RE: PHASE 2 - SPACE ASSESSMENT SURVEY INSTRUCTIONS

December 20, 2012

Based on the February 2012 campus senior leadership update for administrative and support staff space, the Capital Planning and Space Management (CPSM) unit is providing a self-assessment tool for administrative and support staff (non-academic) space needs (Phase 2 of the Campus Space Assessment). The intent is to arrive at planning solutions that are based upon a clear, transparent, and efficient planning process consistent with established space principles issued by the Chancellor. Please refer to Phase 1 of the Campus Space Assessment for background information.

Two surveys are included in the attached tailored workbook for your area of responsibility:

- **Future Space Needs** is a survey regarding growth that should be completed by the cognizant Vice Chancellor or Principal Officer for each major functional area: the Office of the Chancellor; the Office of the Executive Vice Chancellor & Provost; the Information Technology unit; the Library; the Office of Research; the School of Engineering; the School of Natural Sciences; the School of Social Sciences, Humanities & Arts; the Division of Student Affairs; and the Division of Development and Alumni Relations; the Division of Administration; and the Division of Planning and Budget.

- **Existing Space Needs** is a survey regarding existing space that should be coordinated by each Vice Chancellor or Principal Officer for their units.

- Please complete these electronic documents by Thursday, January 31, 2013, and return them via email, to Ramona Dai'Re in Capital Planning and Space Management.

While it is our expectation that the documents are straightforward, the following comments regarding the column headings should ensure such:

**Survey of Future Space Needs:** Please review and complete the fields as indicated in the template.

- **VC or Principal Officer in Charge** – (e.g. within the Division of Administration, the Vice Chancellor for Administration submits the completed survey for her units such as: “Facilities Management”; “Business & Financial Services”; “Human Resources”; "Physical Planning, Design and Construction"; "EHS"; and so on)

- **Home Department** (units) - Payroll data were used to pre-populate this field.

- **Current Number (headcount) of Employees by Department** – Payroll data were used to pre-populate this field (count career employees only)

- **Projected Number (headcount) of Employees by Department in Three Years** – Your current best estimate. This information will also be shared with the campus Budget Office in association with a future campus budget call. (count career employees the Division of Administration )

- **Percent Telecommute** - complete for existing and future employees

- **List Preferred Unit Adjacencies** – This field is an opportunity for you to list other units who, if co-located or located near the unit under consideration, would create efficiencies for the campus or unit. You may include units outside of your functional area.
Survey of Existing Space Needs

Survey includes pre-populated worksheets with a list of all spaces assigned to your unit as indicated in Facilities Link – the official campus record for space inventories and assignments. Any blanks regarding space assignments should be completed as part of the survey using the template provided (i.e. Building and/or Room by employee the position(s) are budgeted and currently not filled.

Home Department; Home Dept. Code; Employee Name; Payroll Title Code; Payroll Title; Percent Time; Building; Room; and Appointment Type – Each field represents the current data contained within the Payroll System and Facilities Link. Please complete any blank information and edit any information you believe may be inaccurate using a tracking feature, or note. For budgeted unfilled positions please extend the rows in the template and add the position data with a note in the comment field that indicates status of the unfilled position.

Suitability for Off-campus Location – Indicate, via the drop-down box, whether this employee/function is suitable for off-campus location.

Percentage of Time in Direct Support (0% - 100%) Indicate, via the drop-down box, the estimated percentage of the employee/function duties that are spent in direct support of students, faculty instructional personnel, and research functions on-campus.

How Often Would the Employee Need to Travel to Campus Per Week? – Indicate, via the drop-down box, the required number of weekly trips from campus (or other off-site locations) that the employee/function would need to make if located off-campus. (Assume that suitable conferencing software and other electronic means of communication are available)

How Often Would Campus-Based Constituents Have to Travel to Employee Per Week? – Indicate, via the drop-down box, the required number of weekly trips from campus (or other off-site locations) that employees would need to make to interact with the employee/function if located off-campus. (Assume that suitable conferencing software and other electronic means of communication are available)

Suitability for Telecommuting – Indicate, via the drop-down box, whether this employee is suitable for telecommuting.

Additional Comments – As indicated above, please use this column to provide any revisions to the fields, such as: “Department Name”; “Employee Name”; “Payroll Title”; “Percent Time”; “Building”; or “Room,” fields as needed.

Please report any assigned space that is unoccupied at this time with a brief description/justification.

The pre-populated data is derived from a combination of personnel system data and Facilities Link data. Please correct any information that you believe may be incorrect, or no longer accurate. You may wish to provide information related to near-term changes not reflected in the provided data. If you have any questions, please feel free to contact Educational Facilities Ramona Dai’Re in Capital Planning and Space Management (209-228-2918). Results will be compiled and shared with the campus Space Advisory Committee and the senior leadership team. A summary report will be issued during Spring 2013.

PLEASE NOTE - with tremendous variation in hardware, software and browsers used on campus, there may be compatibility issues with the attached excel workbook. We request that you open the template as soon as feasible and test the drop-down menus. If you encounter problems, then contact CPSM and we will work with you to resolve the issues. For convenience, the drop-down menu choices are also listed in the column labels. The attached template was created using Excel 2010 for PCs.

John O. White
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Capital Planning and Space Management