Space Inventory & Allocation System (SPIN)

Base Year Refresher

Brenda Harrell – Assistant Controller, Cost Analysis

System Developed by Planning, Design, & Construction
Agenda

• Overview
• Preparing for a Base Year
• Space Allocation Category Refresher
• What Are Auditors Looking For?
• Space System Changes/Updates
• Reports and Other Tools
• Deadlines, Security
• Questions?
Staff from Cost Analysis

- Brenda Harrell
- Deborah Strickland
- Gene Hoskins
- Jane Ellis
- Mercy Avellan
- Arriel Raghoo
- Julie Stroud
- Aaron Henry
- Amanda Wheeler
Overview
Overview

• Why are you making me come to training? I have been doing this for years!
Overview

- Our Base Year is this Fiscal Year 2018
  - July 1, 2017 – June 30, 2018

- What does that mean?
  - The data that is allocated will be used for the Indirect Cost Proposal that will be sent to the federal government.

- How is space used for this calculation?
  - Space tells our office how to allocate the facility costs of the university. So if you code organized research to a space, that tells us the facilities costs for that percentage of the space should be allocated to the organized research cost pool.
Overview

- This makes your job very important!
Preparing for a Base Year
Preparing for a Base Year

• Your space area will be reviewed by a team from Cost Analysis

• You will have an opportunity to update anything that may need adjustments.

• Be sure to conduct interviews with the primary individual of the space to get a good idea as to how to allocate.

• Walk your space! You won’t know what is in a room if you have never been to it.

• Do you have any visiting researchers or anyone who is not paid by UF that is occupying your space? Gather that information.
Space Allocation Categories Refresher
Space Allocation Categories Refresher

- The primary question to ask is “How was 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 Refresher

- There are four main categories that departments use for Space Allocation:
  - Administration
  - Research
  - Instruction
  - Other
Space Allocation Categories Refresher - 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 Refresher - 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 Refresher - Research

- There are two main categories:
  - Organized Research
  - Department Research
Organized Research

- Organized research is all space that is funded by a sponsored project including research training grants. Otherwise - 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 Refresher - Research

Department 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 Refresher

Other Important Categories

• Other Sponsored Activities
  • This is sponsored awards that are not research or instruction that reside in the support from funds 201, 209, & 214.
  • Examples – Extension, Sponsored Museum Exhibits, Sponsored Journal Editorship, Children’s Medical Service

• Agricultural Extension
  • Space related to activities involving the Agriculture College and Vet Med
Space Allocation Categories Refresher

Other Important Categories

• Other Institutional Activities
  • Everything else that does not really fit in a category. (The Dump Pot)
    • Examples – Non-research refrigerators, small kitchen areas, breakrooms, rare book collections, non UF-paid people such as visiting researchers or emeritus faculty.

• Auxiliary
  • Space that contains activities that you charge others for
    • Examples – Dining Halls, Student Unions, Service Centers, Public Museums
Space Allocation Categories Refresher

Other Important 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 Refresher

Other Important Categories

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

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

- 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 Refresher

Normal Categories Departments Will 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

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<th>Allocations</th>
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Save
What are Auditors Looking For?

WHY ARE YOU LOOKING AT ME THAT WAY

I'M NOT DOING ANYTHING
What Are Auditors Looking For?

- Knowledge of the space that is allocated
- Asking about non-UF paid individuals who OCCUPY space.
- Did you take training?
- Odd items in the rooms
- Do you know where your equipment is?
- Any major changes to your area that you may know is coming should be documented.
Space System Changes/Updates
New Check Marks

• On the top of each section there is no longer a dash, it is a check mark with a error sign over the top:

• Once verified it will change from gray to blue with a large checkmark:
New Buttons in the Room Screen

- In order to make the system more mobile friendly updating room information
New Buttons in the Room Screen

- In order to make the system more mobile friendly adding and removing occupants are now in a different location. Instead of the bottom of the selection, it is now in the right hand corner:
New Buttons in the Room Screen

- In order to make the system more mobile friendly adding and removing projects are also now in a different location. Instead of the bottom of the selection, it is now in the right hand corner:
New Lab Manager Option

- The lab manager designation, is the person who is responsible for the space in case of emergencies with Environmental Health & Safety. They are the ones that someone would call in case of an emergency with the lab.

- This is not a required field in order to certify, but can be used as a great tool for your area.
Adding a Non-UF Occupant

• You will now have the ability to add an individual that may need to be added as an occupant of space.

• Go to your Data Screen and Select My Employee’s
Adding a Non-UFOccupant

- Once there click on the notebook paper lined icon:
Adding a Non-UF Occupant

- This will give you the option to add a Non-UF Employee to your employee list:
Adding a Non-UF Occupant

• That will then give you a box to be able to type in the information that the system needs:

• Once you have added the information, you will click the “Add” button to add that individual to your list.
Adding a Non-UF Occupant

• Click Add an Occupant, and start typing the Non-UF Employee’s Name:

![Add Occupant window]

• Be sure to put into the Start Date that the individual started to occupy the space.
New Email Notifications

- Email Notifications will go to the affected individual’s when:
  - Space is Certified
  - Space in Un-certified
  - Space is Unauthorized
  - Space is re-assigned from one department to another
New Email Notifications

• For College of Medicine:
  • Emails will be sent to Karen Pastos and Todd Barnash when a COM Lab or Lab Service Occupant is edited.
  • This email notification replaces the requirement that only Todd/Karen can edit the occupants in those rooms.
  • Space Certifiers are free to make changes to occupants in labs and no longer need to contact Karen or Todd
Canceling Space Change Requests

- As a reminder, you can now cancel Space Change Requests if you feel that it was submitted in error.

- You can do that by navigating to the Certify Option on the left hand menu:
Canceling Space Change Requests

• Then Select “Open Space Requests:

• Then select the “Cancel” button to cancel the request:
Reports and Other Tools
### Status Reports
- **Space Worksheet**
  - This report is used for gathering information to be entered in the system. It lists all rooms by department along with the current occupants.
- **Projects by Building**
  - This report lists buildings and rooms that have projects associated with them, in building/room order.
- **Project Listing**
  - This report lists projects in order by project number and all rooms they are reported in.
- **Unreported Projects**
  - This report lists all projects that have not been reported (or exempted) this fiscal year.
- **Allocation Summary**
  - This report shows an average allocation by department for the current fiscal year.
- **Current Report**
  - This report lists rooms by department with their current occupants, allocations and projects.
- **Status Summary by Department**
  - This report lists each department and their current certification status.

### Supporting Documentation
- **Room Worksheets (PDF)**
  - 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.
- **Employee Rooms and Assets**
  - This report lists the current employees and the rooms and assets currently assigned to them.
- **Employee List**
  - This report lists the current employees and the number of rooms they currently occupy.
- **Non-Employee List**
  - This report lists all individuals added to the system as non-employees and the number of rooms they currently occupy.
- **Project List**
  - This report lists all active projects assigned to a department and the number of rooms they are currently associated with.
- **Capital Assets**
  - This report lists all capital assets by department and their current location.
- **Certifier/Authorizer List**
  - This report shows all the certifiers and authorizers for your space.

### Historical Reports
- **Completed Report - 2017**
  - This report displays room information, occupants, allocations and projects as reported in FY 2017.
- **Completed Report - 2016**
  - This report displays room information, occupants, allocations and projects as reported in FY 2016.
- **Completed Report - 2015**
  - This report displays room information, occupants, allocations and projects as reported in FY 2015.
- **Completed Report - 2014**
  - This report displays room information, occupants, allocations and projects as reported in FY 2014.
- **Completed Report - 2013**
  - This report displays room information, occupants, allocations and projects as reported in FY 2013.
- **Completed Report - 2012**
  - This report displays room information, occupants, allocations and projects as reported in FY 2012.
- **Completed Report - 2011**
  - This report displays room information, occupants, allocations and projects as reported in FY 2011.
Cost Analysis Website

- [http://www.fa.ufl.edu/departments/cost-analysis/space-allocation/](http://www.fa.ufl.edu/departments/cost-analysis/space-allocation/)
Certified Holistic Report

• Did you know that you can see everyone’s activities for a year by running the Effort Certified Holistic Report for your Department?

• The Terms to Run for will be Summer 2017, Fall 2017, and Spring 2018 (Keep In Mind Spring has yet to be open)

• This can be a final review before you certify your space
Deadlines and Obtaining Security
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.)
General Deadlines

• All Interviews should be completed before: May 18th, 2018
  • *This is to avoid any faculty who may leave for the Summer*

• Input of all data in the Space System should be completed by: July 6th, 2018

• Review of the Space data and Space Certification Completed by: July, 20th, 2018

• Authorization of the Space Data Completed by: July 31st, 2018
CTRB Building Deadlines for FY 2018

- All Interviews should be completed before: May 1\textsuperscript{st}, 2018
  - 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 31\textsuperscript{st}, 2018

Don't Miss the DEADLINE!
Help and Assistance

- Cost Analysis
  - For Space Allocation, Training, or General Questions Contact:
    - 392-5778; Option 2
    - spacealloc@admin.ufl.edu

- Planning, Design, & Construction Room Changes
  - For adding a room, removing a room, or correcting Assignable Square Feet
    - 352-273-4006
    - Submit a Request on the Help Menu of the Space System
Questions?