



# UC San Diego

## Policy & Procedure Manual

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### **CONTRACTS AND GRANTS (RESEARCH)**

**Section: 150-14 EXHIBIT C**

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### ***Exhibit C***

March 21, 2012

### **UCSD F&A Functional Space Use Survey**

#### Agenda

Part I: Overview of F&A Proposal

Part II: Objectives of Functional Space Use Survey

Part III: Space Survey Instructions

Part IV: Room Function Code Definitions Part V: Reference Point for Functionalizing Part VI:

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**Part I Overview of F&A Proposal**

- Facilities and Administrative costs are allocated to direct activities to determine rates used to obtain sponsor's reimbursement for their fair share of costs.
- The Functional Space Use Survey is used to allocate costs in the space related cost pools, which comprise 57% of the total F&A costs.
- The current annual federal overhead recovery associated with space costs is approximately \$67million.

**Part II Objective of Functional Space Use Survey**

Specific Goals:

- Identify all activities performed in each room for reasonable cost allocations.
- Develop proposal statistics that are defensible during rate negotiations with the federal government.
- Use methodologies that comply with government requirements and that provide the best cost recoveries.
- The functional space use survey is subject to review/audit by the federal cognizant agency (HHS).

**Part III Space Survey Instructions**

- Read carefully the "Instructions for Functional Coding of Space" and the Functional Use Definitions described in Space Functional Use Definitions of the Instructions.
- You should clearly understand these definitions before starting the space survey for your department.
- You as the departmental space coordinator should be knowledgeable about occupants and activities in each room.
- You should assign functional use codes and use percentages on a room-by-room basis

**Functional Coding of Rooms**

- Be aware of the principle of matching Space and Base
- Requires the functional classification of space be consistent with the functional classification of the activities using the space and the expense accounts that pay for those activities.
- Example: A lab used by a faculty member paid from a sponsored research account and a graduate student paid from a general institutional account would need to be distributed between Organized Research and Instruction in proportion to how much of the space is used by each.

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- **Functional Classification (Coding) of Space Must take into account:**
- Occupants of each room
- Activities performed by the occupants
- Expense accounts that paid for the activities – e.g. sponsored research accounts, general institutional accounts
- **Must also assign appropriate amount of space to any unpaid occupants – e.g., unpaid students, visiting scientists**
- **Usual Space Coding Process:**
- Determine the *primary* use of a room
- Identify all room occupants, paid and unpaid
- Identify all accounts that paid the occupants' salaries
- Assign functions to the room based on occupants' activities and accounts that paid the salaries of the occupants.
- Assign appropriate amount of space to unpaid occupants
- Quantify percentage of alternative usage of the room
- Determine normal use percentage by deducting the non-normal use from 100%
- Adjustments should be based on number of hours/annual hours of usage
- **Be cautious of rooms coded 100% Organized Research**

**Reporting of Room Usage**

- Report room functional usage in specific percentages that reflect all activities performed in the room.
- Caution: predominant use or arbitrary assignment of codes and percentages are not acceptable methods.
- Reflect the room usage for the entire fiscal year
- Caution: a snapshot is not acceptable
- Room percentages must add up to 100%
- Caution: except for vacancy periods.

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**Required Documentation**

- **Required Documentation for all space with any Organized Research usage**
- Room Occupants - All individuals, **paid and unpaid**, who used the room on a regular basis during FY 2007. Includes faculty, staff, graduate students, undergraduate students, post-doctoral fellows, visiting scientists, etc.
- The funds that paid the salaries of the organized research occupants of the room.

**Part IV Room Function Code Definitions**

- **Room Types** describe the physical characteristics of the room
- **Room Function Definitions** refer to the functional use of the room, the activities that take place in the room.
- **Room Type** does **not** dictate room function

**Organized Research (OR)**

- All research and development activities of the University that are separately budgeted and accounted for on a specific project basis, including related cost sharing. It includes:
  - Sponsored research projects (funded externally by federal government and non-federal sponsors)
  - University research projects (separately budgeted and accounted for on a project-by-project basis)
  - Sponsored research training (training of individuals in research techniques)
  - Cost sharing associated with sponsored research (university financial support and faculty and staff effort)

**Organized Research Space– examples**

- Portions of research laboratories and lab service areas used for organized research projects
- Portions of offices used by research assistants, technicians, staff researchers, etc., for organized research projects
- Portions of offices used by faculty members working on organized research projects – including cost sharing effort
- Portion of offices of administrative support time **ONLY** if:
  - Administrator's time and effort is identified to sponsored research, and
  - Administrator's effort is included in the proposal and charged to the project.

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**Instruction/Departmental Research (IDR)**

University research projects (internally funded).

Must include:

- Segregated research scope
- A technical proposal – description of work
- A budget proposal
- A review process
- Awarding of the funds
- Submission of a technical report or an exit interview with the dean or department chair

**Instruction/Departmental Research (IDR)**

- Teaching and training – on a credit or non-credit basis
- Offered by academic departments or separate divisions  
– e.g. Extension division
- Activities of student advisors and student support services that are not separately budgeted and reported as Student Services
- Includes:
  - Sponsored Training (except research training)
  - Departmental Research

**Instruction/Departmental Research (IDR) - Continued**

Departmental Research

- Not separately budgeted and accounted for on a project basis:
  - Not budgeted – part of instructional budget or a draw on a general departmental account
  - Not accounted for – e.g., part of a dean's discretionary account
- Normally supported by unrestricted funds or gifts

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**Instruction/Departmental Research (IDR) - Continued**

Types of Space - Examples:

- Classrooms, class labs
- Office used by teaching assistants
- Portions of faculty offices used by faculty for classroom preparation or student counseling
- Portions of offices and labs used by faculty for scholarly (departmental) research

**Other Sponsored Activities (OSA)**

- Externally funded programs **OTHER** than:
  - Instruction
  - Sponsored Research
- Includes:
  - Sponsored funding for Aquarium/Museums,
  - Sponsored outreach and other public service projects

**Other Institutional Activities (OIA)**

- Activities that are not classified as:
  - Instruction/Departmental Research (IDR)
  - Organized Research (OR)
  - Other Sponsored Activities (OSA)
- Includes:
  - Auxiliaries – bookstore, residence halls, dining facilities, theaters, public museums, etc.
  - Fund raising, alumni affairs, public relations, etc.
  - Intercollegiate athletics

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- Patient care activities
- Clinical drug trials - industry sponsored

**Departmental Administration (DA)**

- Administrative and support activities at the department level (DA) and college administration (CA)
- Benefits common or joint departmental activities in:
  - Academic dean's office
  - Academic departments and divisions
  - Research institutes and units
- Includes:
  - Departmental accounting, human resources, and other general support
  - Faculty time on non-instructional committees

**Operation and Maintenance of Plant (OM)**

- Activities associated with operation and maintenance of facilities:
  - Administration, supervision, operation, maintenance, preservation, and protection of facilities
  - Custodial, Landscaping services
  - Security
  - Environmental Health and Safety
  - LAN administration
  - Hazardous waste disposal
  - Oversight and scheduling of facility management, renovation and maintenance at the departmental level
  - Space formally assigned to Physical Plant
- Operation and Maintenance includes:
  - Office of facilities manager for a department

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- Office of departmental safety officer
- Office of departmental LAN administrator
- Server or equipment rooms for LAN

**Student Administration and Services (SS)**

- Administration of student affairs and services to students
- Must be for units at the school or college level or central university units
- Must be budgeted for and reported as Student Services – support services at departmental level should be classified as Instruction/Departmental Research
- Includes:
  - Admissions
  - Registration
  - Counseling
  - Placement services
  - Student advisors
  - Student organizations oversight

**Library (LIB)**

- Space that houses or supports the University Library Systems
- Departmental libraries or reading rooms benefiting departmental activities should be classified as Joint Use.

**Joint Use Space (JT)**

- JT includes:
  - Conference Rooms
  - Copy rooms
  - Employee lounges



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- Departmental libraries
- Auditoriums
- JT codes must be used consistently for all of these room types
- Will be prorated based on a measure of overall departmental salaries and wages.

**Recharge Activity/ServiceCenter (RCH)**

- Space occupied by recharge activities selling or recharging goods or services to other campus departments
- Recharge space has been previously identified by recharge contacts, and excluded from the space file used for this survey. If you find any recharge space in this survey, please contact:
  - Darryl James at dljames@ucsd.edu
  - Bill Brophy at bbrophy@ucsd.edu

**Vacant Space (VAC)**

- Only space that is vacant for the entire year.

**Part V Reference Point for Functionalizing**

- Functional coding of rooms should be determined by staff who are knowledgeable about the occupants and activities performed in each room, and understand the space study classifications.
- Consider **all** activities performed in **each** room over the **12-month** period (July 1, 2006 through June 30, 2007).
- Assign functions to each room based on the relative time spent on each function. Classification based on predominant use is no longer acceptable.
- Total of room functions must total 100% for each room.

**Reference Point for Functionalizing**

- Research Laboratories
- Treatment of students
  - Code the space used by students paid by OR accounts or related cost sharing accounts as OR
  - Code the space used by unpaid students and students paid from general (non-cost sharing) institutional accounts as

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Instruction. (This space must be coded Instruction even if the student's activity benefits OR projects.)

- Treatment of visiting scientists
- Code the space used by (a) visiting scientists not paid by the University and (b) space loaned or rented by outside entities such as Howard Hughes Medical Institute or Ludwig Institute for Cancer Research as Other Institutional Activities (OIA).
- Research Laboratories Coded 100% OR
- If you code a room 100% OR, perform the following test:
  - Is the room used by any unpaid student or students paid from general, non-cost sharing, funds?
  - Is the room used by visiting scientists not paid by the University or other non-university individuals?
  - Are there any non-research activities performed in the room? (e.g., lab tests performed for a hospital or clinic?)
- If you answer “Yes” to any of the above questions, the room should not be coded 100% OR
- Research Laboratory Service Rooms
  - Room types: cold rooms, dark rooms, equipment rooms, etc.
  - Code the service rooms the same as the average functional use of the labs these rooms supported during the fiscal year.
  - Be prepared to identify all laboratories and other rooms that benefit from the service rooms.
- Offices
  - Offices, particularly faculty offices, are normally used for a variety of functions:
    - Instruction, Organized Research, Departmental Administration, etc.
    - The persons occupying the offices are usually in the best position to estimate the percentage used for each function.
  - Conference rooms and similar multi-purpose rooms
    - Multipurpose rooms are conference rooms, employee lounges, departmental libraries, copy rooms, etc.
    - Code these rooms as “Joint Use.”
- Classrooms, Teaching Labs and Related Service rooms
  - Code these rooms as Instruction

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- Caution: coding any portion of these rooms as OR is very unusual and requires full documentation

**Part VI UCSD Contacts**

- Room Function Code definitions or questions
  - Darryl James, Financial Analysis Office at 858-822-5077
  - Email: dljames@ucsd.edu
- Bill Brophy, Financial Analysis Office at 858-534-6517
  - Email: bbrophy@ucsd.edu
- FacilitiesLink access, questions and problems
  - Kirk Belles, Analytical Studies and Space Planning at 858-534-1035
  - Email: kbelles@ucsd.edu

**Reference Point for Functionalizing**

- **Animal Care Facility**
  - Special rules issued By HHS apply to the coding of space in animal care facilities.
  - These rules are described in the “Instructions for the Functional Coding of Space.”
  - For functional details please refer to Instructions for Functional Coding of Space Animal Care section.

**Instructions for Functional Coding of Space**

**General Instructions**

- The Space Functional Use Definitions should be reviewed and be clearly understood before the space study is started. Questions about the definitions and other aspects of the space study should be directed to the Financial Analysis Office, Darryl James 858-822-5077 or email at dljames@ucsd.edu or Bill Brophy 858-534-6517 or email at bbrophy@ucsd.edu.
- The functional coding of rooms should be determined by department staff who are knowledgeable about the occupants and activities performed in each room.
- Functional coding should be determined on a room-by-room basis. The process normally includes:
  - Determining the normal use of the room. E.g., normal use of a research lab is Organized Research.

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- Identifying the individual(s) to whom the room is assigned. E.g. one faculty member may be responsible for a suite of labs and offices.
- Identifying all the occupants of the room (paid and unpaid).
- For paid occupants, identifying the accounts they are paid from.
- Determining the activities (functions) performed in the space based on knowledge of the individuals' activities, and determining the accounts that pay for those activities.
- For research labs, determining whether there are activities performed in the lab beyond the paid work of the occupants. E.g. use of the lab by unpaid students or visiting scientists; a graduate student working on, and paid from, an organized research project may also come in after his/her normal working hours to work on his or her thesis; an undergraduate group may tour the lab as an introduction to the research the university, department, or individual faculty member performs.
- Quantifying the non-normal activity and reflecting it in the space survey. The normal activity would be quantified by subtracting the non-normal activity from 100%.
- Functional coding must identify a room's usage in specific percentage terms that reflect all activities performed in the room. A "predominant use" methodology is **not** acceptable. Arbitrary percentages are also not acceptable and will be challenged by Federal negotiators.
- The space study should reflect how each room was used during the entire fiscal year 2007 (July 1, 2006 – June 30, 2007). The study is **not** a snapshot of how the space was used at the end of the year.
- The functional coding of a room should take into account all occupants of the room. The coding should be based on the activities the occupants perform in the room and the expense accounts that pay for those activities. For example, if technicians or students in a research lab are working on Organized Research projects and their compensation for all of their work in the lab is paid by those projects (or is reported as cost sharing on the projects in their effort reports), then the space they use in the lab should be coded as Organized Research. On the other hand, if an individual's salary for work in the lab is wholly or partially paid from general institutional funds (and is not reported as cost sharing on an Organized Research project), the space used for the work paid with institutional funds should be coded as Instruction. Research lab space used by unpaid students should also be coded as Instruction. This concept is commonly referred to as "matching space and base" and is critical to determining the proper functional use of space.
- Space used for activities reported in the effort reports as cost sharing on Organized Research projects should be coded as Organized Research. Space used for activities of faculty and senior researchers as voluntary uncommitted cost sharing on Organized Research projects should also be coded as Organized Research (regardless of how the cost sharing is reported in their effort reports).
- Functional coding of a room should take into account the **extent** of use by each occupant. For example, a student working in a lab 15 hours a week for four months should be counted much less than a technician who works in the lab 40 hours a week the entire year.
- **Departmental staff should maintain notes on how they determined the functional percentages of each room and be prepared to defend them in the Federal review of the F&A rate proposal.** A sample of a worksheet used to determine the functional use of rooms is attached.

**Required Documentation**

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- The space study documentation must identify the occupants of all research laboratories and offices coded with any percentage as Organized Research or Other Sponsored Activities. Occupants include all individuals, **paid and unpaid**, who used the room on a regular basis during the fiscal year – faculty, staff, graduate students, undergraduate students, post-doctoral fellows, visiting scientists, etc.
- For rooms coded with any percentage as Organized Research or Other Sponsored Activities, the documentation must also identify the accounts (sponsored and non-sponsored) that paid the salaries of the occupants of the room.
- Occupants and accounts are not required for research laboratory service rooms, animal care facilities, recharge/service centers, or rooms coded as “Joint Use” (e.g., conference rooms, copy rooms, etc.). See instructions for these types of rooms in the next section.

**Handling of Specific Types of Rooms and Situations**

**Research Laboratories**

- The principal activity performed in research labs is usually Organized Research. However, as discussed earlier, if some of the occupants in a research lab are paid from general institutional accounts (and are not reported as cost sharing on Organized Research projects), the space used for the work paid for by these accounts should be coded as Instruction.
- The handling of students in research labs is particularly important:
  - Space used by students should be coded Organized Research if they are: (a) paid by research grants/contracts, (b) supported by research training grants/fellowships, or (c) reported as cost sharing on research grants or contracts.
  - Space used by unpaid students and students paid from general institutional funds (and not reported as cost sharing on research grants or contracts) should be coded Instruction. The space used by these students should be coded Instruction even if the student’s activity benefited organized research projects.
  - Space used by visiting scientists not paid by the University and faculty/staff whose salaries are paid directly by the Howard Hughes Medical Institute should be coded Other Institutional Activities.
- Federal negotiators pay particular attention to rooms coded 100% Organized Research. A “yes” response to any of the following usually indicates that a room should not be coded 100% Organized Research:
  - Is the room used by any unpaid students or students paid from general institutional funds?
  - Is the room used by visiting scientists not paid by the University or other non-university individuals?
  - Are there any non-research activities performed in the room (e.g., lab tests performed for a hospital or clinic)?

**Research Laboratory Service Rooms**

- Research lab service rooms (e.g., cold rooms, dark rooms, equipment rooms) should be coded the same as the average functional use of the labs they supported during FY 2007. Be prepared to identify the labs used to calculate the average to Federal negotiators.

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**Offices**

- Offices, particularly faculty offices, are normally used for a variety of functions, e.g., Instruction, Organized Research, Departmental Administration, etc. The person(s) occupying the office is usually in the best position to estimate the percentage used for each function. Office space used by visiting scientists not paid by the institution and faculty and staff funded directly by the Howard Hughes Medical Institute should be coded Other Institutional Activities.

**Conference Rooms and Similar Multi-purpose Rooms**

- Conference rooms and similar multi-purpose rooms in academic departments, such as copy rooms, employee lounges and departmental libraries, should be coded “Joint Use.”

**Classrooms, Class Labs and Related Service rooms**

- Classrooms, class labs, and related service rooms should normally be coded as Instruction. Coding any space in these types of rooms as Organized Research would need to be clearly documented.

**Recharge Centers/Service Centers**

- Recharge space has previously been identified via a survey of recharge contacts, and all identified space has been excluded from this survey. If your space on this survey includes recharge space, call Darryl James (858) 822-5077, or Bill Brophy (858)534-6517.

**Animal Care Facility**

- If you have departmental space used as animal care space, please contact call Darryl James (858) 822-5077, or Bill Brophy (858)534-6517.

**Specialized Service Facilities**

- Specialized service facilities are fully self-supporting activities, which pay for their own facilities, custodial, utilities, and other maintenance costs. If you have a specialized service facility, please contact Darryl James (858) 822-5077, or Bill Brophy (858) 534-6517.

**Vacant Space**

- Space should be considered vacant only if it is vacant or under renovation for the full 12 months of FY 2007. If it was occupied for part of FY 2007, it should be coded to functions according to how it was used when occupied.

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**SPACE FUNCTIONAL USE DEFINITIONS**

IDR – Instruction  
OR - Organized Research  
OSA - Other Sponsored Activities  
OIA - Other Institutional Activities  
PC - Patient Care  
OM - Operations and Maintenance  
DA - Departmental Administration

CA – College Administration  
SS - Student Administration and Services  
SPA - Sponsored Projects Administration  
LIB – Libraries  
RCH – Recharge Activity/Service Center  
JT – Joint Use

**INSTRUCTION (IDR)** includes all teaching and training activities (**except research training**).

1. **Teaching and Training:** All regular University teaching and training activities, whether they are offered for credits toward a degree or certificate or on a non-credit basis. Includes classroom teaching, preparing instructional materials, preparing and grading examinations, etc.
2. **Departmental Research:** Research, development and scholarly activities that are not separately budgeted and accounted for on an individual project basis.
3. **Sponsored Training:** Instructional or training activities sponsored by Federal agencies and non-Federal organizations through grants, contracts, and cooperative agreements. **However, sponsored training of individuals in research techniques (commonly called research training) should be classified as Organized Research.**

**ORGANIZED RESEARCH (OR)** includes all research and development activities of the University that are separately budgeted and accounted for on a specific project basis, and research cost sharing. Organized research activities include:

1. **Sponsored Research Projects:** Research projects sponsored by Federal agencies and non-Federal organizations (e.g. states, cities, foundations, corporations, etc.) through grants, contracts, and cooperative agreements.
2. **University Research Projects:** Research projects funded with University funds that are separately budgeted and accounted for on a specific project basis.
3. **Sponsored Research Training:** Training of individuals in research techniques sponsored by Federal agencies and non-Federal organizations through grants, contracts and cooperative agreements. Common examples include Career Development (“K”) awards, institutional training grants (T-32), individual fellowships (F-32), etc.
4. **Research cost sharing:** Cost sharing related to organized research projects.

Organized research projects typically require a proposal or other application to obtain funding, have a defined scope of work associated with the project, anticipate a “deliverable” result, and require that periodic financial and progress reports be submitted to the sponsor.

Whenever a room is coded as organized research, regardless of the percentage assigned, an organized research budget number must also be assigned to the room.

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**OTHER SPONSORED ACTIVITIES (OSA)** Other sponsored activities are programs and projects financed by Federal and non-Federal agencies and organizations that involve the performance of work other than instruction and organized research. Examples are health service projects, public service projects, clinical trials, and public service conferences.

**OTHER INSTITUTIONAL ACTIVITIES (OIA)** includes auxiliary enterprises, such as the operations of residence halls, dining halls, student unions, intercollegiate and intramural athletics, bookstores, faculty housing, student apartments, guest houses, theaters, public museums, community relations and development, and other similar auxiliary enterprises.

**PATIENT CARE (PC)** includes those activities directly involved with the delivery of patient care (e.g., University Medical Center and clinics).

The space associated with residents should be coded as PC.

**OPERATIONS AND MAINTENANCE (OM)** includes services related to the administration, supervision, operation, maintenance, preservation, and protection of campus facilities. Services include: janitorial and custodial services; repairs and ordinary or normal alterations to buildings, equipment, and furniture; design services; security; earthquake and disaster preparedness; environmental health and safety; property and equipment insurance; space and capital leasing; facility planning and management; care of grounds; maintenance and operation of buildings and other physical facilities. Facilities planning and management activities at the departmental level are also included. For example, the department may have a facilities manager, LAN administrator, or equipment repair personnel.

**DEPARTMENTAL ADMINISTRATION (DA)** includes the administrative activities performed by academic departments to support the primary programs of instruction, research, and public service. This support includes the departmental chair and department-level administrative, secretarial, personnel, payroll, purchasing, and accounting activities.

**COLLEGE ADMINISTRATION (CA)** includes the administrative activities provided by academic colleges and schools that support the primary programs of instruction, research and public service. This support includes the school or college dean, associate/assistant deans, and college-level or school-level administrative, secretarial, personnel, payroll, purchasing, and accounting activities.

**STUDENT ADMINISTRATION and SERVICES (SS)** includes student-related activities such as counseling and career guidance, student advising, student publications, financial aid, admissions, registrar, student health services, and commencement.

**SPONSORED PROJECTS ADMINISTRATION (SPA)** is limited to separate organizational units primarily established to administer sponsored projects. This category includes Grant and Contract Accounting, Grant and Contract Services, School of Medicine Contract and Grant Office, Scripps Institution of Oceanography Contract and Grant Office, and the Office of Post Award Financial Services. Space may not be coded as SPA unless a unique budget number is established for the unit administering sponsored projects. Accounting, proposal preparation and other sponsored projects support performed at the departments is considered departmental administration.

**LIBRARIES (LIB)** includes activities that directly support the operation of the central library system. Departmentally funded libraries, which do not report to the central library system and do not have a “check out” system and librarian, should be treated as joint use space.

**RECHARGE ACTIVITY/SERVICE CENTER (RCH)** includes space used by units recharging goods or services to other campus units.

**JOINT USE (JT)** includes space used for conference rooms and other multi-function rooms, such as copy rooms, employee lounges, and departmental libraries