MAXIMUS Higher Education

Ways to Improve your Space Management Process

March 13, 2018

MAXIMUS

Agenda

- Introduction to MAXIMUS and Higher Education Practice
- Space Survey Basics
- Planning for the Space Survey
- Training
- Implementation
- Review
- WebSpace

MAXIMUS

- One of the largest publicly-held firms providing dedicated services to government and education sectors
- Revenue of $2.5 Billion (FY17)
- Excellent revenue visibility and strong long-term growth outlook
- 20,000+ employees in hundreds of locations across the U.S., Australia, Canada, Saudi Arabia, Singapore and the U.K.
- MAXIMUS Higher Education serves more than 150 colleges, universities, nonprofits and hospitals

Higher Education Practice

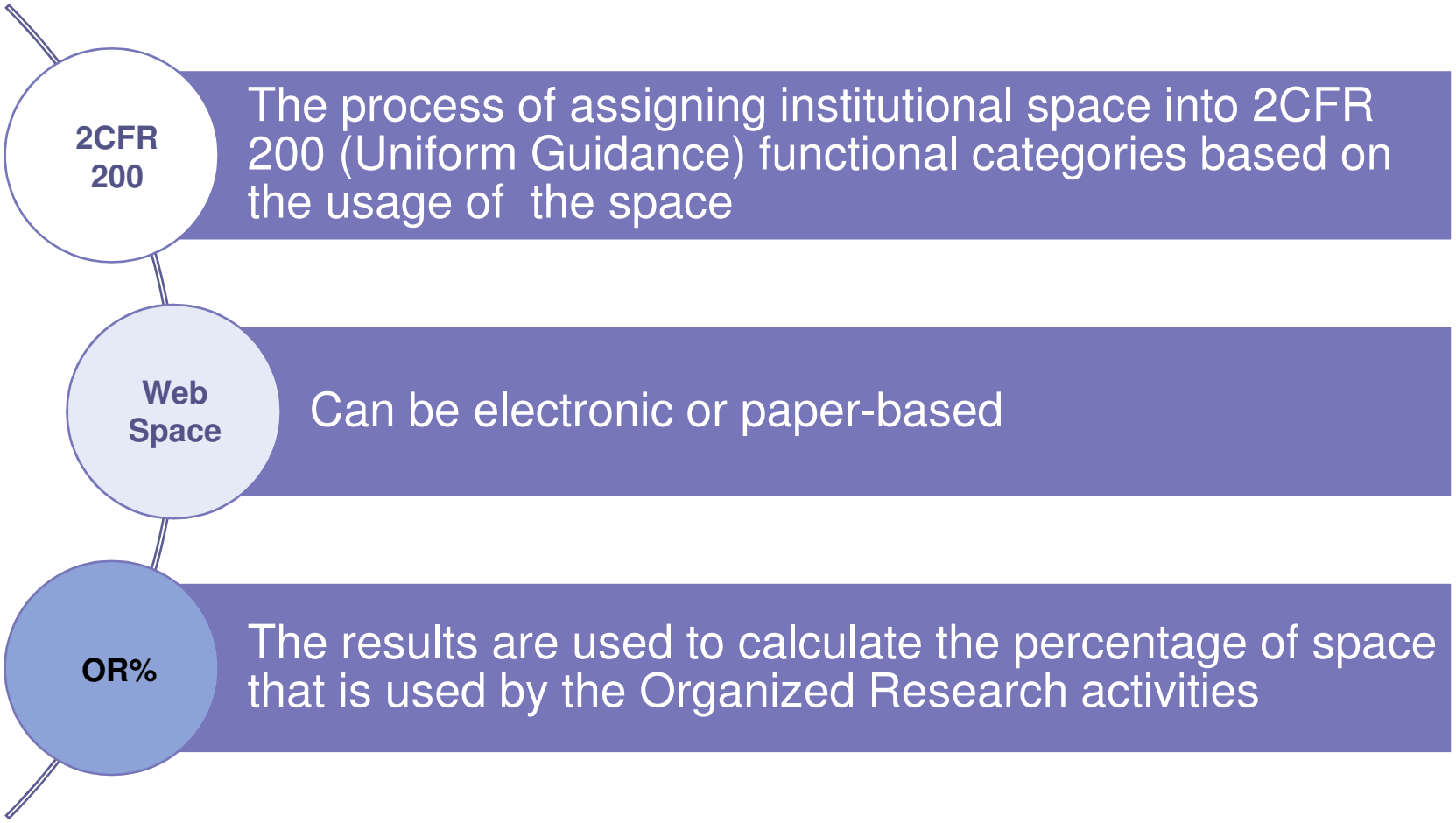
F&A Consulting Services

- F&A Proposal Preparation
- Space surveys/reviews
- Negotiations
- Fringe Benefits Rate Proposals
- Assistance with federal Disclosure Statement (DS-2)
- Reviews of Service/Recharge Centers

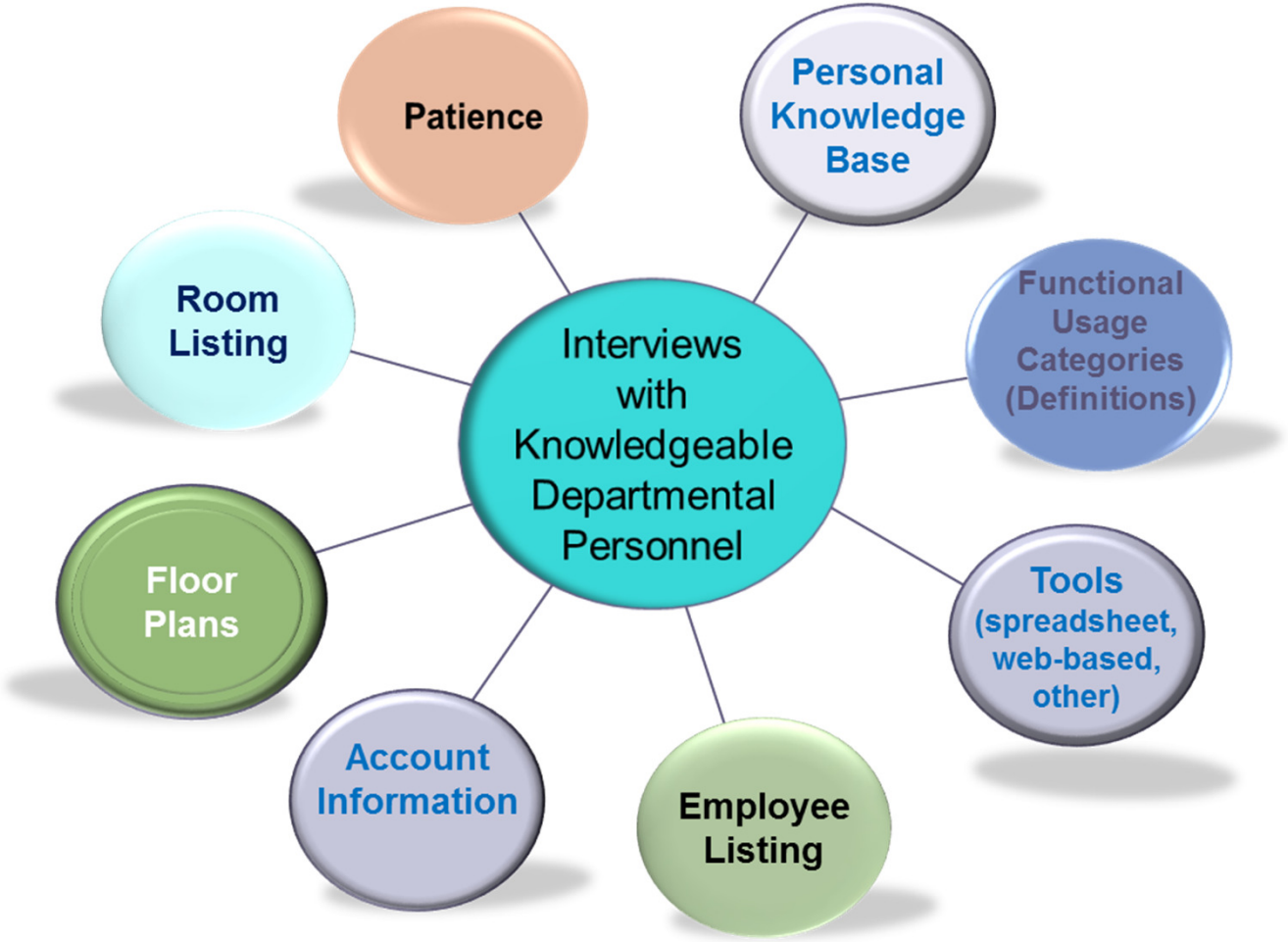
Other Products and Services

- F&A Software: CRIS and WebSpace
- Internal Controls Consulting and Effort Reporting System (ERS)
- Uniform Guidance Diagnostics and Compliance Consulting
- Pre and Post Award Consulting Services and Training
  - Research Operational Reviews – Business Process Review and Improvement – Change Management
  - Policy Review and Development
  - Onsite and Online Training in Grant Management

What is a Space Survey?



Space Survey Musts



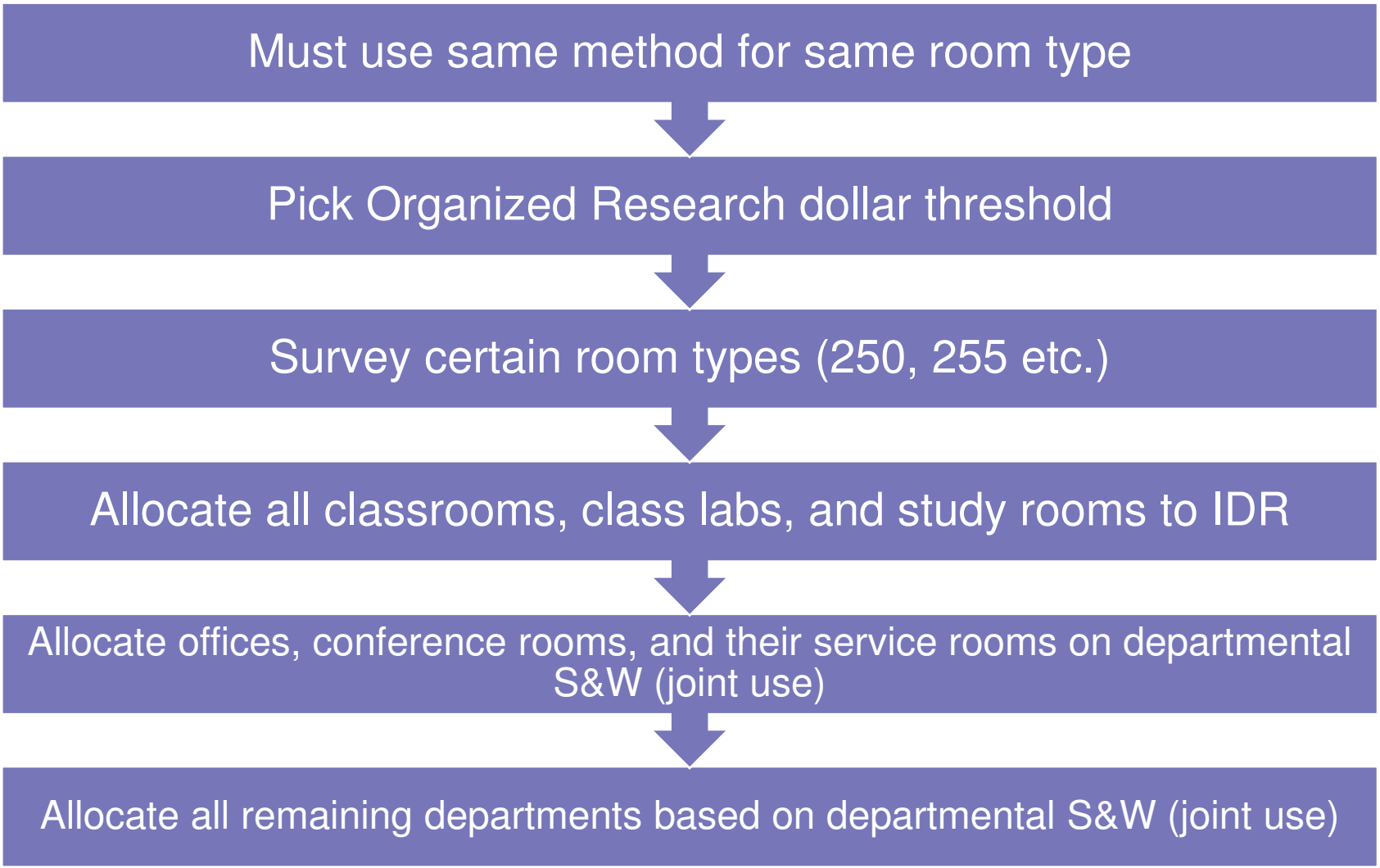
The Space Survey Process

Planning → Training → Implementation → Data Review

Start Planning Early

- When?
- Do the PI's disappear in the summer? Then do it in spring!
- Start planning in January for springtime (April) survey
- Or in March for summertime (July) survey
- Will you use the Alternative Space Method

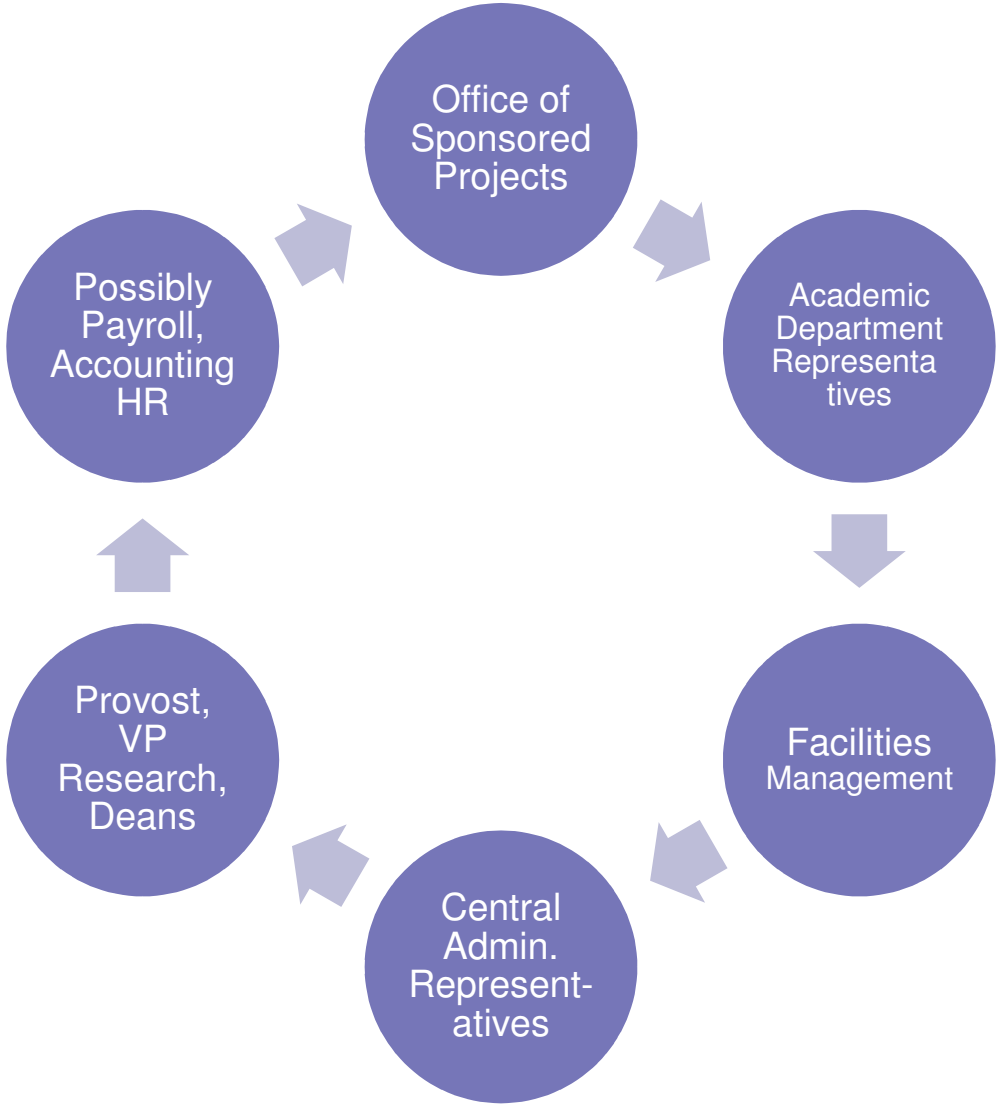
CAS Best Practice Manual – Alternate Space Methodology



Planning

- Identify the space team
- Determine the timeframe and sequence of events
  - Conduct in base year, if possible
  - Allow enough time to complete – depends on scope
- Review, update and/or develop space survey policies, procedures, and definitions consistent with Uniform Guidance and Best Practices Manual

The Space Team



Planning

- Communication
  - Senior Management
  - Departments
- Management issue for departments to get the right people for the assigned tasks
- Accurate facilities information
  - Inventory is what space you have, survey is how that space is used
- Are there other uses for space data?

Training

- Extremely important element of the process
- In-person training follow up can save headaches during review process
- Functional definitions
- Space assignment and types of space
- Room occupants treatment – paid and unpaid
- Funding sources
- Special Circumstances

Space Survey Functional Definitions

- The direct cost functions for an academic department generally consist of:
  - Instruction & Departmental Research (IDR)
  - Organized Research (OR)
  - Other Sponsored Activity (OSA)
  - Other Institutional Activities (OIA)
- Consistent understanding is key

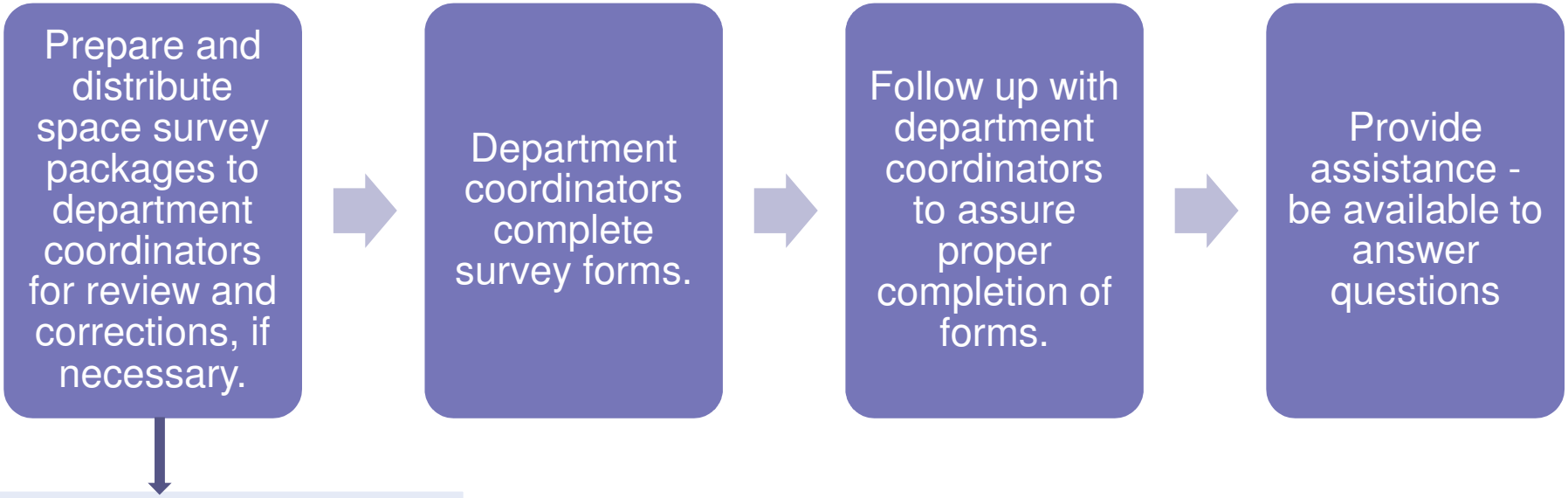
Biology Department

This says "organized research"

Physics Department

This says "organized research"

Implementation



SPACE SURVEY PACKAGE

Policies & procedures
Definitions
Forms
Floor plans
Department account listing by PI
Departmental S&W distribution

Data Review

- Analyze summary data
- Compare research salaries or MTDC to research space
- Research space/no research dollars
- Review detail for
  - Labs 100% to organized research
  - 95/5 syndrome
  - Visiting faculty
  - GRA's
  - Vacant space
  - Coding inconsistent with room type

Important Considerations

- Professional judgment is the key; not an “exact” science.
- Results should be accurate and supportable
- The room should be surveyed by an individual with knowledge of its use.
- Survey based on the entire FY usage.
- Appropriate training is necessary.
- Consistency across departments

MAXIMUS Space Survey Services

- Outsource
- Planning/development
  - Instructions/definitions
  - Scope
- Training
- Quality review
- WebSpace

WebSpace

- Web-based system for inventorying and surveying space
  - Meets F&A (Uniform Guidance compliant) requirements
  - Works with standard browsers and databases
  - Integrated with CRIS
  - Can be used as system of record for inventory and space survey
  - Flexible product adaptable to school's methodology and requirements
  - Can be licensed or leased

WebSpace

WebSpace

- Features/Benefits
  - Integrates analytical process – functional percentage calculation using room occupant/payroll information
  - Rooms can be shared and/or clustered
  - Automates service lab and recharge room calculation
  - Secure – role based security, domain access
  - Management reporting – based on roles for assigned areas, allows for user defined reports
  - Prior year data archival
  - Easy data import/export

WebSpace

Upcoming Webinars

- Project Management of the F&A Process • April *10 • 2pm EST*
- Subrecipients and Monitoring • *May 22 • 2:00 p.m. EST*
- Why Traditional Effort Reporting is Still a Good Solution • *June 4 • 2:00 p.m. EST*
- Compliance Considerations for F&A Proposals • *July 17 • 2:00 p.m. EST*
- Rate Setting for Service Centers – The Basics • *August 14 • 2:00 p.m. EST*
- Tricks and Tips for Reporting in CRIS® • *October 18 • 2:00 p.m. EST*
- Pre-award Costs and Responsible Stewardship • November 6 • *2:00 p.m. EST*

Upcoming Workshops and Annual Meeting

- CRIS University: Introduction to CRIS Workshop • May 16 through May 18 • Northbrook, IL
- F&A Long Form Training Workshop • September 11 through September 13 • Hilton Clearwater Beach, FL
- 31st Annual MAXIMUS Higher Education Practice Meeting • September 12 through September 15 • Hilton Clearwater Beach, FL

Questions

Chuck Wuensch

WebSpace
CharlesMWuensch@maximus.com
800-709-2747

Caroline Beeman

Service Centers
CarolineMBeeman@maximus.com
800-709-2747