

# Space and Movable Equipment On-line Inventory

Course Code: CPT021



THE UNIVERSITY  
OF VERMONT

Facilities Services

SPACE SURVEY

**CAS – Cost Accounting Services:**

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**CPS – Campus Planning Services:**

Joanna Birbeck and Michael Richards

FY12

(July 2011 - June 2012)

# Learning Objectives

- Gain understanding of the Importance of Space & Equipment Inventory.
- Understand the entire Inventory Process.
- How to classify functional space.
- How to inventory Movable Equipment.
- Importance of identifying all space changes whether large or small.
- Understand available reports, resources & tools.

# Key Definitions

## Facilities & Administrative Costs (F&A):

F&A costs are those that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a particular sponsored project, an instructional activity, or any other institutional activity. **3<sup>rd</sup> largest revenue source for UVM!**

Cost Groupings	Cost Pools
F – Facilities (uncapped)	Cost Allocation of Space Building Depreciation Expense Movable Equipment Depreciation Expense Operation & Maintenance Expenses Library Expenses
A – Administrative (capped at 26.0%)	General Administration Departmental Administration Sponsored Projects Administration Student Administration and Services

# Key Definitions Continued

**Base** - Modified total direct costs consists of all salaries and wages, fringe benefits, materials, supplies, services, travel, subgrants and subcontracts up to the first \$25,000 of each subgrant or subcontract (regardless of the period covered by the subgrant or subcontract).

**Income/Expense** - These activities, sometimes called “auxiliary services,” support the primary programs of instruction, research, and public service at the University.

**Organized Research (OR)** - includes all research and development activities of an institution which are separately budgeted and accounted for. This category includes research activities funded by the University or by external sponsors.

**Functional Usage Definitions:**

[http://www.uvm.edu/~cntrllrs/a21inventory/?Page=func\\_codes.htm](http://www.uvm.edu/~cntrllrs/a21inventory/?Page=func_codes.htm)

# Inventory Goal

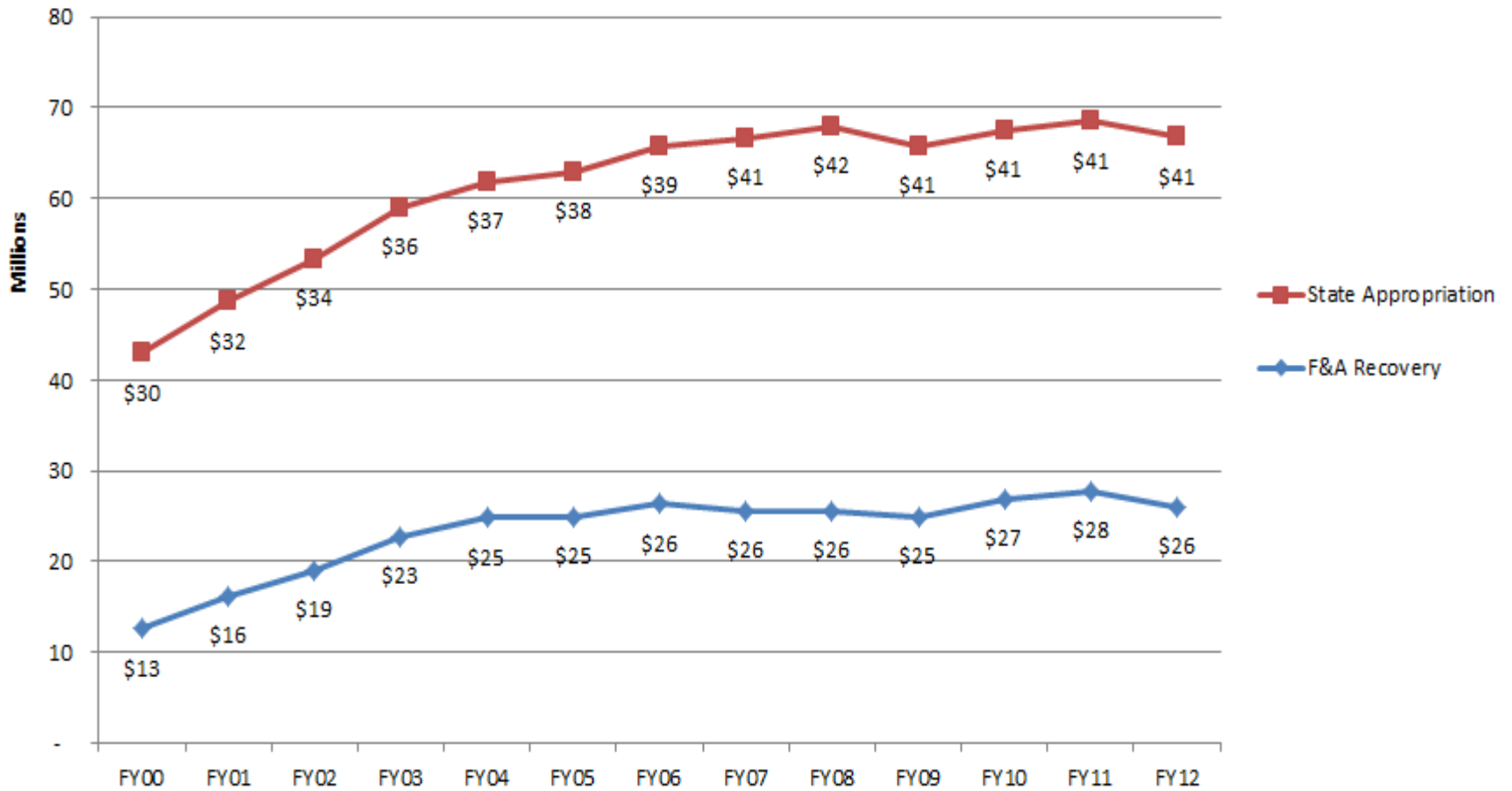
## **Departments to update Space data in three areas:**

1. Space Ownership, Room type and Room Occupants
2. Functional Activities and Funding sources of rooms
3. Movable Equipment location and Usage

## **How is this Inventory Data being used?**

This information is used for a variety of purposes predominant among them, is the calculation of the Facilities and Administrative cost rate) and Income/Expense rates. In addition, the inventory provides valuable information for space planning and management.

## F&A Recovery and State Appropriations Annual Review



# Review of the Functional Use

## Edit Functional Use Information

Site=MAIN, University of Vermont - Main : Bldg=0160, WATERMAN BLDG : Floor=02, LEVEL TWO : Room=221T, OFFICE

Location Room Info Room Use Groups Employee **Functional Use** Room Contacts Equipment Accounts Summary

Functional Use Source = Group

Group	Employee	Functional Use Code	Description	Percent	Area	Select
11270		58	Sponsored Projects Admin	<input type="text" value="100"/>	104.0	<input type="checkbox"/>
				-----	-----	
				100	104.0	

# Functionalize space usage

**Purpose:** To derive compliant rates (F&A rates and Income/expense rates) used to charge sponsored agreements and internal depts



## **Process:**

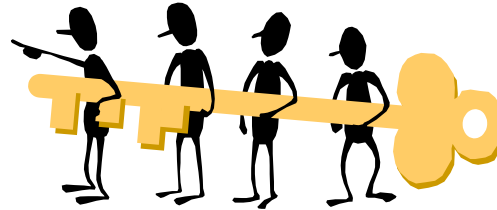
Assess each room's functional activities during the inventory year

- Identify occupants of each room
- Identify functional activities from room occupant(s)
- Identify any sponsored agreement and income/expense related chart strings funding the room's functional activities

# Space Functional Usage – Space Usage matches funding

## Key Principle in Functionalizing Space

- A room's space functional classification aligns with the functional description of the chart strings funding the activities in the room.



Space aligns Base (Salary & Wages of Occupants in space)

**Fiscal Year View of the Space : July 1, 2011 – June 30, 2012**

# Space Functional Usage – Research Definitions

## **Organized Research** (Sponsored and University)

- Sponsored Research (PS Func Codes = 311, 312, 313)
- University Research is separately budgeted and accounted for under an internal application of UVM funds (PS Func Code = 320)
- Space Functional Code for Organized Research = 22



## **Experiment Station Research**

- Federal formula grants such as Hatch, McIntire-Stennis, Multi-State, and Animal Health and individuals sponsored agreements
- Space Functional Code for Organized Research = 28
- Peoplesoft Functional Codes = 351, 352

## **Departmental Research** (Part of Instruction Function)

- Space Functional Code for Dept Research = 10
- Peoplesoft Functional Code = 2xx

# Review of the Accounts – When Required?

Location	Room Info	Room Use	Groups	Employee	Functional Use	Room Contacts	Equipment	Accounts	Summary
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## Important Chart String - Space Function Relationships

The following Functions Require Chart strings - In addition any space coded as 22 Organized Research needs ALL Chart strings funding the room entered

Description	Chart String Fund	Chart String Functions	Chart String Program	Space Functional Use Code
Organized Research		311, 312, 313, 320		22
VCHIP			0601	24
Experimental Station		351, 352		28
Public Service		401, 411, 412, 413		30
Extension		421, 422		38
Auxiliary Services	150			60
Fund~Source *	Function *	RII~Prj. ID~Prj. Act	Program *	

# Space Functional Usage – Funding Chart Strings

## **Organized Research Funded Space** (PS Func codes = 311, 312, 313, 320)

- Enter all chart strings funding a room in the Accounts tab of FAMIS Self-Service space survey.

## **VCHIP Funded Space** (PS Program code = 0601)

- Enter all chart strings funding a room in the Accounts tab of FAMIS Self-Service space survey.

## **Experiment Station Research Funded Space** (PS Func Codes = 351, 352)

- Enter any sponsored experiment station related chart string in the Accounts tab of FAMIS Self-Service space survey.

## **Income/Expense Space** (PS Fund 150)

- Enter the fund 150 chart string(s) funding a room in the Accounts tab of FAMIS Self-Service space survey.

# Space Functional Usage – Funding Chart Strings

## **Instruction Funded Space** (PS Func Codes = 211, 212, 213)

- Enter any sponsored instruction related chart string in the Accounts tab of FAMIS Self-Service space survey.

## **Public Service Funded Space** (PS Func Codes = 411, 412, 413)

- Enter any sponsored public service related chart string in the Accounts tab of FAMIS Self-Service space survey.

## **Extension Service Funded Space** (PS Func Codes = 421, 422)

- Enter any sponsored experiment station related chart string in the Accounts tab of FAMIS Self-Service space survey.

**Remaining space do not need a chartstring entered!**



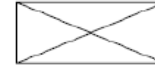
[http://www.uvm.edu/~cntrllrs/a21inventory/?Page=func\\_codes.htm](http://www.uvm.edu/~cntrllrs/a21inventory/?Page=func_codes.htm)

# Using Effort Report

Assume only occupant in an office

Report ID: UVBFFCER  
Fiscal Year: 2011

EFFORT CERTIFICATION FORM  
07/01/2010 - 06/30/2011



Page No: 1  
Run Date: 04/19/2012  
Run Time: 08:29:17

Report Parameters: Emplid:

Name	EmplID	Rcd	Effdt	Home Department	Base Salary	Term	FTE	Position
						9 Mth Fac	1.000000	

**Effort Effective Date 07-01-2010**

el	Combo Code	Account	Source	Function	Dist%	Project Descr
	000166574	54005-100-100001-0000-0000	Tenure-Track Tenured	GOF-General Operating	Instruction	95.00
	000205256	54005-100-100005-021548-0000-0000	Tenure-Track Tenured	GOF-Cost Sharing	CostShr -Rsch-Spon	5.00 USDOT - Varhue Project

**Effort Effective Date 10-01-2010**

el	Combo Code	Account	Source	Function	Dist%	Project Descr
	000166574	54005-100-100001-0000-0000	Tenure-Track Tenured	GOF-General Operating	Instruction	64.00
	000222507	54005-100-100005-022255-0996-0000	Tenure-Track Tenured	GOF-Cost Sharing	CostShr -Rsch-Spon	15.00 NASA NNX07AT56A
	000230295	54005-100-100005-022886-0000-0000	Tenure-Track Tenured	GOF-Cost Sharing	CostShr -Rsch-Spon	10.00 NASA NNX08AZ07A
	000247428	54005-100-100005-024115-0000-0000	Tenure-Track Tenured	GOF-Cost Sharing	CostShr -Rsch-Spon	11.00 NNX09A059A

**Additional Pay Distribution 07-01-2010 to 06-30-2011**

<b>07-01-2010 - 07-31-2010</b>	000166574	54005-100-100001-0000-0000	Tenure-Track Tenured	GOF-General Operating	Instruction	100.00
<b>08-01-2010 - 08-31-2010</b>	000230310	54040-300-201001-022886-0000-0000	Tenure-Track Tenured	Federal Agency	RSch-Spon	100.00 NASA NNX08AZ07A

Mos. Of use based on Effort Report 7/31/10 - 5/31/11 11 Months

# of mos.	Function	Dist %	Yrly View
1	Instruction	95%	9%
1	OR	5%	0%
8	Instruction	64%	47%
8	OR	36%	26%
1	Instruction	100%	9%
1	OR	100%	9%
			100%

Functional Space: 64% Instruction, 36% OR

## Administrative Space:

- The occupant of an office is a staff member whose one activity in the room is to provide administrative support for student services
- Occupant's salary is funded by one chart string with a function code of 701

## Assessing functional usage of space

- 1.0 FTE in the room
- One activity is function 701
- Assign space code 54 for 100% of the room

\* Majority of space will follow this example

## Income/Expense Space:

- The only occupant of a room is a staff member whose one activity in the room is to provide an income/expense service.
- Occupant's salary is funded by two chart strings
  - Chart string # 1 has a chart field fund value of 150
  - Chart string #2 has a chart field fund value of 100 and a function of 201

## Assessing functional usage of space

- 1.0 FTE in the room
- Chart string #1 is funding the income/expense activity
- Assign space code 60 for 100% of the room

## Research Lab space:

- 2 occupants use the lab room
- Occupant #1 - 50 hours per week, paid from Organized Research(OR) (function code 311)
- Occupant #2 - 25 hours per week, paid from Instruction and Dept'l Research (function code 201)

## Total occupant hours of 75 hours:

- 50 hours out of 75 = 67% Organized Research
- 25 hours out of 75 = 33% Instruction & Dept'l Research

## Assessing functional usage of space

- 67% Organized Research (space code = 22)
- 33% Instr. & Dept'l Research (space code = 10)

# Space Functional Usage – Labs and Lab Service rooms

**Principal Investigators (PI) names** are assigned to Labs & Lab Service Rooms

## Lab Service Rooms

- Functional classification follows the lab(s) it serves
- If multiple labs are served, classify lab service space by collective square footage of labs served. Example:
  - First lab is 100% Instruction (100 square feet)
  - Second lab is 100% Organized Research (200 square feet)
  - Functions for lab service room = 33% Inst, 67% OR)
- If lab services are functionally classified based on the lab(s) it serve(s), then occupants for lab service rooms are not required.
- Enter comment of your analysis

### **Research Lab space:**

- 3 occupants in the lab
- One PI, a tech, and two graduate research assistants (GRA) occupy the lab and are all paid from Organized Research funds. The GRA's occasionally use lab for studying.

### **Assessing functional usage of space**

- 95% Organized Research (OR)
- 5% Instr. & Dept'l Research (for study time)

### **Office Space:**

- A professor teaches 2 courses, has four active sponsored grants, and provides some public service. The professor states that she uses her office space primarily for research.
- The function codes of the chart strings on her effort report are consistent with how she is using her office.

### **Assessing functional usage of space**

The cumulative allocation time on the professor's effort report was as follows:

- 80% Organized Research (Space code = 22)
- 15% Instr. & DR (Space code = 10)
- 5% Public Service (Space code = 30)

The professor validated these percentages were consistent with her office usage.

# Functional Usage – Office space of a Dept. Chair

- Position #1 - .20 FTE as Professor position which is 50% funded by Organized Research, 50% funded by Instruction & Department Research
- Position #2 - .80 FTE as Dept. Admin position which is funded 100% by Instruction & Department Research
- The department chair states that he uses his space for all of his funded activities. Should the allocation be 100% department administration? No! It should be:

## Assessing functional usage of space

# of mos.	FTE	Function	Dist %	Yrly View
12	0.2 OR		50%	10%
12	0.2 IDR		50%	10%
12	0.8 Dept Admin		100%	80%
			200%	100%

## Inactive Area:

- A room is active for five months only. Four months was used for Organized Research and one month was used for Instruction and Department Research.

<u># of mos.</u>	<u>FTE</u>	<u>Function</u>	<u>Dist %</u>	<u>Yrly View</u>
4	1 OR		100%	80%
1	1 IDR		100%	20%
5				100%

**Functional Space = 80% OR, 20% Instr. & DR**

# Review of Movable Equipment

## Edit Equipment Group Information

Site=MAIN, University of Vermont - Main : Bldg=0160, WATERMAN BLDG : Floor=02, LEVEL TWO : Room=221T, OFFICE

Location	Room Info	Room Use	Groups	Employee	Functional Use	Room Contacts	Equipment	Accounts	Summary
Equipment Group	Equipment	Nomenclature			Mfr	Type	Keyword	Comment	Select
PSASSET	A068265	51060~TRUCK-PICKUP~CHEVROLET C15~C1500				PSASSET		<input type="text"/>	<input type="checkbox"/>

# Movable Equipment - Process

## Process:

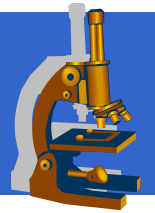
- Obtain current Dept. list of Movable Equipment by running the UVM Report [Mov Equip by Dept w/Comments](#). Download into Excel spreadsheet.
  - To obtain a job aid on how to run this report, go to the main website and click on Movable Equipment Inventory (on left side of page) or go directly to this website: [http://www.uvm.edu/~cntrllrs/a21inventory/?Page=mov\\_eqp.html](http://www.uvm.edu/~cntrllrs/a21inventory/?Page=mov_eqp.html)
  - Add a new column on your spreadsheet for entering inventory related comments
  - Also, add comments for movable equipment items in FAMIS
  
- Equipment in rooms (>5K purchasing price)
  - Identify the movable equipment item using the assigned asset tag
  - Determine the movable equipment is being actively used
  - Determine the location and record any changes
  - Update equipment in room in FAMIS as required
  - Add a comment to note any changes such as trade-ins, disposals or transfers in the movable equipment record in FAMIS

# Movable Equipment

## Process:

- Equipment not in rooms (Vehicles, non-UVM space)
  - Identify the movable equipment item using the assigned asset tag
  - Determine the movable equipment is being actively used
  - Provide a comment on pertinent information regarding moves, trade-ins, transfers or disposals in the excel spreadsheet.
  - Vehicle building = 99999, Non-UVM building = 0B012
- Inventoried items are fed to Peoplesoft Asset Management (AM)
  - Campus Planning Services imports inventoried movable equipment into FAMIS space system
  - A nightly feed is processed from FAMIS space system to PeopleSoft AM database
- Inventory Completion
  - Email a copy of your movable equipment excel spreadsheet to Cost Accounting Services ([Laurie.Desso@uvm.edu](mailto:Laurie.Desso@uvm.edu))

# Movable Equipment - Available for Transfer



**New:** Identify movable equipment available for transfer to other UVM departments for their use

## **Process:**

- Obtain approval from the Operating Unit Responsible official to identify a movable equipment item as “available for transfer”.
- Add the comment available for transfer in the comment field for the movable equipment item in the appropriate FAMIS room.
- Cost Accounting Services will identify the movable equipment item as available and the item will be included in the University’s comprehensive list of movable equipment
- A Peoplesoft Public Query called Available Mov Equip will be available to run and see which items are available for transfer.
- If the equipment item needs to be disposed of, go to the Surplus Property Disposal Program website, and fill out a Surplus Disposal Form. There is a new surplus disposal policy which will be updated soon.

# Space Data Inventory

**Purpose:** Update the FAMIS space database for effective space planning & management

**Process:**

- **Identify any missing rooms** from your department list of rooms in FAMIS. Email Campus Planning Services to add the missing rooms to your department.
- **Review data on the summary tab** of each room listed in FAMIS Self-Service Space Survey.
- **Update inventory data** in the various room tabs in FAMIS
- **Update the inventory year to 2012 and add comments** in the Room Info Tab of FAMIS Space

# Available Reports for Departments to Run

## **Department Inventory Progress Report** (Contact [michael.a.richards@uvm.edu](mailto:michael.a.richards@uvm.edu))

- Provides a report on what rooms have been inventoried
- Available by detail or in summary form
- Inventory year on room info tab must be flipped to fiscal year

## **Room Profile Information Report** (Contact [michael.a.richards@uvm.edu](mailto:michael.a.richards@uvm.edu))

- Provides detailed room information for a department or range of departments

## **Functional Classification Diagnostic Report** (Contact [laurie.Desso@uvm.edu](mailto:laurie.Desso@uvm.edu))

- Provides a list of rooms where the functional classification and the chart strings information do not match.
- All exceptions must be resolved before submission of certification materials to Cost Accounting Services

# Inventory Instructions – Getting Organized

## Inventory Guidance on Space and Equipment Web Site

<http://www.uvm.edu/~cntrlrs/a21inventory/>

## Organize Inventory Reference Materials

- Refer to checklist

# Inventory Certification – Department Requirements

- Certification Form (Located on space & equip web site)
  - Responsible official for department or unit must approve the accuracy and reasonableness of the inventory information
- Movable Equipment Excel Spreadsheet



Note: Email files to [Laurie.Desso@uvm.edu](mailto:Laurie.Desso@uvm.edu)

## Support – Who do I contact with questions?

- Contact Campus Planning Services (Michael Richards) with all FAMIS room custodial changes, room type determination, building diagram request, physical changes to the space layout, and other space data related questions.
- Contact Cost Accounting Services with questions on how to functionalize space (Jana Talcott) or questions pertaining to movable equipment (Laurie Desso)

Contact information is located on the space & equipment web site at:

[http://www.uvm.edu/~cntrllrs/a21inventory/?Page=uvm\\_contacts.html](http://www.uvm.edu/~cntrllrs/a21inventory/?Page=uvm_contacts.html)



# Inventory Milestones and Timeline

<u>Milestone</u>	<u>Deadlines</u>
FAMIS Self-Service Survey Open	April 2, 2012
FY12 Inventory Completion Deadline	June 30, 2012
Space and Equipment Inventory Info Finalized	Fall 2012
FAMIS Self-Service Survey availability	April 2013

# Learning Objectives

- Gain understanding of the Importance of Space & Equipment Inventory.
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- How to inventory Movable Equipment.
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- Understand available reports, resources & tools.