MIT Space Management for Academic and Research Units

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Introduction

The MIT Space Management System provides a means for recording and analyzing the use of space across the Institute at the level of the Principal Investigator (PI). The initiative emerged in response to the Institute Task Force Working Group on space. Prior to the development of this system, detailed information on space use was captured only at the level of the Departments, Labs, Centers and Initiatives (DLCI). All units at MIT are required to maintain their Space Management System data.

Systems and Tools

Space Management System (SMS)

The Office of the Associate Provost/Chair of the Committees for the Review of Space Planning (CRSP) is responsible for overseeing the Space Management System (SMS). The system has two main parts. In Part 1, all spaces are coded with the name of the principal investigator(s) responsible for the space or with the name of the Headquarters Administrator for the unit to which the space is assigned (see below). In Part 2, each person with an appointment in the unit is coded with the name of the principal investigator who is responsible for the space that person occupies. If no PI is responsible for a person's space, that person will be coded with the name of the Headquarters Administrator (HQA). A person's space supervisor (i.e., the PI in charge of the space the person occupies or uses) may or may not also be that person's supervisor in other respects, e.g., performance reviews, thesis advisor, etc.

The SMS will generate reports that identify spaces and people that have not yet been coded with the names of their respective PIs (or the HQA). By default, new space in a unit will be assigned to the HQA until they are appropriately coded by the person in the unit responsible for maintain the unit's SMS records. That person is the unit's Space Management System Liaison (SMSL). A list of SMSLs by unit will be available on-line. By default newly created space will be coded as research space with the expectation that unassigned space will be recoded as HQA.Reserve until a PI is assigned the space.

Roles

Space Management System Liaison (SMSL):

Each unit must assign one person responsibility for maintaining the unit's SMS records. This person will be designated as the Space Management Liaison by the HQA who will create the assignment in the Roles Database. The responsibilities of the SMSL include the following:

1. Identify the PIs in the unit (see below).
2. Working from the Institute's Space Accounting records, identify the PI who is responsible for each space. Otherwise, the person responsible is the HQA.
3. Working from the list of people with appointments in the unit, identify each person's PI. People who are not associated with a PI will be assigned to the unit's HQA, for the purposes of the SMS.
4. Verify that all spaces and all people are correctly coded. This should be done on an on-going basis, but at least once annually. New spaces will appear under the HQA and should be (re)coded, as appropriate. New people will appear under the account supervisor associated with their appointment.
5. Grant access to the SMS for other staff in the unit through the Roles Database interface noted above. For example, Graduate Administrators or HR Administrators could be granted access to assist with coding students and staff with the names of their respective PIs.

Principal Investigator (PI):

For the purposes of the SMS, a Principal Investigator (PI) is a faculty member, senior research scientist or a principal research scientist. In the SMS, each space is assigned to a PI (or to the HQA) and each person with an appointment is assigned to a PI (or the HQA). A person does not have to hold an appointment within the unit to have the role of PI; for example, faculty members do not hold appointments in centers and labs, but they serve as PIs in those units. Also for the purposes of the SMS, each PI is his or her own supervisor and should be identified as such. Thus,

every PI supervises at least one person: him or herself. PIs can supervise people in spaces in multiple units. By default all space assigned to a PI (as opposed to an HQA) is considered research space.

Headquarters Administrator (HQA):

All spaces within a unit that are not coded with the name of a faculty or research staff PI will be coded with the name of the unit's Headquarters Administrator (HQA). The HQA is an administrative staff member, normally the administrative officer, assistant director, or space coordinator for the unit. This convention has been adopted so that a department head or center or lab director's research space will not be confused with space that is held by the unit for the common good (e.g., headquarters offices, teaching labs, etc.) Spaces coded with the name of the HQA will also be coded using one of the HQ designations described below. By default, otherwise uncoded spaces are assigned to the HQA pending the correct coding by the SMSL. By default, please are assigned to the account supervisor associated with their appointment (paid or unpaid).

Assigning SMS Room Codes

This section provides definitions and more specific information on how to code spaces in the SMS.

Before you begin

When the SMS data are first generated for each unit, everyone with an appointment in the unit will appear with the name of the supervisor of the account to which their salary is being charged (or with the name of the HQA). Subsequently, as people are hired/appointed, they will appear in the SMS with the name of the PI who supervises the account shown on the appointment form. For unpaid employees, you are encouraged to include on the appointment form an account supervised by the PI who will be responsible for providing them with space. (The default account associated with unpaid employees is the suspense account controlled by the VPF with an account supervisor in the VPF. There are two steps to ensuring the accuracy of this information:

1. Find all employees on your suspense account in the ESDS system and update the accounts to reflect an account in your unit supervised by the PI supervising the person
2. Appoint all future unpaid employees to an account number associated with the PI who will provide space. You can verify the supervisors of accounts using the Rolesweb interface.

If your unit provides space for people appointed outside of your unit, including graduate students, you should create a list of people in your space. There are several steps that might make the generation of this information easier:

1. Run the people directory report titled, SCOTT'S PEOPLE SPACE ROOM to identify people in your space
2. Distribute a list based on the same report to the PIs or their designee for review and updates
3. Conduct a census of people in your space by going room-by-room.
   Please note that you can increase the effectiveness of the directory report, by asking that people, including graduate students, list their on-campus room number in the MIT directory accurately.
   - Employees can update this information using Atlas Employee Self-Service .
   - Graduate students can update their information using WebSIS, at: http://student.mit.edu/cgi-docs/student.html

You can verify the space assigned to your unit at https://floorplans.mit.edu/mit-room.html under Room Lists. (See Frequently Asked Questions for information on updating room lists.)

Step 1: Confirm Room Assignments, PIs and People in the SMS

In the SMS, the SMSL will be able to access 1) a list of rooms, 2) a list of people with appointments in the unit, 2a) a list of people whose salaries are charged to cost objects in the unit and 3) a pre-populated list of PIs. The SMSL should confirm that the lists are accurate and complete. If room numbers, room uses, or department assignments do not match your records, please contact MIT's Space Accounting group fis-request@mit.edu to request a review of the space.

Step 2: Code Rooms

The SMSL should code each room as one of the following:

- HQ.Admin
- HQ.EducAdmin
- HQ.Meeting
- HQ.Student
- HQ.SharedResearch
- HQ.Reserve
  Or
- Research
- HHMI
- Broad
  In the SMS, spaces coded as HQ.*//** will be "assigned" to the HQA (as opposed to a faculty or research staff PI). Definitions for these room codes are as follows:

- HQ.Admin applies to rooms occupied by unit heads and their staffs, plus any other rooms predominantly used for headquarters administrative activity. Also, space occupied by administrative assistants who support more than one PI should be coded as HQ.Admin.
- HQ.EducAdmin applies to classrooms and teaching labs that are controlled by academic units.
- HQ.Meeting is for unit-controlled conference and meeting spaces as well as Tea Rooms.
- HQ.Student applies to space controlled by the unit that is occupied by graduate students who are not supported by PIs, for example, first year graduate students on fellowships. These spaces are not associated with particular PIs. HQ.Student should also be used for undergraduate or graduate commons or lounges.
- HQ.SharedResearch is for shared research facilities managed by the unit as opposed to individual PIs or groups of PIs.
- HQ.Reserve is for space that is not assigned to a particular PI but is not administrative, for example, space that is currently vacant , which the department has set aside in anticipation of a new faculty hire.
  Research is the code for space associated with one or more PIs. Please note that any space assigned to the HQA that is coded as research space, should be re-assigned to a PI or re-coded to the HQ.Reserve. Please use report Scott's Second Report to identify the spaces that fall into this category.
  HHMI or Broad should be used to code space that is used by Howard Hughes Medical Institute Investigators or Broad faculty.

Step 3: Make PI Assignments

The SMSL should verify that the pre-populated list of PIs for the unit is accurate and complete or should modify the list appropriately, for example, by deleting PIs who are no longer supervising space in the unit. The SMSL should also make sure that the unit's list of PIs includes PIs who supervise space that is assigned to the unit but which is on loan to another unit. Each room used by a PI for his or her research should then be coded with the PI's name. If a room is shared by multiple PIs, the SMSL should indicate the percentage of the space each PI controls. The total must add up to 100%. If there is only one PI, that person will automatically be credited with 100% of the space
The PI for all spaces bearing HQ designations (e.g., HQ.Admin, HQ.Reserve, etc.) will be the unit's Headquarters Administrator (HQA). As indicated above, this will usually be the AO or the Assistant Director. The system has been structured this way to avoid confusing space a unit head controls as part of his or her research with unit-controlled space.

Step 4: Use the Optional Fields

The SMS contains several additional, blank fields whose use is optional. For example, a unit might want to categorize spaces according their condition or it might want to keep track of things like hoods, data jacks or numbers of desks.

Sources and Definitions

Data Sources

MIT Space Accounting data

The Department of Facilities (DoF) is responsible for maintaining room and building data in the space accounting inventories. This information can be viewed on the Space Accounting homepage and the Data Warehouse. Changes to the data that appear in the MIT Space Accounting System are made by Facilities staff.

Home page: https://floorplans.mit.edu/
Contact: fis-request@mit.edu

Data Warehouse

The Data Warehouse is a stable, read-only database managed by IS&T that combines information from separate systems into one location. Data is brought to your desktop by a query tool or displayed on a website using Cognos. Once the data is returned from the warehouse, you may format it to your liking and export the results of your query into other software programs, e.g., Microsoft Excel, and manipulate the data locally. Several reports are available to allow you to access and review your space data. These reports include a report that will allow you to identify any unassigned space and unassigned people.