# FY 2022 Space Training

Grants and Contract Accounting

Infrastructure and Sustainability

# Safe Harbor

The information delivered within this presentation was originally published in  April 2022.

This information, while accurate at the time, is subject to change.

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# Agenda

| Topic | Presenter(s) |
|---|---|
| Welcome | Jonathon Jeffries |
| What is a Space Survey?  What do I have to do? | Jonathon Jeffries |
| Insite Demo – How to enter data into the Survey | Lana Soroka |
| Examples, Summary, and Closing | Jonathon Jeffries |

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# What is a Space Study?



**Jonathon Jeffries**

Director – Cost Accounting

# What is a Space Survey?

- Process to identify research labs that support externally sponsored research (Organized Research)

    - Documentation in support of Facilities and Administrative (F&A) proposal
    - Major driver of <u>cost recoveries</u> for the Institute – Cash Inflow of ~85M annually
    - Covers Resident Instruction (Non-GTRI) Space Only
    - All space is reviewed but Research labs require the most data from Surveyors

- Opportunity to update Insite with any changes to space
    - Re-Orgs, Moves,  Configuration Changes, Room Use Updates

- Helps maintain compliance with Federal Tax requirements around Tax-Exempt Bond but tracking organized research

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# Space Survey Changes

- Occupant Level Data for office no longer required

  - Department assigned space is **<u>IMPORTANT</u>**

- Changes to Use Codes for Graduate Research Assistants (GRA) Offices

# Space Survey Timeline

| | |
|---|---|
| Space Survey Training | April 20 & 21 |
| Survey Distribution | Links distributed week of April 25th |
| Department Survey Completed | June 30 |
| Quality Review | July 15 |
| Surveyor Corrections Due | July 29 |
| Certifications Due | October 14 |
| F&A Proposal Due | December 31 |

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# Tools to Complete Space Survey

- Insite
  - Provides Access to Floor Plans
  - List of Grants by Principal Investigator and Department
    - Reach out to Grant and Contract contacts if grants are missing or you prefer an excel list
    - Grants will be refreshed at end of April and ad-hoc

- Grants and Contracts/INSITE Staff
  - Provide Function and Use Code Definitions and Support
  - Assist with questions about space updates and how to handle vacant or limited term space

- Department Representatives
  - Personal Knowledge of space and occupants
  - Relationship with Researchers
  - Financial Staff have direct knowledge of Grants

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# Insite Data for Review

- **Room Demographics  -**  Organization**,** room number, square footage

- **Use Code** - room use code should be confirmed or modified as appropriate

- **Station Count –** Number of workstations in labs and offices, or
   number of seats in classrooms, conference rooms and meeting rooms
   appropriate number of occupant that can occupy a space

- **Principal Investigator** - PD/PI employee name(s) required for all lab, lab service, and similar
   space with any space functionalized as Organized Research
   (List of Lab Use Codes on next slide)

- **Function Percentage** - required for labs and lab service areas only

- **Grant(s)** – required for all labs, lab services, and similar space with any space functionalized as
   **Organized Research** (Grants in Workday)

# Lab Use Codes

**<u>Open Labs</u>**

OPLBDRY - Open Laboratory - Dry

OPLBHB - Open Laboratory - High Bay

OPLBSV - Open Laboratory Service

OPLBWET - Open Laboratory - Wet

OPNLAB -Open Laboratory

**<u>Research Labs</u>**

RESLAB- Research/Non class Lab

RSLBCMP-Research/Non class Lab – Computational  <u>(No Function Required, Please Provide PI(s))</u>

RSLBDRY - Research/Non class Lab - Dry

RSLBHB - Research/Non class Lab - High Bay

RSLBSV   Res/Non class Lab Service

RSLBWET - Research/Non class Lab - Wet

TSTLAB   Testing/Services Lab

# Primary Definitions for Functions of Labs

- OR -    Organized Research

- IDR -   Instruction & Departmental Research

- OSA -   Other Sponsored Activities

- OIA -   Other Institutional Activities (3$^{rd}$ Party, Service Center)

- OTH -   All Other (Vacant)

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# Organized Research – Grant (GR) Worktag

- **<u>Sponsored Research</u>** – Externally funded and separately budgeted research and development projects; including research training

- **<u>University Research</u>** – Internally funded and separately budgeted research and development projects

  - "Committed" <u>Cost Sharing</u> Projects – Funded from GTF, GTRC, State (non-sponsored) funds (these would have a GR Worktag)

  - Other projects derived from similar sources through a competitive application and award process

# Instruction / Department Research
## Non-Grant (GR) Worktag

- **<u>Instruction</u>** – Standard Teaching and Course Work

- **<u>Department Research</u>** – Internally funded <u>General Research</u>

  - Faculty Start-Up Funds

  - GTF or GTRC Gifts that are not set up as a Cost Share Grant

  - Other Internally Funded research projects on a <u>non-competitive</u> basis, no deliverables to external sources

# Other Sponsored Activity – Grant (GR) Worktag

Externally funded projects for activities other than instruction and organized research.

This includes sponsored public service awards and community service grants that provide non-instructional services to external individuals or groups.

- EII Field Offices, other economic development activities

- Conferences, institutes, general advisory services, reference  bureaus, radio and television

- Consulting and similar non-instructional services to  particular sectors of the community

If undertaken by the Institute without outside support, then OIA

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# Other Institutional Activities

All activities <u>EXCEPT</u> for:

1) Organized Research,
2) Instruction & Departmental Research,
3) Other Sponsored Activities
4) all facilities & administrative (indirect) support functions: (building/equipment maintenance, libraries, and general/departmental administration)

OIA includes:
- Auxiliary Services
- Service/Cost Centers – Add Service Center Name in Notes
- Space used by external entities
- Labs that are vacant for majority of fiscal year – Use OTH

# Required Data

| Room Type | Room Use | PI Required | Function | Grant Required | Station Count |
|-----------|----------|-------------|----------|----------------|---------------|
| **Research/Open Lab & Service** | Confirm/ Update | Yes | Yes | Grant(s) – for OR | Workstation Count |
| Class Lab | Confirm/ Update | No | No | No | Workstation Count |
| Grad Office | Confirm/ Update | No | No | No | Workstation Count |
| Computation Lab | Confirm/ Update | **<u>Yes</u>** | No | No | Workstation Count |
| Other Offices | Confirm/ Update | No | No | No | Workstation Count |
| Conference Rooms | Confirm/ Update | No | No | No | Seat Count |
| Classrooms | Confirm/ Update | No | No | No | Seat Count |
| Other Spaces | Confirm/ Update | No | No | No | NA |

# Room definitions/examples

Reference on room use code
[https://insite.gatech.edu/netfm/survey/GT_use_help.htm](https://insite.gatech.edu/netfm/survey/GT_use_help.htm)
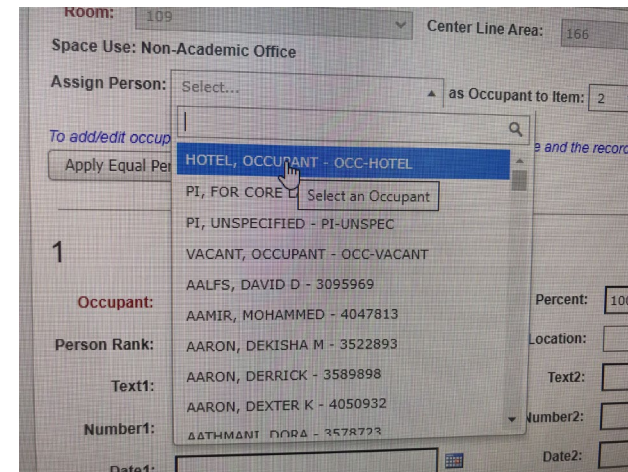
New room use code:

   RSLBCOMP- Research / Non Class Laboratory - Computational

Updated definition for room use code:

   GRADOF

New occupant code:

   HOTEL, OCCUPANT - OCC-HOTEL

# Examples

Professor George Burdell has an office in one of your assigned buildings.

How should this room be coded on your survey list?

# Examples

Professor George Burdell has an office in one of your assigned buildings.

 How should this room be coded on your survey list ?

* Use Info: Confirm "ACADOF Academic Office"
* Function Info: N/A
* Grant Info: N/A
* Station Count: Required

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# Examples

Professor Burdell's research lab is used as follows:

75% for NIH research grants,
15% for general research supported by GTF (gift) funds
10% for research "cost-sharing" supported by GTRC

How should this room be coded in INSITE?

# Examples

Professor Burdell's research lab is used as follows:

    75% for NIH research grants,
    15% for general research supported by GTF (gift) funds
    10% for research "cost-sharing" supported by GTRC.

How should this room be coded in INSITE?
* Use Info: Confirm "RSLBDRY-Research Lab Dry"
* Function Info: 85% OR - Organized Research
              15% IDR -  Instruction & Departmental Research
* PI Info: Burdell, George P.
* Grant(s) Info: GR10000057 - assigned to Burdell,George P.
              GR10000147 - assigned to Burdell,George P.

# Insite Demo

**Lana Soroka**

Facilities Information System Manager

# Examples

Room B76A, previously a "Graduate Student Office", is now occupied by the Department's Financial Manager, Charles Smith .

How should this room be coded in INSITE?

# Examples

Room B76A, previously a "Graduate Student Office", is now occupied by the Department's Financial Manager, Charles Smith.

How should this room be coded in INSITE?

\* Use Info: Update to "NACDOF Non-Academic Office"
\* Function Info: N/A
\* PI Info: N/A
\* Grant Info: N/A

# Examples

Room 214 "Research Lab" is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

# Examples

Room 214 "Research Lab" is a Dry Research lab currently under renovation but is serviced by utilities & HVAC.

How should this room be coded in INSITE?

\* Use Code: Confirm "RSLBDRY-Research Lab Dry"
\* PI: NA
\* Room Comments: "Vacant Space Under Renov - Service"
\* Function Code: "OTH-Other" (100%)
\* Grant: N/A

# Examples

Room 133 "Computational Lab" used by Grad Student(s) for research.

How should this room be coded in INSITE?

# Examples

Room 133 "Computational Lab" used by Grad Student(s).

How should this room be coded in INSITE?

* Use Code: Confirm "Computational Lab"
* PI Info: Burdell, George P.
* Function Code: N/A
* Grant: N/A

# Review Points:

## Office Space

1. Confirm and/or Update Use Code
2. Occupant names are **<u>not</u>** required!!!!!
3. Function Codes are not required
4. Grant(s) are not required

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# Review Points:

## Lab and Lab Service Space

1. Confirm all Use Codes to new designations
2. Select PI Name(s) - <u>REQUIRED</u>
3. Enter functions and percentages for activities performed in the room – <u>REQUIRED</u> except for Computational Lab
4. Select Grant(s) activity performed in the room.
   <u>REQUIRED for OR – Organized Research</u>
5. Lab service space supporting a specific lab should be coded to match the applicable lab (PI names, functions, and grants)

## Review Points:

# Conference Rooms and Other "Common" Space

1. Confirm and/or Update Use Code
2. No additional information is required IF used/open for ALL departmental activities

# Issues to Consider:

- Timeline is majority of FY22 – Grant may be closed but if work performed in FY22 we can still consider it

- Coding 100% Organized Research – Is it really 100%? Is the facility secure? Could Grad Students be doing classwork? We may follow up on some percentages during validation process.

- Use Room Comments Field when possible – Especially for vacant or 3rd Party leased space

- Vacant Space

  - Labs – May be functionalized based on the activities performed during the period of use if utilized during most of the fiscal year.

  - Comments Field to enter additional comments as needed.

- Professional judgment is the key – Consult with Unit Financial Officer and/or PIs

- Space Survey requires Certification and subject to Audit

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# Contact Information

**<u>Grants and Contracts</u>**

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**<u>Infrastructure and Sustainability - Insite Support</u>**

Lana Soroka - lana.soroka@cpsm.gatech.edu

# THANK YOU!

GRANTS.GATECH.EDU