



Facilities Inventory Workshop

**For ASU Space Representatives and Assistants
August 2017**

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State Audit 2017

- ❖ ASU passed with flying colors!
- ❖ Perfect score on ALL 8 audit components!



❖ Thank you for your hard work!!!

Space Alteration and Allocation Form (SAARF)

Online version now available!

- ❖ This form is just the starting point for changes.
- ❖ When should you fill out this form? – Before beginning a space change.
- ❖ Why should you fill this form out?

If your department is changing anything about an old room or creating new rooms that alter the classification of space (Space Use, CIP, Function) or the physical size of space.

Examples:

- You are swapping or acquiring rooms with/from another discipline, department, or location on campus.
- You are adding a closet to a room.
- You are adding or subtracting square feet to a room with construction.
- You are converting a classroom (110) to multiple offices (310's).

- ❖ Who should you send this form to?

- This depends upon the nature of the change you wish to make. Complete the online version and we will electronically forward to the appropriate personnel for approvals. See the Online SARRF.
- For the paper version, required signature spaces are shown. See the [SAARF](#).

On our web
page just click
here!

The screenshot shows the Angelo State University Facilities Inventory website. The top navigation bar includes links for Home, About ASU, Paying for College, Living on Campus, Athletics, and Giving to ASU. The main content area features a sidebar with links to Facilities Inventory, Space Allocation and Alteration Request Form (SAARF), Space Planning and Utilization, Building Floor Plans, Inventory Terms and Definitions, Presentations and Handouts, Space Planning Committee Meeting Minutes, About, and Contact. The main content area displays a large image of a hallway and the text 'What is SAARF?'. Below this, there is a section titled 'Space Allocation and Alteration Request Frequently Asked Questions' with two sub-questions: 'Why fill out this form?' and 'How do I fill out this form?'. A red arrow points to the 'Online SAARF' button. Below the FAQ section, there is a section titled 'Angelo State University Space Allocation and Alteration Request Form' with instructions on how to complete the form. At the bottom, there is a form with fields for 'Requesting Department:', 'Name:', 'Email:', and 'Phone:', followed by a yellow 'Go' button.



Why do we inventory facilities (space)?

Space Usage Efficiency (SUE) Score

- ❖ The THECB uses an algorithm to evaluate general education classrooms (110) and class labs (210)
 - Classrooms are under the purview of the Provost and scheduled first by the departments then centrally backfilled by the Senior Scheduling Coordinator in Special Events.
 - Class Labs are under the purview of the Department and scheduled through the department.
- ❖ Special Class Labs (220) are NOT included in the SUE calculations

SUE Criteria

- ❖ Facilities Demand
- ❖ Utilization Rate
- ❖ Percent Fill

SUE - Facilities Demand

Classrooms

Total hours of all classroom-type
activities (regardless of where taught)

Number of Classrooms

Goal: Classrooms 45 hours per
week (HPW)

ASU Current Score = 34 HPW

Class Labs

Total hours of all class lab-type
activities (regardless of where taught)

Number of Class Labs

Goal: Class Labs 35 hours per
week (HPW)

ASU Current Score = 39 HPW

* All Current scores are for Fall 2016 (201710)

SUE – Utilization Rate

Classroom

$$\frac{\text{Total hours of classroom activities scheduled in classrooms}}{\text{Number of classrooms}}$$

Goal: Classrooms 38 HPW

ASU Current Score: 31 HPW



Class Lab

$$\frac{\text{Total hours of class lab activities scheduled in class labs}}{\text{Number of class labs}}$$

Goal: Class Labs 25 HPW

ASU Current Score: 24 HPW



* All Current scores are for Fall 2016 (201710)

SUE – Percent Fill

Total number of seats occupied/room capacity (NOT course capacity)

Goal: Classrooms 65%
seats filled

ASU Current Score:
Classroom = 71%

Goal: Class Labs 75%
seats filled

ASU Current Score:
Class Labs = 66%

* All Current scores are for Fall 2016 (201710)

Receiving a weighted SUE Score

- ❖ SUE is meant to encourage good stewardship of the property of the State of Texas.
- ❖ We receive maximum points for meeting goals and fewer points depending on how much we fall short.
- ❖ Standard or “passing” score = 75 points for classrooms and 75 points for labs (total SUE Score of 150—this would be considered in compliance).
- ❖ Total SUE of **200** is a perfect score.
- ❖ For more info: <http://www.thecb.state.tx.us/reports/pdf/1831.PDF>

Texas Higher Education Coordinating Board (THECB) Space Usage Efficiency (SUE) – Fall 2016

Institution	Overall Score	Classroom Score	Class Lab Score	Classroom						Class Laboratory					
				Demand	Weighted Score	Utilization	Weighted Score	Average Percent Fill	Weighted Score	Demand	Weighted Score	Utilization	Weighted Score	Average Percent Fill	Weighted Score
Angelo	150	66	84	34	18	31	16	71%	32	39	36	24	24	66%	24
				Classroom Weighted Scoring						Class Laboratory Weighted Scoring					
				Score (weight = 9)		Score (weight = 8)		Score (weight = 8)		Score (weight = 9)		Score (weight = 8)		Score (weight = 8)	
				45 or >	36	38 or >	32	65% or >	32	35 or >	36	25 or >	32	75% or >	32
				38 - 44.9	27	34 - 37.9	24	55 - 64.9	24	30 - 34.9	27	20 - 24.9	24	65 - 74.9	24
				31 - 37.9	18	30 - 33.9	16	45 - 54.9	16	25 - 29.9	18	15 - 19.9	16	55 - 64.9	16
				< 31	9	< 30	8	< 45%	8	< 25	9	< 15	8	< 55%	8

Space Projection Model Purpose

- ❖ Provides “Fair and Equitable Assessment of Space Needs”
- ❖ Predicts E&G (Educational & General) Space Requirements for Institutions to fulfill its Missions of Teaching, Research, and Public Service
- ❖ Auxiliary Spaces (housing, bookstores, athletics, etc.) are NOT included
- ❖ Academic Five-Factor Model (based on room type): Teaching, Library, Research, Office, Support.

Space Projection Model Benefits



❖ Used in Determining Fund Allocations for:

- Formula Funding (i.e. annual appropriations)
- HEAF Funds

❖ Assesses the Need for New Construction

- TRB's (Tuition Revenue Bonds)
- Determine whether new construction will qualify for M&O funding provided by general revenue



Space Projection Model

(aka 5-Factor Model)

- ❖ Teaching Space
- ❖ Library Space
- ❖ Research Space
- ❖ Office Space
- ❖ Support Space

Texas Higher Education Coordinating Board - Academic Space Projection Model - Fall 2016

Summary		Total		Teaching		Library		Research		Office		Support	
FICE	Institutions	Predicted	Actual	Predicted	Actual	Predicted	Actual	Predicted	Actual	Predicted	Actual	Predicted	Actual
003541	Angelo	698,794	597,753	337,668	302,827	95,066	77,061	19,577	20,139	188,784	153,662	57,699	44,064

What does SUE and Space Projection Mean for ASU?



- ❖ We have excess classroom availability and a lack of library, office and support space.
- ❖ We have to prepare for how SUE scores determine state funding recommendations when we want to:
 - Acquire land, construct and equip buildings, perform major repair and renovation of buildings, and acquire capital equipment, library books, and library materials (HEAF).
- ❖ We have to keep track of large amounts of data needed by THECB.
- ❖ We have to gather data in a multi-departmental effort.
 - Includes a **Space Representative** from every department.
 - Increasing our SUE Score is part of ASU's Vision 2020 and we are committed to working together to make that happen.
- ❖ We should use data in other ways to improve ASU.



Why must we complete the Survey?

Federal and State Reporting



U.S. Office of Management & Budget

- ❖ Facilities & Administrative (F&A)
Rate

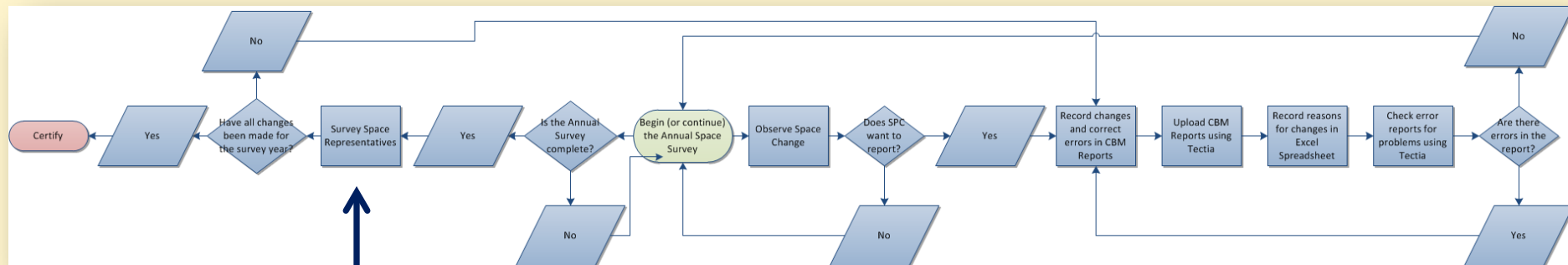


THECB & Legislature

- ❖ Biennium State Appropriations
 - ❖ HEAF Funds
 - ❖ TRB Funds

Facilities Inventory Process Flow Chart

- [Link to larger flowchart here.](#)



You help here by completing your Space Representative Surveys (Part I and II if applicable) and by sending us Space Alteration and Allocation Forms throughout the year.

As a Space Representative



ASU Space Representatives Defined

- ❖ ASU employees in charge of physical space on campus (scheduling classes and people in offices).
- ❖ Usually the department heads (deans and vice presidents).
 - Office Coordinators or administrative assistants will often check space, inform the Space Representative, and then have the representative okay notes and changes.

**How do you read and respond to the
Space Representative Survey?**

Part I: Main Space Representative Survey

- This is sent to you in an Excel sheet
- [View sample here](#) (filled out as though I were Becky Brackin from Communications and Marketing).
- Next two slides discuss what each column means and what you should fill in.

Space Representative Survey Sample.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Acrobat

Cut Copy Paste Format Painter Clipboard Font Alignment Number Styles

Calibri 11 Wrap Text Merge & Center \$ % .00 .00

Conditional Formatting as Table

	A	B	C	D	E	F	G
	Building Number	Building Name	Room Number	Space Use	Space Use Description	CIP 1	CIP 1 Description
305	105	ADMINISTRATION SUPPORT CENTER	101	315	Office Service	825000	Communication and Services
306	105	ADMINISTRATION SUPPORT CENTER	102	310	Office	825000	Communication and Services
307	105	ADMINISTRATION SUPPORT CENTER	103	310	Office	825000	Communication and Services
308	105	ADMINISTRATION SUPPORT CENTER	104	310	Office	825000	Communication and Services
309	105	ADMINISTRATION SUPPORT CENTER	105	315	Office Service	825000	Communication and Services
310	105	ADMINISTRATION SUPPORT CENTER	106	310	Office	825000	Communication and Services
311	105	ADMINISTRATION SUPPORT CENTER	107	310	Office	825000	Communication and Services
312	105	ADMINISTRATION SUPPORT CENTER	108	X01	Circulation Area	834000	Custodial Services
313	105	ADMINISTRATION SUPPORT CENTER	109	U10	Men's Public Rest Rooms	825000	Communication and Services
314	105	ADMINISTRATION SUPPORT CENTER	110	315	Office Service	825000	Communication and Services
315	105	ADMINISTRATION SUPPORT CENTER	111	YYY	Utility/Mechanical Space	839900	Maintenance Operations, Other
320	105	ADMINISTRATION SUPPORT CENTER	00108A	YYY	Utility/Mechanical Space	839900	Maintenance Operations, Other
1897	Totals (1895 Rooms)						

Part I (cont.) Survey Column Definitions



- Filled in for you (what you need to verify as correct):
 - **Building Number**—The 3 digit number assigned to a building.
 - **Building Name**—The name of the building.
 - **Room Number**—The room number (may have more or less zeros; ex: 00001A = 01A).
 - **Space Use**—The code that indicates the primary activity in the area.
 - **CIP**—Classifications of Instructional Programs code to identify discipline or department. Potentially 3.
 - **Function**—The code that profiles the use/function of a room. Potentially 3.
 - **Percent**—The percentage of the Space Use used by CIP and Function. Potentially 3. All percentages for a room, when added, should equal 100%.
 - **NASF**—The sum of all areas within the interior walls of a room. Includes auxiliary space and E&G.
 - **E&G**—Space used for teaching, research, or the preservation of knowledge.
 - **Capacity**—Student stations (chairs or spaces for chairs at un-movable tables).
 - **Room Area**—The square footage of the room (just eyeball this number).

Part I (cont.) Survey Column Definitions

Table Tools Design

Communications and Marketing - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Acrobat Table Tools Design

Clipboard Font Alignment Number Styles Cells Editing

AD305

	A	Z	AA	AC	AD	AG	AH	AI	AJ
	Building Number	Correct? (yes or no)	Errors (if any)	Contact Person	Date				
305	105			Rebekah Brackin					
306	105			Rebekah Brackin					
307	105			Rebekah Brackin					
308	105			Rebekah Brackin					
309	105			Rebekah Brackin					
310	105			Rebekah Brackin					
311	105			Rebekah Brackin					
312	105			Rebekah Brackin					
313	105			Rebekah Brackin					
314	105			Rebekah Brackin					
315	105			Rebekah Brackin					
316	105			Rebekah Brackin					
317	105			Rebekah Brackin					
318	105			Rebekah Brackin					
319	105			Rebekah Brackin					
320	105			Rebekah Brackin					
1933	Totals (1931 Rooms)								
1934									
1935									
1936									
1937									
1938									
1939									
1940									
1941									
1942									
1943									
1944									
1945									
1946									
1947									
1948									
1949									

Additional Questions Your Answers

Do you have any missing rooms? If so, state the building and room numbers.	
Are there rooms listed that you do not occupy? If so, state the building and room numbers.	
Signature of Space Representative (just type your name; no need to print) - states that you certify that all the information you have provided us is complete and accurate to the best of your knowledge.	
Date	

After You Complete This Survey:

1. Save your work and email this completed worksheet to ASUfacilities.inventory@angelo.edu.
2. If you are missing room(s), information about those rooms will be emailed to you to verify accuracy.

Annotations:

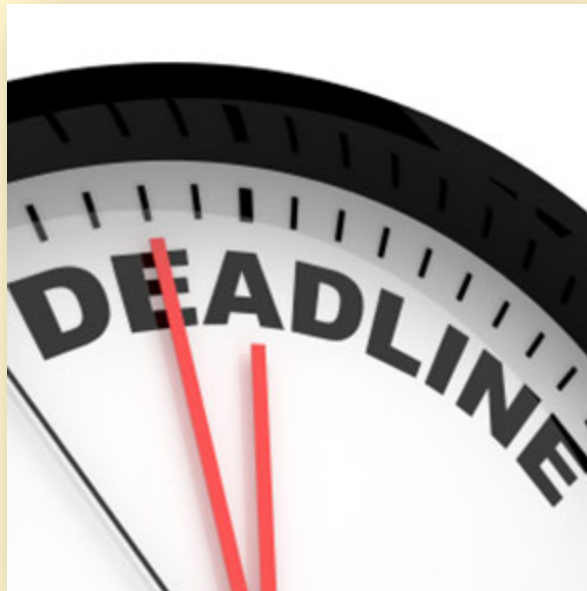
- List any room numbers that are missing. A revised survey will be sent with these rooms added.* (Points to the 'Errors' column)
- List any rooms that are outside your space rep scope.* (Points to the 'Errors' column)
- Date you certified the data as correct* (Points to the 'Date' column)
- Describe any errors with possible solution* (Points to the 'Errors' column)
- Yes or no to verify all is correct for this room* (Points to the 'Correct?' column)
- Type your name (as space rep). This certifies that you have read and certify that all the info is correct and complete with the additions you have made.* (Points to the 'Signature' row in the 'Additional Questions' table)

Fill Out Yellow Columns Here Lookup Values

Ready

Main Space Representative Survey (Part I Certification)

- ❖ Where we ask you to certify that the information we have describing your rooms is complete and correct.
- ❖ Resist procrastination – allow plenty of time!
- ❖ **Deadline:** Friday, September 15, 2017.



Part II: Predominant Use Survey (proration)

Example:

Subject: Sample Predominant Use Request

Good Afternoon:

We are in the final stages of submitting the campus facilities inventory. Because coding for facility inventory submission is based on current predominant use, both the activities that are scheduled in Banner and those that are not must be considered. Could you tell use more about the following room so that we can ensure that we are reporting the predominant use accurately to the state?

Currently Bldg Room has XX hours of lecture and XX hours of lab scheduled. As the state standard use for classroom is 38 hours per week and class lab is 25 hours per week, we are interested in the other items that occur within this space in order to recommend the most appropriate coding, which is based on predominant use this Fall semester. In order to account for the unscheduled use of these space, we need to know what other activities take place in the space such as open lab, research and study space. Please provide me this information at your earliest convenience as well as the hours per week of each activity. Once this is received, we can make a recommendation of how to code and/or prorate the space correctly.

For your convenience, I have provided an example of a room below:

Event	Hours	% of Time
Lecture Hours (provided above)	3	11.8%
Lab Hours (provided above)	2.4	9.4%
Departmental Meeting	5	19.7%
Open Lab	10	39.4%
Student Research		
Faculty Research	5	19.7%
Etc.		
Total	25.4	100%

Thank you in advance for your assistance in this endeavor.

Part II: Predominant Use Survey (cont.)

- ❖ Predominant Use Emails are **only sent to academic departments.**
- ❖ Not every academic department will receive this second part of the Space Representative Survey.
- ❖ Why might you receive this second part of the survey?
 - We have developed a report, that suggests when coding adjustments are needed between classroom and class lab to help improve our SUE score based on the current Fall schedule of classes.
 - A very small percentage of a rooms use is made up of classroom and/or class lab activities, we need to know what other activities (beyond classroom and lab) are scheduled in that room.
- ❖ If you receive this email, we only need to know about your fall semester activities.
- ❖ Predominant Use Feedback



Friday, September 29, 2017.

Classification of Space (THECB Coding System)

❖ Outlined in THECB Reporting and Procedures Manual for Texas Public Universities and the Appendices to the Reporting and Procedures Manual

1. Space Use Code
2. CIP Code
3. Functional Category Code

R0035412017	0102	0112500501	61011100	4522	0421	00000	0000011
R0035412017	0102	0200816000	31061050	156	0000812000	48050	0000011
R0035412017	0102	0201816000	31061075	232	0000812000	48025	0000011
R0035412017	0102	0203818600	31061100	144	0000	00000	0000011
R0035412017	0102	0204811400	31061100	563	0000	00000	0000011
R0035412017	0102	0205818600	31561100	191	0000	00000	0000011
R0035412017	0102	0207815000	31061100	155	0000	00000	0000011
R0035412017	0102	0208811400	31561100	270	0000	00000	0000011
R0035412017	0102	0209811200	31061100	253	0000	00000	0000011
R0035412017	0102	0210811400	31061100	145	0000	00000	0000011
R0035412017	0102	0213811200	31061100	319	0000	00000	0000011
R0035412017	0102	0214816000	65063100	121	0000	00000	0000011
R0035412017	0102	00100A829900	31062100	995	0000	00000	0000011
R0035412017	0102	00100A1829900	31562100	209	0000	00000	0000011
R0035412017	0102	00100A2829900	31062100	243	0000	00000	0000011
R0035412017	0102	00100A3829900	31062100	243	0000	00000	0000011
R0035412017	0102	00100B829900	31062100	222	0000	00000	0000011
R0035412017	0102	00100C829900	31062100	312	0000	00000	0000011
R0035412017	0102	00100C1829900	31062100	209	0000	00000	0000011
R0035412017	0102	00100C1A829900	31562100	15	0000	00000	0000011
R0035412017	0102	00102A818500	31061100	130	0000	00000	0000011
R0035412017	0102	00102B818500	31561100	49	0000	00000	0000011
R0035412017	0102	00102C818500	31561100	66	0000	00000	0000011
R0035412017	0102	00102D818500	31061100	115	0000	00000	0000011

Sample of what our text file submitted to the state looks like.

Common Codes

❖ **SPACE USE CODES** (think in terms of room titles like your home: kitchen, living room, bedroom)

- 110—Classroom
- 115—Classroom Service
- 210—Class Laboratory
- 215—Class Laboratory Service
- 220—Special Class Laboratory
- 230—Individual Study Laboratory
- 250—Research/Non-class Laboratory
- 255—Research/Non-class Laboratory Service
- 310—Office
- 315—Office Service (closets and private bath)
- 350—Conference Room
- 355—Conference Room Service
- 410—Study Space
- 420—Stack

- 520—Athletic or Physical Education
- 610—Assembly
- 615—Assembly Service
- 630—Food Facility
- 635—Food Facility Service
- 680—Meeting Room
- 685—Meeting Room Service
- 050—Inactive Area
- 060—Alteration or Conversion Area

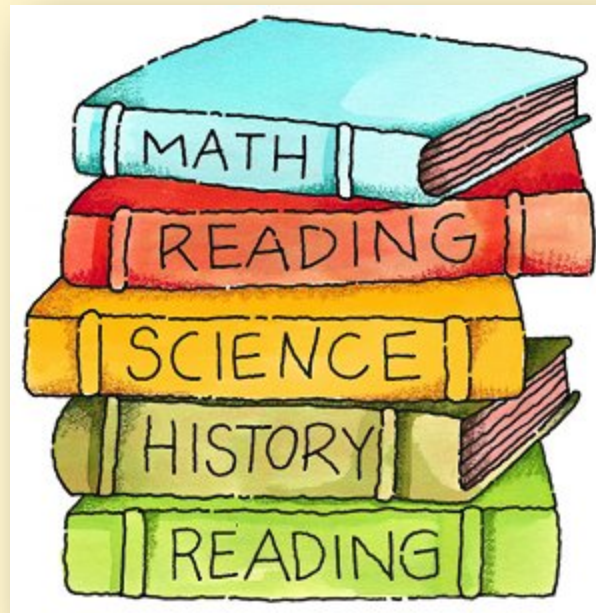
For more Space Use codes, see page 71 of the [Appendices to the Reporting and Procedures Manual](#).



Common Codes (cont.)

❖ CIP (Think in terms of discipline)

- Too many to list.
- For most academic disciplines: visit <http://www.txhighereddata.org/Interactive/CIP/>.
- For additional codes: visit page 36 of the [Appendices to the Reporting and Procedures Manual](#).



Common Codes

❖ FUNCTION (Think in terms of broader CIP codes and people's titles)

- 11—General Academic Instruction (always associated with 000000 CIP)
- 22—Individual or Project Research
- 33—Community Services
- 41—Library Services
- 45—Ancillary Support
- 46—Academic Administration
- 54—Financial Aid Administration
- 61—Executive Management
- 62—Financial Management and Operations
- 63—General Administration/Logistical Services
- 64—Administrative Computing and Telecommunication Support
- 73—Custodial Services
- 02—Custodial Areas
- 03—Mechanical Areas
- 05—Public Restrooms



For more Function codes, see page 110 of the [Appendices to the Reporting and Procedures Manual](#).

How to Certify Your Survey?

- ❖ Fill out the Space Representative Survey (both parts if applicable)
- ❖ Email to ASUfacilities.inventory@angelo.edu
- ❖ Deadlines: (we will send reminder emails)
 - Part I Main Space Representative Survey: **Friday, September 15, 2017**
 - Part II Predominant Use Survey: **Friday, September 29, 2017**





to Help you Certify

- ❖ Facility Inventory Web site: <http://www.angelo.edu/services/facilities-inventory>
(linked on the Facilities Management Web site)
 - Floorplans of all buildings
 - Additional codes linked from THECB Web site
 - Presentation and handouts
 - Terms and definitions
 - Space Allocation and Alteration Request Form (SAARF)
 - Space Planning and Utilization Guide

Reminders

- ❖ Please fill out our questionnaire about your workshop experience. An email link will be emailed to you.
- ❖ Survey Deadlines:
 - Part I Main Space Representative Survey: **Friday, September 15, 2017**
 - Part II Predominant Use Survey: **Friday, September 29, 2017**



Questions?

Contact us:

ASUfacilities.inventory@angelo.edu

or 942-2102

