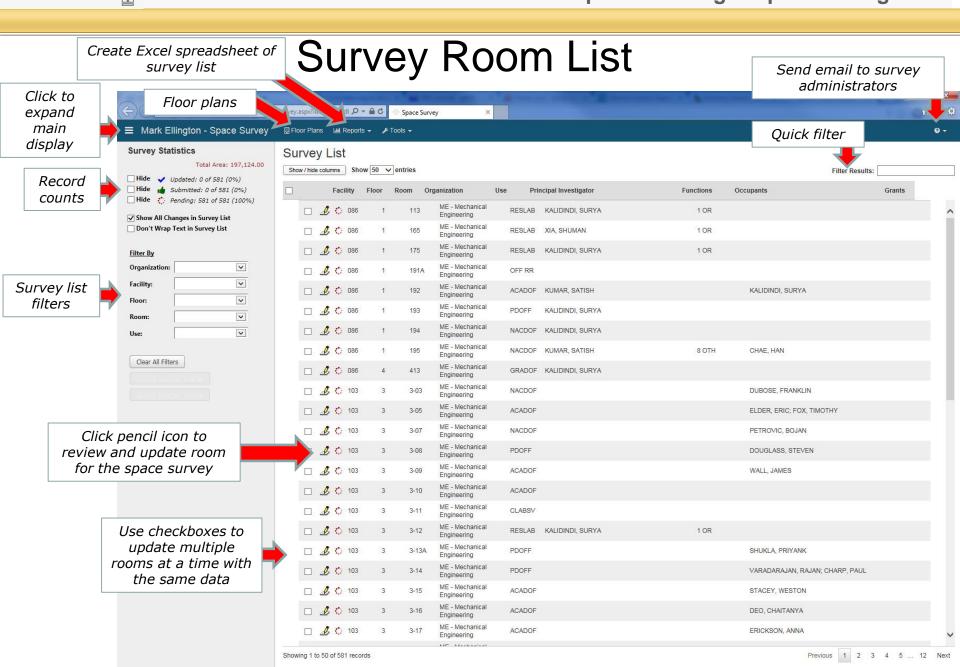




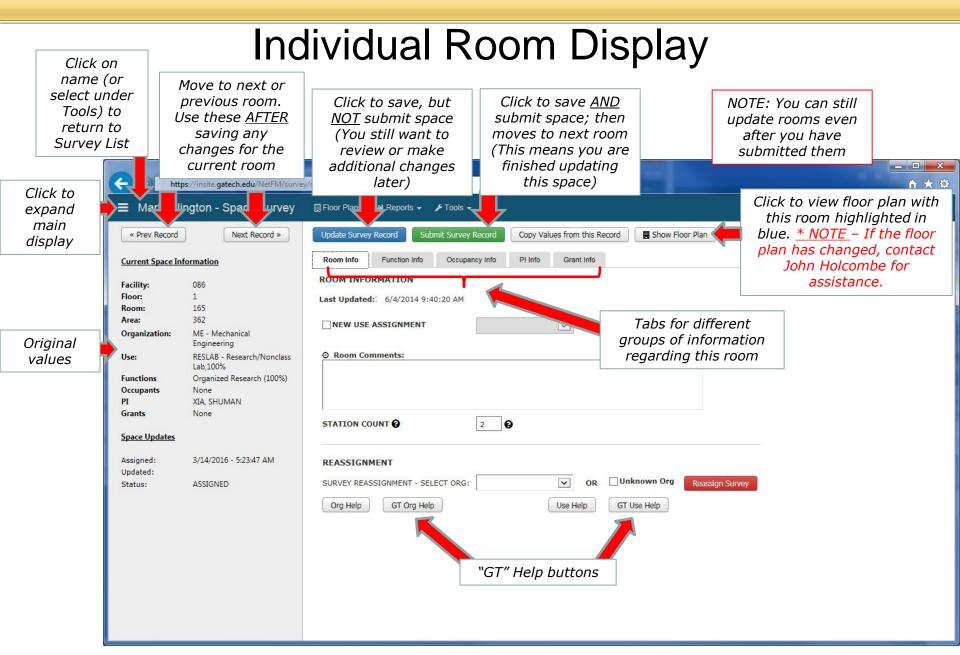




Grants & Contracts Accounting Capital Planning & Space Management

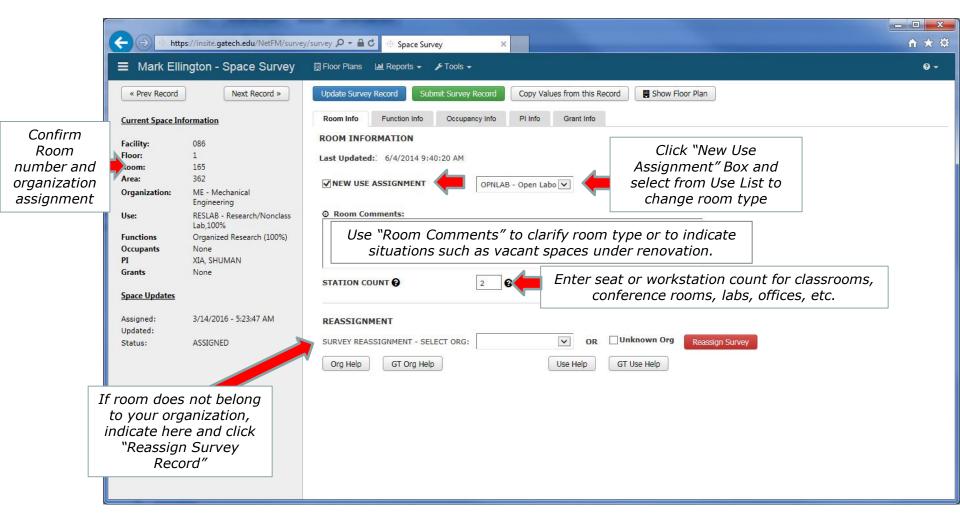




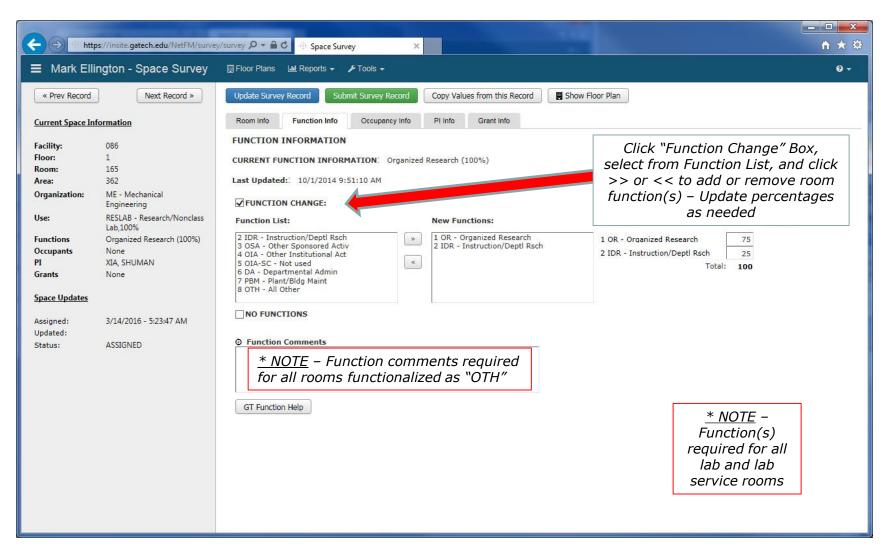




Individual Room Display Room Info Tab

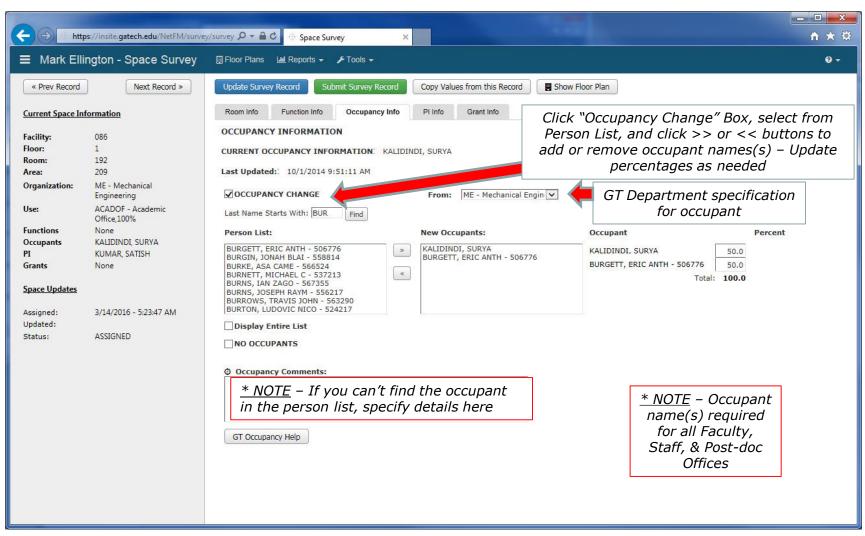


Individual Room Display Function Info Tab

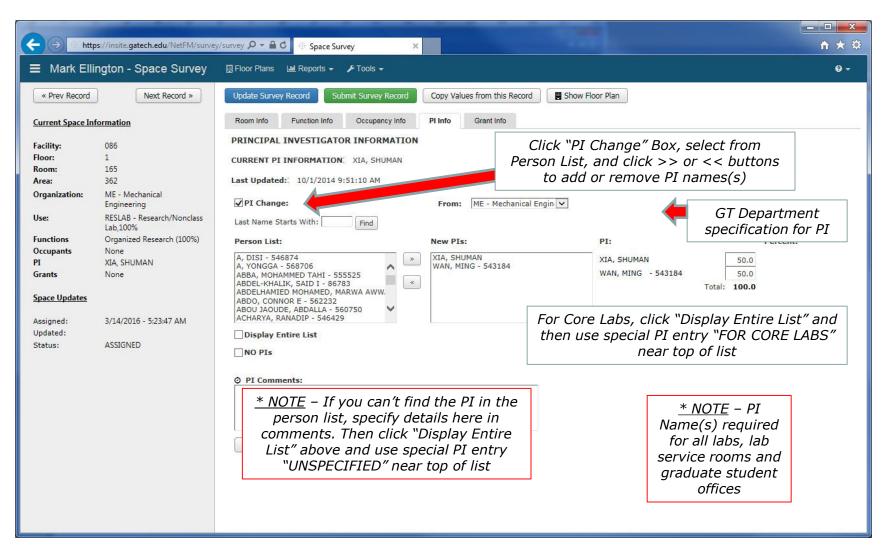




Individual Room Display Occupancy Info Tab

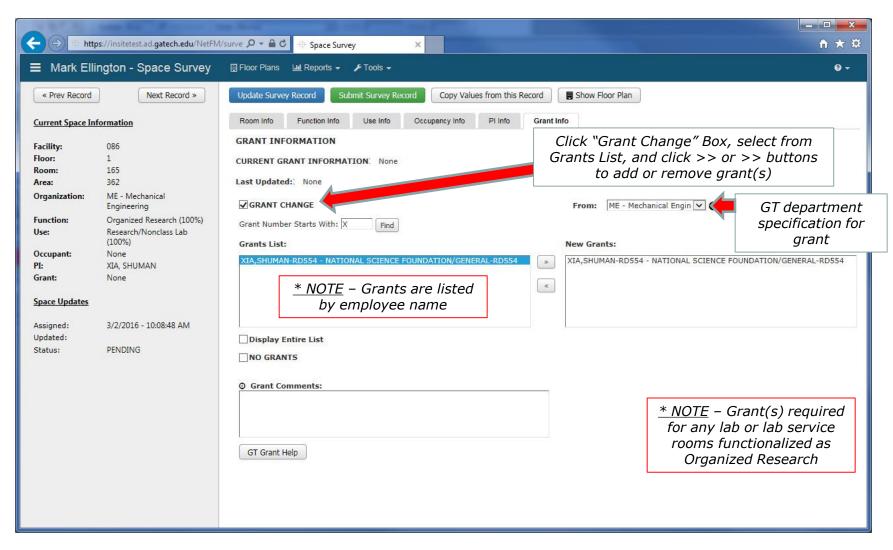


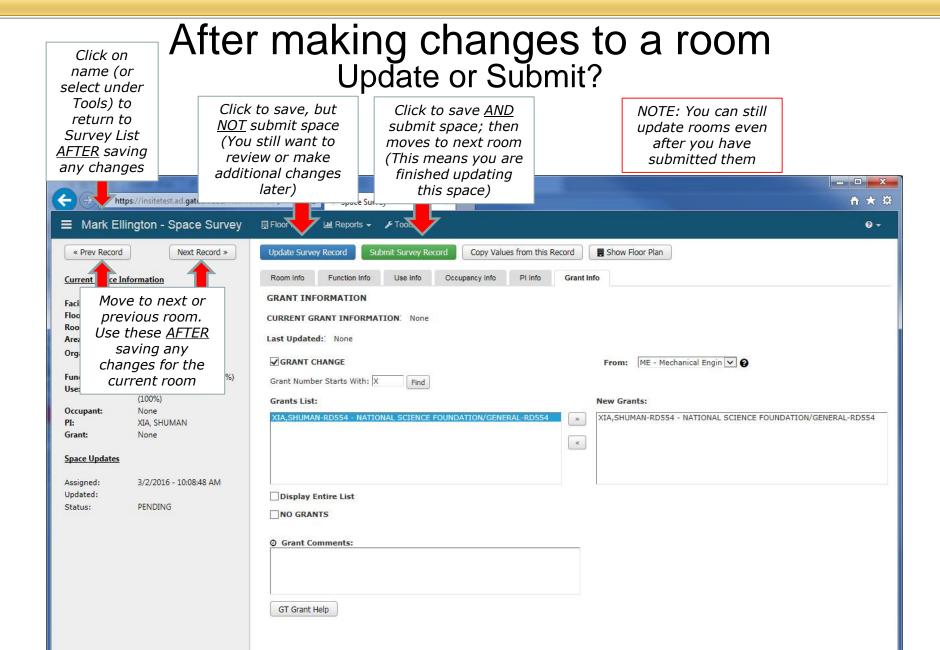
Individual Room Display





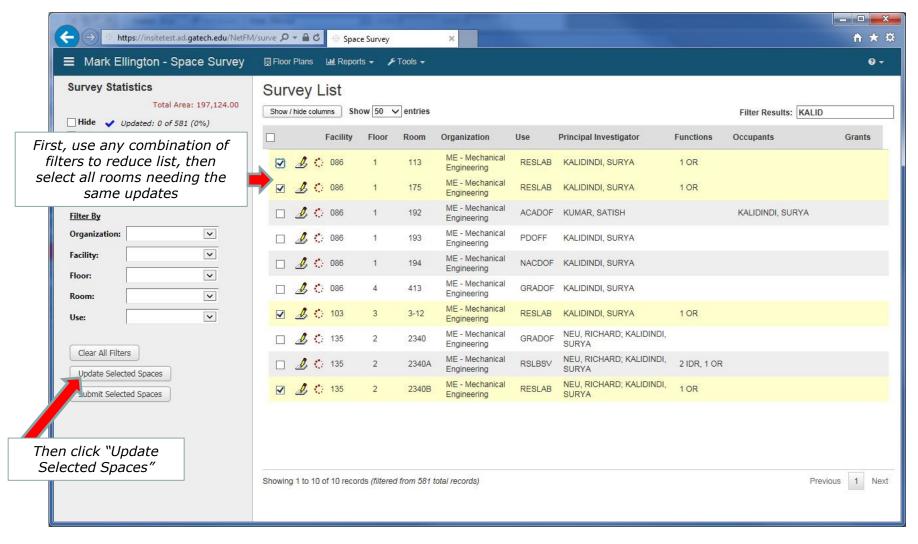
Individual Room Display Grant Info Tab



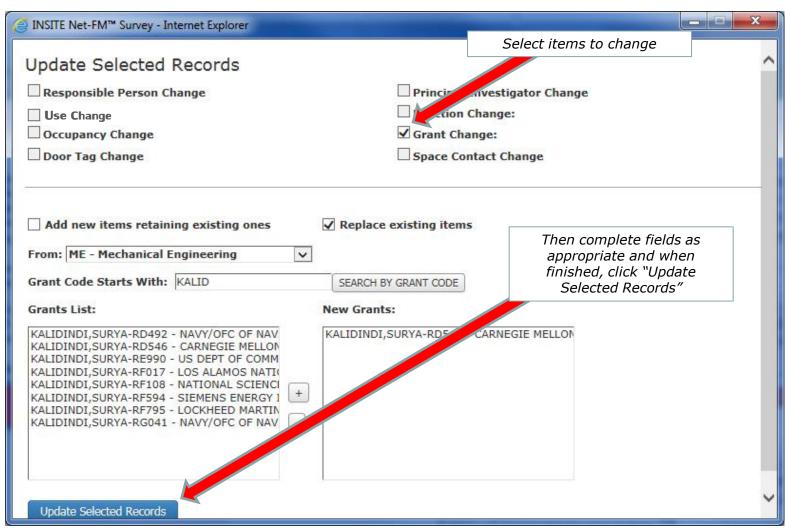




Advanced Usage - Multiple Room Update Select Rooms to Update

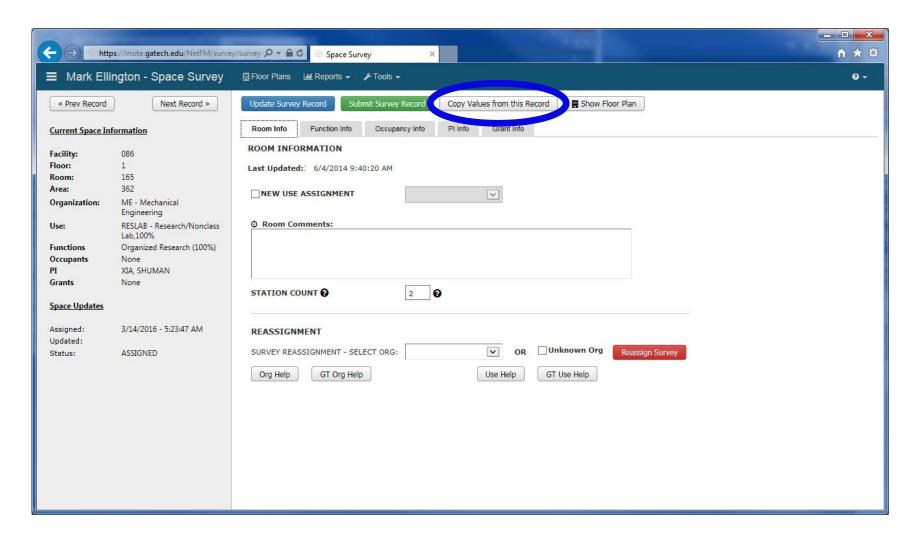


Advanced Usage - Multiple Room Update Specify Fields to Update for the Selected Rooms



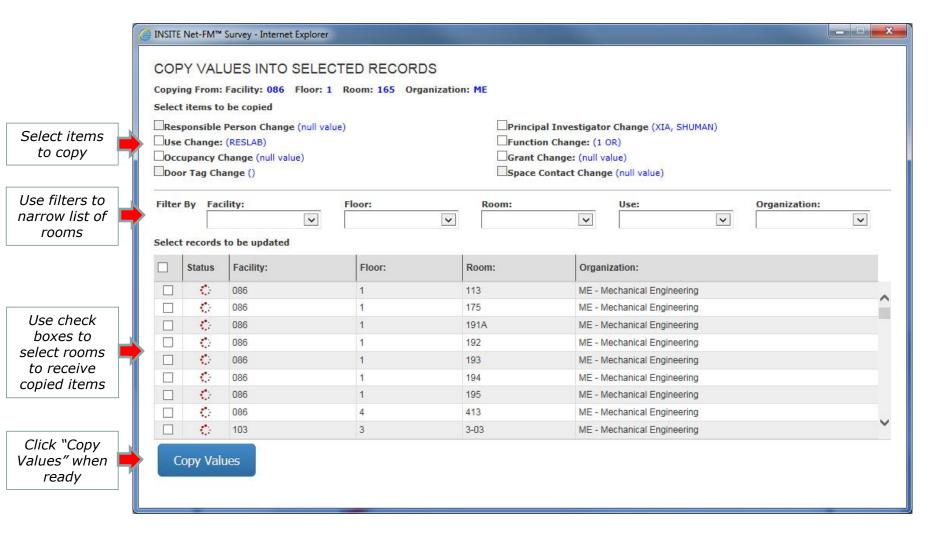


More Advanced Usage Copy Values from this Record...

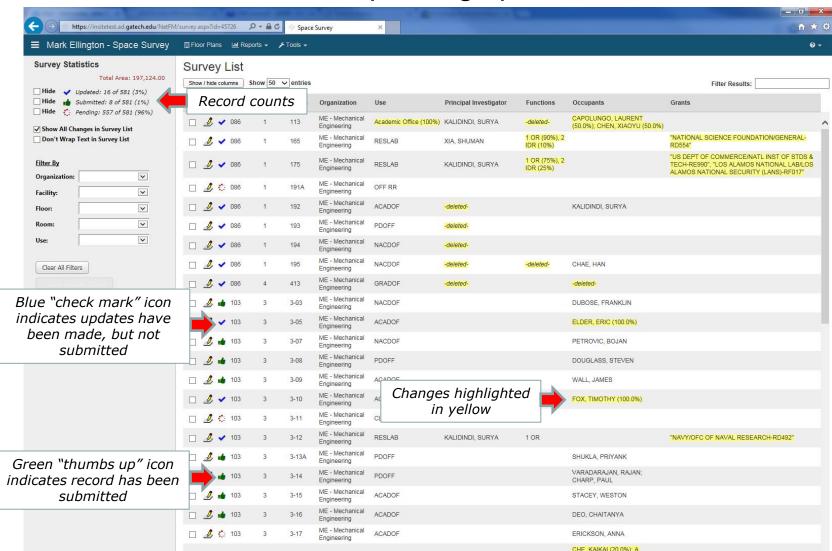


Georgia FY 2018 Space Survey

More Advanced Usage Copy values into selected rooms

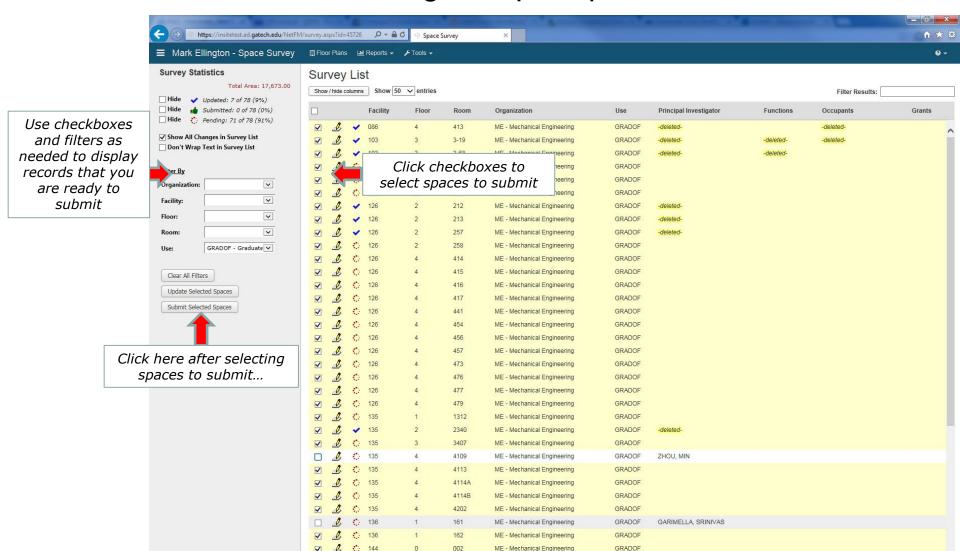


Survey List After updating spaces



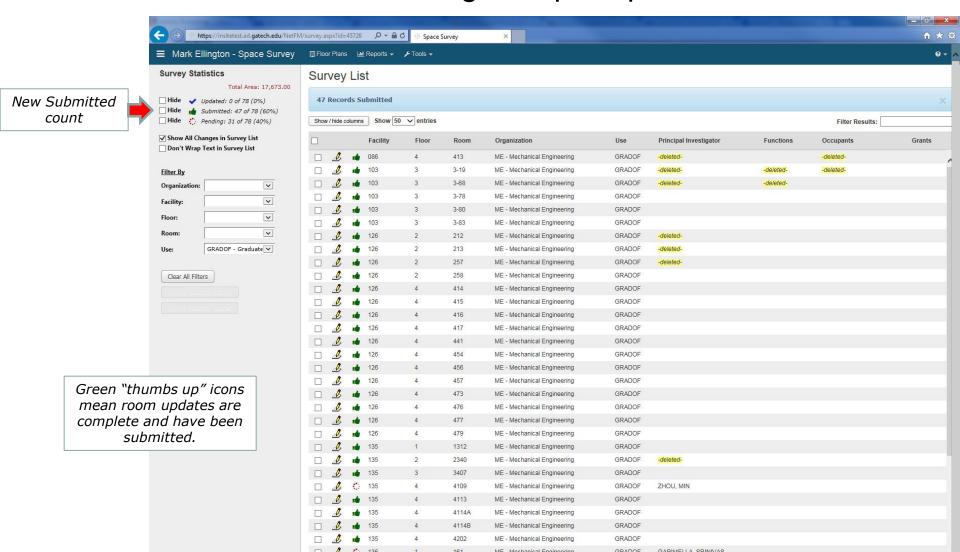


Survey List Submitting Multiple Spaces





Survey List After Submitting Multiple Spaces





Survey List Goal – All Rooms Submitted ••

