Annual Space Survey – 2018

Kick-Off & Town Hall

September 25, 2018

WELCOME

Thank you to all of our Archibus users for joining us for our 3rd Annual Archibus Survey!

We appreciate your support in helping to continuously improve our system and data accuracy.

AGENDA

1. **Space Survey Overview**
   - Welcome – Introductions
   - New this year
   - Timeline
   - System Changes
2. **Importance of Accurate Data**
3. **Space Survey Support**
4. **F&A Survey Information**
5. **Q & A**

ANNUAL SPACE SURVEY

The Space Survey is a process that is conducted on a yearly basis to enable staff to provide an accurate accounting of UCSF space and occupancy data during a designated time period.

o Campus Planning coordinates the space survey process, and organizes the data for UCOP reporting.

o Archibus room and Occupancy data is used as the base data for the F&A Indirect Cost Recovery Survey.

o This is NOT a UCSF Health Space Survey

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WHO UPDATES UCSF SPACE?

Role	Archibus Access	Business Process Responsibilities
Coordinator Department /Unit level space manager	• **Universal read access** including floor plans • **Edit access** for their assigned DeptIDs only	✓ Maintains and updates Department's/Unit's assigned space in Archibus ✓ **Conducts Space Survey for assigned departments** ✓ **Clicks the "Complete Annual Space Survey" button to Complete Space Survey**
Strategist Control Point level oversight of space management	• **Universal read access** including floor plans • **Edit access** for their control point DeptIDs • **Approval access** for Department Assignment & Loan fields if data changes are within their control point	✓ All Coordinator responsibilities plus: ✓ For control point, Is the space point of contact ✓ **Reviews progress of Space Survey for designated Control Point and follows up with Coordinators as needed for completion of the Survey.**

*Please refer to "**User Roles**" Report in Archibus.*

NEW THIS YEAR – 2018

- A modified Facilities and Administrative (F&A) Survey will be performed in conjunction with the 2018 Annual Space Survey.

  - The F&A Survey has been conducted in the past using the SIS system. This will be the first time using Archibus

- The involved departments have already been notified with detailed instructions needed for participation.

- More details on the F&A Survey to be provided by the Budget and Resource Management (BRM) Team later in the presentation.

TIMELINE FOR 2018 SPACE, F&A SURVEY

Date	Activity
Space Survey	
Sept. 25th 2018	2018 Annual Space Survey begins
Dec. 4th 2018	2018 Annual Space Survey ends
Dec 12th 2018	Space Data will be reported to UCOP
Nov 16th 2018	Cut-off date for adding any new Space Coordinators
F&A Survey	
Oct 4th 2018	F&A Survey begins on this day
Ad-hoc Sessions	F&A Working groups will be scheduled with BRM Team
Dec 21st 2018	F&A Survey Ends on this day for all end-users involved
Dec – March 31st 2019	BRM Team review of F&A Survey

Start early to allow time for discussion with your department and any questions for System Admins and BRM Admins.
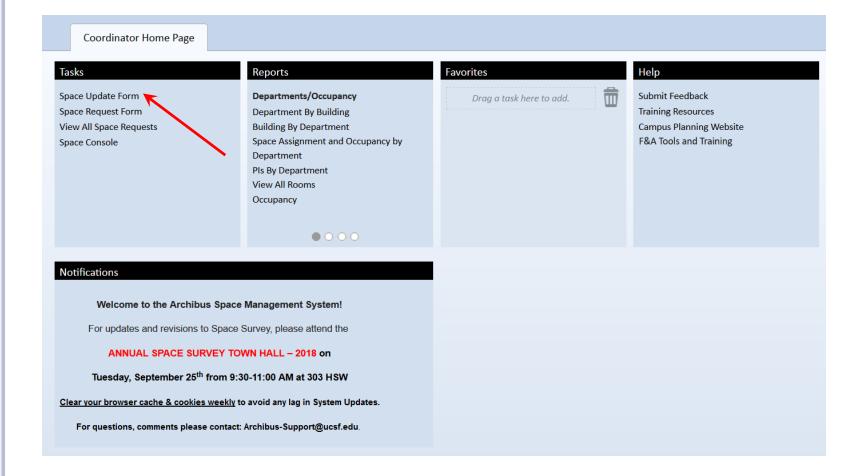
HOW TO ACCESS ARCHIBUS

ARCHIBUS HOME PAGE

- Archibus Home Page (user role is viewable on Home Page)
- Important information under Notifications Section
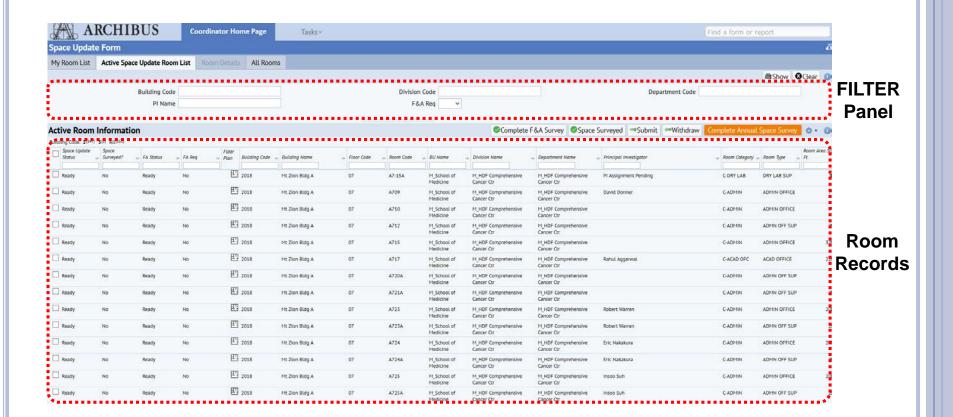- Training resources link: https://space.ucsf.edu/2018-annual-space-survey

ACCESSING THE SPACE UPDATE FORM

Coordinator Home Page

Tasks
Space Update Form
Space Request Form
View All Space Requests
Space Console

Reports
Departments/Occupancy
Department By Building
Building By Department
Space Assignment and Occupancy by Department
PIs By Department
View All Rooms
Occupancy

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Favorites
Drag a task here to add.

Help
Submit Feedback
Training Resources
Campus Planning Website
F&A Tools and Training

Notifications

Welcome to the Archibus Space Management System!

For updates and revisions to Space Survey, please attend the

ANNUAL SPACE SURVEY TOWN HALL – 2018 on

Tuesday, September 25th from 9:30-11:00 AM at 303 HSW

Clear your browser cache & cookies weekly **to avoid any lag in System Updates.**

For questions, comments please contact: Archibus-Support@ucsf.edu.

ACCESSING THE SPACE UPDATE FORM

FILTER Panel

Room Records

SPACE UPDATES VIA BULK UPLOAD

Certain fields can be uploaded in bulk in coordination with System Admins

o Division/ Department (within Control Point/ BU)

o Room Categories/ Type

o Station Counts

For more details, please refer to Job aids to Bulk-Upload Room data at:
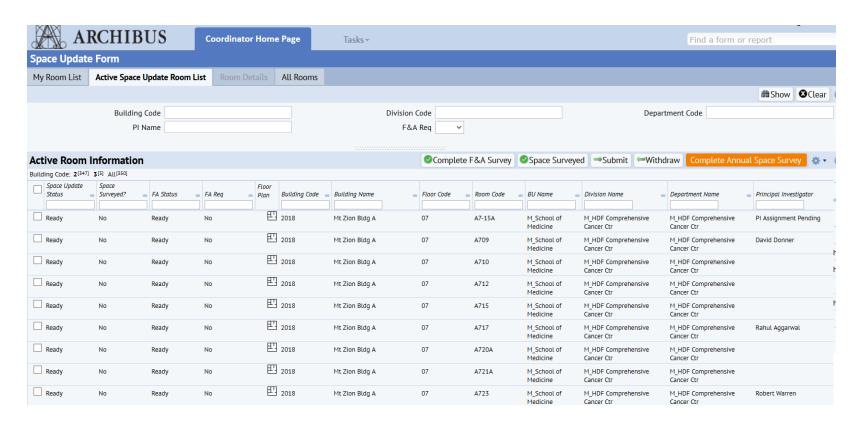
https://space.ucsf.edu/2018-annual-space-survey

Bulk-Upload for Employee Locations is not available at this time

Assistance to **upload/edit Employee Occupancy data** is available

SYSTEM CHANGES TO SUPPORT THE F&A SURVEY

o Specific departments are included in the modified F&A survey this year

o Changes to the **Space Update Form** tabs as well as to the Standard Survey Process flow will affect all users during the F&A survey period.

o Once the F&A survey period ends, the changes are hidden and modified process flow will return to the standard space update maintenance process.
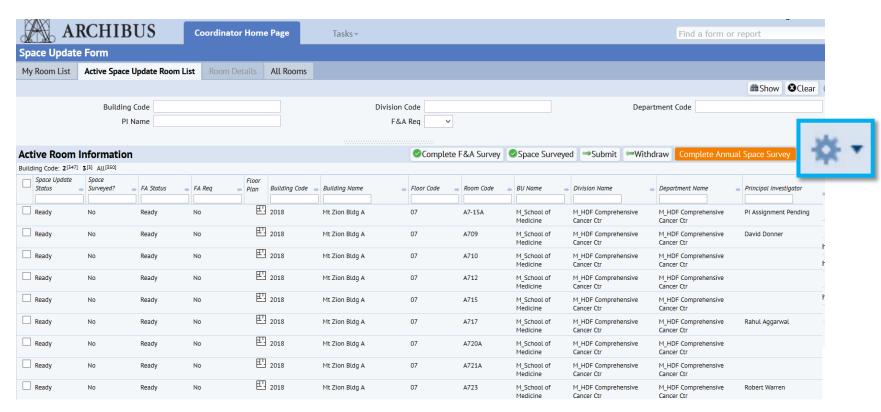
NEW IN SPACE UPDATE FORM

o **Filter panel** – New Filters added
  - PI Name, F&A Req

NEW IN SPACE UPDATE FORM

- o **Additional Field Updates**
  - Space Surveyed?
  - FA Status
  - FA Req
  - Principal Investigator
  - "Space Status" renamed to "Space Update Status"
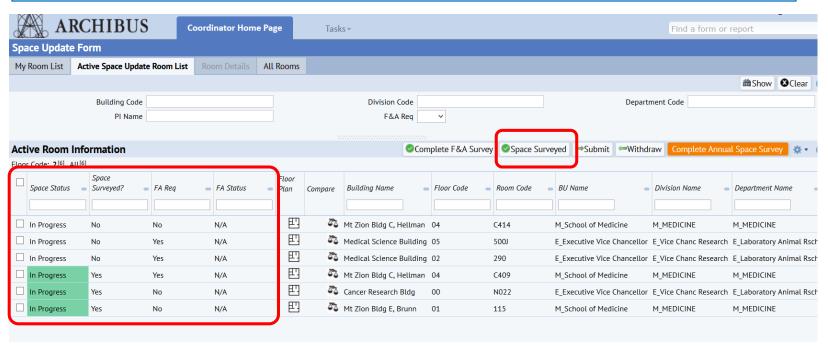
Space Status flow during Survey

```
┌─────────────────┐
│                 │
│                 │
│     Ready       │
│                 │
│                 │
└────────┬────────┘
         ▼
┌─────────────────┐
│                 │
│                 │
│   In Progress   │
│                 │
└───┬─────────▲───┘
    ▼         │
┌─────────────────┐
│   Submitted-    │
│    Pending      │
│    Approval     │
└─────────────────┘
```

✓ Rooms are ready to be Surveyed
✓ Action: Check out Room

✓ Space Updates to rooms that do not require Admin or Strategist approval will remain in a Space Status of "In Progress"

✓ All Rooms will remain in "In Progress" Status until the F&A Survey is complete

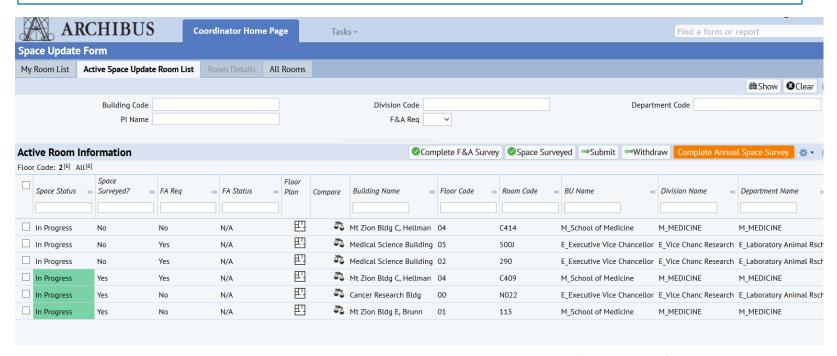✓ At the end of the F&A Survey, the standard Space Update process is followed.

NEW 'SPACE SURVEYED' FEATURE

- Will help Coordinators track Survey progress
- Changes **'Space Surveyed?'** rooms from **No** to **Yes**
- Highlights Space Status for rooms in **green**.
- For Shared Rooms, highlights the Space Status in **green** for the logged in Coordinator when he/she completes an update for their portion of the room.
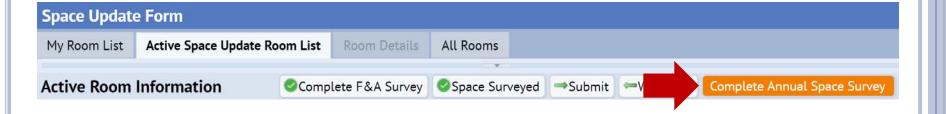
NEW 'SPACE SURVEYED' FEATURE

- All Rooms will be required to be marked as "**Space Surveyed**" by Space Coordinators before the end of Space Survey Dec 4th 2018. **(F&A and Non-F&A)**

- Any rooms left over as Not Surveyed after Dec 4th will be assumed as Surveyed by Coordinators and marked as 'Surveyed' by System Admins.

For more details, please refer to Job aids at :

https://space.ucsf.edu/2018-annual-space-survey

WHEN/WHO TO CLICK THE ORANGE BUTTON

Space Update Form

| My Room List | **Active Space Update Room List** | Room Details | All Rooms |

Active Room Information ✅ Complete F&A Survey ✅ Space Surveyed ⇒ Submit ⇐ ← **Complete Annual Space Survey**
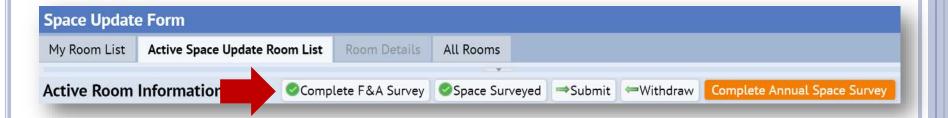
- The Complete Annual Space Survey button is only active during the Space Survey period

- Within a department, Coordinator(s) should collaborate with other coordinators (if multiple) and only click the "Complete Annual Space Survey" button when all rooms for the department (in Archibus – Division) are updated.

- Strategists should only click the "Complete Annual Space Survey" button, if there are No Coordinators assigned for certain departments within their control point and <u>Only</u> after all other Coordinators within their control point have completed their survey.

  When a Strategist clicks the "Complete Annual Space Survey" button, the action applies to all of the rooms for their Control Point.
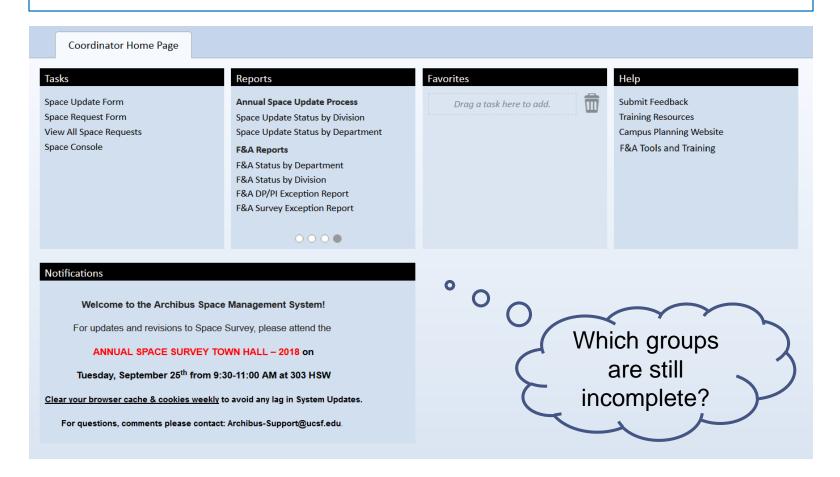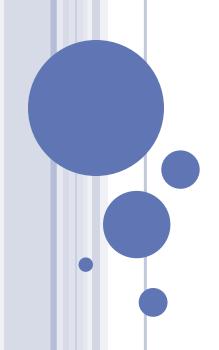
COMPLETE F&A SURVEY BUTTON

o Coordinators **not involved** in F&A Survey 2018 can disregard the 'Complete F&A Survey' button

o Coordinators **involved** in F&A Survey 2018 need to click on 'Complete F&A Survey' prior to F&A Survey end date.

o Training will be provided for Coordinators participating in the F&A survey by the BRM Team.

REPORTING: SURVEY PROGRESS

Reports are available for both Space and F&A Survey to track progress by Division and Department.

THE IMPORTANCE OF ACCURATE SPACE DATA

SPACE DATA

Accurate space information is important to UCSF

✓ Provides the means for effectively managing our growing space at UCSF

✓ Helps us understand what's going on in our buildings

✓ **Required for the Annual UCOP Space Update report**

SUPPORTING DATA INTEGRITY

Focus on Space Update, particularly these fields:

- ✓ Department Assignment and Percentage %
- ✓ Room Category/ Room Type
- ✓ PI Assignment or 'PI Assignment Pending' rooms
- ✓ Station Counts
- ✓ Loan Information
- ✓ Employee Occupancy

"We're ready to scrub the data." #betterdata

TIPS ON SUPPORTING DATA INTEGRITY

Some clues and tips that can help you find data anomalies for your department's space assignment:

o Confirm accuracy of **Research Rooms** with '**PI Assignment Pending**' Status

o Cross reference **Station count, Employees Assigned** and **Availability** field

o Rooms that are **occupiable** (assigned to your department) and are **shown without employees**

o **Employees** from your department and **have no space assignments** in the system

o Update Employees' **primary location** and if appropriate, multiple locations

ROOM CATEGORY/ TYPE

○ Room Use (*pre-2015*) is now Room Category and Type

○ Room Type reflects the **predominant** use of the space in terms of "activity" in the room

○ Campus Room Categories begin with "C-"; Medical Center Categories begin with "M-"

Room Type Reference Guide is available at:

https://space.ucsf.edu/archibus-training-materials

DEPARTMENTS BENEFIT FROM SPACE SURVEY

o Space is a valuable asset managed directly by your department. Stay well informed on how your space is used, so that you can manage your space and employee locations.

o Ensure PIs in your department get credit for the space *(during ICR Benchmarking process)* they are assigned to the research associated rooms.

Room Category	Room Type
C-ACAD OFC	ACAD OFFICE
C-ADMIN	ADMIN OFFICE
C-ADMIN	ADMN OFF SUP
C-DRY LAB	DRY LAB
C-DRY LAB	DRY LAB SUP
C-WET LAB	WET LAB
C-WETLAB SUP	ANIMAL HOLD
	ANIML PROCED
	CHEM WEIGH
	CLOSET
	COLD RM
	COMPUTATION
	DARK RM
	EQUIPMENT
	FUME HOOD
	GLASS WASH
	HISTOLOGY
	LAB BREAK RM
	LAB ISOTOPE
	LIQ MED PREP
	MICRO IMG
	TISSUE CULT
	WARM RM
	WET LAB SUP

Room Type definitions: "Office"

Academic Office: A room used by faculty, department chairs, *academic* deans, and other academic instructional appointees (e.g., lecturers, instructors) teaching assistants, emeriti, or postdoctoral scholars, to perform their desk-based academic work.

Admin Office: A room used by administrative staff, including academic administrative staff (e.g., administrative deans, provosts, directors), to perform their desk-based administrative work.

Reference: Facilities Inventory Guide, University of California, Office of the President.

"Wet" Labs and "Dry" Labs

"Wet" Lab (Research Lab): A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program, *if the setting requires laboratory equipment… or structural support beyond that of an office.*

"Dry" Lab (Research Office):, A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program and *which primarily contains office-type accommodations*. Includes offices in which professional and staff researchers and graduate students engage in *desk, computer, or table top research…*

Reference: Facilities Inventory Guide, University of California, Office of the President.

SUPPORT AREAS AND NON-ASSIGNABLE SPACE

Research Lab or Office Support : A room that directly serves one or more primary research offices as an extension of the activities in those rooms. Included are coatrooms, supply and storage areas, records rooms, *private (restricted access) circulation areas*, etc., if they serve research labs or offices.

Circulation Area (Non-assignable): *Restricted access private circulation* aisles used for circulation within an organizational unit's suite of room, auditoria, or other working areas… *should not be included in Circulation Area (Non-Assignable).*

Reference: Facilities Inventory Guide,

University of California, Office of the President.

STATION COUNTS

o **What counts as a Station**

  • The number of actual Stations which will adequately accommodate users in a particular room

  • Conference rooms – Count only the designed capacity of chairs and not extra chairs that have been placed in the room

  • Research Station – A typical research Station consists of one bench and one desk. *(There are rare exceptions)*

o **Why it is important – for capacity and availability of space**

  • Develop and explore new metrics for Strategic Planning

    • ASF per Station

    • ASF per Employee

    • No. of Stations per Employee

o **This field is not editable by users, but please contact System Admins archibus-support@ucsf.edu, if this field needs to be updated.**

WHERE ARE YOUR EMPLOYEES LOCATED?

○ Update employee locations in Archibus!

○ Easiest way to do this is via the Space Update Form

○ Every employee who requires a Station, should be located in a room.

○ If you have multiple employee updates and need help, please reach out to System Admins for assistance.

○ When an employee is removed from a room, and not reassigned the employees location will appear as 'Location Required' in the UCSF Directory.

○ System Admins will perform a periodic review of 'Location Required' employees.

SPACE SURVEY

Support

DROP-IN SESSIONS

Weekly Drop-In Sessions for assistance with Space Survey
Weekly drop in sessions will be available during the Annual Space Survey to answer any questions.

Check-ins	System Admins will be doing check-ins with Strategists every 3 weeks to review survey progress and other updates

Meeting Date	Time	Location
26-Sep	9:00 - 12:00	654 Minnesota, Embassy Room
3-Oct	9:00 - 12:00	Parnassus Library, CL201
10-Oct	9:00 - 12:00	654 Minnesota, Embassy Room
16-Oct	9:00 - 12:00	Parnassus Library, CL215
17-Oct	9:00 - 12:00	654 Minnesota, Roxie Room
23-Oct	9:00 - 12:00	Medical Science Building, S226
30-Oct	9:00 - 12:00	654 Minnesota, Roxie Room
8-Nov	9:00 - 12:00	Parnassus Library, CL201
13-Nov	9:00 - 12:00	654 Minnesota, Roxie Room
28-Nov	9:00 - 12:00	Parnassus Library, TBD

* Complete schedule for weekly drop-in sessions available here:
https://space.ucsf.edu/2018-annual-space-survey

VISIT SPACE.UCSF.EDU

https://space.ucsf.edu/2018-annual-space-survey

Archibus Administrators

o Campus Planning is the system administrator and campus resource for all Campus Archibus Users.

- System Access
- System Training

o How to reach us
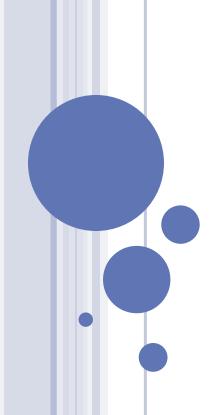
archibus-support@ucsf.edu

Phone:

- Ritesh Khanna: 415-502-3341
- Lisa (Lettau) Rolfsness: 415-502-6446
- Bob Pizzi: 415-476-6510
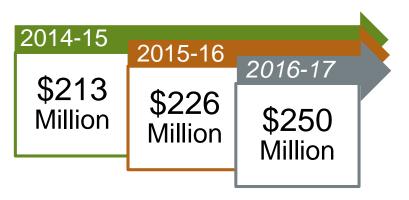
F&A

Modified Survey

Facilities and Administrative (F&A) Survey

○ What is an F&A Survey?

An F&A survey is a way to identify how space is used for development of F&A rates

○ Why is an F&A survey needed now?

In preparation for the F&A base year (2019-20), a modified F&A space survey will be conducted this year (2018)

○ Will this be done every year?

F&A functionalization may or may not be included each year, application will be strategically reviewed and determined

WHY IS THE F&A SURVEY IMPORTANT FOR UCSF?

o UCSF receives reimbursement for costs based on negotiated rates

o Rates are based on analysis including review of space (facilities) costs allocated according to how the space is utilized

2014-15

$213 Million

2015-16

$226 Million

2016-17

$250 Million

o Allocation is based on either general department detail or specific departmental assignment

o Recovered costs are used to support building debt payment, operations and maintenance of facilities, sponsored project support and more

o Continued assessment of F&A space detail is necessary to optimize campus F&A rate(s) and related recovery

2018's F&A Survey Population

o Selected departments need to identify activity by function with funding support for research rooms in selected buildings

o 5 Departments
  ❖ Neurological Surgery
  ❖ IND Neurodegenerative Diseases
  ❖ Neurology
  ❖ HDF Comprehensive Cancer Center
  ❖ Cardiovascular Research Institute

o 4 Buildings
  ❖ Diller Cancer Research Building
  ❖ Sandler Neurosciences Building
  ❖ Smith CVRI Building
  ❖ Dolby Regeneration Medicine Building

o Only Research Room types
  ❖ Research Lab and Research Lab Support (Wet Lab & Support)
  ❖ Research Office and Research Office Support (Dry Lab & Support)

KEY 2018 F&A SURVEY POINTS

o Departments selected for specific functionalization departments may need draw on additional support for help defining specific activity and funding (for example MSO's or PI's)

o An F&A Focus Group Training Session will provide additional details Thursday October 4, 2018 from 9:00-11:00 AM for selected departments

o Follow up working sessions will be scheduled to support completion for the identified departments

o For questions related to F&A see the Budget & Resource Management Team:
Darryl Lim, Morissa Gleichenhaus, Garret Jang

QUESTIONS & ANSWERS