

## **II Overview of the Survey Process**

The Survey process is comprised of two main components: the facilities Inventory Validation component and the Needs Assessment component. The fieldwork portion of the process is carried out by a Survey Team, which is directed by the Survey Leader from one of the university's sister institutions. Other Survey Team Members include staff from the Board of Governors Office of Finance and Facilities and staff from other universities who serve in the planning and space inventory areas of their institutions. A Survey Facilitator is assigned by the subject university to facilitate logistics, collection of data for Inventory Validation, development of the Survey Workbook used by the Survey Team, coordination of university activities, and final preparation and publication of this document. Significant preparation is necessary before each of the two Survey components are carried out. Table 1 identifies the main Survey Activities and lead responsibilities for each activity.

**TABLE 1**  
**Educational Plant Survey Activities**

ACTIVITY	RESPONSIBILITY		
	UNIVERSITY	BOARD OF GOVERNORS	SURVEY TEAM
Establish Schedule	X	X	
Letter to President		X	
Dates, Procedures, Responsibilities, Designation of Univ. Rep., Determine Inventory Sample for Validation	X		
Identification of Existing/Proposed "Ineligible" Space	X	X	
Prepare Facilities Inventory Reports (Site/Building/Room Reports)	X		
Coordinate Logistics for Validation Field Work	X	X	
Perform Validation (on-site field work)	X	X	X
Update Inventory Based on Validation	X		
Provide Established Enrollment Projections		X	
Prepare Formula Space Needs Analysis	X		
Develop Proposed Projects & Justification	X		
Develop Survey Workbook (Schedule, mission statement, site data, Academic Programs, Enrollment, Space Needs, Inventory Data, Project Summaries & Justifications)	X		
Develop Comments regarding Degree Program Facility Needs		X	
Develop Comments regarding Proposed Projects (CIP & Master Plan)		X	
Coordinate Logistics for Needs Assessment Field Work	X	X	
Perform Needs Assessment (on-site field work) (Review proposed projects in relation to programs, space needs, data, current inventory, and any special justification)		X	X
Exit Meeting		X	X
Prepare Initial Summary of Survey Recommendations		X	X
Prepare Letter of Final of Survey Recommendations	X		
Prepare Written Report	X		
Approve Written Report		X	