Agenda

• Overview
• Review Space Allocation Categories
• Tips for Allocating Space
• Space System (SPIN)
• System Changes
• Reports
• Deadlines, Security, Etc.
• Questions?
Staff From Cost Analysis

- Brenda Harrell
- Deborah Strickland
- Jane Ellis

- Staff in Training
  - Gene Hoskins
  - Mercy Avellan
  - Lori Brewster
  - Julie Stroud
  - Aaron Henry
A Reminder – Why Do We Really Have to Do This?

• Required by Federal OMB Circular 2 CFR 200 in the development of the IDC Rate.

• Helps Departments manage and track the use of their space.

• RCM Budget
What is This Year’s Certification Period

July 1, 2016 – June 30, 2017
Space Allocation Categories

• The primary question to ask is “How was the space actually used during the Fiscal Year?

• Some of the rooms, as a space certifier, you will know the answer to.
  • For example – a copy room, breakroom. or a conference room
  • However, when talking about faculty lab space and offices it gets more complicated. Who is the best person to know what is going on in that space?
Space Allocation Categories

• There are basically 4 main categories that departments use for Space Allocation:
  • Administration
  • Research
  • Instruction
  • Other
Space Allocation Categories - Administration

- If there is administration in space for a department – non core office – all of that administration is considered Departmental Administration.

- Practice Plan Administration would be found in the Health Science Center.

- Examples of types of department administration – General Departmental office functions, mail rooms, copy rooms, departmental conference rooms.

* Note – This does not include work that is paid for by a sponsored project!
Space Allocation Categories – Instruction

• Instruction space is space used for all teaching, training, and instructional activities.
  • Examples: Preparing a syllabus or grading papers
  • Classroom teaching or classroom labs
  • Departmental Libraries that are not a part of the Library system

• Sponsored Instruction
  • Projects that come from fund 201 or 209 that are specific instructional grants. This does not include Research Training Grants!
Space Allocation Categories - Research

- There are two different types of research:
  - Organized
  - Departmental
Space Allocation Categories - Research

- Organized is all space that is funded by a sponsored project including research training grants. This space is known at an institution as separately budgeted and accounted for or funded research.

Funds:
- 201 (Federal)
- 209 (Non-Federal)
- 214 (Non-Federal Clinical Trials): **But not Patient Care**
- 103 (IFAS State Matching)
  - Only for Program code 2200
- 221 (IFAS Experiment Station Federal appropriations)
  - Only for Program code 2200

This also includes cost sharing space to meet committed cost sharing requirements from grants that may come from a variety of resources!
Space Allocation Categories - Research

• Departmental Research looks and acts just like Organized Research but the salary and funding support is from a departmental source and is not separately budgeted and accounted for.
  
  • This includes GAP and Start-Up Funding
  
  • Other examples: Indirect Cost Funding, development of proposals for new research (not continuations).
Space Allocation Categories - Other
Space Allocation Categories - OSA

• Other Sponsored Activities (OSA) comes in a variety of forms. It is funding from outside agencies that are not research or instruction.
Space Allocation Categories – Agricultural Extension

- Space related to activities involving the Agricultural College and Vet Med.
Space Allocation Categories – OIA versus AUX

• The difference between OIA (Other Institutional Activities) and AUX (Auxiliary) is are you charging for services?
  • If you are charging for services, then it is auxiliary.
    • Examples: Dining Halls, Student Unions, Service Centers, Public Museums
  • Other Institutional Activities is really everything else that doesn’t fit into one of the other categories.
    • Examples: Non-Research refrigerators in research labs. Small kitchen areas, breakrooms, rare book collections, non UF-paid people such as visiting researchers or emeritus faculty.
Space Allocation Categories

- Governance – preparing for a faculty senate meeting or university-wide search committees. This is only a when a significant amount of work is devoted to these university wide committees.

- Library – Only used for the operation of a library in the official library system, not small departmental libraries or rare book collections.

- Patient Care – All space used for the clinical practice activity, including the treatment of patients related to the Faculty Practice Plans.

- Public Service – Example: Serving as a consultant to a local, state or national agency. This is a rare category to use.

- Union Activities – Space used for the United Faculty of Florida (UFF) or Academic and Professional Assembly (APA) pretty much need to be an officer. This is a rare category to use.
Space Allocation Categories – Vacant/Renovated

• Space that is closed, entirely unused, empty, or undergoing renovation.

• Space that was unused during part of the fiscal year should be shown at the corresponding percentage that it was vacant.

• Normal work breaks, vacations, and absences does not mean the room is vacant.
Space Allocation Categories – That Normal Departments Would Use

- General Administration – University Core Offices (IT, ES, F&A, HR)
- Sponsored Project Admin – Sponsored Programs, C&G, Cost Analysis
- Student Administration – Criser Hall, Registrar’s Office
- O&M – PPD, Facilities, Campus Mail, EH&S, UPD
Tips for Allocating Space

• Interviewing the occupants of the space is the best way to get an general idea of the activities that goes on in the space!

• Get out and tour your space! How do you know if a refrigerator or lounge sofa is in a research lab if you have never been?

• If someone says the space is research, verify how those occupants are being funded to determine what kind of research.

• Students in lab space with a desk must have proportion allocated to instruction regardless of how they are paid. UNLESS they have dedicated space to do their school work in a different area.
Tips for Allocating Space

• Avoid Standard splits! If all of your research space is coded 90% OR and 10% DR every space year, it will be viewed as if no review of the space has actually been done.

• It is also recommended that the space certifiers work in conjunction with your payroll person in your department, effort coordinator, and grants individuals.
Tips for Allocating Space

• Payroll Matters! It is important to have a space to base match.

• Effort Matters! We expect that if a faculty member has multiple activities on their effort record, there would be multiple activities in their office space.
  
  • *Note – Effort to space is rarely a one to one match!* Example – a faculty member has administration on his effort record. We would not expect administration to be in the research lab.
Tips for Allocating Space

• Whether or not the room use is coded as a research lab or research lab service, each type is just as important in the allocation process. Typically, the allocation percentages of the research lab will be very similar in the space that is research lab service. Most of the time the service space is where all of the equipment is. The exception is the students normally would not have desks in this area and we see this type of space coded 100% Research whether departmental or organized based on who is using the space. If it is shared space with multiple users, contact us we will assist in how to code that space.
Where Do I Go to Login?

- https://survey.facilities.ufl.edu/
- Or you can navigate through PeopleSoft Menu Now!
Tips of the SPIN System

• Don’t forget that the Data screen is very useful! You could input all of your information from this screen.

• There are also ways you can download your data into Excel from this screen to work with the information.
SPIN System Project Verification

• If the room was allocated to Organized Research (OR) or Other Sponsored Activities (OSA), the associated project numbers must be added to the room. In addition, if a room is allocated between 1-99% OR or OSA Federal requirements dictate that you not only designate the sponsored research projects that are occurring within the room, but that you also provide the funding sources (chartfield string) supporting the non-sponsored activities occurring in the room.

• Both projects and chartfields entered in the previous fiscal year will be shown in the Room Information screen. If a project was not worked on in this space for any part of the current fiscal year, the project should be removed with an end date of June 30, 2016 or earlier.

• Projects that ended in the fiscal year must still be accounted for.
SPIN System – Non-Sponsored Sources

• In the system, there are special selections that can be made to document the non-sponsored allocation(s) when PeopleSoft ChartFields are not applicable.

• Use these selections to report the non-sponsored portion of a room that has been partially allocated to Organized Research:
  • **Not UF-Paid:** This can include laboratories and other research space used by students, visiting researchers, Emeritus faculty, and volunteers who are not paid by UF.
  • **GA Grant-Funded:** Students who are paid by the grant being conducted in the room **AND** have a desk in the room at which they can work on their own dissertation or other course work.
  • **Vacant/Renovated:** This can be used if the room has some portion allocated to Organized Research and Vacant/Under Renovation for the fiscal year.
SPIN Status

- You can see the status of the space reporting from many different locations. The certifier’s goal is to have all rooms contain a **✓** in the Occupants, Space Allocation and Projects columns. The best place is on the home page of the SPIN system.

<table>
<thead>
<tr>
<th>The FY2017 survey covers July 1, 2016 through June 30, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Please complete all interviews by May 18th</strong></td>
</tr>
<tr>
<td>Room Verification</td>
</tr>
<tr>
<td>Occupancy Verification</td>
</tr>
<tr>
<td>Allocated Rooms</td>
</tr>
<tr>
<td>Allocated Projects</td>
</tr>
</tbody>
</table>
SPIN Status

- The other area is to click “Certify” from the left hand menu and see the overall status for each department ID that you are responsible for.
SPIN Status

• All Organized Research and Other Sponsored Activity projects must be accounted for in the Space Inventory & Allocation System before certification can occur. If there are any projects that have not been associated with space, a message will appear indicating how many unreported projects remain. Clicking the “Unreported Projects” will show all projects that still need to be associated with a room. If a project is included on this list in error, please contact the Office of Cost Analysis at 392-5778 for assistance.
SPIN Status

• In addition, all space requests must be completed before certification can occur. If there are any pending space requests that have not been resolved, a message indicating how many pending requests exist will be displayed. Clicking the “Open Space Requests” will show the user all the pending space requests.
SPIN System Updates

- If you go in to verify the room information, and request a space change on accident, you can now cancel that request.
SPIN System Updates

- The filter functions holds the filter in place until you remove it.
### SPIN Reports

#### Reports

<table>
<thead>
<tr>
<th>Status Reports</th>
<th>Supporting Documentation</th>
<th>Historical Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Space Worksheet</strong></td>
<td><strong>Room Worksheets (PDF)</strong></td>
<td><strong>Completed Report - 2016</strong></td>
</tr>
<tr>
<td>This report is used for gathering information to be entered in the system. It lists all rooms by department along with the current occupants.</td>
<td>This generates a PDF that puts each room on a page with current occupants and projects and a space to enter in allocations. Can be used when conducting surveys of room occupants.</td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2016.</td>
</tr>
<tr>
<td><strong>Projects by Building</strong></td>
<td><strong>Employee List</strong></td>
<td><strong>Completed Report - 2015</strong></td>
</tr>
<tr>
<td>This report lists buildings and rooms that have projects associated with them, in building/room order.</td>
<td>This report lists the current employees and the number of rooms they currently occupy.</td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2015.</td>
</tr>
<tr>
<td><strong>Project Listing</strong></td>
<td><strong>Project List</strong></td>
<td><strong>Completed Report - 2014</strong></td>
</tr>
<tr>
<td>This report lists projects in order by project number and all rooms they are reported in.</td>
<td>This report lists all active projects assigned to a department and the number of rooms they are currently associated with.</td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2014.</td>
</tr>
<tr>
<td><strong>Unreported Projects</strong></td>
<td><strong>Capital Assets</strong></td>
<td><strong>Completed Report - 2013</strong></td>
</tr>
<tr>
<td>This report lists all projects that have not been reported (or exempted) this fiscal year.</td>
<td>This report lists all capital assets by department and their current location.</td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2013.</td>
</tr>
<tr>
<td><strong>Current Report</strong></td>
<td><strong>Allocation Summary</strong></td>
<td><strong>Completed Report - 2012</strong></td>
</tr>
<tr>
<td>This report lists rooms by department with their current occupants, allocations and projects.</td>
<td>This report shows an average allocation by department for the current fiscal year.</td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2012.</td>
</tr>
<tr>
<td><strong>Status Summary by Department</strong></td>
<td></td>
<td><strong>Completed Report - 2011</strong></td>
</tr>
<tr>
<td>This report lists each department and their current certification status.</td>
<td></td>
<td>This report displays room information, occupants, allocations and projects as reported in PY 2011.</td>
</tr>
</tbody>
</table>
SPIN Reports – New Report: Room Worksheet
General Deadlines for Fiscal Year 2017 Space Survey

• All Interviews should be completed before: May 18th, 2017
  • This is to avoid any faculty who may leave for the Summer

• Input of all data in the Space System should be completed by: August 1st, 2017

• Review of the Space data and Space Certification Completed by: August 11th, 2017

• Authorization of the Space Data Completed by: August 31st, 2017
CTRB Building Deadlines for Fiscal Year 2017

Space Survey

- All Interviews should be completed before: May 1st, 2017
  - This is to avoid any faculty who may leave for the Summer

- Input of Space Data for anyone who has space in the CTRB Building and review of that data: May 31st, 2017
Space Training

• It is mandatory to take the space training to become a space certifier. To register you can navigate to myUFL > My Self Service > Training and Development > mytraining and type in RSH210 in the Activity.

• If you would like for us to walk the space with you if you have a questions, send us an email and we would be happy to assist:
  • spacealloc@admin.ufl.edu
See More Space Information on the CA Website!
Obtaining Space Inventory & Allocation (SPIN) Security

There are three roles that are available to users to access Space Allocation data for your department.

**SPIN Browse Role**

 UF_N_IND_COST_SP_ALLOC_BROWSE

This is a “View Only” role to allow the user access to the system.

**SPIN Certifier Role**

 UF_N_IND_COST_SP_ALLOC_CERTIFY

This role is for the Department Space Certifier. The role requires RSH210 training completion before the role can be requested. This individual should be a department staff individual that would have responsibility to speak with faculty and staff to determine space usage, input space data in the system, compare effort and payroll to verify space usage that was given, and the overall certification of the department’s space data. If the department is selected for audit by the federal government, this individual will also represent the department to discuss how space was determined and provide backup documentation of that determination.

**SPIN Authorizer Role**

 UF_N_IND_COST_SP_ALLOC_AUTH

This role is for the Department Authorizer. The role must be a Dean, Director, or Department Chair level in order to approve the space certification for the department. If the department is selected for audit by the federal government, this individual will also represent the department to discuss how space was determined and answer questions related to the overall departmental functions.

**Authority Area Security Request Requirement**

All roles require input into the Authority Area field of the security request that includes the eight-digit Department ID(s) that you are requesting access to the SPIN system for. If the field is not initially updatable, the DSA must select the Save button to activate the field for input.

**Examples:**
- 29000000 = provides access to all DeptIDs beginning with “29”
- 29010000 = provides access to all DeptIDs with “2901”
- 29010000:29020000:29030000 = access to all DeptIDs beginning with 2901, 2902, 2903 (Note the required semicolons between each and at the end, with no spaces in between.)
Reminder for College of Medicine

If you are a department with the College of Medicine, you will not be able to enter, remove, or change the occupants in the rooms. This will be done by Karen Pastos. However, you are still responsible for collecting this information and submitting it to her for input.

Karen’s Contact information – pastos@ufl.edu or 273-8350

Also, if you have a space change request to the room, you must go through Karen Pastos to request the change.

You are responsible for gathering and entering the actual space allocation for the rooms (that is how the room is actually used) and the projects that are associated.
Keep Sending In Your Suggestions

• We are always happy to hear your suggestions and comment. Please keep sending them in!
Questions?
Need Assistance

• Cost Analysis
  • For Space Allocation, Training, or General Questions Contact:
    • 392-5778
    • spacealloc@admin.ufl.edu

• Planning, Design & Construction
  • To Add, Remove, or correct the ASF of a room contact:
    • space@admin.ufl.edu the Email will come up with