

# Improving Your Space Management Process

February 7, 2024

# Agenda



**Introduction to  
Maximus Higher  
Education**



**Space Survey  
Basics**



**Space Survey  
Process**



**WebSpace  
Software**

***Improving your Space Management Process***

# Maximus Higher Education Practice

## Organization and structure

- Established in 1985
- Headquartered in Northbrook, IL, with multiple satellite offices across the country

## Consulting services

- F&A proposal assistance, Space Survey, Negotiations
- Fixed/Moveable Asset Physical Inventory

- Fringe benefit rate proposals
- Reviews of service/recharge centers
- Pre- and Post-Award Assistance

## Software Solutions

Comprehensive Rate Information System **CRIS**  
(F&A software used by 90 of top 100 universities)

WebSpace® — Space Inventory and Survey System

Effort Reporting System®

# 35+

Years of Experience

# 28

Full-time consulting and IT staff

# 250+

Colleges and universities served

# What is a Space Survey?

**2 CFR 200**

The process of assigning institutional space into 2 CFR 200 (Uniform Guidance) functional categories based on the usage of the space

**Paper or  
Electronic**

Can be paper-based or electronic – in-house or WebSpace

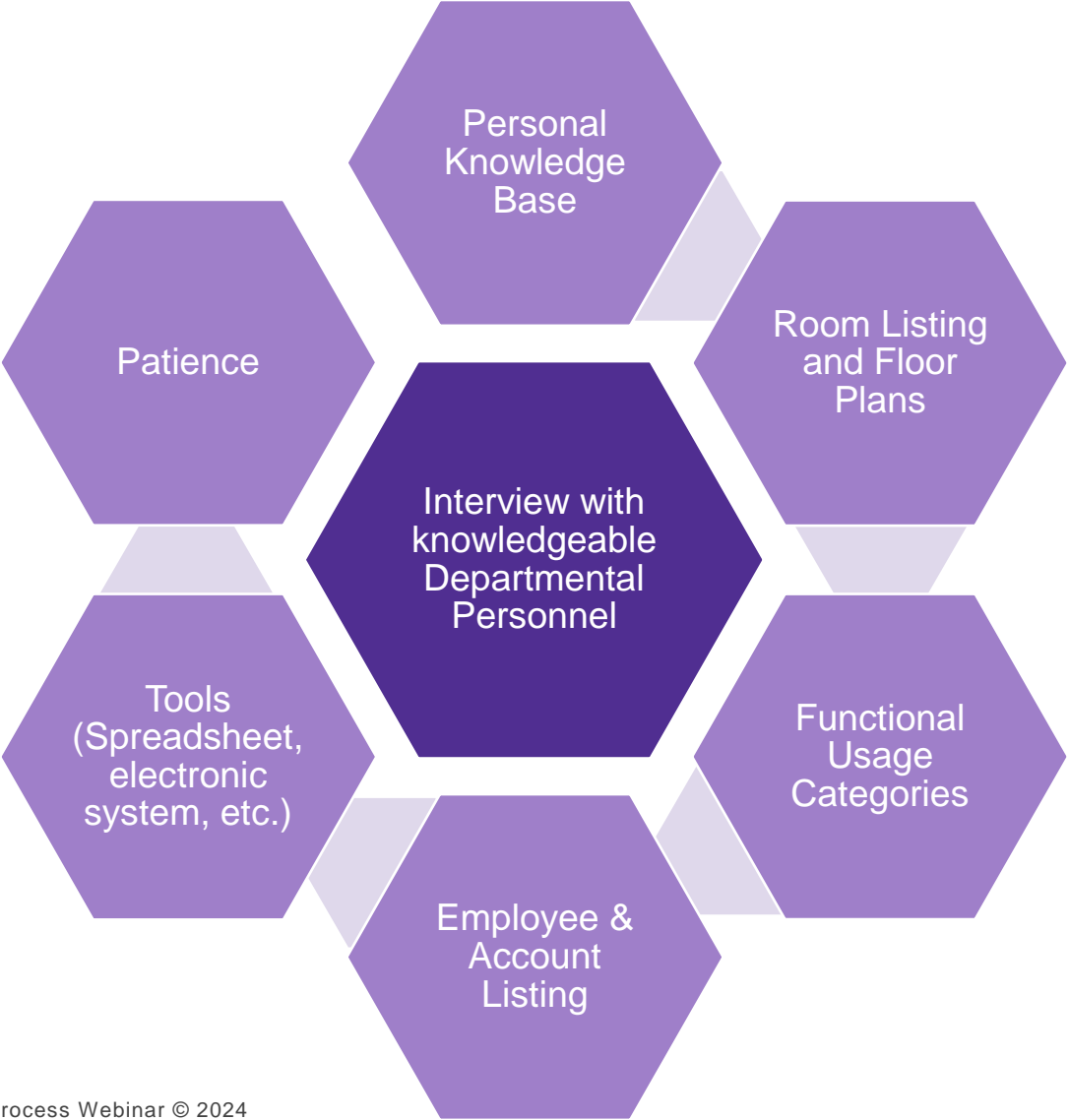
**OR %**

The results are used to calculate the percentage of space that is used by the Organized Research activities

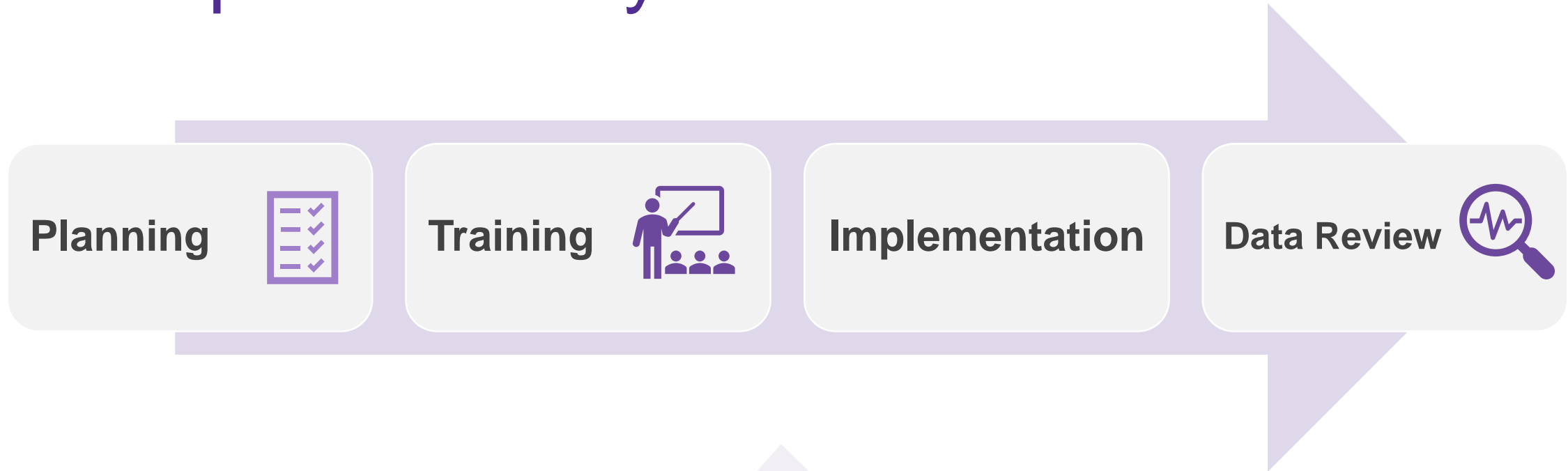
# What is a Space Survey?

- The survey supports the development of the institution's F&A rate proposal
  - Can also assist university facility, administrative and academic personnel in planning future space use.
- Used to allocate facilities costs – building and equipment depreciation, interest, and O&M
- Admin capped, so any rate increase must come from facilities
- Most reviewed areas by **HHS-Cost Allocation Services (CAS)** and **ONR/DCAA** when negotiating F&A Rates

# Space Survey Musts



# The Space Survey Process



# Space Survey Tasks and Activities

Space Survey Task	Activities
<b>Communication and Gathering the Data</b>	Alert the deans and departments of the upcoming space survey. Meet with various campus representatives to request necessary data Allow for extra time due to scheduling and other priorities.
<b>Data review and validation</b>	Review the data for accuracy; validate important aspects; ensure data consistency
<b>Training Materials Preparation</b>	Prepare training materials; provide examples of various scenarios
<b>Conducting Training</b>	Face-to-face, virtual or hybrid. Allow for questions; record the sessions for future playback and reference.
<b>Completing Space Survey</b>	Provide as much information as possible; provide access to floor plans; clear instructions and timelines
<b>Department One-on-One meetings</b>	Schedule one-on-one meetings early on; hold regular office hours sessions; Monitor progress and follow up with departments regularly; update senior management on progress and status



# CAS Best Practice Manual – Alternate Space Methodology

Simplified Method of Surveying Space



Pick **Organized Research** dollar threshold



Survey certain room types [250 (res labs), 255 (res lab srvc), etc.]



Assign all classrooms, class labs and study rooms to **IDR** [Instruction]



Allocate offices, conference rooms, etc. on departmental S&W [joint use]



Allocate all remaining departments based on departmental S&W (joint use), including room types surveyed for departments below threshold

# Example

- Select departments based on 70-85% of Organized Research MTDC or S&W
- Ensure all selected departments have research space (research labs/service, research offices, greenhouses, animal space)
- Other departmental space will be assigned based on:
  - One-function – Instruction for all classrooms, etc.
  - Joint Use – offices, conference rooms and space used by departments not selected for survey

# Planning

- **Determine Department Population**
  - Establish the \$ Threshold (use both MTDC and S&W for analysis)
  - Ensure all selected departments have research space; if not, determine where the space is
  - Obtain contact for each targeted department
  - Any new buildings were placed into service since last survey?
- **Compare to last space survey**
  - How many departments were surveyed last time?
  - How many room types were surveyed last time?
  - Were any new room types added since the last survey?
  - How long did the last survey take to complete?
  - What tools were used last time?

# Planning

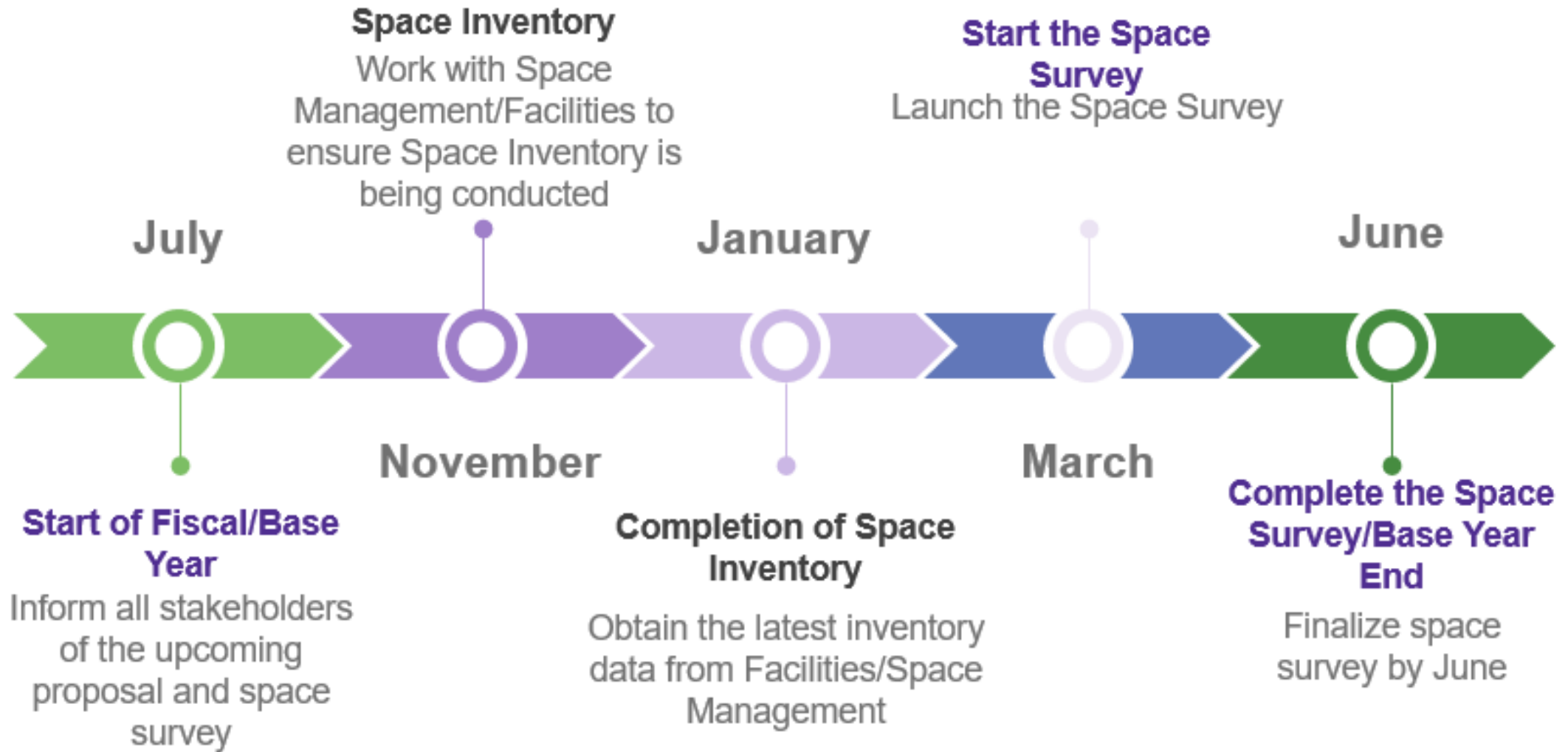
## ▪ **Prepare Communication**

- Inform Deans and Department Chairs of the upcoming space survey
- Meet with Space Management/Facilities to review latest space information
- Obtain floor plans or know where to access them; determine how up to-date they are
- Coordinate any space changes with space management/facilities

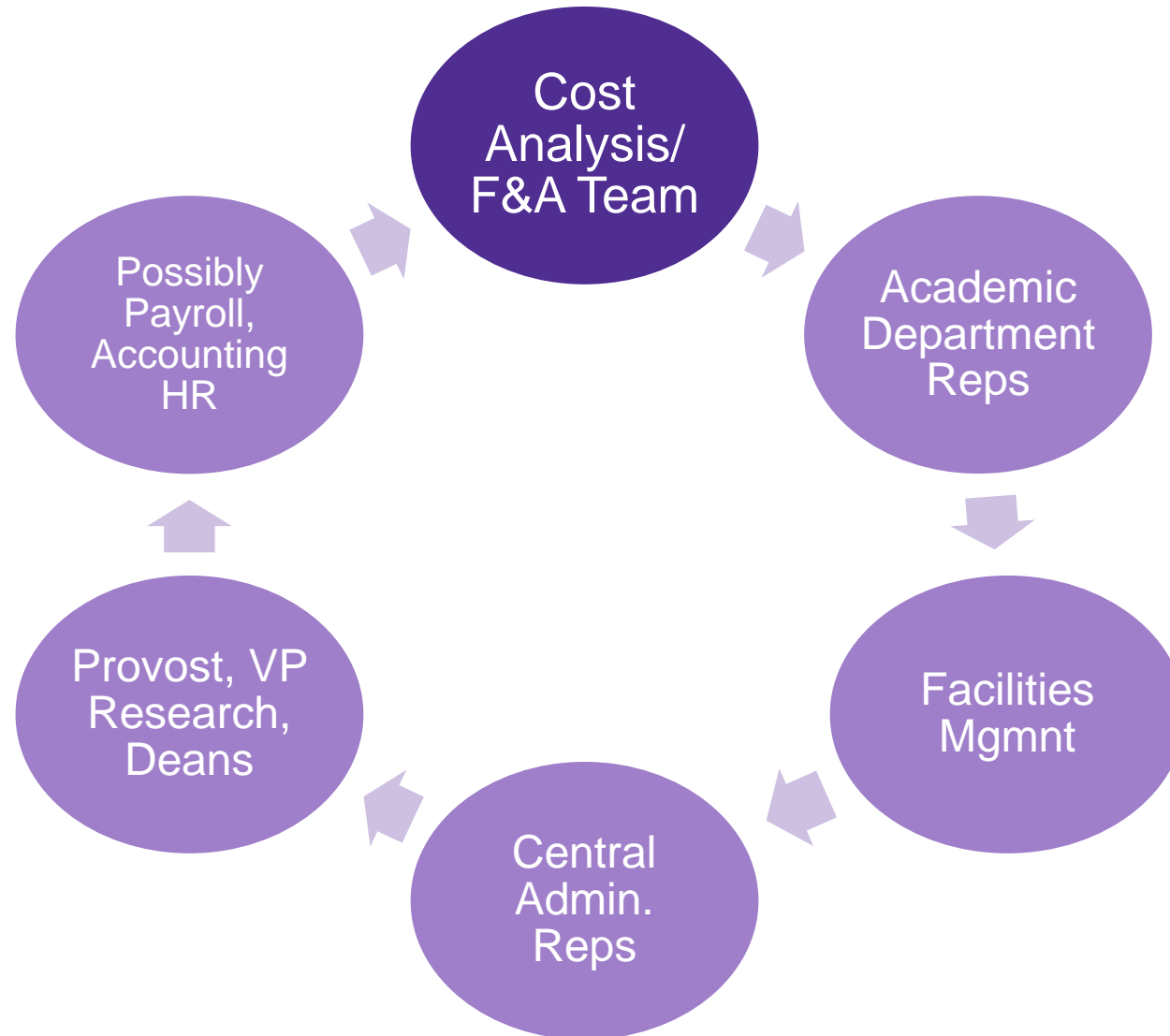
## ▪ **Determine optimal timing for the survey**

- Ensure space survey will not conflict with other major initiatives
- If staff/faculty leave for summer, try to complete the survey before they leave
- Potentially launch in phases to be able to support and assist participating departments
- Ensure staff are trained on how to apply the rules and the tools to be used

# Timeline



# Planning – The Space Team



# Training

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Extremely important element of the process

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Training follow-up can save headaches during review process

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Functional definitions

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Space assignment and types of space

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Room occupants' treatment – paid and unpaid

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Funding sources

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Special circumstances

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In-house or Maximus

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Remote training and review - provide recording and other materials

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# Training - Space Survey Functional Definitions

The direct cost functions for an academic department generally consist of:

- Instruction & Departmental Research (IDR)
- Organized Research (OR)
- Other Sponsored Activity (OSA)
- Other Institutional Activities (OIA)

Consistent understanding is key

**Biology Department**



*This says  
“organized research”*

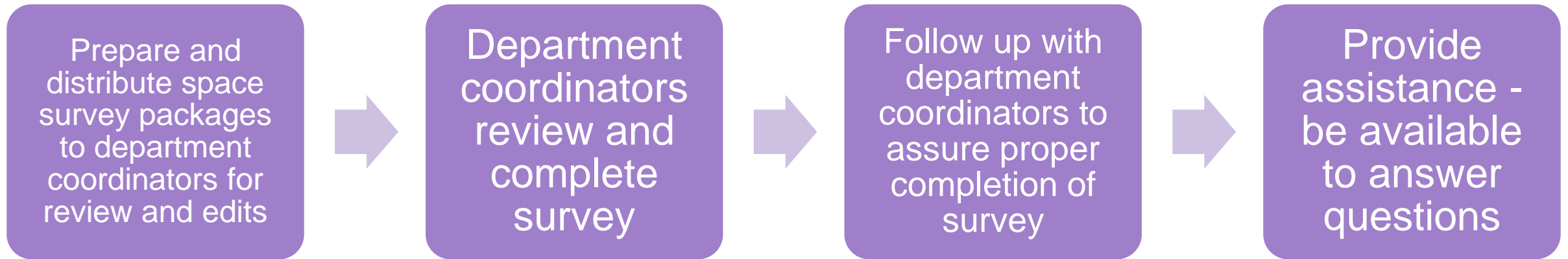
**Physics Department**



*This says  
“organized research”*



# Implementation



## **SPACE SURVEY PACKAGE**

- Policies & procedures
- Function Definitions
- Survey Information
- Floor plans
- Funding Sources listing by PI
- S&W distribution by Employee within Department

# Implementation

## ▪ **Launch Space Survey**

- Schedule training – on-site or virtual or both
- Ensure all required participants are fully trained; record training sessions
- Provide examples
- Ensure questions and issues are communicated
- Establish a helpdesk email/phone

## ▪ **Schedule one-on-one meetings**

- Touch base with each participating departments and offer to schedule sessions to review their specific space
- Provide clarity and walk through a few rooms with them
- If helpful, have last survey results handy as a reference
- Establish escalation process, if necessary

# Data Review

Analyze summary data; compare to last survey

Compare research salaries or MTDC to research space – note any discrepancies

Research space/no research dollars

Perform Quality Review of Selected Rooms

Compare to Departmental S&W Profile (joint use) to get baseline

Recharge operations – is billing data available?

# Data Review

- Review detail for:
  - Research Labs **100%** to Organized Research
    - Is it too aggressive? Can it be supported?
  - **0%** Organized Research
    - Any cost share?
  - 95/5 syndrome
  - Visiting faculty – were they taken into account?
  - GRAs – paid or unpaid?
  - Vacant space – was it coded according to definition? Was the space used in hybrid mode? Fully remote?
  - Coding inconsistent with room type (for example, DA function should not be used in Research Labs)

# Important Considerations

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Professional judgment is the key; not an “exact” science

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Results should be accurate and supportable

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The room should be surveyed by an individual with knowledge of its use

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Survey based on the entire FY usage

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Appropriate training is necessary

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Consistency across departments

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Recharge Centers (i.e. electronic repair shop) should be coded based on client usage/billing data

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Start-up funds, seed money, bridge funds, and dept funded research are IDR, not OR

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# Things to Keep In Mind Under Hybrid Mode

- **Delays in data collection**
  - It might take longer to get the data due to other competing priorities or special access needed
- **Need Senior Management involvement**
  - Other priorities will compete to keep space survey on track
  - Good communication and reminder of how critical space survey is will be necessary to get everyone on board
- **Departments may not be able to physically walk the space and confirm the layout**
  - Provide floor plans or other helpful tools to assist with this
- **Be available to assist**
  - Be prepared to assist, schedule zoom calls, do follow ups; use other tools to help stay on track
- **Space is fluid and changes frequently; space systems may not be up to date with the latest information**

# Maximus Space Survey Services

- Outsource
- Planning/development
  - Instructions/definitions
  - Scope
- Training
- Quality review



# WebSpace®

Web-based system for *inventorying* and *surveying* space to meet:

- F&A requirements (Compliant with UG 2CFR 200)
- University requirements

Developed by Maximus

On the market for over 20 years

Works with standard browsers and mobile devices

Integrated with **CRIS**

Flexible product adaptable to school's methodology

Space survey/reviews

- Maximus has successfully developed software application tools
- Annual releases
- Flexible and easy data load and extract

Can be Licensed or Leased



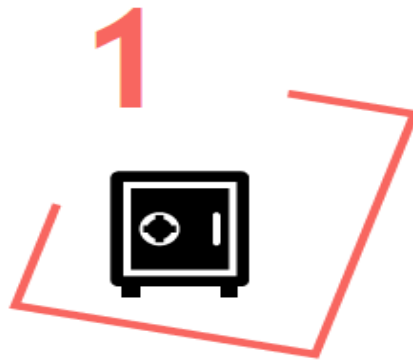
Used by **over 75** Universities



# WebSpace Features and Benefits

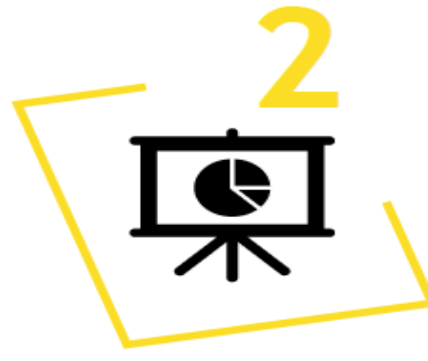
## Secure and Flexible

- Role-based and domain security
- SSO integrated and SSL enabled
- Up to 30 configuration options
- Clustering option to group rooms by Principal Investigator to survey as one unit.
- Account/Funding source requirement for specific functions
- Occupants and PI requirement for specific room types.
- Up to five custom-defined attributes.
- Seamless integration with **CRIS**



## Management Reporting

- Delinquency reports for easy identification of incomplete rooms.
- Survey Status, Occupants and Funding Sources reports.
- Ad Hoc reporting allows creation, downloading and distribution of customized reports.
- Management report with latest survey percentages and occupancy
- Reports by building, department, room type, PI and occupant
- Research space analysis and review



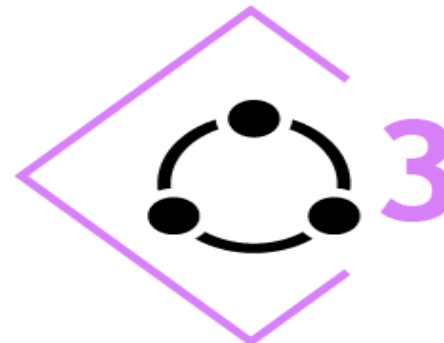
## Ease of Use

- Help pages are available throughout
- Error checks performed everywhere
- Step-by-step end user tutorial
- Training Documents section for policies, procedures, references, recordings, etc.
- Dashboard of completed and pending activity items
- Automation of surveying service rooms based on associated labs.
- 100% web-based – internet and browser only



## Functional Edits

- Survey must add to 100 percent.
- Use of payroll profile as a guide
- Requires assignment of accounts (project) for space coded Organized Research, etc.
- Option to disallow the attributes of a room to be changed unless an explanation is provided.
- Designate and account for unpaid occupants
- Use of billing for recharge/core space



## Notifications & Alerts

- Tailored e-mail to alert users of other actions.
- Built-in Automated Delinquent reminder to alert of completion/pending items
- Announcement on user's home page



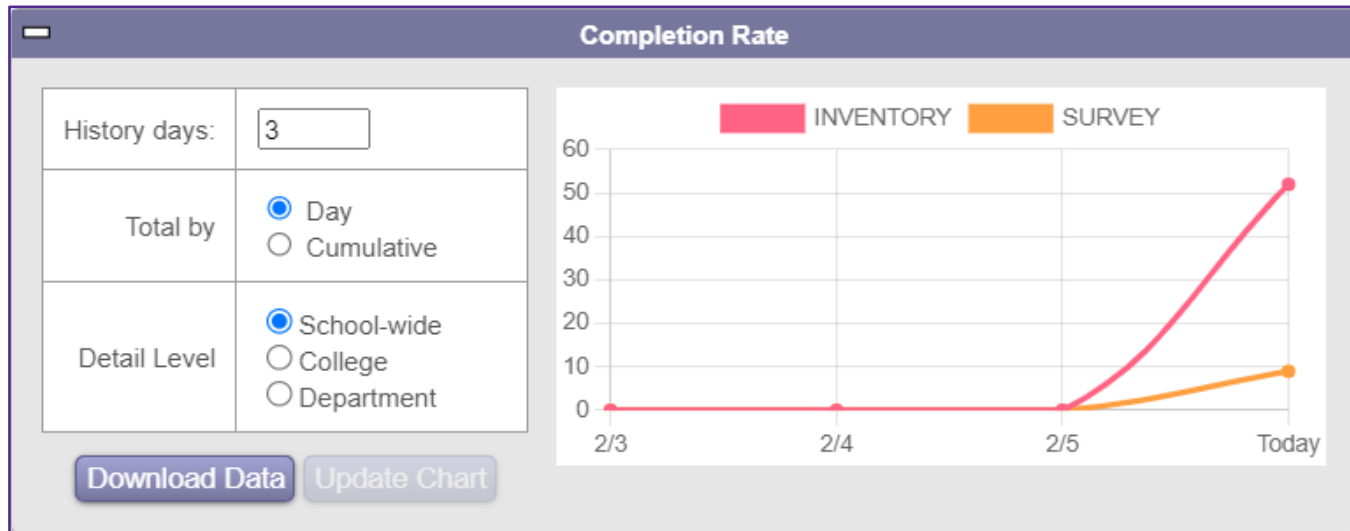
## Analytics

- Perform density analysis
- Perform space/base analysis
- Perform trend analysis to assess increase/decrease of space
- Meet state requirements
- Analyze space by Principal Investigator
- Download all reports to excel, pdf and other formats



# WebSpace to Help with Reporting and Status

Completion Rate Graph – daily tracking of Inventory and Survey



Dashboard reflecting overall completion and pending status

	Inventory	Cluster	Survey
Pending Completion	87%	0%	17%
Complete	13%	100%	7%
Not Available	0%	0%	76%
Total	100%	100%	100%

# WebSpace to Help with Reporting and Status

- Completion Status:

## Survey Completion Percentage by Department

Displaying 2 of 2 records

Department	Department Name	Rooms to Survey	Rooms Survey Completed	Total number of Rooms	Completion Percentage	Survey Coordinator
2201	General Sciences	117	18	135	13%	Adams, Grant
2202	Physics	129	0	129	0%	Burgos, Federico

- Survey Results Report:

## Assignable Square Footage by Department

Department	OR	OSA	INS	OIA	Total
<a href="#">2201-General Sciences</a>	5,994	147	3,103	427	9,671
<b>Total:</b>	<b>62.0%</b>	<b>1.5%</b>	<b>32.1%</b>	<b>4.4%</b>	<b>9,671</b>

# WebSpace Reporting

View Organization – provides the status on the number of rooms, completion, Occupants identified, Projects/Funding Sources designated

Department: 2201 - General Sciences (Edit)			
<b>Assigned Department Coordinator:</b>	Adams, Grant		<b>Assigned Audit Department Coordinator:</b>
<b>Total Number of Rooms:</b>	315	<b>Total ASF:</b>	104,213
<b>Number of Rooms Initiated:</b>	271 (0)	<b>ASF:</b>	89,478
<b>Number of Rooms Inventoried:</b>	<a href="#">77</a> out of 282	<b>ASF:</b>	19,110
<b>Number of Rooms Surveyed:</b>	<a href="#">18</a> out of 135	<b>ASF:</b>	8,252
			<b>Percent Inventory Completion:</b> 27.3%
			<b>Percent Survey Completion:</b> 13.33%
<hr/>			
<b>Number of Employees in Department:</b>	164 (49)	<a href="#">Link to Occupant Identified/Not Identified</a>	
<b>Number of PIs in Department:</b>	10	<a href="#">Link to PI</a>	
<b>Number of Accounts:</b>	44 (23)	<a href="#">Link to Account used/not used</a>	
<b>Number of Clusters:</b>	2	<a href="#">Link to Cluster</a>	
<b>Number of Shared Rooms:</b>	25	<a href="#">Link to Shared Room Report</a>	
<b>Number of Recharge Rooms:</b>	3	<a href="#">Link to Recharge Room Report</a>	

# WebSpace Reporting – Summary by Bldg, Room type and PI

Assignable Square Footage by Building

Displaying 4 of 4 records

Building	OR	OSA	INS	OIA	Total
1001- Building One	5,494	106	2,477	411	8,489
1002- Building Two	360		597		957
1003- Building Three	22	6	5	2	35
1005- Building Five	118	34	25	13	190
<b>Total:</b>	<b>62.0%</b>	<b>1.5%</b>	<b>32.1%</b>	<b>4.4%</b>	<b>9,671</b>

Assignable Square Footage by RoomType

Displaying 2 of 2 records

Room Type	OR	OSA	INS	OIA	Total
250-RESEARCH LAB OTHER	4,944	38	2,709	362	8,053
255-RESEARCH LAB SERVICE	1,050	109	394	64	1,618
<b>Total:</b>	<b>62.0%</b>	<b>1.5%</b>	<b>32.1%</b>	<b>4.4%</b>	<b>9,671</b>

Assignable Square Footage by PI/ PO

Displaying 8 of 8 records

PI/PO	Number of Rooms	OR	OSA	INS	OIA	Total ASF
CLINTON, LEON	2	91		9		1,331
COX, JAMES	1	62	18	13	7	370
FIBER, STEVEN	4	97		3		3,403
MILLER, EDWIN	4	4	2	94		1,512
N/A	8	66	3	28	3	1,248
PANERA, CHRIS	3	25		43	33	1,113
STEVENSON, JAMIE	1	74	2	24		55
TILAPIA, DAVID	2	8		92		638
<b>Total:</b>	<b>25</b>	<b>62%</b>	<b>1%</b>	<b>32%</b>	<b>4%</b>	<b>9,670</b>

# WebSpace Built-in FAQ for contextual help

## FAQ/Help button is available throughout to assist departments:

- Provides information related to the process/screen the user is on
- Allows institutions to customize the FAQ/Help to incorporate institution-specific topics and clarifications
- Allows the user to search contents and follow steps

### Frequently Asked Questions

Question:  [Ask Question](#)

#### Inventory

⊕ How do I perform a Room Inventory?

⊕ The room list is pretty large. Is it possible to filter and sort the rooms in the list?

⊕ The room I am looking for is not on the department list. Can I add a room?

⊕ One of the assigned rooms needs to be shared by a couple different groups. Is it possible to split up the room and perform the Space Survey process for each individual room?



# Upcoming Webinars

- **Grants Management – February 2024**
- **Using CRIS to Analyze Your Proposal – March 2024**
- **F&A Long Form Workshop – April 2024**
- **CRIS University – May 2024**
- **F&A Short Form and Long Form Considerations – May 2024**
- **Benefits of Building Componentization/Fixed Equipment Inventory & Physical Space Inventory/Verification Study – June 2024**





Questions?



thank  
you

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