CHANGES FOR FALL 2014

There have been a few changes that will affect how you complete the space survey for Fall 2014.

- **Outside Agency Types:** The Fall 2010 outside agency type ‘PRIVATE’ has been broken out into two types, ‘NON PROFIT’ and ‘FOR PROFIT’.
- **ISU work performed in Ames Lab space is now assigned to the PI’s academic department, and is no longer assigned to IPRT.**

GETTING STARTED

You are receiving the Campus Space Survey because your Administrative Officer has identified you as your department’s Space Coordinator. If you feel that the space survey was mistakenly sent to you and/or there is someone in your department who is more qualified to complete the survey, inform your Administrative Officer immediately so that a new person can be assigned to complete the survey. The Administrative Officer should contact Kelly McCool with information for the new Space Coordinator; the survey cannot be completed by another person until this is done.

The space survey that you have received represents the most current listing of space for your department. If you find that the space survey you have received is not complete and several rooms or entire buildings are missing, please notify Kelly McCool immediately. Do not proceed until Kelly has verified that either the space is actually missing from the data file or that it is being surveyed by someone else and she will instruct you on the next step(s).

DOCUMENTATION FOR AUDIT

The information you provide in the Space Survey will be subject to audit by the University. In addition, your survey response may be audited by the Federal government as a part of their preparation for F&A cost rate negotiations with the University. In order to prepare for an audit, please retain a copy of all documentation that supports your survey response. This would include notes of conversations with space occupants about how space is used and notes made when you personally inspected space. Always include the date, time, names of contacts, and room numbers. In addition, please retain a copy of the space survey instruction book.

DUE DATE

All surveys are due by October 31, 2014.

As you work on your survey and make changes, use the “save changes” button at the top of the form when you want to exit the form but are not yet ready to submit your survey. This will save your work so that you can come back to it at a later date.

Once all space is reviewed, selecting the **Submit Survey button** will electronically submit your space survey to Kelly McCool, Office of Facilities Planning and Management. The **Submit Survey** button will remain inactive until all space data is reviewed and a ✅ (check mark) is placed in the review column on the form. You may only submit your survey once; once it is submitted the survey form will be closed to any more changes.

ALL SURVEYS MUST BE SUBMITTED USING THE ELECTRONIC SURVEY TOOL. ANY SURVEY SUBMITTED ON PAPER WILL BE RETURNED!
QUESTIONS

Questions regarding space/room function categories should be directed to Kathy Dobbs or Lana Jarvis in the Controller’s Department.

Questions regarding all other aspects of the survey should be directed to Kelly McCool in Facilities Planning and Management.

Kelly McCool  
Facilities Planning & Management  
200 General Services  
Phone: (515)231-1968  
Email: kmccool@iastate.edu

Kathy Dobbs  
Controller’s Department  
3607 Administrative Services Building  
Phone: 294-6653  
Email: kadobbs@iastate.edu

Lana Jarvis  
Controller’s Department  
3607 Administrative Services Building  
Phone: 294-4384  
Email: ljarvis@iastate.edu
DESCRIPTION OF THE DATA ELEMENTS

The following is an example of the electronic survey form. The number corresponds with the data element and description listed below the form.

<table>
<thead>
<tr>
<th>ELEMENT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Department</td>
<td>The department to whom the space is assigned.</td>
</tr>
<tr>
<td>(2) Building</td>
<td>Name of building.</td>
</tr>
<tr>
<td>(3) Reviewed</td>
<td>The column that is checked as the room information is verified or updated.</td>
</tr>
<tr>
<td>(4) Room</td>
<td>This number should represent an actual room as shown on the floor plan.</td>
</tr>
<tr>
<td>(5) Room Type</td>
<td>This code describes the type of space (click on the ? in the heading column for further definitions).</td>
</tr>
<tr>
<td>(6) Prorated Sq Ft</td>
<td>A room's area may be divided among functions, agencies, departments, or room types. The prorated area is the net</td>
</tr>
<tr>
<td>(7) Total Sq Ft</td>
<td>Net square footage of the entire room, as measured from inner wall to inner wall.</td>
</tr>
<tr>
<td>-----------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>(8) Function</td>
<td>The type of activity being supported in a room (click on the ? in the heading column for further definitions).</td>
</tr>
<tr>
<td>(9) Outside Agency</td>
<td>The type of outside agency supporting the activity of a room with &quot;Outside Agency&quot; (OUT AGNCY) as a room function (click on the ? in the heading column for further definitions).</td>
</tr>
<tr>
<td>(10) Stations</td>
<td>The number of stations is the number of laboratory positions in a teaching lab, open lab, office studio space or the normal seating capacity of a classroom, conference, seminar, meeting, study room or assembly area. <strong>Number of stations is not required for office spaces or any other type of space other than those listed.</strong></td>
</tr>
<tr>
<td>(11) Principal Investigators</td>
<td>Name of the principal investigator(s) in charge of rooms with the functions of “organized research”, “sponsored instruction and training”, or “other sponsored activities and public service/extension”. A drop down list of names is provided.</td>
</tr>
<tr>
<td>(12) Grad Students</td>
<td>The number of graduate students associated with any space with a function of “organized research”, “sponsored instruction and training”, or “other sponsored activities and public service/extension”. For spaces with no grad students enter 0 (zero) in the field.</td>
</tr>
<tr>
<td>(13) Account Numbers</td>
<td>The account number(s) associated with the “organized research” activities, “sponsored instruction and training” activities or “other sponsored activities and public service/extension” in a space. All account numbers must be valid. Valid account numbers will begin with a 1, 4, 6 or 7. Record only those accounts with material activity.</td>
</tr>
</tbody>
</table>
General Instructions for Updating Campus Space Information

1. Compare your room inventory list to your floor plans.
   
a. Print a blank copy of your space survey by clicking on the “Printable/Sortable Report” link located under the “Save Changes” button. Directions for printing the report are at the end of these instructions.
   
b. Print or view copies of your building floor plans by using the electronic link “view floor plans” associated to each building in your survey on the row listing the building.

   Some buildings may not have plans available. If plans are not available, call Kelly McCool at (515)231-1968.
   
c. At this time you will also want to check the floor plans against your actual inventory for accuracy of room numbers. If changes have been made that have not been reflected on the plans or not reported to Facilities Planning and Management, please note the changes and notify Kelly McCool.

2. Determine if there are rooms on the list that are no longer assigned to your department. If a room is no longer assigned to your department enter a “0” (zero) in the Prorated Sq. Ft. field(s) for that room.

3. Review each room on your inventory list for changes. Check for changes in room type, room function, and number of stations (if applicable). If the room function is “Outside Agency”, be sure that you add the outside agency type in the “Outside Agency Type” column.

As you review your room inventory, you will notice that some of the room numbers have more than one line of information attached to them. This is because these rooms are currently “prorated” i.e., the square footage is divided up between two or more uses. You will need to review each room to determine whether its status has changed. Specifically, if a room is not currently a prorated room, has its use changed so that it should now be prorated; or if it is a prorated room, is it no longer prorated and all of the square footage should be for a single use. You will need to know this information before you can make changes to the survey.

4. **Explanation of a prorated area** - a prorated room is used jointly by two or more departments, and/or for two or more functions, and/or by two or more agencies, and/or where two types of rooms are confined within one room area or any combination of these. The **prorated area** is the square feet or area chargeable to one department, type of room, function or agency. Generally, offices are to be prorated on the basis of the effort reporting system indicated on the Employee Activity Summary of Effort (EASE) form. Most other prorations may be obtained through a physical division of the room or by a division based on the amount of time used, or both.

   Example: Department A uses 75% of a room, the total area of which is 1000 sq ft. Department B uses the remaining 25% of the room. Therefore, Department A is charged with 750 sq. ft. and Department B is charged with 250 sq. ft. of the room. Further, one-half of Department A’s 750 sq. ft. is used in conjunction with instruction and one-half is used in conjunction with organized research. Therefore, Department A’s 750 square footage is further prorated as 325 sq. ft. to the function of instruction and 325 sq. ft. to the function of organized research.

   Although you may prorate a room on more than one basis, please try to restrict the number of prorations of a multiple function room to those major functions which are significant to record. Small fractional pieces of time (2 or 3 hours a week) or space (such as 25 sq. ft. or less) should be ignored. For more information on how rooms may be pro-rated, click on the ? in the Prorated Sq. Ft. column heading.
5. Add the names of Principal Investigators (available on the drop down list) for all spaces with a room function of “organized research”, “sponsored instruction and training” or “other sponsored activities and public service/extension”. All Principal Investigator names must be valid. A name that is not on the list will not be accepted. If you have questions regarding Principal Investigators contact Kathy Dobbs in the Controller’s Department.

6. Add sponsored program and organized research account numbers for all room numbers with a function of “organized research”, “sponsored instruction and training” or “other sponsored activities and public service/extension”. All account numbers will be validated. You cannot enter an account number that is not valid. Valid account numbers will begin with a 1, 4, 6 or 7. If you have additional questions regarding account numbers contact Kathy Dobbs in the Controller’s Department.

7. For graduate student spaces with a function of “organized research”, “sponsored instruction and training” or “other sponsored activities and public service/extension”, the number of students housed should be indicated in the “# Grad Students” column. For spaces with no grad students enter 0 (zero) in the field.

8. As you finish making changes to a room, place a ☑ (check mark) in the “Reviewed” field to indicate you are done making changes to that room. All rooms must be checked off before you can submit your survey.

9. If you need to leave your survey and come back to it later, you can save your changes by clicking on the “Save Changes” button.

10. Submit your survey by clicking on the “Submit Survey” button. Remember, all rooms must have a check mark before you can submit the survey and that once you submit your survey, no more changes can be made to the form.
Making Changes to the Survey

This section of the instructions will show you how to make your changes to the survey form on the web.

How to add a room to your inventory:

You can not add rooms using the web survey! If you have new rooms that have been assigned to your department, please send Kelly McCool an e-mail with the room information. Notify the department to which the rooms were previously assigned that they should send Kelly McCool an e-mail confirming that the space no longer belongs to them, and they should remove it from their inventory. When this is done we can then reassign it to your department.

How to delete a room from your inventory:

If a room is no longer assigned to your department, that room should be deleted from your inventory. Do this by entering a 0 (zero) in the prorated sq ft field(s) for the associated room number (if it is a prorated room you will need to put a 0 (zero) in all rows for that room number). Put a check in the reviewed field to indicate you are done with that row or rows.

(Once a 0 (zero) is entered in the Prorated Sq Ft field and the Reviewed box is checked, that row will turn to gray, indicating that this room is no longer part of your inventory).

You will then need to notify the department where the space has been re-assigned and request that they need to send Kelly McCool an e-mail confirming that the space now belongs to them. We cannot remove a room from your inventory until this has been verified.
How to make changes to a room that is not prorated:

A. If a room is currently not prorated and is not changing to a prorated room, check to see whether the type of room, the function of the room, the agency of the room and the number of stations are still accurate. If not, a drop down list of values is provided for each of these fields from which you can select your changes. An example of the list of values for the room type is shown in the following snapshot:

(The red rectangle illustrates the drop down list of values of the room type. If the room type is known, typing the first letter of that room type will take you to that alphabetic area of the list.)

If the number of stations has changed (if applicable), enter the change in that field.

When done making updates to the row, place a ✓ (check mark) in the reviewed field.
How to change a room that is not prorated to a prorated room:

A. If a non-prorated room is changing to a prorated room, you will need to add a line with the information about each proration to the list. First, you will need to determine the room type and the amount of square footage to be attributed to each proration. When that has been determined, change the sq. ft. of the existing room record to represent the new sq. ft. of that proration. Make changes to room type, function and agency (if they are changing) by using the drop down list of values associated with these fields as shown in the example above.

B. To add the new proration to the room, click the “+” button in the Prorated Sq Ft field that is in the same row as the room number you need to change. A new line for that room number will be added with blank fields. Enter the appropriate square footage in the Prorated Sq Ft fields making sure that the total Prorated Sq Ft is equal to the room Total Sq Ft. Add the rest of the room information to the new proration. An example is given below.

Example of a nonprorated room:

The following example illustrates how room 0172 it looks after it has been changed to a prorated room. What was once a research lab is now a research lab and a graduate assistant office. On the first line, the information has been changed to reflect that 250 sq. ft. is now attributed to Research Lab space with a function of Organized Research. A line has been added to reflect that 100 sq. ft. is now attributed to graduate assistant office with a function of Organized Research. Note that the prorated square footage for both lines adds up to the total sq. ft. for the room.

Rooms may be prorated on more than one basis. Please try to restrict the number of prorations of a multiple function room to those major functions which are significant to record. Small fractional pieces of time (2 or 3 hours a week) or space (such as 25 sq. ft. or less) should be ignored.
How to make changes to Prorated Rooms:

- **If the information for the prorations for a room is not changing**, simply put a check in the reviewed column for that room.

- **If a room is to remain prorated, but the prorated information has changed**, use the drop down lists to select the new room type, function or agency as needed. Add occupant, Principal Investigator, graduate student and sponsored program account information if applicable.

- **If a room is to be changed from a prorated room to a non-prorated room**:

  **Example of prorated room:**

  - Enter a 0 (zero) in the Proration Sq Ft field on all but one of the line(s) associated with that room number and check the Reviewed box. Once this is done the row(s) will turn to gray, representing that the proration(s) no longer exists. On the remaining line associated with the room, update the sq. ft. and add the correct information for the room that is no longer prorated.

  - In this example, room 0275C is no longer divided between RES LS and SUPPLY room types. It is now all RES LS. All of the square footage is now attributed to the new space.

**Using the Printable/Sortable Report**

On the next page is an example of the results you will get after clicking on the Printable/Sortable Report option.
By using “select all” and “copy” functions, this information can be pasted into a spreadsheet for reporting and sorting as you see necessary. You must have clicked on “Save changes” in order for your changes to be reflected on the printable sortable report. (Example below).

### Campus Space Survey Report

To dump this file to Excel, where you can sort and filter, just copy the entire table below to the clipboard and then paste into Excel.

<table>
<thead>
<tr>
<th>Building</th>
<th>Room</th>
<th>Room Type</th>
<th>Prorated SqFt</th>
<th>Total SqFt</th>
<th>Function</th>
<th>Outside Agency</th>
<th>Stations</th>
<th>Principal Investigators</th>
<th>Grad Students</th>
<th>Account Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASC 1</td>
<td>0035</td>
<td>C STOR</td>
<td>195</td>
<td>195</td>
<td>INST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0053</td>
<td>C STOR</td>
<td>182</td>
<td>182</td>
<td>INST</td>
<td></td>
<td></td>
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<td>0</td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0080A</td>
<td>C STOR</td>
<td>74</td>
<td>74</td>
<td>INST</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0080B</td>
<td>C STOR</td>
<td>244</td>
<td>244</td>
<td>INST</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0111</td>
<td>RES L</td>
<td>780</td>
<td>780</td>
<td>ORG RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0112</td>
<td>RES L</td>
<td>396</td>
<td>396</td>
<td>ORG RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0116</td>
<td>RES L</td>
<td>157</td>
<td>157</td>
<td>ORG RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0133</td>
<td>CLR OF</td>
<td>116</td>
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<td>DEPT ADMIN</td>
<td></td>
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<td>ASC 1</td>
<td>0133A</td>
<td>ADM OF</td>
<td>233</td>
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<td>INST</td>
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</tr>
<tr>
<td>ASC 1</td>
<td>0141</td>
<td>RES L</td>
<td>390</td>
<td>390</td>
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<td>0142</td>
<td>C STOR</td>
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<td>117</td>
<td>INST</td>
<td></td>
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</tr>
<tr>
<td>ASC 1</td>
<td>0144</td>
<td>RES L</td>
<td>435</td>
<td>435</td>
<td>ORG RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0145</td>
<td>RES L</td>
<td>390</td>
<td>390</td>
<td>ORG RES</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASC 1</td>
<td>0148</td>
<td>RES L</td>
<td>210</td>
<td>210</td>
<td>ORG RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>