FY2022 Base Year for F&A (Facilities and Administrative) Cost Rates:

Space and Equipment Surveys

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UNIVERSITY *of* ROCHESTER

Discussion Points

A. Identify surveyor(s)

B. Review current space assignments

C. Gather data

D. Prepare PIs and other departmental employees

E. HRMS Effort distributions

FY2022 Base Year for F&A

- July 1, 2021 – June 30, 2022

- Research Departments Space Survey

- Research Departments Equipment Survey

URSpace Access – Add/Remove

- URSpace Production
  - https://urspace.ur.rochester.edu/urspace/Ursis.aspx
- URSpace User Access Request Form
  - https://tech.rochester.edu/forms/urspace-access-request/
    - Add new; add/remove access
    - **Space** and **equipment** access by Cost Center
    - Requires supervisor approval
    - System training

URSpace System Training

- URSpace General Training
  - MyPath : 4 on-line sessions
    - URSpace: Security Access
    - URSpace: Navigation
    - URSpace: Room Maintenance
    - URSpace: Reports

Research URSpace Training

- **URSpace Research Training**
  - Lab room (RUC 250) and Lab service room types (RUC 255)
  - Register in MyPath **UR Space Research Training**
    - In person sessions, download materials, bring laptop

- **2 CFR 200**
  - Late April (tentatively last week)
  - Government requirements for sufficient documentation
  - Required for all

Research Space Study Timeline

Space Task	Timeframe
URSpace System Training	April – May 2022
2 CFR 200 Functional Usage Training	April 2022
Help Sessions	May – August 2022
Data Documentation by Departments	March – July 2022
Rolling deadlines	
Divisional Quality Assurance Reviews	June – July 2022
Data Finalization by Departments (year end data)	July – August 2022
Final Quality Assurance Review (space)	August – Sept 2022

Equipment survey

- Required under 2 CFR 200
  - Physical inventory must be performed every two years
  - Equipment updated for location as of 06/30/2022
  - Surveys due 05/31/2022
  - Final updates due 07/31/2022
  - Please make sure space is accurate as this impacts both space and equipment surveys
- Equipment training to be offered virtually on as-needed basis (Zoom/Teams)

Equipment Survey Timeline

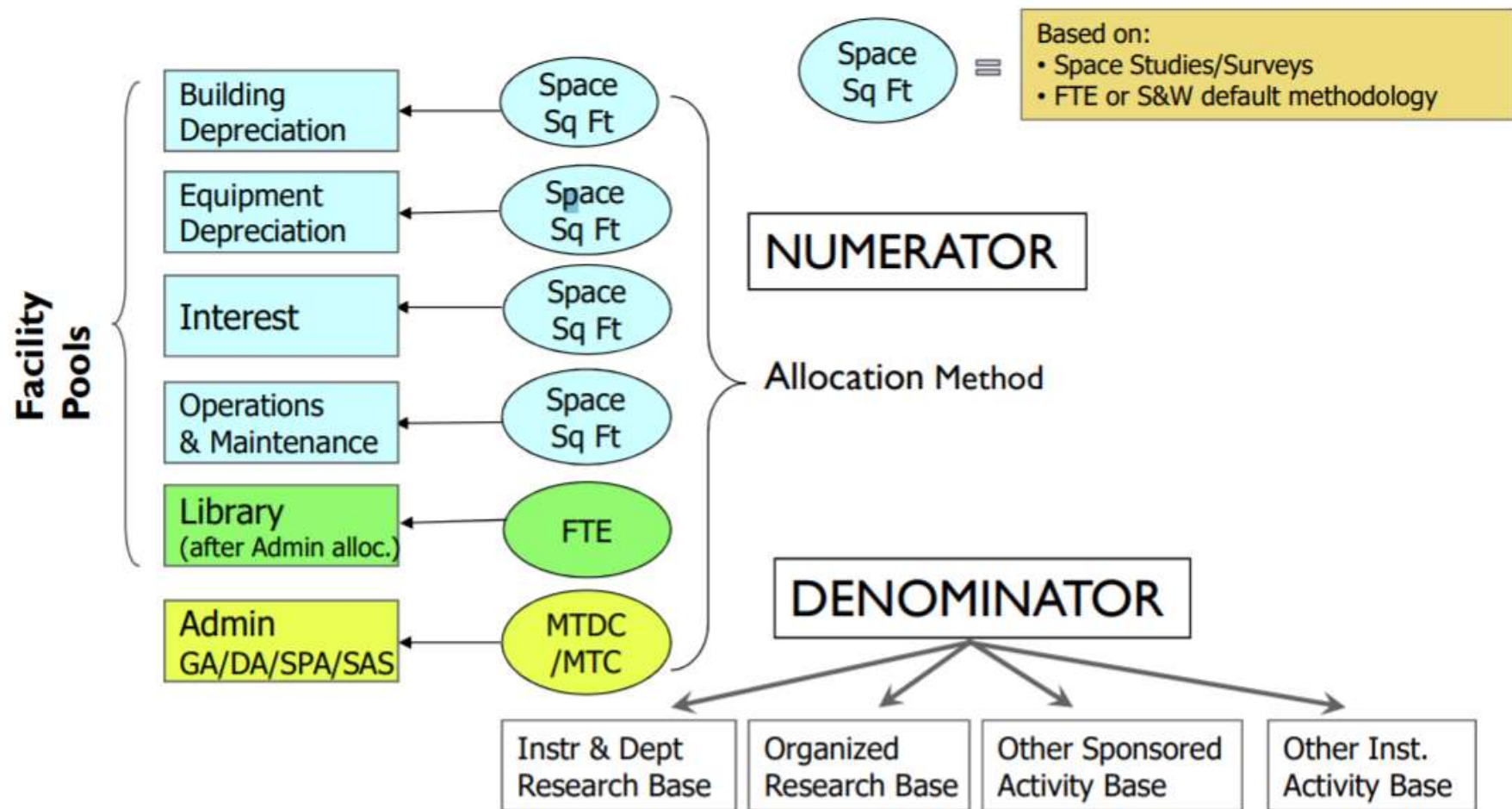| Equipment Task	Timeframe
Equipment survey requests sent to departments	March 1, 2022
Equipment survey training (virtual)	March – May 2022
Data documentation by departments	March – June 2022
Data finalization by departments (year end data)	June - July 2022
Final quality assurance review (equipment)	June – July 2022

F&A Pool Allocation

Preparation for success

- Review Current Space Assignment
  - Work with MC Space Planning, or
  - AS&E Office of Finance and Operations

- Gather information
  - Review current funding mechanisms and awards to be received in FY
  - Review employees and students paid from sponsored funding
  - Review departmental directory

- Prepare PIs, lab technicians, others
  - What activity is occurring in the room
    - Externally funded ? Departmentally funded? No funding?
  - What individuals occupy the room
    - Paid or unpaid? If paid, what is the source of funding
  - Locate Equipment, track equipment movement, disposition

Preparation for success

- ## HRMS Effort distributions
  - ### Verify payroll support
    - Lbr By Pay Period
    - HRMS Labor Distribution Effort Report

- ## Cost sharing and salary cap
  - ### Consider as support of sponsored funding, ORG, OSP or IDR

- ## Cross departmental effort
  - ### Obtain funding sources
  - ### Rotational Students
    - Reduce time in labs, based on rotation
  - ### Graduate Program Administrator
    - https://www.urmc.rochester.edu/education/graduate/contact/program-representatives.aspx

COVID 19 Considerations

- Determining weighting using the Occupants tab in URSpace for # Days/week and # Months/year

    - If individuals would otherwise have been in a lab full-time the entire year (or for a partial year), but were temporarily onsite only a few days due to COVID social distancing restrictions, then the weighting should be 5 days/ 12 months (or partial months).
    - If the remote work arrangement becomes permanent, the individuals should be assigned as occupants using the appropriate weighting adjustment.

- Equipment (remote work arrangement) if permanent, the equipment should be assigned accordingly ["Offsite" with "WFH" in the location field].

Resources

- Donna Galloway, SMD Finance & Operations:
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- MC Space Planning: SpacePlanning@URMC.Rochester.edu

- Greg Meyer, AS&E Office of Finance and Operations:
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- Equipment Administrator:
  equipadmin@Finance.Rochester.edu

- Research Space Study/functionalization:
  ORACSResearchSpaceStudy@UR.Rochester.edu

- URSpace Support: URSpacespt@UR.rochester.edu

Questions ???