Space Survey Guide

Contact Space Inventory with questions (SpaceInventory@utdallas.edu | 972-883-6201).

Purpose

All public higher education institutions in the State must submit an annual facility inventory report to the Texas Higher Education Coordinating Board (THECB). The amount, type, and use of physical space are among other components used to determine each institution’s funding both current and projected.

In addition, facilities inventory information is used by UT Dallas to negotiate Federal Facilities and Administration rates for research grants and for federal reporting of associated research space. The UTD Facilities Management Space Inventory division is responsible for submitting these reports.

Conducting an annual Space Survey is the tool used to ensure accuracy in UTD’s reporting. Departments on campus are responsible for identifying Space Inventory Contacts (SIC). SICs are charged with completing their department’s Space Survey and ensuring the information they submit to Space Inventory is correct and current.

Introduction

As your department’s designated SIC, you are responsible for completing the annual Space Survey accurately and within the designated time frame. The information you are required to provide consists of THECB codes, occupant information, and other characteristics unique to each room assigned to your department or unit.

Surveys will be placed on Box.com and organized by department; the Space Inventory team will let you know when you receive access to your department’s survey(s). Please allow sufficient time to complete your review prior to or by the closing date. There is an entry for every room assigned to your department or unit, and each space can take a few seconds to a few minutes to complete.

Only designated SICs who have completed Space Survey training will be sent the Space Surveys by the Space Inventory team.

If you are not currently a SIC and need to become one, please contact Space Inventory to request authorization. This may be done via email at SpaceInventory@utdallas.edu or by phone at (972) 883-6201. You may also complete the SIC Change Form online. Approval by your dean, VP, or department head is required.

Accessing the Survey
Space Surveys will be accessible via Box.com. You will receive an automated message from Boox.com inviting you to your department’s Space Survey folder. Surveys will be formatted in Microsoft Excel.

Floorplans will also be included in your Box.com folder. If, while completing the survey, discrepancies are found on the floorplan, please submit a Report a Floorplan Discrepancy form online.

**SIC Deputies**

Space Inventory Contacts (both primary and secondary) are responsible for making sure their survey is completed by the established deadline. If needed, SICs can ‘deputize’ others in their area to assist them with completing the survey. Deputizing others may be a good option if your department has numerous sub-departments/programs with their own space. Once a SIC has a deputy(ies), they can share data and information needed to complete the survey with their deputy(ies).

If a SIC deputizes others to assist them in completing their space survey, the SIC is still held accountable for the information submitted to the FM Space Inventory division.

**Completing the Survey**

The survey will open to the list of rooms specific to your department, and will display information such as building and room number, space use code, area (square feet), department, etc. **Only those rooms that are currently assigned to your department or unit will appear in your survey.**

The survey consists of room information that is displayed horizontally. The first four columns of your survey will list the building code, building name, floor number, and the room number. All subsequent columns contain information pertaining to the room identified in the 4th column (Column D). See Figure 1 for a visual that shows how the information on the Space Survey is displayed.

Here are the steps we suggest SICs follow to complete their survey:
1. Go to the building identified in Columns A and B. Use your floorplan to find the room listed in column D.

2. Confirm or change the following:
   a. Room number (in Column D) – Is the room number in your spreadsheet on the floorplan and displayed in the building?
      i. **Yes:** Move on to Step 2b.
      ii. **No:** If you found the location of the room using the floorplan but the signage displayed in the building does not match Column D in the spreadsheet, record the displayed number. Enter the correct room number in Column E (Revised Room Number) and submit a **Report a Floorplan Discrepancy** form online to have the floorplan updated.

      If you found the room number without the floorplan because it was missing or incorrect, make a note on the floorplan and submit a **Report a Floorplan Discrepancy** form online.

      If the room number is missing on the floorplan and you can’t find it, notify the Space Inventory team.

   b. Department Code (in Columns F and G) – Is this the department using the room?
      i. **Yes:** Move on to Step 2c.
      ii. **No:** Enter the correct department code in Column H (Revised Department)

   c. Space Use Code (in Columns I and J) – Is the correct Space Use Code used (see our Space Use Code Reference Sheet)?
      i. **Yes:** Move on to Step 2e.
      ii. **No:** Enter the correct Space Use Code in Column K (Revised Space Use).

   d. Seat Capacity (in Column L) – This refers to the number of occupants in an applicable room (see Question #16 in our FAQ sheet for the list of applicable rooms). Is the number shown correct?
      i. **Yes:** Move on to Step 2d.
      ii. **No:** Enter the number of seats in the room in Column M (Revised Seat Cap).
e. CIP 1 (in Column N) – This is the Classification of Instructional Program Code used to describe the academic program taking place in the room. **Reminder:** Each space can have up to three different CIP Codes associated with it. This column is for the 1st CIP code associated with the space. Does the code in Column N reflect the type of program housed in the space?
   i. **Yes:** Move on to Step 2f.
   ii. **No:** Enter the correct CIP Code in Column O.

f. Function 1 (in Column P) – This code identifies the type of activity which takes place in the room (e.g., education, research, student services, etc.). **Reminder:** Each space can have up to three different Function Codes associated with it. This column is for the 1st Function code associated with the space. Does the code in Column P reflect the type of activity occurring in the space?
   i. **Yes:** Move on to Step 2g.
   ii. **No:** Enter the correct Function Code in Column Q.

g. Room Percent 1 (in Column R) – This percentage is prorated according to the percent of time the space is used for each CIP and Function code. **Reminder:** Each space can have up to three different Function Codes associated with it. This column is the percentage for the 1st CIP and Function codes entered in Columns N and P. For example, if the room is used for instructional purposes 100% of the time, the Room Percent entry would be 100; if the room was used for instructional and research purposes equally, then the Room Percent entry would be 50 (with a 2nd Room Percent Entry of 50). Does the percentage in Column R reflect the amount of time that the room is used for the CIP and Function codes entered in Columns N and P?
   i. **Yes:** Move on to Step 2h.
   ii. **No:** Enter the updated percentage in Column S.

h. CIP 2 (in Column T) - This is the Classification of Instructional Program Code used to describe the academic program taking place in the room. **Reminder:** Each space can have up to three different CIP Codes associated with it. This column is for the 2nd CIP code associated with the space. **If a 2nd code is not needed, then ignore this step.** Does the code in Columns T reflect the type of program housed in the space?
   i. **Yes:** Move on to Step 2i.
   ii. **No:** Enter the correct CIP Code in Column U.

i. Function 2 (in Column V) – This code identifies the type of activity which takes place in the room (e.g., education, research, student services, etc.). **Reminder:**
Each space can have up to three different Function Codes associated with it. This column is for the 2nd Function code associated with the space. If a 2nd code is not needed, then ignore this step. Does the code in Column V reflect the type of activity occurring in the space?
   i. **Yes**: Move on to Step 2j.
   ii. **No**: Enter the correct Function Code in Column W.

j. Room Percent 2 (in Column X) – This percentage is prorated according to the percent of time the space is used for each CIP and Function code. Reminder: Each space can have up to three different Function Codes associated with it. This column is the percentage for the 2nd CIP and Function codes entered in Columns N and P. If a 2nd code is not needed, then ignore this step. Does the percentage in Column X reflect the amount of time that the room is used for the CIP and Function codes entered in Columns T and V?
   i. **Yes**: Move on to Step 2k.
   ii. **No**: Enter the updated percentage in Column Y.

k. CIP 3 (in Column Z) – This is the Classification of Instructional Program Code used to describe the academic program taking place in the room. Reminder: Each space can have up to three different CIP Codes associated with it. This column is for the 3rd CIP code associated with the space. If a 3rd code is not needed, then ignore this step. Does the code in Columns Z reflect the type of program housed in the space?
   i. **Yes**: Move on to Step 2l.
   ii. **No**: Enter the correct CIP Code in Column AA.

l. Function 3 (in Column AB) – This code identifies the type of activity which takes place in the room (e.g., education, research, student services, etc.). Reminder: Each space can have up to three different Function Codes associated with it. This column is for the 2nd Function code associated with the space. If a 3rd code is not needed, then ignore this step. Does the code in Column AB reflect the type of activity occurring in the space?
   i. **Yes**: Move on to Step 2m.
   ii. **No**: Enter the correct Function Code in Column AC.

m. Room Percent 3 (in Column AD) – This percentage is prorated according to the percent of time the space is used for each CIP and Function code. Reminder: Each space can have up to three different Function Codes associated with it. This column is the percentage for the 3rd CIP and Function codes entered in
Columns Z and AB. **If a 3rd code is not needed, then ignore this step.** Does the percentage in Column AD reflect the amount of time that the room is used for the CIP and Function codes entered in Columns Z and AB?

i. **Yes:** Move on to Step 3.

ii. **No:** Enter the updated percentage in Column AE.

3. Repeat Steps 1 through 2m for all the spaces identified on your survey.

4. Once your survey is completed, fill out and submit the [Space Survey Submittal Form](#). Be sure to attach your completed Space Survey!

5. Answer any follow-up questions the Space Inventory has regarding your survey submittal.
### General Room Information

| A | B           | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | AA | AB | AC | AD | AE |
| BLD Code | BLD Floor | Room Number | Revised Room Number | Dept Code | Dept Name | Revised Department Code | Space Use Code | Space Use Description | Revised Space Use | Revised Space Use Capacity | CIP1 | Revised CIP1 | Function1 | Revised Function1 | Percent 1 | Revised Percent 1 | CIP2 | Revised CIP2 | Function2 | Revised Function2 | Percent 2 | Revised Percent 2 | CIP3 | Revised CIP3 | Function3 | Revised Function3 | Percent 3 | Revised Percent 3 |

**Figure 1.** Visual example of Space Survey layout.