TEXAS A&M UNIVERSITY – COMMERCE

FACILITIES SPACE INVENTORY MANUAL

Process Documentation

Office of Facilities Management

2600 S. Neal St.

Commerce, TX 75428

(903) 886-5761 voice

(903) 886-5751 fax

This manual is intended to identify processes in place at Texas A&M University – Commerce as they pertain to the Texas Higher Education Coordinating Board procedures of Facilities Space Inventory Control. 2012 Edition

Purpose and Overview

This manual is intended to identify processes in place at Texas A&M University – Commerce for the use of Facilities Inventory Space Control as described in the Texas Higher Education Coordinating Boards' Facility Inventory Manual.

The A&M Commerce system of managing its facilities now reflects a culture of continuous commitment and improvement to ensure the following standards are met as put forth by the THECB:

1. All rooms will be identified by a unique alphabetic or numeric code.
2. Room type and room use codes, and Classification of Instructional Programs (CIP) codes accurately reflect the actual use of the room.
3. Pro-rated use reflects the time used for each function.
4. Room area (square footage) is verifiable, accurate and in AutoCAD.
5. Control systems for the space inventory are in place:
    a. The inventory control system is now a formal process that is efficient, effective and enforced.
    b. Reporting mechanisms are now in place to provide more reliable data input to all involved.
    c. Renovations and/or conversions are reflected in the inventory data in a timely and effective manner.
    d. Inventory data is reconcilable and compatible between reporting systems.

INVENTORY CONTROL SYSTEMS

Texas A&M University – Commerce manages it's space inventory through the following mechanisms:

1. A regular series of audits, surveys, updates and reports.
2. Formal project management and inventory control
3. Centralized responsibility for physical space reporting
4. Recorded Documentation
5. Inventory control and communication

1. AUDITS, SURVEYS AND REPORTS
To maintain an accurate snapshot of changes to facilities space, A&M Commerce manages different levels of formal and informal reporting of room data. The following mechanisms either capture or verify changes to university spaces:

THECB Facilities Room Inventory Audit
Frequency – Every five years
Scope – The THECB's randomized space inventory system helps A&M Commerce improve the data and process by which the university accurately reports the use of campus facilities. In addition, accurate information supports the objective of maximizing space utilization and aids in the planning of future facilities. Room data entered throughout the year become eligible for audit. Data is entered on a continuing basis throughout the five year reporting cycle due to both formal and informal space changes on campus.

Campus-Wide Space Survey
Frequency – Every year
Scope – Departmental space surveys are collected by the Facilities Information Manager (FIM) and reconciled with the current THECB Facilities Inventory Listing. The FIM reviews the campus room inventory and changes which reflect renovations, modifications in room usage and space utilization. The revised data is verified, updated and sent electronically to the THECB

Facilities Space and/or Relocation Requests
Frequency – Ongoing
Scope – Requests for changes are initiated by submission of a Renovation/Minor Construction Projects Approval Form and/or the Relocation Request Form. The Renovation/Minor Construction Form is used when there is to be a physical change to the room(s). The Relocation Request form is used when an existing space is changed by someone moving to or from a space. No moves will be scheduled without the FIM receiving a Relocation Request Form. Weekly submissions of project listings are forwarded to the FIM weekly to help identify possible changes to the inventory. Facilities custodians, maintenance workers, and supervisors are also instructed to notify the FIM of any observed

changes. All information obtained by the above is then entered into the Space Inventory Database by the FIM.

Summary of Inventory Analysis and Reporting

Type of Change	Frequency of Data Uploaded to the THECB
Relocation Request	Data collected from form, verified by the FIM, and the facilities space inventory is updated.
Renovation/Minor Construction Projects Approval Form	Data collected from form, verified by the FIM, and the facilities space inventory is updated.
Weekly Project Manager Updates	Data of possible future change is collected and tracked through the project. The facilities space inventory is updated at completion of project.
Annual Facilities Inventory	Yearly data collected from the individual departments is uploaded to the facilities space inventory then forwarded to the THECB through their methods of data transmission.
THECB Facilities Audit	Data collected on ongoing basis from the mechanisms above with focused audit being performed by the THECB every five years.

2. **FORMAL PROJECT MANAGEMENT AND INVENTORY CONTROL**

Both small and large projects involving physical alterations to existing space are managed by Facilities Services staff and often result in changes to the facilities space inventory.

Requests reach facilities services through any of four documented methods: the Relocation Request Form, the Renovation/Minor Construction Projects Approval Form, through submissions to the SchoolDude Work Order System, and from weekly status reports from all Project Managers. To filter, analyze and prioritize these requests, the Facilities Advisory Committee conducts as needed meetings, where requests are assessed and submitted for approval and funding. Once verified by the FIM, revisions are made to the facilities space inventory then updated to the THECB electronically.

3. **CENTRALIZED RESPONSIBILITY FOR PHYSICAL SPACE REPORTING**

Facilities Information Manager (FIM)
Upon completion of any physical changes, a final floor plan is reviewed and verified by the Facilities Information Manager (FIM). The changes are then certified by the FIM as an accurate rendering of the final space and an authoritative reference tool when conducting audits and departmental surveys. In the case of new construction or large-scale

renovations, the FIM coordinates a visit with the department(s) involved in the space to appropriately code it for occupancy, room use, room type, CIP code and size.

The FIM is responsible for assigning and/or verifying unique room numbers, room type, room use, CIP codes, researching of prorated institutional space and the verification of measured space. The FIM also creates, initiates and manages the department-level inventory surveys, creates data collection tools, and provides standards and training for all individuals involved. The FIM gathers inventory space data from the variety of sources described in this document and is responsible for submission of accurate data to the THECB.

Documentation

In addition to formal processes, various forms are used to record, track and maintain accurate record of the space inventory. Documentation helps to act as a trigger to advance data changes through the A&M Commerce inventory control process. Documentation includes:

Documentation	Description and Purpose
THECB Facilities Inventory Classification and Procedures Manual (most current version)	A&M Commerce has adopted the THECB's Manual as its own training and reference manual. THECB definitions of room type codes, room use codes, CIP codes and instructions for other applications are used.
Texas A&M – Commerce's Process Documentation Manual	Outlines all of A&M Commerce's processes, relationships, systems, documents, and procedures for tracking, recording and verifying facility spaces
Relocation Request Form	Used whenever a space is changed by a move from one space to another
Renovation/Minor Construction Projects Approval Form	Used whenever a space is changed by renovation and/or construction.
Facilities Space Inventory Update Form	Used by individual departments to comply with the annual facilities space inventory audit.
Weekly Project Manager Updates	Data of possible changes is collected and placed in the construction file. The FIM keeps track of completion dates and then collects the necessary data to update the facilities space inventory.

FACILITIES INVENTORY CONTROL AND COMMUNICATION PROCESS

Space Change	Changes occur to physical space as a result of renovation, owner, room type or use change, alteration construction etc. Change is captured by any of four formal reporting methods.
Capture	Discovery is triggered by control mechanism in place: e.g. Relocation Request form, Renovation/Minor Construction Projects Approval Form, Facilities Space Inventory Form, and weekly project manager updates. Data are captured using appropriate documentation.
Report	Reported space changes are reported to the FIM using appropriate documentation form. FIM conducts a review.
Verify	Space is analyzed and if changes exist they are verified and new data is collected. FIM documents changes in database and room CAD files.
Revise	FIM alerts stakeholders of approved changes (i.e. floor plans were revised, space type or use categories are updated.)
Upload	FIM inputs recorded space changes and electronically uploads the data to the THECB. If error occurs, the FIM investigates and corrects the data. New corrected data set is ready for ongoing use.