FACILITIES & ADMINISTRATIVE COST

Space Usage Certification Training

February - May, 2012
The packet you received includes the following:

- **Sample Space Certification Form**
  - Printing your Department(s) Space Certification Form FY2012
- **FRH0003 Contact and Grand Ledger Executive Summary by Index**
  - Sample Report with Instructions.
- **Space Management FAMIS-Self Service Training**
  - Upcoming FAMIS Training Classes
    - Register through Learning Central
  - Upcoming FAMIS Open Labs
    - Register through Learning Central
- **F&A Cost Space Usage Certification Instructions**
- **Certification of Space form**
- **A printed version of this presentation**
Space Usage Certification Session Agenda

- Overview
  - Why is Space Usage Certification Necessary?
  - What is the Process?
  - What is the Space Validation?
  - What is Space Usage Certification?
  - Who Completes it?
  - Components

- Space Use Definitions
- Completing the Space Usage Certification
- Timeline
- F&A Space Survey Contacts
- Questions
Overview: Why is this Necessary?

• **NOTE:** This process will **NOT** change or reduce your space allocation!

• The *Space Usage Certification* is critical for the development of the institution’s Facilities and Administrative (F&A) rate proposal.

• *Space Usage Certification* has become the primary focus for government review of the F&A proposal.

• Current UNM F&A negotiated rate is 51%

• FY11 F&A Generated Revenue:
  - Main/Branch Campuses - $21,026,496
  - HSC Campus - $24,370,443
Overview: What is the Process?

**STEP ONE**
Assign Contacts for FAMIS

- Announcement of Facilities Space Validation and Cert.

- Departments to Assign Contacts
  - FAMIS Database Training for Assigned Contacts
  - Contact(s) Verify Access and Rights to Space FAMIS Database

**STEP TWO**
Space Validation

- Assigned Contacts(s) Verify and/or Correct Space in Database

  - Visual Map Tool
  - Space Survey Tool

**STEP THREE**
Space Usage Certification

- Assigned Contacts(s) Verify and/or Correct Space Usage in Database

  - Visual Map Tool
  - Space Survey Tool

**ITEMS TO VALIDATE:**

1) Department(s) are in the buildings they occupy
2) Department(s) are in the rooms they occupy
3) Correct building name and number
4) Correct room number and type
5) Square footage is correct (estimate, don’t remeasure)

**INTERVIEW KNOWLEDGEABLE DEPARTMENTAL PERSONNEL FOR:**

1) Room’s departmental functional use categories
2) Room’s employee room assignments
3) Banner Index **Added 4/16/2012** Information for organized research, sponsored instruction, and sponsored public service (use drop down menu in FAMIS)
Overview: What is *Space Validation*?

- **What is *Space Validation*?**
  
  Validation in FAMIS of:
  
  - Department owner of space (organization code)
  - Building Name and Number
  - Room Number
  - Room Type (e.g. office, research laboratory, classroom, conference room, etc.)
  - Square footage (estimate based on judgment, don’t measure!)
Overview: What is *Space Usage Certification*?

- *Space Usage Certification* is the process of assigning institutional space into OMB Circular A-21 usage categories based on how space is used for the period July 1, 2011 through June 30, 2012.

- The results are used to calculate the percentage of total UNM space used to conduct sponsored research, instruction and public service.
Overview: Who Completes Certification?

• Completed by the Space Contact/FAMIS departmental coordinator

• Information for the Usage Certification comes from your own knowledge and from those who are most familiar with the activities conducted in departmental space. The following people can provide valuable information and insight as to how a room is used:

  – Department Administrators
  – Department Space Coordinators
  – Department Chairs
  – Principal Investigators
Overview: What gets certified?

• Information Certified:

  – How the space was used during July 1, 2011 through June 30, 2012 – what happened in percentages for each specific room during FY2012

  – Banner Index Information for Organized Research, Sponsored Instruction, and Sponsored Public Service (using drop down menu in FAMIS.)

  – If available, Employee Information (using drop down menu in FAMIS.)
Space Use Definitions

For Academic Departments:

(ORR) ORGANIZED/SPONSORED RESEARCH: Sponsored and Institutional Research and Development separately accounted for (has its own index)

(SI) SPONSORED INSTRUCTION: Instructional or training activities established by a grant, contract, or cooperative agreement

(OSA) OTHER SPONSORED ACTIVITY (Public Service): Project established by a grant, contract or cooperative agreement that is not ORR or SI

(DR) DEPARTMENTAL RESEARCH: Research that is NOT funded by a contract or grant

(INS) INSTRUCTION: All activities that are a part of the instructional program

(DA) DEPARTMENTAL ADMINISTRATION: Administrative and supportive services that benefit an academic department
For Academic Departments Continued:

Additional space usage categories for HSC Departments:

(HOS) HOSPITALS:  Space used for UNM Hospital Activities
(CLN) CLINICS:  Space used for UNM Outpatient Clinics
For Non Academic Departments:

(GA) GENERAL ADMINISTRATION: General executive and administrative offices and other activities that benefit the entire university

(LIB) LIBRARIES: For the operation and administration of the libraries in the university library system

(OM) OPERATION AND MAINTENANCE OF PLANT: Administration, supervision, operations, maintenance, protection of physical facilities

(SAS) STUDENT ADMINISTRATION AND SERVICES: Administration of student affairs and for services to students

(SPA) SPONSORED PROJECTS ADMINISTRATION: The Pre-Award and the Contract and Grant Accounting Offices, and Research Center’s administration costs
Space Use Definitions (Continued)

Non Academic Departments Continued:

(OIA) OTHER INSTITUTIONAL ACTIVITY: Activities that are normally considered auxiliaries and athletics (Museums and Galleries, Student Activities, Public Relations, Development, Alumni, Auxiliaries, Independent Operations, Internal Service Centers, Bookstore)
Space Use Definitions  (Continued)

Research Centers:

**SPA SPONSORED PROJECTS ADMINISTRATION**: The Pre-Award and the Contract and Grant Accounting Offices, and Research Center’s administration costs

**ORR ORGANIZED/SPONSORED RESEARCH**: Research and Development separately accounted for (has its own index)

**OSA OTHER SPONSORED ACTIVITY (Public Service)**: Project established by a grant, contract or cooperative agreement that is not ORR or SI

**DR DEPARTMENTAL RESEARCH**: Research that is NOT funded by a contract or grant

**INS INSTRUCTION**: All activities that are a part of the instructional program

**OM OPERATION AND MAINTENANCE OF PLANT**: Administration, supervision, operations, maintenance, protection of physical facilities
Other Categories that might be used by all:

(COM) COMMON/NON-ASSIGNABLE: Stairwells, Restrooms. The Financial Services Division will complete usage of the Common Spaces.

(VAC) UNOCCUPIED SPACE: Space that is unoccupied for the entire fiscal year with no set or definite plans to be occupied within one year (can cross fiscal years). If space is only unoccupied for part of the fiscal year or has set or definite plans to be occupied within one year, assign functions according to how it was/will be used when occupied.
Completing the Certification

• After completion of the Space Validation,
  
  – Verify the room use for fiscal year 2012 by indicating the percent of total space used per functional use code.
  – Sign, scan and e-mail the Certification of Space form to:
    • Lorrie Black
      – F-and-A-Rate-Proposal@salud.unm.edu
Timeline

- February 2012 – On going: Establish and update Space Contacts
- March 1 – April 30: Validation of Space
- May 1 – June 15: Certification of Space Usage
Questions

Any questions on what we’ve discussed so far?

The remainder of the presentation will focus on accessing FAMIS.
Accessing FAMIS

• How to access the FAMIS Space Module and its information on-line
• Login to the MyUNM Portal
• On the Finance or Employee Life tab
  – Locate the UNM Business Applications
  – Under Space Management you’ll find Space Survey, Floor Plans and Reports
Accessing FAMIS

- If you do not have a UNM Business Applications Channel on your Finance or Employee Life tab you can go directly to the website.
- From the UNM home page (www.unm.edu) scroll down to the bottom
Accessing FAMIS

• In the column
  – About UNM
    • Select Campus Map
Accessing FAMIS

- On the left select Space Database (FAMIS)
Additional Resources

F&A Space Survey

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<td>Upcoming FAMIS Class and Open Labs</td>
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Certification Deadline and Contacts

- Space Usage Certification should be completed by **June 15, 2012**.

- If you have any questions regarding the survey, please email or call:

  **E-mail:** F-and-A-Rate-Proposal@salud.unm.edu
  **Phone:** 277-4560

  **Space Survey Project Manager, Lorrie Black**

  **Space Survey Support Staff:**
  - Roseanne Shaw
  - Jason Daresburg
Questions

Thank you for your attendance.

Questions?