

Lamar State College Port Arthur

Facilities Space Reporting Procedures

2008 / 2009 LSC-PA Facilities Space Inventory Control

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Lamar State College – Port Arthur Facilities Space Reporting Procedures

Purpose and Overview

The scope of this procedure manual is to identify the processes in place at Lamar State College – Port Arthur (LSC-PA) for systematically implementing and practicing the procedures regarding Facilities Space Inventory Control described in the Texas Higher Education Coordinating Board (THECB) Facility Inventory Manual.

LSC-PA's system of managing its facilities space inventory reflects a culture of continuous improvement and a commitment to ensure that the following standards put forth by THECB are met:

1. Rooms are identified by a unique alphabetic or numeric code.
2. Room use codes, room type and Classification and Instructional Programs (CIP) codes accurately reflect actual use.
3. Prorated use accurately reflects the time used for each function.
4. Reported room area (square footage) is accurate and verifiable.
5. Inventory control systems are in place and in use:
 - a) Facility inventory systems are formal processes that are efficient, effective and enforced (Documentation supports this formal process).
 - b) Reporting mechanisms to provide for feedback to and from data input to executive management are effective.
 - c) Changes (e.g. renovations, conversions, etc.) are reflected in the inventory data in a timely and accurate manner.
 - d) Inventory data is reconcilable and compatible between internal and external reporting systems.

Coordinating Facilities Space Reporting: Ensuring accurate and controlled inventory

LSC-PA Facilities space reporting is managed using the following control mechanisms:

1. A series of audits, surveys and reports.
2. A formal project management process.
3. A centralized reporting process with clearly defined roles and responsibilities.
4. Systems and software.
5. Documentation and drawings.

1. AUDITS, SURVEYS AND REPORTS

To maintain an accurate snapshot of changes to facilities space, LSC-PA manages different levels of formal and informal reporting room data. The following are types of mechanisms that either verify room data or capture changes to its space:

THECB Facilities Room Inventory Audit

Frequency: Every five (5) years.

Scope: The THECB's randomized room space inventory helps LSC-PA improve the data and process by which the college accurately reports the use of campus facilities and project funding. In addition, accurate information supports the objective of maximizing space utilization and aiding in the planning of future facilities. Room data entered throughout the year become eligible for the audit. Data are entered on a continuing basis throughout the five year reporting cycle due to both formal and informal space changes on campus.

Facilities Review Committee Surveys

Frequency: Twice a year, prior to and corresponding with each long semester, campus-wide space surveys are conducted by the Facilities Review Committee (FRC).

Scope: The Facilities Review Committee reconciles the current THECB Facilities Inventory list with the planned utilization for the upcoming semester. This

committee, in coordination with the Registrar, reviews the campus room inventory and indicates changes to reflect renovations, modifications in room usage, funding and personnel changes. The revised data is turned over to the Property Manager (PM) who then verifies the changes, updates the space inventory and submits the updated Facilities Inventory electronically to the THECB.

Existing Space Change Reports

Frequency: As changes occur and uploaded monthly.

Scope: Space changes or errors discovered any time outside of formal audits or surveys is reported directly to the PM. These data include any changes to an existing room’s size, type, use, coding or space number assignment.

Changes are reported by members of the Facilities Management Department to the PM concerning vacated space, changed capacity to rooms (missing chairs), missing equipment, reassignment of space among departments or personnel changes to space by existing occupants (e.g. changing a supply room into a break room, adding a station to an existing office, etc.) Facilities custodians, maintenance mechanics and supervisors are instructed to notify the Director of Facilities of the change, so the director can forward the information to the PM.

Summary of Inventory Analysis and Frequency

Type	Frequency of Data Uploaded to THECB
Existing Space Change Requests	Data collected and uploaded monthly
Facilities Review Committee Audit	Data collected and uploaded each long semester
THECB Facilities Inventory Audit	Data collected on an ongoing basis from mechanisms above but focused review and preparation occurs every five (5) years

2. FORMAL PROJECT MANAGEMENT AND INVENTORY CONTROL

Both small and large projects involving physical alterations to existing space are managed by the Facilities Management Director and staff and often result in changes to the Facilities Space Inventory.

Requests reach the Facilities Management level through many points of input. Work order requests submitted to LSC-PA's Work Order Request System can develop into small or large projects depending on the nature of the request. Physical space change requests are filtered from operational requests (changing light bulbs, custodial inquiries, damage reports, etc.) by the Facilities Work Order Control system and sent to the supervisor who oversees the type of work (HVAC, Contracted Services, On-Site Construction, etc.) Other ideas for space or requests for alterations originate from personal communication between the Facilities Director and individuals across the campus or requests introduced by groups of stakeholders through email or formal meetings (e.g. Faculty Senate).

To filter, analyze and prioritize these requests, the Project Planning Committee (PPC), consisting of the President, VPAA, Facilities Director, Purchasing Agent and Facilities Planner, conduct weekly project management meetings where requests are assessed and submitted for approval and funding. These formal records are collected by the PM who adds approved space changes to the Inventory Punch List for verification and then adds to the Coordinating Board Update form. The Coordinating Board Update form is then submitted to the Director of Institutional Research for analysis and subsequent reporting. The PM then makes revisions to the THECB data and submits the revised Facilities Space Inventory electronically.

3. CENTRALIZING RESPONSIBILITY FOR PHYSICAL SPACE REPORTING

Roles and Responsibilities in Physical Space Reporting

(See also Appendix A: Inventory Control and Communication Process Flow Chart)

Facilities Management Department (FMD)

Upon completion of physical changes, Facilities Management Department designees are responsible for providing space change data for approved projects to the PM in written form. A final floor plan is reviewed and verified by the

Facilities Director or designee and certified as an accurate rendering of the *final* space (not the architectural drawings used during construction when changes are taking place) and submitted to the PM as an authoritative reference tool when conducting audits and departmental surveys.

In the case of new construction or large-scale renovations, FMD coordinates a visit by the PM who works with the departments(s) involved in the space to appropriately code it for occupancy, space type and function. Again, final floor plans are reviewed and verified by the FMD and certified as an accurate rendering of the final space and provided to the PM.

Property Manager (PM)

The PM in coordination with the Facilities Review Committee is responsible for assigning and/or verifying unique room codes, analyzing functional use of space, verifying measured space, verifying room types, researching prorated use of institutional space, recording room capacity and reviewing accuracy of floor plans. The PM also initiates and manages the department-level inventory surveys, creates data collection tools and provides standards and training for all individuals involved. The PM gathers inventory space data from a variety of sources described in this manual and is responsible for reporting accurate data to the THECB.

Coordinator of Institutional Research and Reporting (IRR)

The Coordinator of Institutional Research and Reporting at LSC-PA plays a vital role in the provision of information for planning and decision making in both administrative and academic capacities.

Institutional Research provides official data and information about LSC-PA for state and federal government, other external agencies and the College administration, faculty and staff. Included in this official information is the approved facilities inventory.

Facilities Coordinating Committee (FCC)

The FCC consists of the President, VPAA, VPF, VPSS, Registrar and the Director of Facilities Management. This is the over-sight committee that reviews the

recommendations of the FRC prior to them being forwarded to the PM for submittal to THECB.

Facilities Review Committee (FRC)

This team consists of The Coordinator of Institutional Research and Reporting (IRR), The Classroom Scheduling Coordinator (CSC), and the Property Manager (PM). This committee is responsible for initiating and completing the Building Level Space Survey each long semester. This survey consists of a listing of rooms with all current room codes, proration, dimensions, capacity and unique alpha or numeric designation. The committee representatives need only to change incorrect data or input new information. Surveys are signed, dated and submitted to the FCC for review.

Department Representatives

The FRC may ask Department Representatives to assist them in determining the specific utilization of a particular space. The Department Representatives are provided documentation on how to interpret the THECB codes, how to calculate proration and on how to use the Building Space Inventory printout. Departments benefit from contributing accurate space inventories because inventory data influences assessment of both long-term building needs, as well as, more immediate concerns such as renovations. The Space Allocation and Alterations Request Form originates at the Departmental level.

The Department Representative is also the central point of contact if any critical changes occur to space in between surveys.

Project Planning Committee (PPC)

The PPC consist of the President, VPAA, Facilities Management Director, Purchasing Agent and Facilities Planner. This committee conducts a weekly project management meeting where project requests and major work orders are assessed and reviewed for approval and funding. Often this meeting results in the first notification of an impending project or renovation.

4. DOCUMENTATION

In addition to formal processes, forms are used to record, track and maintain accurate records of space inventories. Documentation also helps to act as a trigger to advance data changes through the LSC-PA inventory control process.

Documentation Includes:

Document	Description / Purpose
LSC-PA Facilities Space Reporting Procedures Manual	Outlines all official processes, relationships, systems, documents and procedures for tracking, recording and verifying facilities space.
THECB 2001 Facilities Inventory Classification and Procedures Manual	LSC-PA 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 their application are used in the field. Also used are the THECB manual's instructions for measurement, definitions of alcoves and lists of all excluded categories for official audits.
Space Alteration and Allocation Request Form (See Appendix A)	This form is the starting document for the process to request space alterations or allocation changes.
Space Inventory Update Form – Field Version (See Appendix B)	Used to verify space characteristics. An abbreviated guide to the THECB's classification scheme is included, as well as, measurement instructions and a checklist on excluded areas.
Inventory "Punch List" (See Appendix C)	Used by the PM for gathering, recording and investigating unverified space data. Also used to capture space change data discovered outside of planned audits and surveys.
LSC-PA Department Space Inventory Form (See Appendix D)	Used by department representative during the Department Level Space Survey. This form lists all the rooms, room codes, proration, square footage and capacity for a department. A floor plan is also included. Department representatives need only to change incorrect data or input new information. Surveys are signed and dated and returned to the FCC.
Coordinating Board Update Form (See Appendix E)	Used by the PM to record any final changes to the space inventory. The form is used by the PM to review and reconcile changes prior to submission to THECB. A copy of the form is sent to Coordinator of IRR for reporting purposes.

Lamar State College- Port Arthur

Appendix A

LSC-PA Facilities Space Inventory Control

Lamar State College- Port Arthur

Appendix B

LSC-PA Facilities Space Inventory Control

Lamar State College- Port Arthur

Appendix C

LSC-PA Facilities Space Inventory Control

Lamar State College- Port Arthur

Appendix D

LSC-PA Facilities Space Inventory Control

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Appendix E

LSC-PA Facilities Space Inventory Control

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Appendix F

LSC-PA Facilities Space Inventory Control

LSC-PA Facilities Inventory Control and Communication Process

