AiM Advisory Committee's Deliverables and Charge

SUBJECT MATTER EXPERTS *(subject to ongoing updates)*
- F&A Indirect Cost Recovery Reporting – Office of Research Services
- Space Planning and Management – UH Manoa and UH Hilo Planning Offices
- eFacilities AiM Software – Office of Capital Improvements
- IT Resources and Best Practices – Information Technology Services
- Policy and Procedure development – Various executive level administrators on committee
- Kuali Financial System – Financial Management Office
- Peoplesoft System – Office of Human Resources
- Property/Building naming and numbering – Property & Fund Management Office
- ITS Identity Management information – ITS Systems Middleware Group

DELIVERABLES

After hearing from committee members and the various subject matter experts on the issues currently surrounding space planning and management at UH, there seems to be three main areas of focus:

1) The need to draft policy and procedures for obtaining and maintaining space-related information**:**

   a. Recognizing that a software be named as the system of record for space-related building and room information for the 10 UH campuses. Such a data repository shall complement existing systems of records that house related data in an effort to create a more comprehensive and holistic data collection for advanced reporting and analyses.

   b. Mandate that space management practices be adopted and maintained at all campuses,

      i. Including the collection of relevant data sets for campus planning needs and periodic F&A Indirect Cost Recovery reporting.

      ii. Including a Space Change Notification policy to be administered through designated campus space planning offices, and supported by the executive administration via UH Executive Policy and/or the UH APM.

      iii. Including the upload and update of floor plans and square footage due to renovations or new construction.

DELIVERABLES *(continued)*

    c. Establishes criteria for prioritizing system-wide and campus needs in areas of survey tools, data gathering, and reporting. This shall also include a system of standard definitions, terms, and reporting formats, and reporting/survey schedules to be used for both individual campus planning and management, or a system-wide examination of space planning trends and metrics, including data exports for F&A Indirect Cost Recovery on an on-demand basis.

    d. Formalizes agreements with other UH data systems of record as necessary (i.e. KFS, Peoplesoft, UH IMS, etc.) for data interfacing, without duplication, and for the purpose of comprehensive reporting and analyses in AiM. Such data interfacing shall be created within existing systems and/or processes, with the proviso that perhaps new areas of data collection may be added.

2) The need to identify sources of new data (i.e. people demographic and location data, and grant location data). Past practice has shown that without a real-time method for collecting such data, the burden of information lies upon departmental personnel assigned to complete annual space surveys. The committee seeks to find an automated way to obtain reliable data from valid, centralized sources to better ensure data integrity and on-demand data availability.

    a. People demographic data (i.e. faculty, staff, students, affiliates, etc.) – the majority of the desired data sets seem to reside in several different systems. ITS has offered to research possible data centralization within its UH IMS system. The committee will present a comprehensive data crosswalk as a means to streamline needed data sets into the UH IMS. A data interface with UH IMS or the UH Message Broker would then be designed and implemented for regular automated feeds/updates.

    b. People location data – a methodology need be derived for capturing people/occupant location data. Knowing and understanding the location of occupants within buildings is a key criterion for effective space management. The above interface with UH IMS could also notify campus space planners/managers of any departures from UH employment, hence also notifying of the vacated spaces. Additionally, a Space Change Notification policy and procedure can help track ongoing movement. However, the source for baseline data has yet to be identified.

DELIVERABLES *(continued)*

    c. Grant Location data – knowing where grant activity occurs is a critical data set needed for F&A Indirect Cost Recovery reporting, as well as institutional planning and analyses. This data set is currently not being collected by any system of record. Such must be identified with a data collection procedure to assure sustainability each grant funding year. Currently there are two candidates for this 'system of record' which include KFS and ORS's MyGrant system.

3)   A common data dictionary and core program standards which shall serve as a guide and baseline for all campus' space management protocols.

    a. Program standards shall include consistent templates for reporting across campuses. Reporting formats to be used for both individual campus planning and management, or a system-wide examination of trends and metrics for space planning, management, and utilization.

        i. Track space currently occupied, space needs, and justify requests for new buildings.

        ii. Can be used as a tool for developing or supporting CIP budget requests.

        iii. Could also be expanded to set standards for room dimensions and usage rates (outside the scope of AiM).

    b. A data dictionary shall:

        i. Draw from nationally recognized space management terminology and classifications (i.e. FICM).

        ii. Formally identify systems of record for data sets such as UH organizational hierarchy, UH Username, etc.

        iii. Set infrastructural standardizations such as room naming and numbering conventions, floor numbering conventions, and other relevant labels within AiM.

DECISION-MAKING PROCESS

A steering team shall be established of staff level membership to collectively set agenda items, determine readiness of documents and discussion items to be brought forth to the AAC each month. Such shared leadership will foster a more productive, transparent, and evenly represented approach to the committee's charge and deliverables.

Throughout the month, the committee chair shall call together relevant subject matter experts and interested committee members for working sessions on each of the 3 primary areas of

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DECISION-MAKING PROCESS *(continued)*

focus. Through these working sessions, the data dictionary, drafting of policy and procedure, and discussions to identify and crosswalk new data sets shall be developed and compiled. Updates and draft documents shall be presented each month to the committee for review and feedback.

BROAD TIMELINE OF GOALS

November 2013
- Present draft committee charge and determine decision-making process
- Better educate members on space planning principles; presentation by Manoa Space Planning program
- Present and discuss draft #1 of data dictionary; rough outline
- Present and discuss draft #1 of Space Policy and Procedure
- Update on research done with UH IMS (ITS)

December 2013
- Adopt final draft of the committee charge and determine on decision-making process
- Present and discuss draft #2 of data dictionary
- Present and discuss draft #2 of Space Policy and Procedure
- Update on research done with UH IMS (ITS)

January 2014
- Present and discuss draft #3 of data dictionary
- Present and discuss draft #3 of Space Policy and Procedure
- Update on research done with UH IMS (ITS)
- Begin discussion about Grant Location data needs

February -- March 2013
- Finalize data dictionary
- Finalize proposed Space Policy and Procedure
- Continue discussion on obtaining Grant Location data

April 2014

- Submit entire Space Planning package/program for adoption and action by the larger Business Process Council

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DESIRED END RESULTS

1. Submittal of standards for a comprehensive Space Management program to be formally adopted and implemented by the UH Business Process Council and UH Administration. This should include adoption of the policy and procedure into the UH Executive Policy or UH Administrative Procedures Manual.

2. Strongly recommend a staggered implementation of space management and planning programs for the following campuses (in no particular order): UH Hilo, UH West Oahu, and the Community College system. Scheduled space surveys may follow suit and occur on a routine basis.

3. Strongly recommend a web based interface be developed to enable users to more easily update data without using the out-of-the-box AiM Space Survey module. For example, using AiM Web Services to design an interface similar to the one at Vanderbilt University. This will entail identifying and securing the resources for the programming effort.

4. Require that campuses compile and maintain a listing of the research intensive buildings on the UH Manoa, UH Hilo, UH West Oahu, and CC campuses. The report should also identify the buildings that have substantial non-research sponsored activity, such as extramurally funded training. When resources are limited, the University can prioritize F&A space survey updates on the buildings that contribute most to F&A recovery.

5. Use as its baseline for scheduling deliverables, the upcoming F&A Indirect Cost Recovery reporting. Preparation for F&A space survey data collection/validation on behalf of ORS shall begin in FY 2016 with refresher training for users from September 2015 to November 2015. The actual data collection/validation will take place over six months (December 2015 through May 2016) for compilation and reporting by September 30, 2016.

6. The committee may also elect to suggest national reports and surveys UH may want to contribute to with space management data. Standard report layouts should be used in preparation of such participation.

NOTES:

- Rough draft shared with steering team on 11/5/13; ORS responded with some additions.
- Presented to AAC at 11/13/13 meeting for discussion and finalization.
- Edits from 11/13 meeting incorporated into this document on 11/15/13.

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