

Higher Education Consulting Services

March 1, 2022

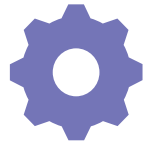


**Improving your
Space Management Process**

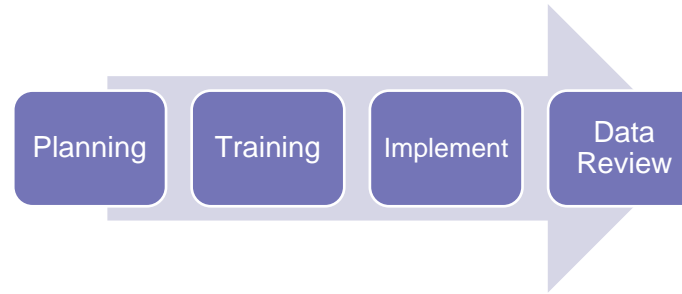
Agenda



**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

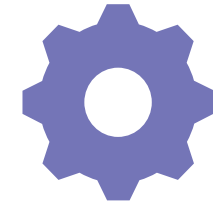
The process of assigning institutional space into 2 CFR 200 (Uniform Guidance) functional categories based on the usage of the space

Paper or Electronic

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

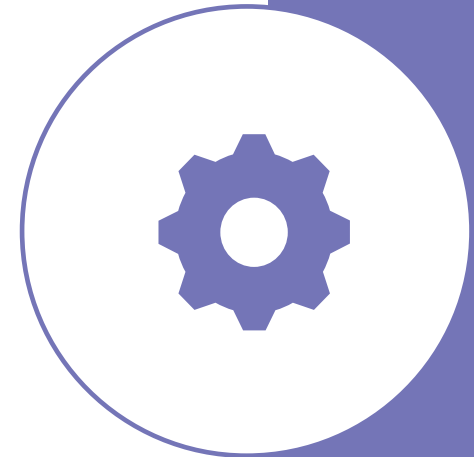
OR%

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

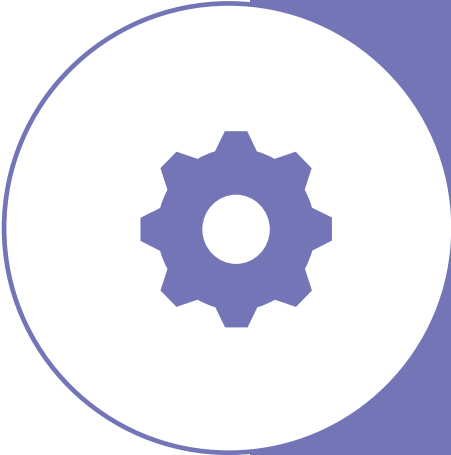
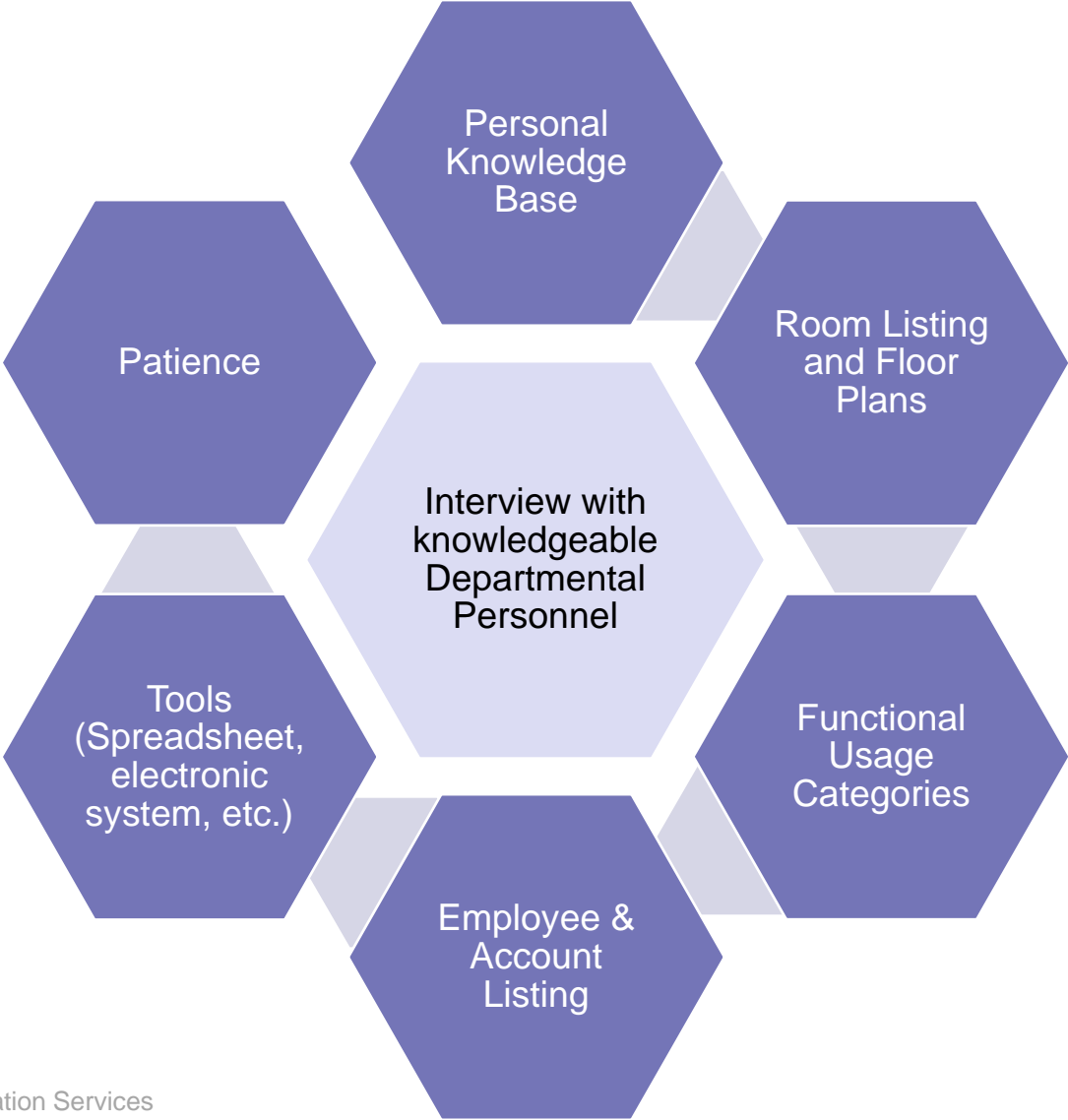


What is a Space Survey?

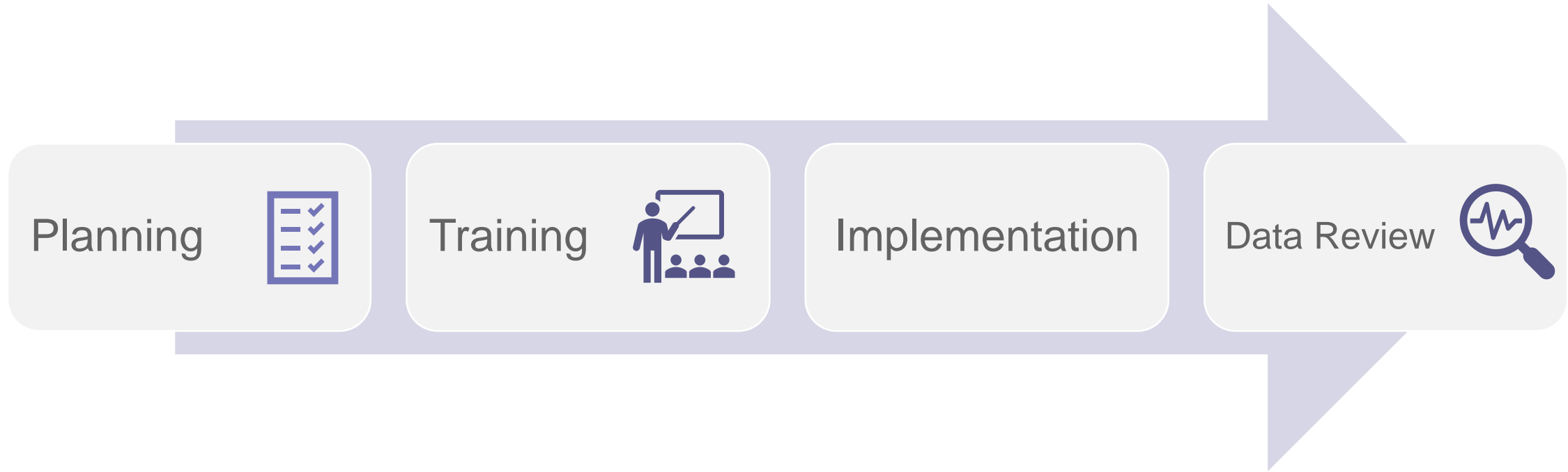
- The survey supports the development of the institution's F&A rate proposal
 - Can also assist university facility, administrative and academic personnel in planning future space use.
- Used to allocate facilities costs – building and equipment depreciation, interest, and O&M
- Admin capped, so any 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



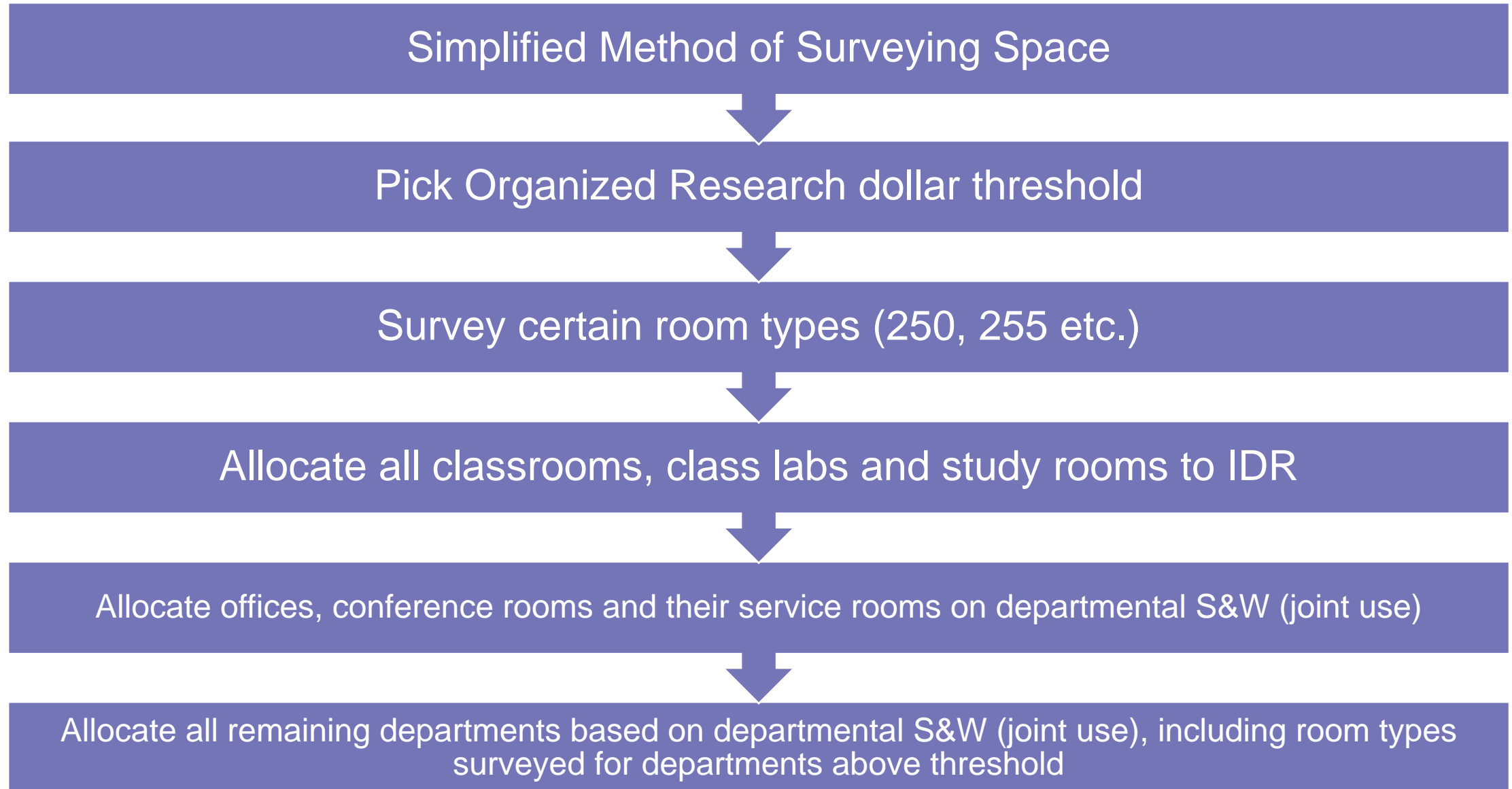
The Space Survey Process



Space Survey Tasks: Typical vs. under Covid-19

Space Survey Task	Typical	Under Covid-19
Gathering the Data	Meet with various campus representatives to inform of data needed	No change; meetings had to be done remotely
Loading and validating the Data	Review the data for accuracy	No change
Training Materials Preparation	Prepare training materials; hands-on scenarios	Prepare training materials. General demo – no hands-on practice
Conducting Training	In a lab setting, with hands-on exercises; face-to-face	Via Zoom (other web tool); general demonstration of scenarios. No face-to-face interaction.
Completing Space Survey	Depending on what system is being used – can be done on-site or remotely	Mostly done remotely
Department One-on-One meetings	Face to face; walk the space; review latest progress	Via Zoom; record the sessions; post on university website use Zoom for ad hoc questions/issues

CAS Best Practice Manual – Alternate Space Methodology

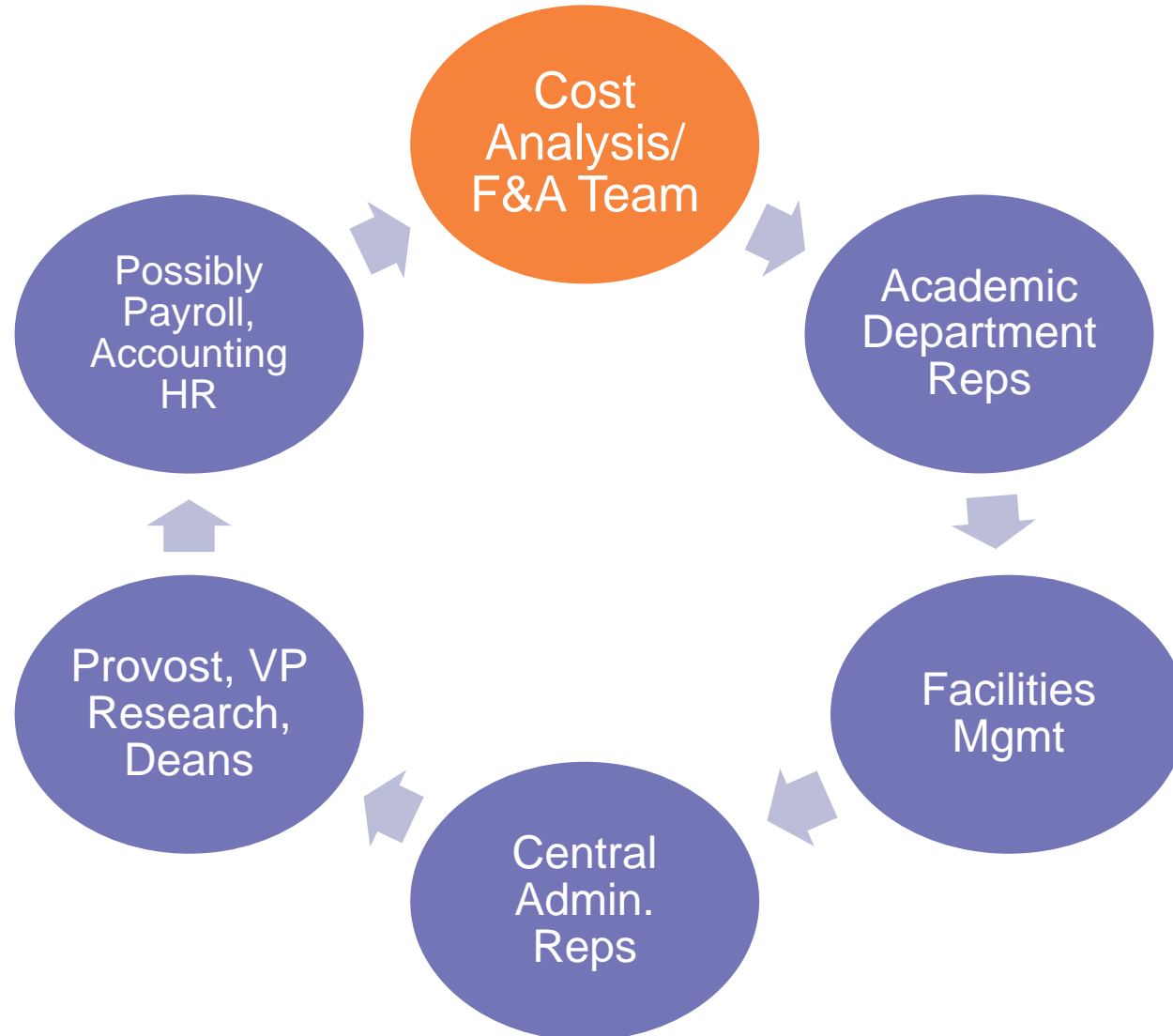


Planning

- Identify the space team
- Determine the timeframe and sequence of events
 - Conduct in base year, if possible
 - Allow enough time to complete – depends on scope
- Review, update and/or develop space survey policies, procedures, and definitions consistent with Uniform Guidance and Best Practices Manual



Planning – The Space Team



Planning

- Communication
 - Senior Management (Deans, Department Heads, etc.)
 - Departments
- Management issue for departments to get the right people for the assigned tasks
- Accurate facilities information
 - Inventory - what space you have
 - Survey - how that space is used
- Are there other uses for space data?



Training

- Extremely important element of the process
- Training follow-up can save headaches during review process
- Functional definitions
- Space assignment and types of space
- Room occupants treatment – paid and unpaid
- Funding sources
- Special circumstances
- In-house or Maximus
- Remote training and review
 - Provide recording and other materials



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



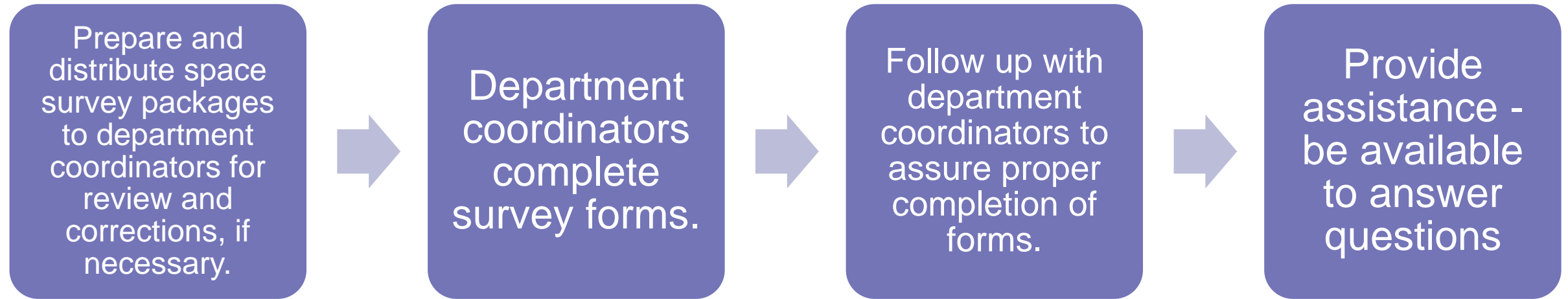
*This says
“organized research”*

*This says
“organized research”*

Physics Department



Implementation



SPACE SURVEY PACKAGE

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

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



Data Review

- Review detail for:
 - Research Labs 100% to Organized Research or 0% Organized Research
 - 95/5 syndrome
 - Visiting faculty – how were they accounted for?
 - GRA's – how were they accounted for?
 - Vacant space – was it coded according to definition?
 - Coding inconsistent with room type (for example, DA function should not be used in Research Labs)



Important Considerations

- Professional judgment is the key; not an “exact” science.
- Results should be accurate and supportable
- The room should be surveyed by an individual with knowledge of its use.
- Survey based on the entire FY usage.
- Appropriate training is necessary.
- Consistency across departments
- Recharge Centers (i.e. electronic repair shop) should be coded based on client usage
- Start-up funds, seed money, bridge funds, and dept funded research are IDR, not OR
- Consider COVID-impacted space as if the work was being conducted as usual (not Vacant)



Things to Keep In Mind under COVID-19

- 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
- **Web**SPACE



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 databases; 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

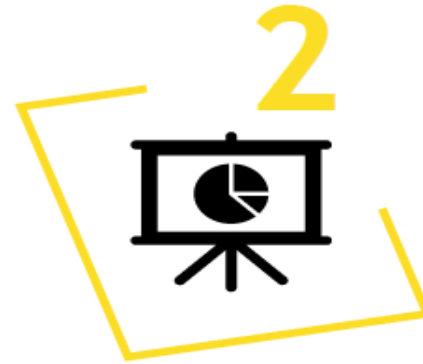
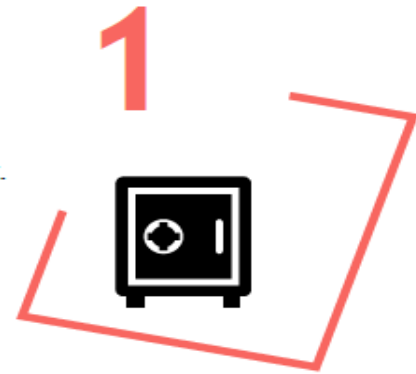


Used by **over 75** Universities

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**

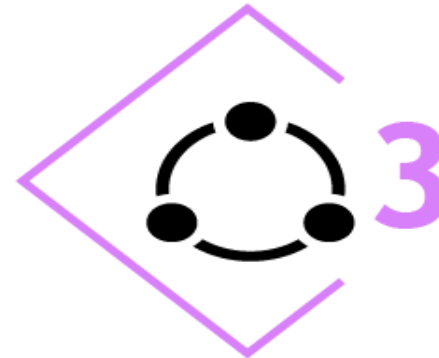


Management Reporting

- 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

- Survey Completion Report:

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
10.001	Training Dept 001	32	0	32	0.00%	Adams, Grant
2201	General Sciences	111	24	135	17.78%	Adams, Grant

- Survey Results Report:

Survey Results by Department/Sub Department

Assignable Square Footage by Department

Department	INS	OSA	OR	OIA	Total
2201-General Sciences	2,182	138	6,469	114	8,902
Total:	24.5%	1.6%	72.7%	1.3%	8,902

WebSpace Reporting

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

Department: 2201 - General Sciences (Edit)

Assigned Department Coordinator:	Adams, Grant			Assigned Audit Department Coordinator:	
Total Number of Rooms:	305	Total ASF:	106,934		
Number of Rooms Initiated:	269 (1)	ASF:	92,488		
Number of Rooms Inventoried:	36 out of 268	ASF:	12,892	Percent Inventory Completion:	13.43%
Number of Rooms Surveyed:	24 out of 135	ASF:	8,902	Percent Survey Completion:	17.78%

Number of Employees in Department:	161 (46)	Link to Occupant Identified/Not Identified
Number of PIs in Department:	11	Link to PI
Number of Clusters:	5	Link to Cluster
Number of Shared Rooms:	8	
Number of Accounts:	44 (25)	Link to Account used/not used

WebSpace Reporting – Summary by Function, Bldg, Room type

Assignable Square Footage by Function

INS	OSA	OR	OIA	Total
2,182	138	6,469	114	8,902
24.5%	1.5%	72.7%	1.3%	100.0%

Assignable Square Footage by Building

Displaying 3 of 3 records

Building	INS	OSA	OR	OIA	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1001-Building One	1,292	137	5,243	114	6,786
1003-Building Three	4	1	13		18
1006-Building Six	886		1,213		2,099
Total:	24.5%	1.6%	72.7%	1.3%	8,903

Assignable Square Footage by RoomType

Displaying 2 of 2 records

Room Type	INS	OSA	OR	OIA	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
250-RESEARCH LAB OTHER	2,002	134	6,272	106	8,514
255-RESEARCH LAB SERVICE	181	4	197	8	389
Total:	24.5%	1.6%	72.7%	1.3%	8,903

WebSpace Reporting – Summary by PI

Assignable Square Footage by PI/ PO

Displaying 9 of 9 records

PI/PO	Number of Rooms	Total ASF	INS	OSA	OR	OIA
CLINTON, LEON	2	661	53		47	
FIBER, STEVEN	3	1,232			94	6
GUSTAVSON, RENE	1	145	50		50	
KEYES,RACHEL	1	305	13	18	62	7
N/A	3	179	72		24	4
PANERA, CHRIS	6	3,510	36		64	
STEVENSON, JAMIE	6	2,662	8	3	89	
TILAPIA, DAVID	1	110	95		5	
WANG,JANE	1	99	14	3	83	
Total:	24	8,903	25%	2%	73%	1%

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



- **Strategic Asset Management**
Tuesday, 2pm eastern, March 29, 2022
- **Grants Management** – April 2022
- **Fringe Benefits Proposal** – May 2022
- **Service Centers** – June 2022
- **Short Form F&A Proposals** – July 2022
- **Using Trend Analysis in CRIS** – August 2022



Questions?

thank
you

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