
Campus Planning Office (CPO)
Contact Information
For further information regarding Space Allocation and Management contact:

Amanda Wolf
Space Management Analyst
wolf@pdx.edu
Phone: 503-725-4939

Ernest Tipton
Assist. Dir. for Facilities Planning & Design
tiptone@pdx.edu
Phone: 503-725-4318

Campus Planning Office
Market Center Building 340
1600 SW 4th Avenue
Portland, OR 97201
www.pdx.edu/planning-sustainability/space-management
campusplanning@pdx.edu
Phone: 503-725-2031
Table of Content

Contact Information............................................................................................................ 2
Table of Content .................................................................................................................. 3
General Information ........................................................................................................... 4
Overview of Space Management ......................................................................................... 5
Space Allocation Standards ................................................................................................. 6
The Space Allocation Process .............................................................................................. 8
Assignment of Building Names, Abbreviations and ID Numbers ............................................. 11
Assignment of Floor Numbers and Room Numbers .............................................................. 12
Assignment of Space Classification Codes .......................................................................... 13
Coordination of CAD and AiMCAD between CPO and CPC .................................................. 15
Annual Space Survey and Adding AiM Data ......................................................................... 25
Classroom Condition Assessments .................................................................................... 34
Classroom Utilization Report .............................................................................................. 43
Academic Program Review Space and Utilization Report ....................................................... 44
Annual Sightlines Reporting ............................................................................................... 45
Annual American Physical Plant Administrators (APPA) Facilities Performance Indicators (FPI) Reporting............................................................................................................. 46
Annual Space Splits ............................................................................................................ 48
Federal Administrative Research Cost Allocation Survey Process ....................................... 50
Archival Requirements ........................................................................................................ 51
General Information

Purpose
Space is a finite and valuable resource at Portland State University. These Policies and Procedures establish consistent practices for the planning, assignment, inventorying and analysis of space at Portland State University.

Who we are
The Campus Planning Office, a department within Finance and Administration, works to meet the current and future needs of the University through physical planning. Physical planning at PSU supports the overarching strategic planning, academic planning, research objectives, and student success initiatives of the University. Space Allocation and Management is a group within the Campus Planning Office that provides space related data, planning, and recommendations for the physical planning of the campus

Mission Statement
The purpose of space management at PSU is to continually provide the correct types of space, in the correct quantities and arrangements. The mission of the Space Allocation and Management group is to provide administrator’s accurate and timely space related information to facilitate balanced and efficient resource allocation. The Space Allocation and Management group works closely with other Finance and Administration departments and serves as staff to the PSU Space Allocation Committee.
Overview of Space Management

**Space Management Process**
The management of space plays a critical role in the iterative process of planning and development of the campus. It provides current and historic data about PSU’s physical resources and spatial opportunities for meeting campus needs. PSU’s space management system is a location relational database. The database provides the framework for other facilities management modules including PSU’s work order system and maintenance cost accounting, linking human and financial resources associated with space allocation. Combined, this information provides trend and baseline data for the planning process. The Space Allocation and Management group works with various sub-committees of the Campus Advisory Committee in the management of space allocation and design standards that meet current building codes, comply with the Americans with Disabilities Act, and current trends in higher education space planning. Based on data driven quantitative and qualitative analysis it informs the planning process through needs assessments, programming and schematic conceptualization.
Space Allocation Standards

Adoption and Administration of PSU Standards
The Capital Advisory Committee’s Standards Subcommittee adopts, and approves amendments to the standards. The Campus Planning Office maintains the adopted standards and coordinates their implementation with other departments and units within Finance and Administration. The Campus Planning Office periodically reviews the standards and recommends amendments as needed.

Furniture Standards
Furniture standards provide campus design consistency and guide the development of office and classroom standards and policies. The standards include kits of parts, furniture, fixtures and equipment to be accommodated in the layout and design of new and modified campus space. The current version of the furniture standards is available at the following website: http://www.pdx.edu/planning-sustainability/standards-committee

PSU Office Standards and Policies
Office standards and policies at PSU provide equitable means of planning, allocating and measuring the efficient use of campus space for office related functions. They apply to all new construction and major renovations to PSU buildings. The current version of the office standards and policies are available at the following website: http://www.pdx.edu/planning-sustainability/standards-committee

Office space needs are projected at the department and school/college level based upon the number of FTE faculty (including Tenure, non-tenure post-doctoral fellows and employed graduate students), FTE staff, (including contract and wage agreement personnel) and employed FTE graduate students. Individual office space may have a split use, but space required is based on FTE occupant load. The change in space required at the department and/or school/college level is determined by the area sum for FTE office stations, FTE open office work stations and required office related service areas (\(-\) Minus the Actual space allocated.

PSU Classroom Standards
The classroom standards set forth guidelines for the layout and design of new and renovated classrooms to ensure that the design of learning spaces meet the needs of students and faculty. The current version of the classroom standards are available at the following website: http://www.pdx.edu/planning-sustainability/standards-committee

The required quantities, size and types of classrooms are projected based on intended use, existing capacities (utilization) and demand analysis.

Student station utilization is used to determine efficient filling of classrooms and appropriate classroom sizes needed. Actual enrollment equal to number of seats available in the classroom is 100% student station utilization. The design goal is for student stations utilization to average between 65% and 85%.
Classroom utilization is used to determine efficient use of classrooms and the appropriate quantities of classrooms needed of various sizes. Classrooms in scheduled use 40 hours per week are defined as 100% utilized. The design goal is for each classroom to be utilized between 85% and 100%.

<table>
<thead>
<tr>
<th>Classroom Utilization Goal</th>
<th>Student Station Utilization Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>34 &lt; Scheduled hours per week &lt; 40</td>
<td>65% &lt; Aver. Seats Filled &lt; 85%</td>
</tr>
</tbody>
</table>

**Instructional Laboratory Standards**

There are currently no standards established for instructional (class) labs. Class labs are rooms used for regularly scheduled classes, which require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study. Class labs at PSU are often prorated by location type and use, serving as classroom laboratories and research laboratories. Class lab scheduling are predominantly departmentally controlled.

The existing and required quantities, size and types of class labs vary considerable, and are based on field of study and proportion of funded research use.

Student station utilization of class labs is not currently tracked at PSU.

Class lab utilization is not currently tracked at PSU.
The Space Allocation Process

Requesting Space at PSU
All space allocations, relinquishments or significant changes in the use of space at PSU requires approval of the Space Allocation Committee, a sub-committee of the Capital Advisory Committee. The process begins with a department or unit submitting a one-page space request form. The department or unit may request changes in the allocations of space, without a specific location identified. Once the Campus Planning Office receives a request, a Space Allocation and Management staff member will contact the requester to set up a meeting. Staff will gather additional information, assist the requester in application of the Space Allocation Standards, identifying location options to accommodate the request and prepare a space allocation proposal on behalf or the requester for action by the Space Allocation Committee. Further information regarding the current composition, roles and responsibilities of the Campus Allocation Committee is available on the Campus Planning website at:

http://www.pdx.edu/planning-sustainability/space-allocation-committee

Space Request Form
Departments and units across campus can submit a space request form to the Campus Planning Office to initiate the space request process. The space request form and information related to completing the form are available on the Campus Planning website at:


Written approval by the requestor’s Dean, Executive level Director of above is required to initiate the space request process.

Presentation to SMSU and NASCC Advisory Boards
If a space request is submitted for a location in a student run building (Smith Memorial Student Union and Native American Student and Community Center) the request is first submitted to the SMSU or NASCC advisory board for an advisory recommendation. The Space Allocation Committee is ultimately responsible for deciding the allocation of space within these buildings (with the exception of student controlled spaces as defined by the SMSU by-laws), but will take into consideration the advisory committee’s recommendations.

Preparations of Space Allocation Proposals
Space allocation and management staff in the Office of Campus Planning are responsible for preparing and presenting all space allocation proposals on behalf of the requester. Staff will work with the requester to develop a comprehensive proposal conforming to the evaluation criteria established by the Space Allocation Committee. A full description of the space allocation process and proposal topics are provided on the Campus Planning website at:

Space Request and Allocation Process

The following flow chart outlines the space allocation process.

---

Agenda and Meeting Summary Distribution

Space Allocation Committee agendas are approved by the chair of the SAC and distributed to all SAC meeting attendees approximately one week prior to the meeting. Requester and other stakeholders potentially affected by the request will be notified of the time and place of the SAC meeting and provided an opportunity to attend and make a statement.

All meeting summaries will be distributed to SAC attendees and PSU Finance and Administration staff who may be effected by the allocation (Facilities and Property Management, Capital Projects and Construction, Office of Information Technology, etc...) Agendas and meeting summaries will be posted to the public SAC website approximately one week after the meeting.
Applicant Notification
The day after the SAC meeting, staff of the Campus Planning Office will notify the requester of the SAC’s decision. The notification should include detailed information of the reasons for the decision, as well as any next steps that need to be taken by the requesting unit.
Assignment of Building Names, Abbreviations and ID Numbers

All building names and/or abbreviation changes go through the Campus Planning Office, and are approved by the President. The Campus Planning Office in cooperation with the Registrar’s Office assigns building abbreviations for space inventory, class scheduling, mail delivery and various other uses.

Every building structure PSU occupies (leased or owned) is assigned a letter and four-digit location code. All building codes are set up through the Fixed Asset Accountant in Finance and Administration’s, Campus Accounting Services using the following letter structure:

- B – Building
- I – Improvements Other than Buildings
- M – Land Improvements
- N – Infrastructure

Each year a tabulation of all buildings with calculated replacement values (RV) at each institution (Building Valuations Schedule) is produced. The building valuation schedule is used for asset tracking, insurance purposes and updating the Facilities Condition Indexes (FCI = DM/RV). A copy of this schedule is made available to the space management and allocation staff in the office of Campus Planning. The staff are responsible for confirming or noting corrections to the building names, ID numbers, abbreviations and gross square foot area.

The current building names, codes, and acronyms are available at the website under Useful Links:

http://www.pdx.edu/planning-sustainability/space-survey
Assignment of Floor Numbers and Room Numbers

Scale floor plans and space management floor plans for all buildings are maintained on the PSU office of Capital Projects and Construction’s website and available for use by the PSU community and the public. Space management floor plans should accurately define the building gross area and all internal space allocation groups, which include; Unassigned (Circulation, Building Services and Mechanical) and Net Assigned. The space numbers should be indicated on the plans exactly as they are reported in the inventory records.

All new room numbers and changes to room number sequencing are to be assigned by the space allocation and management staff in the Campus Planning Office. At no time are room numbers to be assigned or changed by consultants or other university personnel without approval of the space management staff.

Room numbering is based on a sequential floor-room system above and below grade, with the last two digits representing the space. For floor numbering purposes, the main building entry level is defined as the first floor and floor numbering increases moving up (e.g. 100, 200, 300, . . . 1000, etc.). Floors below grade are basements and are identified by adding a “B” to the number. Basement level numbers increase moving down (e.g. B1-00, B2-00, B3-00, etc.) Mezzanines are defined as intermediary levels between floors with an area not exceeding one-third the floor below. Mezzanine levels are identified by adding an “M” at the beginning of the floor number below (i.e. a mezzanine between the first and second floor would be M-100; a mezzanine between the first basement level and the first floor would be MB-100). An additional letter is added to the right of the floor designation number to identify Halls “C”, Elevator “E”, Lobby “L”, Stairs “S”, Vestibule “V”, Ramp “R” and are numbered sequentially (e.g. C101, B1-C01, M-C101, etc.) Elevator numbers are assigned based on the university elevator state permit log maintained by Facilities and Planning. Hall/Corridor numbers are generally assigned with odd number corridors aligned north/south and even numbers aligned east/west moving clock-wise through the floor or suite. Rooms and suites of rooms are generally numbered clock-wise through the building in a right-left pattern from a way-finding perspective. Where large rooms exist, gaps are provided in the sequence to accommodate potential sub-division and additional numbers to be added into the sequence in the future. Suites are numbered using a combination numbers and suffix letters added to the suite number (i.e. Suite 110: 110(A-Z) - 119(A-Z); Suite 120: 120(A-Z) - 129(A-Z), etc.). Letters are always capitalized and the letters “I” and “O” are not used. The main suite identification number is based on the number assigned to the suite waiting area, lobby or other space at the primary entry door to the suite. All space require a number, including cubicles, for identifying telecom locations, inventory control and custodial/maintenance work order locations.

The building floor plans can be found on the following website:
http://www.pdx.edu/floorplans/
Assignment of Space Classification Codes

Location Type
The location type is identified by an abbreviation code and a full name. The name includes a three digit code, generally corresponding with the Postsecondary Education Facilities Inventory and Classification Manual (FICM) standards and assigned by the space Allocation and Management group of the Campus Planning Office. The location type identifies the functional purpose of an allocated space.

Location Types at PSU are generally grouped by code as followed:

- 100 Series - Classroom Facilities
- 200 Series – Laboratory Facilities
- 300 Series – Office Facilities
- 400 Series – Study Facilities
- 500 Series – Special Use Facilities
- 600 Series – General Use Facilities
- 700 Series – Support Facilities
- 000 Series – Unclassified Facilities (Inactive or unfinished areas)
- WWW Series – Circulation Area
- XXX Series – Building Services Area
- YYY Series – Mechanical Area

The location type codes, their abbreviated names, and the code definitions can be found on the following website under Useful Links:

http://www.pdx.edu/planning-sustainability/space-survey

Functional Use
The use type is identified by an abbreviation code and a full name. The name includes a two digit code, generally corresponding with the Department of Education’s National Center for Higher Education Management Systems (NCHEMS) and Western Interstate Commission for Higher Education (WICHE) standards and assigned by PSU Facilities and Planning. The use type identifies how the occupant uses the space.

The principal use codes and their definitions can also be found on the following website under Useful Links:
http://www.pdx.edu/planning-sustainability/space-survey

Organizations
The Space Allocation and Management group is responsible for confirming the organizations and reporting structures annually. Three database fields are used to define an Organization; Institution/Department/Organization Unit. The Space Allocation and Management group is responsible for reporting all Organization space allocation changes to the Facilities and Property Management Lock Shop for the coordination of空间 keying and access control. The current organizational units can be found on the following website under Useful Links:

http://www.pdx.edu/planning-sustainability/space-survey
Coordination of CAD and AiMCAD between CPO and CPC

Introduction
AiMCAD links floor plan drawings to the asset management database (AiM) and provides bidirectional links between AutoCAD drawings and space information provided in AiM. AiMCAD provides accurate room counts and area calculations based on CAD floor plan drawings and provides a platform to generate detailed graphical reports that leverage AiM data and run directly from CAD drawings. The Campus Planning Office, in coordination with the office of Capital Projects & Construction, ensures accurate floor plans via new construction, project updates, annual space surveys, and field verifications. These plans are then exported to AiM to provide accurate representation of space at Portland State University. The following provides a step by step process of how to export AutoCAD floor plans in the AiM database.

AiMCAD
The AiMCAD extension allows you to insert rooms for a certain floor of a building and to calculate the area of that room. Other features include configuring your drawing, in which it stores drawing specific configuration data in the drawing. This will be discussed in details later on. An image of the ribbon can be seen in Figure 1.

Figure 1: An image of AiMCAD ribbon

In order to use AiMCAD’s full potential one must have full access to the Dwgs folder within the facilities folder on PSU’s I Drive. Please contact your supervisor if AiMCAD is not set up on your computer or if you do not have access to the appropriate folders. Follow the following maps to see if you have access to both of the files:

I:\Staff\Facilities\Dwgs

File Locations and Responsibilities
CPC and CPO share responsibilities when it comes to editing campus drawings. CPC’s responsibility is to maintain the base drawings for the University, and ensure that PSU’s Maps and Floor Plans Website is up to date. These drawings are also maintained as an external reference drawing for CPO to make necessary changes to the area calculation drawings. The files prepared by facilities must have correct dimensions and appropriate layers. Separate folders are created within the drawing folders to avoid confusion. The main folder that we are concerned with involves the name Area_Calc_Dwgs in front of the building name. If we were to use the Engineering Building as an example, our desired location path will be as following:
Once in the *Area_Calc_Dwgs* folder, one can see a list of AutoCAD drawings for all the floors of the building. Each drawing will have an up to date calculated space area. This is where editing and updating must occur.

Other folders within the *Area_Calc_Dwgs* folder include the *Standard-Space-Reports* and *Check-List-Change-Space*. The *Standard-Space-Reports* includes the updated PDF version of the CAD calculated area drawings. Once the editing is done in AutoCAD, the file must be exported as a PDF within this folder.

To make sure all steps are completed a check list is included in the *Check-List-Change-Space* folder.

**Working in AiMCAD – How to Update and Edit Drawings**

**Login**

Prior to editing any drawings make sure that you are logged in. To log in, click on the AiMCAD tab and click on “Login” located on the far left. The icon is circled and can be seen in Figure 2.

Once the “Login” button is clicked, a small window will pop up asking for your username and password. The window will look similar to Figure 3. Ask your supervisor for your password. The *login* must be performed for each AutoCAD session.

**Configure**

The *Configure* command must be done on each floor plan. This command stores drawing specific configuration data in the drawing. This command will invoke a dialog box which allows the user to input
drawing configuration data. The configuration needs to be done only once for every floor. The Configure command can be found under the AiMCAD tab and can be seen in in Figure 4.

Once within the dialog box, the user can set up the drawing settings. The dialog box will look like Figure 5. Select Floor Plan as your drawing type and fill in the location information codes in the Location Description section. It is VITAL that these codes exactly match the codes in the database.
**Attaching Polylines**

An AutoCAD entity called a polyline must be drawn around each space. This polyline not only determines the area used by each space, it will also be utilized later for color or gray scale reports in the software. These commands assist the user in the creation and maintenance of these polylines.

Polylines must also be added to each floor plan to calculate total gross area and interior gross area. Polylines may also be added to subtract ‘open to below’ areas from the gross areas. Tracing around the building exterior with the AutoCAD PLine command is the easiest way to create the gross polylines. Interior gross polylines include, vertical penetration (for mechanical shafts), mechanical, building services (for restrooms, janitorial rooms), circulation, and net-assignable. These polylines must be on the layers that are specified in the selected configuration file. The software Administrator has been trained to properly configure this file.

Whenever changes occur to the floor plan, the polylines must be modified to reflect the new wall locations. Some types of changes can be done using standard AutoCAD commands without destroying the integrity of the polyline (like STRETCH). Other modifications require erasing and replacing the polylines.

**Insert Rooms**

Click on the *insert Rooms* Command shown in Figure 6. Pick the polyline surrounding the room and confirm that the selected polyline is correct. The operator is prompted to select the room number from an existing AutoCAD text or block entity. If there is no existing room number, the operator can hit ‘Enter’, then type in the desired room number. Either method will populate the software smart room block with the desired room number.

A new room can be inserted using this command. If a certain room needs to be edited, the polylines can be deleted and a new polyline can be created and the inserting room process can begin again. Under the *Smart Block* section, one can also set room attribute visibility. This command allows the user to set the room number, door number, room area, alternate room number, and data1-5 attributes to either be visible or invisible regardless of their respective layer setting. Checking or clearing the appropriate box toggles the attributes on and off. The Attribute Visibility window can be seen in Figure 7.
**Error Checking**

Once the previously listed commands are completed, the floor plan drawing can be connected to the database. Prior to this connection, it is important to make sure there are no errors in the drawing that will affect the database. The error checking commands help prevent some common mistakes. The Check Rooms command offers tools that allow the user to identify issues with room numbers and polylines. Invoking the Check Rooms command allows the user to select one of four options – Rooms (ensures all Plines have room numbers attached), Plines (ensures all Plines are closed), Loops (ensure there are no Plines overlapping), or All.

**Hatching Polylines and Saving Area-Calculation PDF**

This command colorizes all the intelligent space polylines in a drawing. The layer the polyline is on and its corresponding settings in the configuration file will determine its color during Hatch Plines. However, the user can elect not to hatch the exterior gross area polyline by un-checking the appropriate box on the Hatch Smart Polylines dialog box. The user may also elect to modify the drawings layers states according to a preconfigured LAY file by checking the appropriate box on the Hatch Smart Polylines dialog box. The dialog box for the Hatch Pline dialog box will look like Figure 8.

![Hatch Pline Dialog Box](image)

*Figure 8: Hatch Pline Dialog Box.*

Once you have run the hatch polylines report you will want to save an update PDF to the Standard-Space-Reports folder. To do this you go into the paper space of the drawing. The paper space has already been formatted to include CPO’s name and website, the building name, floor, address, and has a space to update “last modified date.” The “last modified date” is the only feature on the paper template you need to update with the month/year of the modification. Once you have updated the date you will plot the drawing as a PDF and save it as the appropriate floor in the Standard-Space Reports folder.

Once you have saved the PDF you have one more step to update the combined Standard-Space-Report PDF. This report is all floors combined into one PDF and is used to update the PSU floorplans website. To update the Standard-Space-Report you must open the combined files and replace the floor(s) you have modified. Instruction to post to the website will be covered below.
**Export Data**

The Export Data command exports the room data into the database. Any rooms that no longer exist in the drawing will be deleted in the database. Any new rooms in the drawing will be added to the database. All square footages are updated in the database. The location of the command can be seen in Figure 9.

![Figure 9: Location of the Export Data Command.](image)

The dialog box of the command can be seen in Figure 10.

![Figure 10: Export Data dialog box.](image)

**AiMport: Accepting the Exported AiMCAD Drawings in AiM**

Once you have completed the export to AiM, you must accept the drawing in AiM before it will reflect the changes in the database. To do this you will need to log into AiM and go to the AiMport module (see figure 11).
Once you are in the AiMport you will select the floor you have updated and approve the drawing by clicking on the green check mark in the top right hand corner. Once the drawing has been updated you will need to update the occupant, location, and use information for any rooms that have been added. See the Space Survey and Enter AiM Data section of this manual for details on how to enter in AiM data.

**Completion Checklist**

Once the updating is done on both the CPO and CPC side, each department must complete a checklist as shown below. This checklist helps to ensure that all steps have been completed by both CPC and CPO staff. The file location of these will be under the Area_Calc drawing within a folder called Check-List-Changes. For example for the building Fourth Avenue Building, the location will be as follows:

I:\Staff\Facilities\Dwgs\090_FAB\FAB_Model\FAB_Area_Calc_Dwgs\01-FAB_Check-List-Changes
Updating Standard-Space-Reports on the Website

All floorplans are located at the PSU Floorplans website, [http://www.pdx.edu/floorplans/](http://www.pdx.edu/floorplans/). This website is maintained by CPC. To gain access to update the Standard-Space-Reports CPC will need to send University Communication a request giving you permissions to update the website. The only section of this website you will update is the Standard Space Reports, CPC maintains all other information on this website.

Anytime you modify an area calculation drawing you must replace the Standard Space Report on the website. To do this you will login to the website. Once you have permissions to update the website you can get to the login screen at the following URL: [http://www.pdx.edu/floorplans/login](http://www.pdx.edu/floorplans/login). Your login is your odin name and password. Once you have logged in select the building you are going to update and click on the edit tab (see figure 12 below).
Once in edit mode, you can scroll down the page to the *Floor Area* section. Here you will remove the current PDF and attached the updated PDF. Once you have updated the PDF you must scroll down to the bottom of the page to save the changes (see figure 13 below). If you do not save changes, the floor area drawings will not be updated on the website. It is always best practice to check the live website to ensure that the drawings have been updated.
Conclusion
To conclude, the purpose of this report is to give a general idea of AiMCAD and what it can be used for. There are many other functions that this software has and it should be explored more when given the chance. A detail exploration of AiMCAD can be found at the following location:

Annual Space Survey and Adding AiM Data

Introduction
Every year the Campus Planning Office (CPO) conducts an annual Space Survey to update and maintain Portland State University’s space database. This database is a critical part of Portland State University’s operations, providing important information for the Federal Finance and Administration Cost Recovery Rate, internal/external reporting and analysis, master planning, facilities maintenance, logistics, and mail services.

Space Survey
The Space Management module in AiM provides space information for planning and reporting purposes as well as basic space information for facilities maintenance and operations, the lock shop and mail services. The AiMCAD tool (discussed in the section above) provides the room numbers and square footage of every room in a building. Once a room has been established, the property module and space management module allow you to provide additional detail about the spaces. These details include, Location Type (classroom, staff office, etc.), Department Occupying the space, Use of the space (administration, instruction, research, etc.) and the name of the occupants. Space is updated anytime there is a change in the physical space, occupancy, and/or location or use of a space. Additionally once a year, a space survey is sent out to every department on campus to make any changes that have occurred over the past year. This section of the document will discuss briefly the essentials of space surveys and how they can be updated into the AiM database.

The main criteria that needs to be updated in space survey (AiM as well) are the following:

- Building Code (Has the space been relocated to another building?)
- The organization (Institution and Departments might also change)
- Room Number (Has the room number been changed? Does the Room no longer exist?)
- Department Percentage (Percentage of Space used by the Department)
- Location Type (Classroom, Storage, Faculty Office, etc.)
- Functional Use (What is the space being used for?)
- Functional Use Percentage (What is the functional use distribution for each room?)
- Occupant Name
- Employee Type
- ODIN (PSU email address)

The space surveys are sent to all department space contact representatives out once a year to review and verify existing database information or indicate possible errors. Once the surveys are completed and returned to the Campus Planning Office, the information is verified by Space Allocation and Management group prior to entering updates in the AiM database. The next section provides the process for updating the AiM database.
**AiM Data Entry**
Once the space surveys are returned and if changes were made, the data can be entered in AiM. The process of entering data in AiM is quite simple and repetitive. First make sure you have access to AiM before following the step by step process.

**Login**
AiM is not a software program like Excel; it is accessed through your network using the internet. For Portland State University, the following website is used to access the database:

https://atlantis.psu.ds.pdx.edu/fmax/login

Once logged in, one can see that AiM provides a great deal of options. The interface of the home page can be seen if Figure 1. For the purpose of entering space surveys, we are mainly interested in “Property” and “Space Management”.

![AiM home page](image)

**Property**
On the property side we are mainly concerned with the location type, Description, Institution, Department, Organization, Status, Floor, Space Type, and User Square Feet if available. In order to update a change on this side, click on the “Property” link on the home page. The location of this link can be seen in Figure 2.
Once in property, click on the magnifying glass next to “property profile”. The location of this can be seen in Figure 3.

Property profile allows you to choose the building that you want to make space changes in. To choose the desired building, one can either use the “Property” option to put in the building code or use the “Description” option in which it allows putting the initials of the building. The rest of the options may also be used but it might not be as useful. The locations of “Property” and “Description” can be seen in Figure 4.
Once the desired building is chosen, press the “Execute Search” Button shown in Figure 5.

Once the search is executed, click on the building code. Once inside the building, the entire data for the chosen building will be available. All spaces for all the floors should be available for the chosen building. To edit a building, the “Edit” button shown in Figure 6 must be clicked first.

Once the “Edit” key has been executed, the spaces are now ready to be edited. When a room is selected something like Figure 7 will show up.
Figure 18: Editing a space in AiM

From the figure above, we can see the information that we can update. Once finished updating the space information, click on the green flag on the top right corner. If there are no more rooms to be update make sure to click on the save button shown in Figure 8. If there are no changes made just click on the cancel button.

Figure 19: Saving changes

This is all that needs to be done on the property side. We shall now go to the Space Management to update the same information. If only the location type was updated, there will be no need in updating that on the Space Management side since it does that automatically.
**Space Management**

On the space management side we are mainly concerned with the Institution, Department, Organization, Percentage Occupancy, Dates, Functional Use, and Functional Use Percentage. The space management link can be found in the homepage of AiM. The location can be seen in Figure 9.

![Space Management Link](image)

Figure 20: Location of Space Management

A similar process is made as it was done for the Property side. After clicking on space management, click on the magnifying glass next to “Organizational Occupancy” and put in the building information and then execute the search. Unlike the property side, the space has to be selected before editing it. After selecting the desired room, one can see that the edit button is now available. It will look something like Figure 10. After clicking the edit button, click the organization name in order to edit the information of the space. Figure 10 highlights where to click.
After clicking on the organization, one can see that the institution, department, or the organization cannot be edited. In order to have the capability of editing more information, one must delete the entire organization within the room. To do this, change the “To Date” to a day after the “From Date” and less than the current date of editing. An example can be seen in Figure 11.

Figure 22: Deleting an organization (Date deleted: November 25, 2014)
Once the date has been set, press the green flag button to execute it. You may now add the correct information by clicking the add button shown in Figure 12.

All the necessary information can now be added to the space. The usage information can be triggered by clicking the add button. Once all information has been entered, click the flag button and then save everything.

**Adding Occupant Information**

To add occupants to the location you need to go to the occupant page under the “view” dropdown menu, shown in figure 13.

Similar to the previous steps you can click on the current occupant to give an “end date” to inactive the occupant and/or you can click on the add line item (the green plus sign) to add a new occupant. The occupant ID is the occupants Odin ID. If the person who completed the space survey does not have the Odin ID you can search for the occupant by name using the search button. In this module you will add the start date and occupant type. Once you have updated the information click on the green flag to return to the room record and click on the save button to save all changes. Figure 14 below highlights all the field you will need to complete in the occupant page.
Conclusion
This section has given a step by step process of entering data in AiM regarding the space surveys that are conducted once a year at Portland State University.
Classroom Condition Assessments

Purpose
The Campus Planning Office reviews classroom conditions annually to track the quality of instructional space and identify recommended maintenance and capital improvements. A list of rooms to be assessed is determined in collaboration with the Registration and Records office during fall term. A report of the findings is presented to the Space Allocation Committee annually.

General Room Condition
Each room is visually evaluated by Campus Planning staff and assessed an over all condition rating based on a broad range of factors. The overall general room condition is determined as good, fair or poor defined as follows:

**Good** - There are no major defects, either visible or functional and the item remains in full working condition.

**Fair** - The item suffers from some amount of wear and appears clearly to be a well-used item. Nonetheless, it continues to function generally as was originally intended and should be expected to do so for some amount of time.

**Poor** - The item has major damage and is unlikely to be able to function as was originally intended or may be aesthetically compromised.

Evaluation Factors and Condition Ratings
The following factors are evaluated in each room. Any fire, life, safety or building repair issues are reported to Facilities and Property Management.

**Furniture:**
The quantity and type of student station furniture is inventoried, verifying if the furniture is fixed or moveable. The number of Disability Resource Center installed ADA student stations are confirmed. The conditions of the furniture is determined based on the following ratings:

**Good** – There are no major defects, either visible or functional and furniture matches

**Fair** – There is some amount of wear, but continues to function as originally intended, there may be some missed-matched furniture

**Poor** – there is major damage to several pieces of furniture leaving them either unable to function or may be aesthetically compromised, there are several missed-matched furniture pieces

**Clocks:**
The presence of a clock in classrooms is determined and the condition of the clock is evaluated based on the following:
- Good – There are no major defects and the clock is working and displaying the accurate time
- Fair – there is minor wear (scratches, fading etc.) but the clock works and may or may not need the time adjusted
- Poor – There are major defects making the clock no longer functional or aesthetically compromised.

**Signage:**
Door signage is verified at each entry to the room and that the room numbers match the CAD drawing floor plans. Braille is verified as existing as part of the room signage.

**Audio & Video Technology:**
The type of technology in each room is determined based on the Office of Information definitions of High-Tech, Mid-Tech, Low-Tech or No-Tech. Projector and projector screen types and locations are identified. Projector screens are evaluated based on the following ratings:

**Good** – There are no major defects in the screen and the screens manual or electrical controls functioning as intended

**Fair** – There is some amount of wear on screen (minor rip or stains), but the screens manual or electrical controls are still functioning as intended

**Poor** – there is major wear on the screen compromising the function and/or the screens manual or electrical controls are no longer functioning

**Writing Boards:**
Writing Boards are identified by type, (whiteboard or chalkboard), and the condition is rated as follows:

**Good** – There are no major defects and the board is clean

**Fair** – There is some amount of wear on the board (scratches, etc) and/or the board is visually dirty (could be cleaned) but still functions as was originally intended.

**Poor** – there is major damage and or is aesthetically compromised and no longer functions are originally intended.

**Room Conditions:**
The interior room envelope is evaluated for maintenance and repair deficiencies. The evaluation includes visual observation of the following elements:

- Floor Finishes
- Wall Finishes
- Door and Window Conditions
- Ceiling Finishes
- Lighting and Controls
- Mechanical and Controls
The type of finishes and furnishings of the room elements are evaluated based on a similar Good/Fair/Poor rating system.

**Classroom Condition Assessment Procedure**

**Purpose**
The Campus Planning Office reviews classroom conditions annually to track the quality of instructional space and identify recommended maintenance and capital improvements. A list of classrooms to be assessed will be provided prior to beginning.

These procedures provide basic information for completing the field assessment review of classroom physical conditions. Additional condition deficiencies may be observed in the field that were not contemplated and should be noted in the assessment.

For further information and training in completing the form, coordinate with Amanda Wolf, Space Management Analyst.

**Accessing the assessment document**
The assessment information is collected electronically using computer tablets. Tablet unlock code is **PSRE (7773)**.

Go to Bookmarks:  

Scroll to: Classroom Survey

**Surveyor Name:** Enter your name in the field provided.

**Building:** Using the pull-down menu, select the building where the classroom is located.

**Room:** Enter the room number of the classroom to be surveyed, as provided on the list of classrooms. If the classroom can’t be located notify the Space Management Analyst.

**Continue:** to next page of the assessment

**General room information**

**1) Are there obstructed views?**
Obstructions include columns, walls, built-in equipment or other items that would prevent occupants from seeing the instructor, white boards, projector screens, tack boards or other items used for instructional purposes.

**2) Is the room ADA accessible and easy to navigate?**
An accessible path of travel is required from the buildings main entrance to the student ADA station and instructor’s podium or table.
Building Entry: At least one main building entry requires an ADA power-assist button and provide an accessible path to the classroom. No thresholds in the path can be more than \( \frac{1}{2} \)” high and no carpet can be more than \( \frac{1}{4} \)” deep.

Elevator: All classrooms on other than the ground floor are to be assessable by elevator.

Hallways: Main hallways leading to classrooms should be at least 5’-0” wide.

Doors: All doors in the path of travel and entering the classroom should be at least 36” wide.
- Doors should have a level unobstructed 5’-0” x 5’-0” clearance at both sides. There should be at least 18” clear width at the door handle/latch side.
- Classroom doors should have a closer, wall mounted doorstop and viewing pane or sidelight.
- Closers require average force of not more than 5 lbs. to pull or push and need to take at least 5 seconds to close.
- Door hardware is to be lever handle or exit push bar, always operable from the inside.
- Door viewing pane must be within 43” of the floor.

Classroom Aisles: All aisles between and around rows of tablet arm or tables/chairs are to be not less the 36” clear.
- Provide two 30” wide by 48” deep ADA chairs at each ADA desk.
- One ADA desk is required for each 25 occupants or portion thereof.
- A 60” diameter turning radius is required adjacent to the ADA desk(s).

3) Is there compliant signage at every classroom door?
- Signage is required to be centered in the 18” zone at the door handle/latch side centered 54” above the finish floor.
- Verify that signage room numbers are correct.

4) Is there braille on all signage?
- Verify that all the classroom signage includes braille.

5) Is there an ADA power assist button?
- If there are no ADA power assist buttons on any of the classroom doors, skip question 6.

6) If there is an ADA power assist button, does it work?
- Verify that the ADA power assist button is located within 15” of the frame on the door handle/latch side and provided with a 30” clear width.
- Verify that the location does not conflict with the door swing.
- Verify that the power assist button opens the door, holds it in the open position for approximately 5 seconds, and takes approximately 5 seconds to close.

7) Is door hardware ADA compliant?
- Door hardware is to be lever handle or exit push bar, always operable from the inside.
8) **What is the pressure weight on the door(s)?**

- After opening the door about 15 degrees apply the pressure meter to the face of the door near the door handle and continue to push the door open to about 45 degrees at a slow constant rate.
- Enter the measured amount of approximate force required to push (or pull) for each door.

9) **Is there a trashcan in the room?**

- Verify if there are any trashes, recycling or other disposal receptacles located in the classroom.

10) **Did you submit a work order?**

- Indicate if you submitted a work order for any issues identified in items 1 – 9.
- If items appear to need repair and a work order was not submitted notify the Space Management Analyst.

Continue: to next page of the assessment

11) **Furniture type**

- Indicate the predominant type of furniture in the room and if the correct number of ADA tables and chairs are provided. See item 2 for the number of ADA tables and chairs required.
- Two extra wide heavy-duty chairs capable of carrying 200 lbs. each are required at each ADA table, See item 2 for required clearances.
- ADA tables are height adjustable for chair or wheelchair knee clearance while providing an appropriate working surface elevation.

12) **Is the furniture fixed?**

- Indicate if the predominate type of furniture is fixed. Fixed furniture could include chairs, desks or room conditions that prevent rearrangement of classroom setup.

13) **Seat count**

- Indicate the total number of chairs with available writing surface, including compliant ADA seats.

14) **Furniture condition**

Rate the general overall condition of the classroom furniture based on the following criteria:

- **1) Good** – No observed defects and furniture is of a consistent type, style and color (ADA furniture may differ)
- **2) Fairly Good** - No observed defects, but there are multiple furniture types, styles or colors.
- **3) Fair** – Chairs or tables have observed minor wear, which may include abrasion, surface scratches or dirty surfaces.
4) **Fairly Poor** - Chairs or tables have observed minor damage, which may include chips, deep scratches, dents, graffiti, etc. They may still function, but the condition impacts usability and education quality.

5) **Poor** – there is major damage to chairs or tables that could prevent safe use or function for the intended purpose. These conditions would include; loose base attachment, broken seats, backs or writing surfaces, bent/broken/uneven legs, damaged wire molding or connections, etc.

15) **Comments**

Provide clarifications and comments regarding furniture condition, including specifics for furniture conditions rated fairly poor (4) or poor (5).

16) **Did you submit a work order?**

- Indicate if you submitted a work order for any issues identified in items 11 – 14.
- If items appear to need repair and a work order was not submitted notify the Space Management Analyst.

**Continue:** to next page of the assessment

17) **Screen**

Is there a projector screen in the room? Specify type

18) **Screen Condition**

Rate the general overall condition of the projector screen based on the following criteria:

- **1) Good** – No observed defects screen functions as intended.
- **2) Fairly Good** - No observed defects, but there are multiple furniture types, styles or colors.
- **3) Fair** – Chairs or tables have observed minor wear, which may include abrasion, surface scratches or dirty surfaces.
- **4) Fairly Poor** - Chairs or tables have observed minor damage, which may include chips, deep scratches, dents, graffiti, etc. They may still function, but the condition impacts usability and education quality.
- **5) Poor** – there is major damage to chairs or tables that could prevent safe use or function for the intended purpose. These conditions would include; loose base attachment, broken seats, backs or writing surfaces, bent/broken/uneven legs, damaged wire molding or connections, etc.

**Condition Ratings:**

- Good – There are no major defects in the screen and the screens manual or electrical controls functioning as intended
- Fair – There is some amount of wear on screen (minor rip or stains), but the screens manual or electrical controls are still functioning as intended
- Poor – there is major wear on the screen compromising the function and/or the screens manual or electrical controls are no longer functioning
- Comments - specifically call-out the reasons why condition was rated fair or poor

19) Type of Board

Is there a whiteboard or chalkboard in the room?

20) Number of Boards

21) Is the Board behind the screen?

22) Board Condition

Rate the general overall condition of whiteboards and chalkboards based on the following criteria:

- **1) Good** – No observed defects screen functions as intended.
- **2) Fairly Good** - No observed defects, but there are multiple furniture types, styles or colors.
- **3) Fair** – Chairs or tables have observed minor wear, which may include abrasion, surface scratches or dirty surfaces.
- **4) Fairly Poor** - Chairs or tables have observed minor damage, which may include chips, deep scratches, dents, graffiti, etc. They may still function, but the condition impacts usability and education quality.
- **5) Poor** – there is major damage to chairs or tables that could prevent safe use or function for the intended purpose. These conditions would include; loose base attachment, broken seats, backs or writing surfaces, bent/broken/uneven legs, damaged wire molding or connections, etc.

- Good – There are no major defects and the board is clean
- Fair – There is some amount of wear on the board (scratches, etc) and/or the board is visually dirty (could be cleaned) but still functions as was originally intended.
- Poor – there is major damage and or is aesthetically compromised and no longer functions are originally intended.

23) Comments

Provide clarifications and comments regarding furniture condition, including specifics for furniture conditions rated fairly poor (4) or poor (5).

24) Did you submit a work order?

- Indicate if you submitted a work order for any issues identified in items 17 – 22.
- If items appear to need repair and a work order was not submitted notify the Space Management Analyst.

Continue: to next page of the assessment

25) Type of flooring

26) Flooring condition
Base

Condition Ratings:

- Good – There are no major defects
- Fair – There is some amount of wear on the flooring (stains, rips, snags, etc.) but the flooring is safe and not aesthetically compromised
- Poor – There is major damage to the flooring (stains, rips, snags, etc.) that compromise the safety of occupants (tripping hazards, etc.) and/or is aesthetically compromised (cannot be cleaned and should be replaced)
- Comments – specifically call-out the reasons why rating was fair or poor

15) Comments

Provide clarifications and comments regarding furniture condition, including specifics for furniture conditions rated fairly poor (4) or poor (5).

16) Did you submit a work order?

- Indicate if you submitted a work order for any issues identified in items 11 – 14.
- If items appear to need repair and a work order was not submitted notify the Space Management Analyst.

Continue: to next page of the assessment

Wall Condition

Condition Ratings:

- Good – There are no compromises in the wall structure (holes, etc.) and there are no major defects in the paint (stains, dirt, scratches, etc.)
- Fair – There is minimal compromises to the wall structure (no large holes) and there is some amount of wear to the paint (stains, dirt, scratches, etc.)
- Poor – there are major compromises to the wall structure (large holes, etc) and/or there are major defects in the paint (stains, dirt, scratches, etc.) that compromise safety of occupants and/or is aesthetically compromised (cannot be cleaned/patched and/or should be repainted)
- Comments – specifically call-out the reasons why rating was fair or poor

Is there a clock?

If there is a clock, does it work?

Are there windows?

Window Condition
Water damage to surrounding surfaces

Signs of leaks

Mold or mildew

Operable? Window stops

*Condition Ratings:*

If there is a window what type of window covering does it have?

Window covering condition

- **Good** – There are no major defects, whether visible (stains, rips, broken panels) or functional and the window coverings remain in full working condition
- **Fair** – There are minor amounts of defects (stains, rips, broken panels, etc.) but window coverings still function as originally intended
- **Poor** – There are major defects that leave window coverings as aesthetically compromised and/or no longer functioning as originally intended
- **Comments** – specifically call-out the reasons why rating was fair or poor

15) **Comments**

Provide clarifications and comments regarding furniture condition, including specifics for furniture conditions rated fairly poor (4) or poor (5).

16) **Did you submit a work order?**

- Indicate if you submitted a work order for any issues identified in items 11 – 14.
- If items appear to need repair and a work order was not submitted notify the Space Management Analyst.

**Continue:** to next page of the assessment

Ceiling Condition

Are the light switches labeled

Type lighting controls
Classroom Utilization Report

The Campus Planning Office reviews classroom utilization annually to track the efficiency and need for additional classrooms. Utilization is based fall 4th week class schedule and enrollment data drawn from the BANNER information system. All rooms generating student credit hours fall term are evaluated including; general pool and departmental classrooms, laboratories, studios, conference rooms and other spaces. This provides data on current classroom demand as well as pent up demand by classes being held in rooms not intended for instructional purposes. The criteria for measuring utilization is provided in the Space Allocation Standards section of this manual. Need assessment is based on demand analysis, comparing current quantities of classrooms by size with existing or projected enrollment information. The report on classroom utilization and pent up need is presented to the Space Allocation committee annually.
The Office of Academic Affairs (OAA) has an Academic Program Review policy. The academic program review process is designed to provide continuous improvement of academic quality within units through self-study, external review, and internal action plans. Part of this review process includes a report from the Campus Planning Office of departmental space and a breakdown by usage. CPO has developed the following template to provide departments and OAA detailed space and utilization information to help inform goals and action plans:

- **Introduction**
  - Total square feet, location(s), types of space

- **Classroom Utilization**
  - Look at % of course held in departmentally controlled room and general pool classrooms
  - Utilization of departmentally controlled classrooms
  - Review course enrollments for the last academic year
  - Review number of hours course scheduled for the last academic year

- **Office and Office Support Utilization**
  - Review number of FTE and total square footage assigned to the department

- **Qualitative Spatial Assessment**
Annual Sightlines Reporting

Sightlines is a facilities asset advisor group that helps educational institutions better manage their facilities investments. Using shared data and working collaboratively with PSU, they build an innovative model to benchmark performance. Through the use of reporting and analysis tool, Return on Physical Assets (ROPA), Sightlines is able to track performance over time, helping PSU to make more informed policy and strategic decisions based on consistent and accurate empirical evidence.

Each year PSU works with Sightlines to provide important facility asset information that is analyzed and refreshed annually in the ROPA software. The Space Management team in the Campus Planning Office is responsible for providing space information each year to Sightlines. The Campus Planning Office provides the annual space splits each year for Sightlines staff to analyze. This is typically done in late fall or early winter. While the Campus Planning Office provide the space information, in some cases the splits will be based on Finance and Administrations decision of the financial splits for that fiscal year (which are subject to change annually). The Campus Planning Office will work with Sightline representatives and PSU accounting staff to ensure that each year space information is accurately tracked.

The Executive Administrative Coordinator of Planning, Construction & Real Estate (PCRE) is responsible for coordinating all Sightline information.
Annual American Physical Plant Administrators (APPA) Facilities Performance Indicators (FPI) Reporting

The American Physical Plant Administrators (APPA) Facilities Performance Indicators (FPI) is an annual survey of over 300 higher education institutions. The survey asks comprehensive questions to allow extensive comparisons of average costs for different types of space and institutions such as staffing levels, salaries, and performance levels for custodial, grounds, maintenance, and other functional areas.

The Space Management Team in the Campus Planning Office is responsible for the Campus Current Replacement Value (CRV) Worksheet and Module 2 of the survey each year. Module 2: What Facilities Make Up Our Institution?, provide the following space information:

- Total GSF maintained by facilities
- Building NASF (based on FICM Space Use Categories)
  - Total campus
  - Classroom
  - Laboratory Facilities
  - Office Facilities
  - Study Facilities
  - Special Use Facilities
  - General Use Facilities
  - Support Facilities
  - Health Care Facilities
  - Residential Facilities
  - Unclassified Facilities
  - Non-Assignable Facilities
  - Structural Facilities
- Number of Buildings
- Building Adjusted Average Age
- Total acres maintained by facilities

The Campus CRV worksheet is completed each year in coordination with Capital Projects and Construction (CPC). The CRV looks at total GSF of specific space types and the current construction costs per GSF to determine the replacement value. CPC updates the constructions costs each year. The space types categories are as follows:

- Research/Laboratory
- Classroom/Administration
- Residential
Each year the spreadsheet along with detailed notes on how the information for each module was gathered is saved on the Facilities and Property Management drive in the *Shared folder*. Each year a new file is created with the name *FPI (year)*, for example *FPI 2014*. The following is a link to the FPM *Shared Folder*:

I:\Staff\Facilities\Shared\All_FAP

This survey is completed annual during the month of November and submitted by mid-December. The Executive Administrative Coordinator of Planning, Construction & Real Estate (PCRE) is responsible for coordinating all Sightline information.
Annual Space Splits

The annual space splits are conducted each year in late winter after space surveys have been updated in AiM. The purpose of this report is to inform accounting staff of billing rates in a particular building for projects. The space splits divide building space into the following categories:

- Education and General (E&G)
- Auxiliary (AUX)
- Parking
- Housing
- Retail
- Child Care
- Student Health
- City of Portland
- Campus Recreation
- Athletics

The Space Splits can be found in the following location:

I:\Staff\PSRE\PSRE_Planning\--Projects\CPO Projects\Space Reports\Space Splits Report

Most buildings on campus are 100% E&G, parking, or housing but there are several buildings that have space in one or more of the categories above. If there is a use split you will need to calculate the square footage of each categories space and prorate the common areas (circulation, restrooms, mechanical space, and janitorial services) for the entire building. In most cases you will use the following rules when calculating space splits:

- All common space prorated for percent of each category in building
- Common space include
  - All circulation open to the public (not assigned to a department)
  - All mechanical rooms
  - All building services (telecom, janitorial, restrooms, building storage)
- All retail space percentage will be calculated using the rent roll square footage. You can get an updated rent roll from the Property Manager in Facilities and Property Management.
- Retail space will not be included in the common space proration

There are some exceptions to these rules and a detailed methodology can be found in the Space Splits Report folder.

For every building that has parking located in the building two (2) splits will done. Once split will look at the space not including parking. The second split will calculate the space splits including parking.
Once you have finished the splits for the upcoming fiscal year, you will send the report to CPO, CPC, and accounting staff.
Federal Administrative Research Cost Allocation Survey Process

The Campus Planning Office assists Research and Strategic Partnerships (RSP) during renegotiations of the Federal Facilities and Administrative (F&A) rate every 3-6 years. The F&A rate determines the percentage of overhead funding the institution is eligible to receive from the federal government relative to PSU sponsored programs, and competitively awarded grants and contracts.

The overhead funding covers the indirect space, operations and maintenance costs associated with accommodating research in PSU buildings. Several methods can be used to determine the reimbursement rate, based on the accurate FICM type and use coding of PSU’s building space. One method is to conduct a full audit of all campus buildings with research located in them to determine the proportion of research space to associated support space. A second method is to use sampling of major PSU research groups and the buildings they’re located in.

In 2012 the F&A rate was renegotiated using fiscal year 2011 space information. RSP partnered with Huron Consulting Group to develop the F&A proposals and negotiate the rate of F&A overhead cost recovery. The Campus Planning Office assisted Huron by working with the departments selected as PSU’s research samples. Detailed surveys of their research space were conducted and measured in relation to associated common space and indirect expenditures associated with accommodating research.
Archival Requirements

Where the Various Files are to be Saved
There are various locations within the I-Drive that files can be saved in. As a space analyst, we are mainly concerned with the Facilities and PSRE Planning folders. These two folders can be found using the following path:

I:\Staff

Facilities
The main purpose of visiting the Facilities folder is to make changes to space area on a dwg. file. Under the DWG folder within Facilities, one can see a folder for all buildings associated with Portland State University. As mentioned before in the AiMCAD section, we are only interested in the Area_Calc_Dwgs of the buildings. For example, if we were to make changes to a space’s area in Market Center Building, we would use the following path:

I:\Staff\Facilities\Dwgs\087_MCB\MCB_Model\MCB_Area_Calc_Dwgs

PSRE Planning
For space allocation and management purposes most files will be located within the PSRE Planning folder. Within PSRE Planning there are three folders (Projects, Resources, Space Planning) that are important and are used frequently. The PSRE Planning folder can be found using the following path:

I:\Staff\PSRE\PSRE_Planning

Projects
Within the Projects folder one can find the following useful folders:

Capital Project Requests
CPO Projects
    Space Reports
    Various other specific
Non PSU Projects
Project Archive
Project Set-up
PSU Projects (non CPO initiated)

Resources
Within the resources folder one can find the following useful folders:

Academic Scheduling Policies and Reports
ACAD-Standards
AiM
Building Inventory
Space Management

*Space Planning*
Within the Space Planning folder one can find the following useful folders:

- Classroom Utilization 2012
- Conference Space Planning 2011
- Space Allocation Drawings
- Space Planning Policies and Procedures
- Space Request Forms