

# Louisiana State University Health Sciences Center Space Survey Presentation

- Presented by  
Jim Vitale & Associates  
(214) 213-8073  
[JimVitale@att.net](mailto:JimVitale@att.net)  
January 22-23, 2020



1

## Presentation Agenda



Why do a space usage study



What is a space usage study



How do we complete the survey



What is the survey process

2



## Why do a Space Inventory

- Stats are used to allocate O&M, Building & Equipment depreciation
- 2 CFR Part 200 (formerly known as A-21) requires an update every 4 years
- Primary purpose is to acquire accurate information about University space to enable University to recover its costs



3



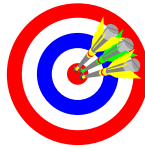
## What is a Space Inventory?

- Functional coding of all University space based on actual use during Fiscal Year 2020.
- Functional coding definitions comply with Federal regulations, 2 CFR 200.
- Unrestricted revenue generation device.

4

## Importance of Survey

- A large portion of the indirect (F&A) costs recovered by the University are dependent on the space inventory .23 points out of 47.
- Accuracy and consistency of the space coding is *critical*.



5

## Typical Survey FAQs

- What does a room usage survey mean?
- Why are you asking me?
- Why do you need to know these details?
- Why is it so important?
- What is 2 CFR Part 200 (formerly A-21)?
- Is this going to increase the rate?
- What year are we talking about?
- Aren't all rooms alike?
- Are you going to take away my space?

6



## How to complete the survey

- Space Survey Team(s)
- Define the space
- Identify the space by type (office, lab, etc)
- Create survey instrument
- External quality control review

7

## Survey room data on a building and departmental basis

- Room type
- Departmental responsibility
- Primary and secondary occupants
- Source of funding
- Programmatic activity statistics in specific percentage terms

8

LSU HEALTH SCIENCES CENTER - NEW ORLEANS  
FY 2020 SPACE INVENTORY  
ROOM SURVEY FORM

| Room Description                                                                                               | Functional Usage                                                       |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| Building: <input type="text"/>                                                                                 | Instruction/Departmental Research <input type="text" value="0%"/>      |
| Floor: <input type="text"/>                                                                                    | Organized Research <input type="text" value="0%"/>                     |
| Room Number: <input type="text"/>                                                                              | Other Sponsored Activities <input type="text" value="0%"/>             |
| Square Footage: <input type="text"/>                                                                           | Other Institutional Activities <input type="text" value="0%"/>         |
| Room Type Code: <input type="text"/>                                                                           | Joint Benefit <input type="text" value="0%"/>                          |
| Room Type Desc: <input type="text"/>                                                                           | Departmental Administration/University <input type="text" value="0%"/> |
| Department: <input type="text"/>                                                                               | Departmental Administration/Hospital <input type="text" value="0%"/>   |
| Dept. Usage %: <input type="text"/>                                                                            | Specialized Service Facilities <input type="text" value="0%"/>         |
| <b>Research Projects</b><br><small>Use Sponsored Research Projects</small>                                     | Library <input type="text" value="0%"/>                                |
| <input type="text"/>                                                                                           | Operation and Maintenance <input type="text" value="0%"/>              |
| <input type="text"/>                                                                                           | General and Administrative <input type="text" value="0%"/>             |
| <input type="text"/>                                                                                           | Sponsored Projects Administration <input type="text" value="0%"/>      |
| <input type="text"/>                                                                                           | Student Services <input type="text" value="0%"/>                       |
| <input type="text"/>                                                                                           | Patient Care <input type="text" value="0%"/>                           |
| <input type="text"/>                                                                                           | Vacant <input type="text" value="0%"/>                                 |
| <input type="text"/>                                                                                           | GRAND TOTAL <input type="text" value="0%"/>                            |
| <b>Room Occupants</b><br><small>(PIs, Research Associates, Technicians, Post Docs, Grad Student, etc.)</small> |                                                                        |
| <small>Emp# ID</small>                                                                                         | <small>Name and Title</small>                                          |
| <small>Emp# ID</small>                                                                                         | <small>Name and Title</small>                                          |
| <small>Emp# ID</small>                                                                                         | <small>Name and Title</small>                                          |
| <b>Comments</b>                                                                                                |                                                                        |
|                                                                                                                |                                                                        |
| Dept. Representative: <input type="text"/>                                                                     | Surveyor: <input type="text"/>                                         |
| Principal Investigator: <input type="text"/>                                                                   | Survey Date: <input type="text"/>                                      |

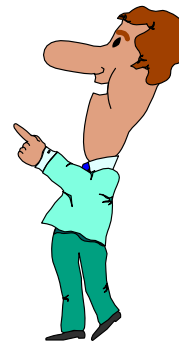
Jim Vitale & Associates, Inc. Use back of form if necessary

9



## What is the Process?

- Process
- Definitions
- Documentation
- Special considerations
- Follow-up



10

## Process

- Survey team contacts the department and schedules a meeting
  - Interviews (3-5 minutes per room)
  - Interviews limited to 1.5 to 2 hours, if longer second interview is scheduled
- In advance of meeting, departments are provided copies of definitions and room lists.
- Prior to meeting, department representatives are asked to add employee information and grant account numbers to individual rooms.
- Survey team arrives for meeting department representative

11

## Process – cont'd

- Survey Team reviews 2 CFR 200 definitions with department representative
- Using floor plan the department's space is identified
- From the department representative
  - Is the space ours?
  - Who is in the space?
  - What is the space used for?
  - How is the activity funded?
  - If sponsored research, how is it funded

12

## Process – cont'd

- Functionalization – what is that?
- Functionalizing a room in a space study – is the process of assigning a percentage to a specific function. Such as
  - Organized research 80%
  - Instruction/Dept research 20%Or
  - Organized research 45%
  - Instruction/Dept research 15%
  - Department Administration 40%

13

## Function/Percentages – But How! For Labs and Lab Services

- Think about how the space activity is funded
- For the people working in that room how are they paid?
- For the non-salary expenses in that room how are they paid?
- Total that funding by 2 CFR 200 definition (we'll help) and create a ratio



14

## Key Definitions for Departments

- 2 CFR 200 separates and groups activities differently from how a university may look at funding activities
- There will be areas and activities where the line between functions is blurry. Because the opportunity for enhanced information is greater from following this process, there is greater effort associated with it.
- Let's talk about key definitions

15

## There are Three Types of Research:

- Departmental Research
- University Research
- Organized Research



16



## Joint Benefit Space

Under 2 CFR 200 costing principles, the University is looking for a reasonable and defensive means for allocating the costs and space of service areas that benefit more than one project or more than one function. Joint benefit rooms are typically space within an academic or research department that serve multiple projects or program classifications. Example might include hot/cold rooms, autoclaves, specialized research equipment (electron microscopes, etc.). If these items were inside a research laboratory then the cost of this equipment would be allocated to the program classifications occurring in that lab.

17

## Departmental Administration University

- Space that supports activities including administrative and supporting services that benefit common or joint departmental activities or objectives in academic deans' offices, academic departments and divisions and organized research units. Organized research units include such units as institutes, study centers, and research centers. Examples include conference rooms and copy rooms.

18

## Departmental Administration Hospital

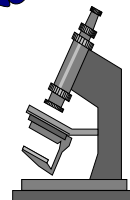
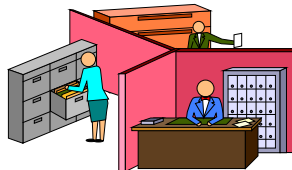
- Space used for administrative support activities for hospital departments and outpatient clinics providing inpatient or outpatient health care services to LSUHSC-NO patients.

19



## Documentation

- Who used the space during FY2020
- How was it used
- How was it funded (Chartfield Strings)
- Special considerations



20

## Special Considerations

- Institutes & Centers of Excellence Funding
- Graduate students
- Post-docs and Fellows
- Faculty offices
- Visiting/Emeritus Faculty
- Individuals supported by other institutions or agencies



21

## Next Steps

- Departmental cooperation
- Provide interview packets
- Schedule departmental interviews
- Complete department surveys
- Perform quality control reviews
- Finalize statistics



22