University of Texas at Dallas
Space Survey Training
A Brief Training Presentation on Conducting Annual Space Inventory Surveys
This Presentation Covers...

• Introduction to Space Reporting
• Space Survey Process
• Your Role as a Space Inventory Contact (SIC)
• Resources & Forms
• Space Survey Timeline
• Contact Information
Space Reporting at UT Dallas

The Department of Facilities Management’s Space Inventory division reports all UT Dallas space to the Texas Higher Education Coordinating Board (THECB) annually.
What is a Space Survey?

• A Space Survey is an annual departmental survey of the campus room inventory.
• Departments review the room usage and space utilization for their designated areas that were reported to the THECB in the prior year.
• Departmental space surveys are collected by the Space Inventory division and reconciled with the current THECB Facilities Inventory Listing. The revised data is verified, updated, and sent electronically to the THECB.
**Who Completes a Space Survey?**

- **All** academic and non-academic departments and units on campus must complete the annual UTD Space Survey.

- **Space Inventory Contacts (SICs)** are selected from each department to verify the information, descriptions, and classification of the spaces in their areas.
  - If needed, SICs can select **Space Inventory Deputies (SIDs)** to assist in completing their survey. Deputizing others may be a good option for departments that oversee several sub-departments/programs or own a large volume of spaces.
Why Conduct a Space Survey?

• Ensures the submittal of an accurate record of space to THECB.
• Reports submitted to THECB impacts:
  ➢ UTD’s Legislative State appropriations.
  ➢ Amount of Higher Education Funds (HEF) received.
  ➢ Qualifications for Tuition Revenue Bonds (TRBs) for new buildings.
  ➢ F&A (Facilities and Administrative) Federal funding for research space.
How to Complete a Space Survey

1. Review Space Survey Spreadsheet
2. Review Coding Documents
3. Tour Your Space
4. Update & Submit Survey Spreadsheet
How to Complete a Space Survey

1 Review Space Survey Spreadsheet

- Your annual Space Survey will be sent by the Space Inventory team as an Excel spreadsheet containing rooms currently assigned to your department.
- Spreadsheet displays information such as:
  - Building Name and Code
  - Department Name and Code
  - Room Number
  - Space Use Code
- We recommend taking a look at this spreadsheet before you tour your area. You’ll be making updates to it later.
How to Complete a Space Survey

Review THECB Coding Documents

- The THECB has coded and defined all campus spaces.
- Helpful Appendices (found [here](#)) will help clarify and determine how a space should be coded. Includes:
  - Classification of Instructional Programs (CIP) Codes
  - Space Usage Codes
  - Functional Category Codes
  - Building Codes
- Take a minute to review the coding documents (including our [Quick Reference Guides](#)) to familiarize yourself with the codes that apply to your area.
How to Complete a Space Survey

3 Tour Your Space

- We recommend walking around your area with your Space Survey spreadsheet and floorplan in hand and taking notes on any updates that need to be made.
- Keep an eye out for:
  - Room numbers on signage
  - What the rooms are being used for & who is using them
  - Seat capacities (if required for space type)
  - Discrepancies on floorplan
  - Rooms that belong to your department but aren’t on your Space Survey spreadsheet.
How to Complete a Space Survey

Update & Submit Survey Spreadsheet

- Use your walkthrough notes to enter updates in the “Revised” columns highlighted yellow in the Space Survey Spreadsheet.

- To submit your completed survey, fill out the Space Survey Submittal Form with your completed spreadsheet attached.

Need Help? Refer to our Space Survey Guide and email questions to SpaceInventory@utdallas.edu
Space Inventory Contact Responsibilities

- Participate in Space Survey training
- Complete annual Space Surveys on behalf of your department
  - Elect Space Inventory Deputies (SIDs) for help in completing your survey, if needed
- Notify the Space Inventory division of space changes that occur between surveys
Quick Reference Guides

- Space Survey Guide
- FAQs
- Training Slides *(this presentation)*
- Space Use Codes
- Function Codes
- CIP Codes
- Department Codes
Space Inventory Contact Forms

• Space Survey Forms
  • Space Survey Training Request
  • Report a Floorplan Discrepancy
  • Space Survey Submittal Form
  • SIC Feedback Form
• Other Forms
  • Space Change Form
  • SIC Change Form
Space Survey Timeline

Below is a general timeline for UT Dallas Space Surveys. Please contact the Space Inventory team for your department’s upcoming survey deadlines.

<table>
<thead>
<tr>
<th>APRIL – AUGUST</th>
<th>JULY – SEPT</th>
<th>ON/BEFORE SEPT 30</th>
<th>OCTOBER</th>
<th>NOVEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SURVEYS SENT</strong></td>
<td><strong>SURVEYS REVIEWED</strong></td>
<td><strong>SURVEYS SUBMITTED</strong></td>
<td><strong>UPDATES MADE IN FIMS</strong></td>
<td><strong>RETURN FEEDBACK</strong></td>
</tr>
<tr>
<td>Space Inventory Division sends Survey spreadsheets to Space Inventory Contacts</td>
<td>Space Inventory Contacts compare their department’s space with the information listed on the spreadsheet and enter updates.</td>
<td>Space Inventory Contacts submit completed surveys to Space Inventory Team</td>
<td>Space Inventory Division verifies Space Survey findings and enters data in Facilities Inventory Management System (FIMS).</td>
<td>Space Inventory Contacts return feedback forms to Space Inventory Division.</td>
</tr>
</tbody>
</table>

Allow yourself plenty of time to complete your survey!
Space Inventory

A Division of UT Dallas
Facilities Management

(972) 883-6201
SpaceInventory@utdallas.edu
utdallas.edu/facilities/inventory