Evaluation of Space Need Calculation Methodology

May 31, 2022

Pursuant to Section 1001.706(12)(e), Florida Statutes.

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Executive Summary

Beginning in 2019, the Legislature directed the Board of Governors (Board) to review its space needs calculation methodology developed pursuant to section 1013.31, Florida Statutes (F.S.), governing the assessment of space need for educational facilities. The review must incorporate improvements, efficiencies or changes, with recommendations submitted to the chairs of the House and Senate appropriations committees by October 31st, and every three years thereafter.

To conduct this study, the Board reviewed its existing regulations, records, systems and procedures regarding the assessment of need for educational space within the State University System (SUS), with the goal of identifying opportunities for improved clarity, guidance and value to the overall system. By and large, the evaluation was driven by the Board's investigation and research, along with interviews of university space planners and facilities planners. A survey of the 12 state universities was also conducted to gather information on their procedures for the assignment and usage of space as well as their input regarding the Board's existing methodology. As a result of this work, the Board Office identified issues impacting the accuracy and efficiency of space need calculations and policies. The issues are detailed in the findings and recommendations later in this report, but, at a high level, can be summarized as follows:

- Several Board applications/platforms, fundamental to facilities and space needs management, require enhancements to improve their utility and value.
- The absence of consistent direction regarding university reporting of space data, coupled with university data inaccuracy, promotes confusion system-wide and exacerbates reporting inaccuracies.
- The SUS would benefit from more formal guidance from the Board regarding a variety of space planning issues.

Introduction

The 2019 Legislature directed the Board of Governors to review its space need calculation methodology; specifically, s. 1001.706(12)(e), F.S. requires the following:

> ***"The board [Board of Governors] shall review its space need calculation methodology developed pursuant to s. 1013.31 to incorporate improvements, efficiencies, or changes. Recommendations shall be submitted to the chairs of the House of Representatives and Senate appropriations committees by October 31, 2019, and every three years thereafter."***

The Board last evaluated its space need calculation methodology in 2019. At that time, the report provided three recommendations, each of which is reflected below

along with the status of implementation, which has been delayed by the effects of the pandemic.

1) The State University System Facilities Space Planners, in consultation with the Board of Governors' Office of Finance and Facilities, should review the current space needs calculation methodology and funding formula to recommend an equitable policy and process to:

A. Recognize and account for the critical components of an institution's mission.
B. Enable universities to identify one unique, institution-specific space factor for its space needs calculations.
C. Recognize and account for student support services facilities.
D. Consider new space needs calculation methodologies, including metrics for new buildings.
The SUS Facilities Space Planners should consult with SUS Academic Affairs and Student Affairs leaders on issues of relevance.

Status: The study of these specific points requires complex analysis and vetting that, while delayed by the pandemic, is currently ongoing as part of the work to develop a comprehensive statewide regulation regarding university space needs. While a basic methodology is essentially embedded in the Educational Plant Survey process, and implied in the basic calculations therein, in the absence of a formal Board regulation based on iterative university consultation, the above considerations are premature.

2) The State University System Vice Presidents for Research should review the policies and procedures for the assignment, recognition, and accurate accounting of research space, research laboratory space, and research faculty office space, including Educational and General (E & G) research entities and Contracts and Grants (C & G) research entities, and make recommendations to improve the accuracy and efficiency of the SUS space needs calculation methodology. Where appropriate, these SUS leaders should identify best practices for the System.

Status: The space needs assessment process is statutorily limited to E&G space only. Moreover, it is unclear why academic administrators would be utilized in the capacity described. While their input could prove helpful, the management of university E&G space is generally left to subject matter experts, i.e. university space planners and facilities planners. As noted, such joint sharing of expertise and best practices has just restarted post-pandemic.

3) The Chancellor of the State University System should appoint a Space Task Force for the State University System to review university academic space needs and related facilities issues, recommend solutions to identified space problems, promote best practices for issues and conditions facing the institutions, and assist in the development of Board of Governors regulations relating to facilities and space needs. The Task Force should include representatives of the SUS Facilities Space Planners, Academic Affairs leadership, and other experts as needed. The Space Task Force should be coordinated by the Board's Office of Finance and Facilities.

Status: As noted above, Board facilities staff and university space and facility planners have begun to reengage post-pandemic. Quarterly meetings have been scheduled, and they are already helping to address and find solutions for several of the key issues described later in the report.

SUS Space Needs Assessment - Procedural Context

Below is a brief description of the integral components of the SUS space planning process.

Accountability Plans

Each state university is required to develop and maintain an Accountability Plan that reflects its mission and focuses on its strengths within the context of Board goals, as well as regional and statewide needs. The plan, approved by the university board of trustees (UBOT), and the Board, outlines each institution's strategic direction, top priorities and performance expectations and outcomes. The "Strategy" section of each plan includes an institutional mission statement, the identification of strengths, opportunities and challenges, key initiatives and investments, as well as a "Metrics" section reflecting how the institution is performing in key indicators. Enrollment projections are also included, complying with s. 1013.31(c)4., F.S.; in part, "***The projected capital outlay full-time equivalent student enrollment must be consistent with the 5-year planned enrollment cycle for the State University System approved by the Board of Governors***."

Campus Master Plan

The foundation for each state university's physical plant and academic space planning is a campus master plan, developed and adopted by the UBOT according to requirements established in s. 1013.30, F.S., and Board Regulation 21.202. The master plan is framed by the institution's Accountability Plan. It includes academic mission and goals, providing planning for educational and infrastructure elements, such as buildings, land, utilities, public transportation, roads, water usage, and open space. The master plan provides a road map for university development for the coming 10 to 20 years (to be updated at least every 5 years), and guides the Educational Plant Survey (EPS), conducted at least every five years, to evaluate a university's existing facilities and identify future space needs that align with the institution's mission and strategic plan.

Educational Plant Survey

The state universities follow the requirements of s. 1013.31, F.S., which directs that, ***"At least once every 5 years, each board [university board of trustees] shall arrange for an educational plant survey, to aid in formulating plans for housing the educational program and student population, faculty, administrators, staff and***

auxiliary and ancillary services or the district or campus, including consideration of the local comprehensive plan." Although the universities could conduct their own survey, as a practical matter, they request assistance of the Board's Office of Finance and Facilities in conducting the educational plant survey (EPS). The Board Office, in turn, requests the volunteer assistance of peer universities, resulting in a team of facilities/space practitioners, led by Board Office staff, who conduct the EPS.

The procedural goal is to promote a consistent approach to the EPS, at minimal costs to the State, while also providing an informal "reality check" of actual conditions in the field by the Board Office and university staff. Potential points of improvement to the current EPS process are noted later in the report.

The EPS process involves two phases, *Inventory Validation* (phase 1), typically conducted between October - December; and *Needs Assessment* (phase 2), conducted the following January through March in order to complete the report and obtain requisite UBOT and Board approvals by fiscal year-end. During Inventory Validation, the EPS Team physically walks all new educational space constructed or acquired since the last EPS, confirming room classifications and square footage are consistent with reporting standards. This phase also provides an opportunity for the Team to confirm or correct facilities space data previously submitted by the university to populate the Board's Space Data Management system, including technical information on all university physical plants down to the room level. The Team also walks any space that the university has identified for potential demolition, renovation or remodeling.

Following the Inventory Validation phase, and incorporating any corrections to a university's facilities space data, the EPS Team conducts the Needs Assessment and makes recommendations for site acquisition, remodeling, renovation, demolition, and new construction for designated facilities and sites. The Team's recommendations fulfill statutory requirement pursuant to s. 1001.706(12)(c), F.S., specifically, "***A new construction, remodeling, or renovation project that has not received an appropriation in a previous year shall not be considered for inclusion on the prioritized list required by s. 1013.64(4), unless:…***

3. The project has been* [EPS] *recommended pursuant to s. 1013.31."

A report reflecting the findings and recommendations of the EPS Team is subsequently reviewed and approved by the UBOT. After UBOT approval, the university submits the official report to the Chancellor for approval by the Board.

Determining Space Needs

The basic method used to determine the space required by a university to accommodate its educational programs, student enrollment, academic personnel, and supporting services is a data-driven, calculative approach. Historically, it was known as the Fixed Capital Outlay Space Needs Generation Formula (Formula Method). In accordance with s. 1013.03, F.S., the method employed must determine, in part, the

space needs "***for educational facilities to be funded in whole or in part by the state, including public broadcasting stations but excluding postsecondary special purpose laboratory space".***

The current method employs a basic calculation utilizing three types of information to determine unmet space needs for educational facilities[1].

1. Projected Full-Time Equivalent (**FTE**) enrollment from the Accountability Plan
2. Space Standards, establishing the minimum Net Assignable Square Feet (**NASF**) per student FTE per category of educational space
3. Existing facilities inventory in NASF by standardized category

Projected student enrollment is the single most important variable in determining additional educational space needs. The EPS uses the 5-year, full-time-equivalent student enrollment projections reflected in a university's approved Accountability Plan. Enrollment is based on student credit hours; whereas, 30 credit hours equals one (1) undergraduate FTE; 24 credit hours equals one (1) graduate FTE, and adjustments are made to account for online FTE's.

Space supporting a university's educational mission is represented by 3 Classifications and 9 Space (type) Categories, as reflected below:

Classifications	**E&G Space Categories**	**Space Standard** (NASF per student FTE)
Instructional	Classroom	9
	Teaching Laboratories	11.25
	Research Laboratories	18.75
Academic Support	Study	13.5
	Instructional Media	3
	Auditorium/Exhibition	2.25
	Teaching Gymnasium	4.5
Institutional Support	Office	22.5
	Campus Support Service	4.2375

Total Net Assignable Sq. Ft. (NASF) per student FTE:		**88.9875**

The basic concept for calculating space needs is as follows:

(FTE x 88.9875) – Inventory = Unmet Space Need in NASF

[1] Educational facilities are those that support the Educational and General mission of the university; examples of non-E&G functions would include Housing, Parking, Athletics, and Contracts and Grants Research Space. The State University System does not use PECO funds for non-E&G functions.

Observations and Recommendations

As required per s. 1001.706(12)(e), F.S., the Board reviewed its space needs calculation methodology developed pursuant to s. 1013.31 F.S. *to incorporate improvements, efficiencies, or changes*. This included a review of existing regulations, records, systems and procedures regarding the assessment of need for educational space within the SUS. A survey of the 12 state universities was also conducted to gather additional feedback to enhance the review. As a result of this work, the Board Office identified issues impacting the accuracy and efficiency of space needs assessment systems, procedures, and processes. The observations and recommendations are described below.

1) **Section 1013.31(1)(c)4. F.S. states, in part, "*Projections of facility space needs must be consistent with standards for determining space needs as specified by regulation of the Board of Governors.*" However, there is limited Board regulation governing the determination of university educational space needs.**

   Board regulations regarding space planning are currently focused on master planning (Chapter 21). The absence of space planning governing policies and parameters has inadvertently fostered reporting inaccuracies and procedural inconsistencies. In speaking with university facilities/space personnel, they have expressed concerns regarding the EPS process and managing educational space needs, citing the lack of formal guidance and parameters from the Board office.

   Recommendation:

   Develop and adopt new Board regulation(s) governing the EPS process and providing guidelines for the determining university E&G space needs. A new regulation would also address the universities' concerns with inconsistency in terms of guidance and expectations related to the EPS process and determining space needs. Board Office staff will work with space/facilities personnel from the universities to help facilitate the development of a new regulation.

2) **The Space Standards (aka: "Space Factors") utilized in the calculation of university space needs have become "unanchored" from supporting methodology or formulaic basis**

   The current SUS Space Standards (see pg-7) are generally below historical levels. Furthermore, they do not appear to be fully derived from a detailed data-driven mathematical approach, as they once were 25 years ago, but rather represent an evolutionary end-product, sometimes influenced by policy considerations (e.g., decreasing statewide space needs to promote online learning) and resource constraints (e.g., reducing the Space Standards by varying degrees in light of the SUS adopting the national standard for an FTE of 30 hours instead of the prior 40 hours).

However, despite the unclear origins of the current universal Space Standards, the Board Office has utilized them relatively effectively in past years to assess university space needs. In fact, the December 2019 SmithGroup report "Review of the Capital Outlay Facilities Space of Florida's State University System" (commissioned by OPPAGA[2]) indicated that many of the Space Standards are generally aligned with national standards and, in some cases, with systems in peer states.

Moreover, the Florida Department of Education's parameters governing educational facilities and space planning are reflected in the State Requirements for Educational Facilities (SREF). Last revised in 2014 for technical edits, SREF has not been substantively updated since 2006, and its standards are per-occupant, generally speaking, whereas SUS current Space Standards are per-FTE. When the Board of Governors was created in 2003, the SUS was no longer required to follow SREF. Nevertheless, it still contains detailed references to university space guidelines, and many universities still utilize SREF for space planning purposes.

Recommendation:

The current Standards may ultimately prove to be appropriate, but the Board Office, with university involvement, should evaluate them for accuracy and appropriateness, with the ultimate goal being to formally establish Space Standards with documentation evidencing supporting rationale and methodology by which they are derived, and establish governing parameters by which they may be revised in the future.

3) **Section 1013.03(2), F.S. requires the Board to, "*Establish, for the purpose of determining need, equitably uniform utilization standards* [rates] *for all types of like space…*" As is the case with the Space Standards (see #2 above), there is limited record supporting the establishment of current utilization rates and/or standards.**

Currently, there are cited standards for two of the nine Space Categories. First, Florida Statute provides a minimum utilization standard for *Classroom* space (40 hours per week at 60% station utilization). Per a 2020 facility consultant's report commissioned by the Legislature, this standard is consistent with national benchmarks. Second, Board records from 1995 cite a *Teaching Lab* standard (20 hours per week at 80% station utilization) – it is dated, but provides a basis from which to start. That leaves seven (7) remaining Space Types unaddressed; *Study, Research Lab, Gymnasium, Office, Auditorium/Exhibition, Instructional Media* and *Campus Support Service*. Utilization rates are part of the typical calculation when deriving Space Standards (i.e. the NASF per FTE for each Category); however, as described in Observation #1 above, there is little/no record of how the current Space Standards were derived, thus there is no record of the utilization rates used to calculate them. Furthermore, as reflected in the 1995 records and the aforementioned

[2] The Office of Program Policy Analysis and Government Accountability (OPPAGA) is the research arm of the Florida Legislature, providing data, research, and analyses that assist budget and policy deliberations.

consultant's report, a utilization rate may not be applicable or appropriate for every Space Type Category.

Recommendation:

Develop uniform utilization standards and/or rates for each of the nine Space Type Categories, as appropriate and necessary, leveraging relevant data from the universities, comparative metrics and methodologies from similar public university systems in other states, as well as National/US standards (if available). The standards should be incorporated into a new regulation or ancillary guidelines, as appropriate.

4) **The current EPS "report" is a collection of tables and charts of EPS-related facilities inventory and space data, sans any informative descriptive text, making it challenging for certain audiences to follow.**

In keeping with various statutory provisions, the onus of preparing the EPS historically fell on the universities, with guidance from Board Office staff. The "old" EPS report format was voluminous, to the point of being non-reader-friendly, and its preparation was time-consuming and labor intensive. To relieve university burden and promote efficiencies, the EPS platform was developed by the Board Office to quickly and efficiently compile data and generate related tables/charts to facilitate the EPS process. With the roll-out of the EPS platform, the EPS report format was also revamped, removing all text, descriptions, summaries, site information, university history, references to campus master plan, etc. The revised current format is little more than 5-6 tables and charts (generated by the EPS platform) that need to be enhanced to assist the audience in understanding the content. In short, the "old" format was exceedingly large and burdensome, while the "new" format is too limited. The solution may be a report format somewhere in between the "old" and the "new" that delivers the findings of an EPS in a format that is more readily understood by a general audience.

Recommendation:

The Board should develop a standard template for EPS reports to be utilized by all universities. The standardized template should incorporate sufficient text, captions and descriptions to provide context, while maintaining a concise, informative format that is easily discernable by a casual reader. Revisions to the standard format should also consider the following:

- Revamp all tables and charts included in the report, generally simplifying them so they are more easily understood.
- Incorporate exception procedures where a Survey Team may provide recommendations to address unique circumstances.
- Simplify the Needs Analysis ("Form B") chart, removing duplications, condensing and simplifying the format.

- In the Needs Analysis ("Form B"), evaluate the utility of "Unsatisfactory" and "Ineligible" line items in the current format.
- Include an acknowledgment or reference to the university Campus Master Plan in terms of its role in framing a university's proposed FCO projects.

5) **The Needs Assessment methodology employed in recent years is flawed in that it only considers E&G space inventory on a university's main campus, disregarding all other space on ancillary sites and branch campuses, effectively overstating space needs and compromising the Needs Assessment process.**

In researching the Board's EPS platform, specifically its embedded approach to calculating a university's current and projected space needs, it was found that the FTE enrollment data was totaled for all of a university's E&G inventory, including main and "branch" campuses, but it only considered E&G space on the main campus (i.e. Site 1 in the data system). All other Sites were excluded, thus their related E&G space inventory was excluded as well, understating total E&G inventory and thus overstating a university's space needs.

Recommendation:

The Board should amend the EPS platform to include all Sites, not just the main campus, in order to provide a complete validation of a university's E&G inventory and provide for a more accurate space needs assessment.

Furthermore, the space data system and EPS platform does not accommodate space needs analyses at a campus/site level; it can only accommodate an aggregate (all Sites) view. This functionality was available before the EPS platform was developed, and would be an improvement to the current EPS process, namely in terms of assessing space needs on prominent branch campuses. As such, the Board Office should explore the feasibility of modifying current systems to accommodate this functionality.

6) **The annual university Accountability Plans are utilized in the EPS to evidence "*projected capital outlay full-time equivalent student enrollment…approved by the Board of Governors",* as per s. 1013.31(1)(c)4., F.S. However, the format does not provide sufficient Board-approved enrollment data to fully recognize a university's projected enrollment growth for EPS purposes.**

EPS reports and Accountability Plans (AP) are typically approved at the same time each year (June). In light of this, as well as the need for statutory-compliant data, the EPS Team utilizes the UBOT and Board approved AP from the prior year. This effectively shortens their 5-year projection data by one year. To resolve this, historically, the AP format essentially provided a sixth year; i.e. sufficient FTE enrollment data for the EPS Team to calculate a university's projected space needs out the full 5 years of the EPS. Around 2017-18, the AP format was modified, inadvertently removing this facet from the AP format, leaving the Survey Teams with

4 years of board-approved enrollment data. To facilitate the Needs Assessment, the statutorily-compliant 4th year data was applied to the missing 5th year, compromising the accuracy of projected space needs.

Recommendation:

Amend the standard format of the AP accordingly to accommodate the missing data, as described above, providing the statutorily-compliant 5th-year data. This will allow the Survey Teams to consider a university's 5th-year enrollment data and provide for more accurate Needs Assessments. *Note: the AP format has been modified accordingly and will be effective with the 2022 AP's approved by the Board in June 2022.

7) **To account for the lack of space needed for online FTE enrollments, the current space needs methodology applies a factor to certain Space Type Categories. While this approach has been used effectively in past years, the post-pandemic landscape is changing in terms of online activity, thus the factor and its application may no longer be appropriate.**

The current space needs methodology applies a .20 factor (i.e. 80% discount) to the E&G Space Categories Classroom, Teaching Lab, Gymnasium and Auditorium/Exhibition to account for the lack of FTE utilization of such space.

During the height of the pandemic, the universities shifted to 100% online instruction. While campus life and operations have returned to normal, generally speaking, and online activity continues to retrench from its pandemic peak, it is above pre-pandemic levels. Furthermore, the Board projects that, over the next few years, online activity will continue to increase beyond its pre-pandemic level, and interviews with university staff cite increased student preference for courses that combine online and in-person instruction.

The university survey conducted with this evaluation asked if the current .20 factor for online FTEs is still appropriate. All 12 universities responded. The two smallest institutions indicated they don't utilize online instruction in a material sense, and two others said the current method remains valid. Of the remaining eight, some said the factor should be increased, while others said it should be decreased. Furthermore, one respondent said students now spend more time on campus, and using facilities, despite taking classes online, while another said the methodology should consider space needs relating to content production and delivery support.

Recommendation:

Based on university survey responses, as well as Board projected online activity and student preference for combined online and in-person instruction, the factor utilized to account for online FTE enrollment in the current space needs calculation methodology needs to be evaluated for accuracy and appropriateness across each of the nine E&G Space (type) Categories.

8) **There is limited guidance and protocols governing the assessment and recommendation for demolishing E&G facilities, ultimately impacting the integrity of space needs assessment process and potentially increasing hazard risk to a university.**

There are limited guidelines governing the demolition of E&G facilities, particularly as they relate to its reporting in space data submissions, its treatment in the EPS needs assessment, and the accountability for actually razing the facility. During the EPS process, a university can propose space for demolition, and the Survey Team can recommend the same. This removes it from the university's E&G space inventory, thus increasing space need and helping justify new construction (i.e. new/added space). However, in some cases, 5 years later, when the subsequent EPS is performed, the Survey Team finds that a university is still using the facility for student instruction and, in some cases, now proposing to renovate/remodel it. This begs the question, should it have been flagged for demolition in the first place? Furthermore, in some cases, the Survey Team has found the facility still standing vacant, 5 years later, when conducting the next EPS.

Recommendation:

Create parameters governing the demolition of SUS E&G facilities, particularly when it relates to the EPS process. Potential considerations when crafting guidelines are: 1) requiring universities to provide a 3rd-party cost-benefit analysis (to the EPS team) to support the recommendation for demolition of the subject facility, and 2) requiring the facility be demolished within 36 months of UBOT and Board approval of the EPS.

9) **Persistent, material inaccuracies in facilities space data submitted by universities (following each semester) continue to impact processes, reports, and analyses relating to SUS E&G inventory and space needs determination.**

Accurate space data is a fundamental prerequisite to ensure value, utility and accuracy of the Facilities Space Reports and the EPS process. Inaccuracies have been observed in nearly all universities' data in recent years, albeit to varying degrees, but sufficient to materially impact processes and reports. It also requires a significant investment of Board Office resources to research issues and facilitate corrective actions by the university.

For perspective, in one such case, while conducting the EPS, it was found that a university had coded most of its C&G (contracts & grants, sponsored research) space incorrectly as E&G space; a large Auditorium/Exhibition hall was incorrectly coded as a Teaching Lab; and, clinic "SIM" lab space was erroneously removed from E&G inventory altogether. Ultimately, the inaccuracies were so pervasive that the university launched an extensive internal initiative to confirm and correct all of its space data, building by building, room by room.

Several factors contribute to the overall issue or data reporting inaccuracies, such as the lack of formal clear guidelines/parameters for coding E&G space accurately, the lack of workshops in recent years to vet such matters with space/facilities personnel, and limited experience of new university staff in light of turnover in space planning and facilities departments. There is, however, little university accountability for maintaining and reporting accurate space data.

Recommendation:

In the last month, the Board Office reinstituted regularly scheduled workshops with university space planning and facilities planning personnel, which have been well-received and should improve reporting accuracy through the discussion of space data issues and best practices for reporting. The following measures should be taken to help promote accurate data reporting:

1) The Board should develop clear, written guidance for university reference in terms of appropriate and accurate coding of space data. Such guidance should draw heavily from the "Postsecondary Education Facilities Inventory and Classification Manual" (FCIM), as well as statutory parameters and input from university personnel and data administrators.

2) The Board should consider incorporating a certification of accuracy (on the part of the university) to accompany each post-semester space data submission to the Board Office. Note, similar certifications have been incorporated with other periodic reporting, such as the university Carryforward Spending Plans, FCO Budgets and CITF Project Lists.

Appendix A

Below is the Survey of universities conducted in connection with this evaluation. Each survey question is followed by a summary of university responses. For the purpose of this report, some responses have been paraphrased.

2021 Survey

Space Needs Calculation Methodology in the State University System

Created during the 2019 Legislative session, Section 1001.706(12)(e), Florida Statutes, requires that, every 3 years, the Board of Governors *"review its space need calculation methodology developed pursuant to section 1013.31 to incorporate improvements, efficiencies, or changes"*. To assist the Board in this work, please respond to the following questions:

1) **Each SUS institution is currently assigned the same space factor/standard per FTE for each of the nine (9) E&G space categories, regardless of mission. Similar to the question asked in 2019, should the Board of Governors space needs assessment allow each university to choose a space factor(s) and modify it, accordingly, to the extent it furthers your institution's unique mission? If so, should there be a ceiling/max (cite a source or basis) in modifying the factor, and the frequency with which such modifications should be made? Explain your answer.**

   - The Board should allow each University to choose a space factor(s) that aligns with its mission and strategic goals. We are overbuilt in many space categories, making it hard to improve performance metrics.
   - Consistent with our response in 2019, we recommend maintaining standard factors for the space categories among all universities. Ideally, the space needs factors should mirror national and/or Carnegie class standards.
   - The current EPS and Form-B allocations within the nine space categories are disproportionate and not ideal for our university. It should provide a balance of space allocation that more appropriately meets our needs.
   - We support the evaluation of space needs using the same space factors across the university system. However, a university should be allowed to select and increase Categories helpful to its mission or strategic goals, with offsetting reductions in other Categories so its aggregate space need is unchanged.
   - Use factors that more closely resemble STEM universities, drawing comparisons to peer institutions within Florida as well as comparable institutions in other states. Match space factors to best meet the mission of the university.
   - Each university should be able to modify any of the factors if it can demonstrate why the modification is required, prior to every EPS.
   - Each university should be able to modify space factor(s), up to a predetermined level, to the extent such adjustments further their mission. Each institution should prescribe their own gross space needs.
   - No. Altering the space factors only provides relief to the institutions overbuilt or nearing 100%. The only factors that should be reviewed are Classroom and Auditorium, as the increase in Active

Learning instruction requires more space per student. Also, growth in online offerings is largely in response to the lack of space.

- The space factors should reflect and support the university's mission and should not be arbitrarily established. Also, not all should be tied to FTE enrollment. The evaluation and rationalization of the space factors should be the first step of every EPS.
- Each university to be able to choose a space factor(s) that complement their mission, and modify it accordingly, within established parameters, prior to every EPS.
- Yes, the Universities require that flexibility.
- No. The space factors assess institutional allocation of E&G space within the nine categories to varying degrees to support missions.

2) In terms of managing the use of academic space:

a) Describe any technological tools, such as software platforms, that you are currently utilizing.

- *Assetworks AiM* - used by Facilities Services for work requests and work orders.
  PeopleSoft - maintains sites, buildings, building acquisitions and room data.
- *Course Leaf Section Schedule* (CLSS) – course scheduling management platform designed to centralize coordination of courses meeting times and maximize classroom utilization.
  25Live – enables users to schedule classrooms, events and more on campus, providing live reports regarding space, building, classroom type and more filters.
  FAMIS – used for tracking physical space inventory within the 9 space categories.
- We do not utilize any technological tools at this time.
- *Banner* - student database for class scheduling, tracks meeting days, times, buildings & rooms.
  25Live - system shared Academics and Campus Reservations, secures room reservations, tracks space use and space utilization (and utilization statistics).
  X25 - reporting system, allows user to see graphically what is scheduled (rooms) and provides utilization statistics.
  Cognos – generates Excel reports reflecting class meeting & room information.
- *FAMIS* - repository of space information, generates space data submittals required by the Board
  Analytical Reports (Tableau) – internally developed platform, provides utilization reports for classrooms and labs, by time, building and room.
- *Excel* – at this juncture, an advanced system is not necessary. Our campus has comprised of one building for instruction.
- *AssetWorks AiM* – platform driven by space data, used primarily used for property.
  Ad Astra - to manage academic space. Note: some academic space is under the purview of academic departments, where it is managed separately using local software solutions.
- *MS Excel* – used to track facilities & space information; only one instructional building on campus.
- *Archibus* - software that syncs with several modules within *PeopleSoft* and Service-Now. We are transitioning from Archibus to *Asset Works AiM* for managing space and moving from PeopleSoft to *Workday*.
- *Autodesk Revit* – tracks all university space, and is connected to UF-STARS, a database/web application.

UF-STARS – database/web application used to code room uses and assignments, track square footage, and set room capacity.
EMS – receives data from UF-STARS, used for scheduling academic rooms.

- *FAMIS 360* and *Banner*
- *25Live* - for classroom scheduling
  AutoCAD and *FAMIS* – to track room data based on the CAD drawings.
- *Space Tracking and Reporting System (STARS*) – used by Facilities to document sites, buildings and rooms, and report data to the Board.
  Space Inventory & Allocation System (SPIN) – used to report any changes to assigned buildings and rooms, as well as gather data on research projects, faculty/staff locations, and property/asset locations.

b) Describe any limitations, challenges, constraints in how your native system uploads to the Board portal in terms of impact to the space needs calculation.

- The current system is unable to account for "shell" space in our inventory.
- The inability to prorate academic (E&G) and research (C&G) space does not accurately reflect space assignments and usage, impacting space needs calculations.
- Buildings that have been flagged inactive in our database are not captured as such in the data submission to the Board; they remain active, satisfactory space.
- The only issue stems from apparently Board portal capacity to accept the size of our data uploads.
- No challenges or limitations with the uploading. We use STARS.
- Our native system uploads all appropriate files without any constraints.
- No concerns or issues.
- We do not have any problems uploading the information in our system to the BOG portal.
- None.
- There are no limitations, challenges, or constraints in data reporting to the State.
- We have a new system, so recent issues are related to our learning the new system in terms of uploading data to the Board.
- There have been issues with closing old/inactive sites in data reporting.

c) Is there a benefit to utilizing one universal application/platform system-wide?

- Yes, but this isn't practical. Most institutions utilize space system for more than Board reporting. Consistency of reporting (the data) is more important; this requires clear definitions, policies, and standards for evaluation during the EPS process.
- There is no benefit. We have not experienced any issues.
- Yes, a universal application/platform would allow for system wide continuity and collaboration.
- A centralized organization would provide clear standard expectations.
- There could be benefits to a universal application, but centralization is not conducive to change; i.e. if the system performs badly, we are stuck with it. Also, it would be a large financial investment, requiring State funding.

- Yes, if it allows flexibility in reporting space unique to our mission.
- There would be no benefit. University space databases are deployed to meet needs beyond Board reporting. A singular platform would likely not address those needs.
- No.
- There is a cost benefit to this approach, but it would be difficult and expensive to coordinate. If sufficient resources were available, this should be pursued.
- A system-wide application/platform would provide more consistency between SUS institutions.
- There might be cost benefits as well as consistency, but it would be challenging to find one system that accommodates all institutions and economically connect into existing systems.
- Using the same system makes it easier to compare issue and resolve problems.

3) Describe challenges that exist at your university in the assignment of space and efforts to optimize space usage, particularly in the aftermath of the pandemic, and how can the Board help in resolving them.

- The challenge we face is the lack of policies and processes university-wide. The last suggestion by the Board was for each university to use SREF as a guideline, which we did, but it hasn't been updated since 2014.
- Assignment of space is managed by divisional Vice Presidents, sometimes delegated to deans and department heads. Decentralized authority presents challenges in terms of accurate reporting and optimal space utilization, particularly in Classroom and Teaching Labs. The Board could help address challenges by developing clear regulations for universities to develop policies and procedures that establish a clear path as to how space is regulated and by whom.
- Our assignment of space resides at the unit/college level. This decentralized structure poses challenges in terms of accurate tracking and reporting of room assignment, and was further strained by the pandemic. We are considering a centralized structure, to control space assignment, promote reporting accuracy and increase space utilization.
- Our educational space is assigned to a primary use during peak hours, then often reassigned to secondary use in off-peak hours to maximize utilization, but this presents challenges in terms of maintenance/custodial servicing and furniture set-up.
- The lack of space is the core challenge, particularly research space for high level scientific experimentation, as well as the lack of funding to renovate/remodel space for re-assignment and optimal utilization. To optimize teaching space, non-scheduled classrooms are made available for other uses (tutoring, study groups and academic meetings). To optimize Office space, we are reducing office sizes in new buildings and promoting double-occupancy in existing large offices. It is too early to comment on the impact of the pandemic on space and utilization. While most faculty adapted to a remote working environment, many prefer to have an assigned office. Recent policy providing flexible work arrangements (i.e. remote & hybrid) may yield *Office* space savings.
- As a small institution, our challenge is limited instructional space for a rapidly growing enrollment.
- None.
- Limited existing space for incoming faculty and staff is our primary challenge. Also, renovations needed to create certain spaces, especially labs, is incredibly expensive, challenging their feasibility. Also, we do not have sufficient flex space to use during renovations, thus creating added costs and logistical issues in relocating employees and students. It would be helpful to

have supplemental funding to cover these costs. Sharing existing spaces is our only option for meeting current space needs, which is difficult in light of building code capacity requirements.

- There are no identified areas where the Board could assist.
- The “ownership” (usage) of space and funding for maintaining technology within spaces continues to be a challenge for assignment of space. COVID is still influencing our ability of optimizing enrollment in “in-person” classroom space within the .20 factor calculation.
- Our challenge is meeting the need for Teaching Lab space and larger Classrooms to meet student demand. Faculty want Classrooms in STEM and Business to be flexible to meet their instructional modality. Specific funding for the renovations required to create these classrooms would be helpful.
- It can be challenging to properly code *Classroom* vs *Teaching Lab*, as minor differences (e.g. a periodic table on the wall) can dictate proper coding.
  Also, the lack of space inventory and/or suitability requires us to be creative in utilization, such as; non-Classroom space with large seating capacity is used for Classroom activity; storage areas and Study spaces have become office spaces; conference rooms have become Classrooms; we have had to lease space in an off-campus industrial park for mechanical engineering research space; and we have utilized library space for tutoring programs.
  It is difficult to convince students to enroll in non-peak time classes, such as before 10:00 am, after 4:00 pm, or on Saturdays.
  Lastly, clarity as to proper coding of space. For example, FCIM inadequately differentiates between faculty and staff office spaces (simply coded as 310).

4) In light of s. 1013.31(1)(c)4, the Board of Governors must create regulations providing, among other things, standards for determining space needs. Do you see this as helpful in terms of system-wide guidance or unnecessary? What would you envision codified in regulation in this regard?

- Consistency would be beneficial. The regulation should provide guidelines as to how E&G space need is calculated, including needs assessments for main campus vs. branch campus/institutional sites. Considerations of space needs to address unique university mission and/or level of research activity should be presented outside of the standard model, thereby keeping all standard space requirements comparable and in line with FTE growth.
- Yes! A regulation would be helpful, in that it would provide Space Planning with specific standards and guidelines to share with the campus community. It should include, at least, room use (& sub use) codes, room/building budget classifications (E&G, C&G, Auxiliary, etc.), how to measure GSF and NASF, required data reporting to the Board, and reporting of leased space. Institutional leadership teams should understand the importance of 1) accurately reporting space, as well as the Needs Assessment in terms of maximum space allowed for each space category. And there should be a mechanism in place to regulate the change of space use codes.
- Each university should be allowed to establish its own space management policies and procedures to address its mission and strategic goals. We have been SREF 2014 as a guideline for space management.
- Regulations should create a baseline reference only, codifying a less restrictive standard that would cater to the unique vision of each university.
- Unnecessary.
- Yes, a regulation would be helpful. Flexibility should be provided to the universities, with broader space types and less prescriptive criteria. And facilities older than 100 years should be automatically excluded from E&G inventory due to obsolescence.

- Standards for determining space needs could be helpful guidelines, but should not be the only tool in determining SUS space needs. Space Factors should codified in regulation for greater definition and understanding.
- The EPS is helpful to validate space and assess need, but it does not take into account our STEM mission and lack of online instruction.
- The Board needs to go beyond guidance and make accountability mandatory. Such regulations should closely adhere to SREF as a starting point. Justification for exceeding the standards should be part of the Needs Assessment process, particularly for *Office* space.
- There has been a lack of direction, likely due institutional uniqueness making standardization difficult, but standardizing for the perception of equality is unnecessary. We believe that feedback [the Survey Team] during the EPS is enough for determining space needs.
- A regulation would be helpful, provided it supports the mission of the universities. Clear definitions, processes, and methods must be included in any regulation developed. Supporting each institution's unique mission while ensuring data is consistently used should be the goal.
- The Board should create Space Factors, but allow for adjustments to further university strategic goals, if properly justified by the university.

5) In terms of Educational & General (E&G) versus Contracts & Grants (C&G):

a) Describe your policy or process for recognizing and assigning space as E&G versus C&G, as well as any challenges you experience in doing so.

- Allocation of E&G space to colleges/departments is typically done by the Provost, based on input from VP's, Deans and department heads, with each college/dept then assigning space within their area. A space committee reviews and approves C&G and E&G space reallocations, and the designation of E&G vs C&G, for reporting purposes, is determined by who occupies the space the majority of the time; i.e. a 51/49 rule. The funding source for construction (i.e. PECO) is also a determining factor. PECO projects are E&G, therefore, that space should be assigned as such. The challenge occurs is when the space is being utilized by both E&G and C&G; we can only report one entity/designation.
- The primary determination of space (E&G vs C&G) is based on the percentage of use (i.e. if 51% of the usage is for research supported by C&G, then it is categorized at C&G), per information captured after initial construction or renovation/remodel. Any subsequent adjustment is based on information provided by the occupants. Greater collaboration between Facilities space data and Division of Research funding (based on the federal reporting for indirect cost recovery models) could help with this process.
- Currently, our university has no C&G-funded spaces.
- The university follows the guidelines for reporting space under C&G, although a more detailed definition would be helpful. The university has a research space allocation formula to determine the assignment of existing research space to maximize the utilization of existing space.
- Our C&G funds are growing, but relatively small in terms of other institutions. All research space is contiguously used for both C&G and E&G.
- Our process for assigning E&G vs C&G is based on the primary activities/function of the space. This can be challenging when space has multiple uses from multiple funding sources.
- Our university has minimal C&G space, and thus does not currently have a policy.
- We do not track employee placement; space is assigned to units. Without knowing which spaces employees use, there is no way to know if their research is funded by C&G, E&G or

both. Generally, spaces are only categorized as C&G if the occupant/home unit informs the Space Planning office.

- Traditionally, we have not coded any space as C&G. The identification of C&G space is related to the use of the space, not its characteristics. C&G space is also dynamic, depending on the program in question, and can change frequently. As an R1 university, we do an extraordinary job tracking the use of space-related to the C&G mission to support federal and other requirements.
- Policy and/or process follows the funding for identifying C&G space.
- We do not have a current policy for recognizing and assigning space as C&G in our space file, but we do identify research spaces that are funded by grants through the F&A [indirect costs] process on a periodic basis. Most labs assigned to faculty have a dual purpose of supporting grants and training students in research that may or may not be funded by contracts or grants. For us, changes to this field are too frequent to centrally track with accuracy on a semester basis since it's tied to the occupying individual at the room level and their pay.
- Typically, we assign space as E&G, unless we have sufficient information to support allocating space otherwise.

b) Describe any challenges in reporting E&G vs C&G space to the Board, and how it can be improved/resolved to more accurately represent space need?

- There isn't an option to report the utilization of E&G and C&G space simultaneously; only one budget entity can be reflected (at 100% usage). This primarily impacts *Research Lab* and *Teaching Lab* space. Historically, the Board has advised universities to use the 51/49 rule, with the majority user (C&G or E&G) being assigned to the space for reporting purposes.
- The Board's data submission format does not allow for proration of space; therefore, space that supports both E&G and C&G gets categorized at 100% in either category based on primary use. A better system would allow for reporting of prorated usage of space, and further enhanced by linking the financial data to the space file.
- Currently there are no C&G-funded spaces.
- Currently, the university has such a large research space deficit that there are no challenges in reporting it, as it is all carefully monitored.
- Given our limited space inventory, it is not possible for us to have our research space separated between dedicated E&G and C&G.
- The Board could help improve university determinations of E&G vs. C&G space by setting clearer guidelines for space classifications.
- None.
- Our space planning office lacks the personnel to authenticate data designating space as C&G vs E&G, and data accuracy would rely on the reporting by each unit's designated representative. A unit's designated representative may not be aware if a researcher is using multiple spaces.
- We do not code space as C&G in the regular space file submission. During our last EPS, we were asked not to make mass changes, as the Board didn't want to impact the historical trend. For the current EPS, we utilized the Space Inventory and Allocation System data to determine an appropriate quantity of space to remove from each assignable space category, i.e., the C&G supporting space.
  Clear guidelines are required to ensure all institutions report C&G space equally, which should be audited as part of the EPS process.

- Identifying actual usage for space is challenging for accurate coding. This could be improved by prorating of C&G activity that occurs within E&G space.
- Part of the challenge is not working from a consistent understanding and definition within the SUS of how to classify these spaces as such. We believe the universities' Strategic Plans, as it relates to recruitment strategy of grant funded researchers, should be considered in the space needs calculations. This should include what research discipline they are practicing. A researcher in library sciences would not need the same space as a medical researcher needing clinical, lab, and research spaces.
- Our challenges include determining the correct funding source – especially if there are multiple sources assigned.

6) Should the space factor/standard for Instructional Media (refer to attached FICM definition; space codes 530 & 535) be changed; if so, how and why?

- Instructional Media should be reevaluated given the circumstances of the pandemic. The definition should be revised to consider the rise of online and hybrid classes.
- Yes. With the expansion of online and hybrid models of teaching, the need for instructional media has increased dramatically, and the current factor does not account for the expanded program in developing media/e-learning content.
- We has no issues with the current FICM definitions for space codes 530 and 535.
- The current space factor of "3" for Instructional Media seems adequate. The definition, however, should be revised to clarify/allow office space related to/or being used by Instructional Media staff.
- Instructional Media has little impact on our space needs; recommending a change is not necessary.
- The factors may require adjustment, but the definition needs to be change first since it was developed long ago when instructional media was distributed from one location. The Board should consider all distance learning spaces (offices, green rooms, storage, servers, etc.) in the *Instructional Media* space category, including consideration for prorating office space where an instructor is teaching classes online.
- Yes, it needs to be changed to include online education as well as live pod-casting to better support current technology.
- Proportionally, technology and equipment associated with *Instructional Media* has decreased in size. Except for TV and motion-capture studios, most recordings can be done in faculty offices. The definition could be expanded to include the workspaces that house our Graphics, Instructional Development, and Learning Systems & Technology teams; that space is currently coded as *Office*.
  If the Instructional Media category were absorbed into another Space Category, it would be difficult to allocate square footage - it could be interpreted as open labs, Offices or Classroom depending on the department.
- The space factor should be evaluated and changed to reflect trends in media production related to online learning and other modernizations.
- Yes. The current definition is outdated; it does not reflect today's technology, and should be revised to reflect all aspects of distance learning.
- Yes, the definition should be modernized and expanded to meet today's standards.

(530) - Media Production, Change to: A space used for the development and production of digital media for teaching and learning.
(535) - Change to: spaces include video/photo production studios, virtual production studios, audio recording booths, podcasting suites, post-production workspaces and suites, maker spaces, graphic/multimedia/animation design spaces, XR labs for AR/VR/MXR production & implementation, visualization centers, fabrication studios, content production workrooms, and 3D scanning and modeling facilities.
These spaces have a clearly defined production function that serves the broad category of content creation for the purposes of teaching and learning.

- Yes! Instructional Media use codes should be updated to include spaces used for distance and online learning. However, if the Board ever brings back a utilization reporting formula, the formula should include any Instructional Media use codes assigned to instructional spaces.

7) Should the need for Office space (for faculty and/or staff) be driven by student FTE's, as is currently the case, or by some other metric? If the latter, please explain.

- FTE's seems to work adequately.
- Office space needs on main campus is adequately supported by FTE's; however, space that is used by C&G funded staff should be removed from the needs formula. Consideration should be given as to how office space is addressed for other sites [not main campus] the university operates, to account for duplication of services as well as provide space for faculty/staff that support multiple sites.
- Office space should be based on employee FTE, not student FTE.
- Student FTE only represents a portion of the university's mission, thus it is a poor metric to determine Office space. Student FTE might be a reasonable baseline, provided it considers other factors, such as research portfolio or total faculty/staff-to-student ratio.
- When it comes to the need for office space by faculty, FTE should be considered as well as the need for C&G space, since most faculty teach and conduct research. Currently, the [E&G] space need formula does not include C&G research space needs. For staff, a possible recommendation is to use a defined range of assignable square feet (ASF) per person, based on specific role should.
- We suggest that Office space be based on faculty/staff FTE plus a percentage to accommodate common spaces (conference and service areas). All faculty/staff positions are assigned "tiers", which have corresponding standard amounts of office space. For example, the President (Tier 1) has an Office space allowance of 350 sf, while a student assistant (Tier 9) has 64 sf. An additional 30% is added to provide for conference rooms, collaboration space, support areas, etc.
- The Office space metric might be better served by faculty/staff FTE rather than student FTE. Our limited Office space impacts faculty recruitment and we are currently unable to have all staff on campus.
- Office space needs should not be driven by student FTE; it should be based on current positions and projected faculty/staff positions. Many administrative offices house individuals providing services to the entire university, not just students.
- The student FTE is an important factor. However, it should recognize the need for student office space (i.e. teaching assistants, research assistants and post-doc positions). A weighted factor (to account for graduate FTE vs undergraduate FTE) may be appropriate, or a headcount factor should be used instead.

- No, it should not be driven purely by FTE's, but by need. Due to our strong STEM/Research mission, there is a need for additional Office space for graduate assistants, research assistants and other C&G-related activities.
- Yes, student FTE's should drive the need for office space.
- Office space should be driven by staff/faculty FTE, not student FTE.

8) Based on your latest EPS needs assessment, have space deficits in any of the space categories required you to modify curriculum offerings or instructional modality? Explain your answer.

- The latest EPS did not depict space deficits in any of the categories. Curriculum offerings have not been driven by space deficits in the past.
- Space deficits have forced the university to adapt instructional modality and expand class schedules to include evenings and weekends. Also, the use of hybrid instruction has increased to maximize course offerings. While these adaptations are not ideal, they are necessary in light of available space.
- Based on our EPS, the institution is overbuilt in all areas except student space and research. This did not require us to modify curriculum offerings or instructional modality.
- Yes, the university's upcoming quality enhancement plan (QEP) for its 10-year reaffirmation of institutional accreditation will focus on active learning, and we have had to develop a phased plan due to limited classroom availability. The space deficit is more severe in mid- and large-sized classrooms, where much of these active learning activities take place. Small classrooms are more readily available, but are not conducive to large lectures with in-class breakouts, which is what active learning requires. Additionally, the institution is looking to convert some of its high-capacity (100+ student) classes into online formats due to limited lecture hall availability.
- Yes, it has required "flexing" our space to meet curriculum demand and the need to share research space, which creates scheduling conflicts.
- We had to make many modifications to modalities and curricula when we had COVID social distancing requirements in place. Outside of COVID requirements, lack of lab spaces for physical labs have run up against enrollment demands and prompted us to create sections with different modalities. This sort of compression between space and modalities does exist in certain regular classes (most commonly in Business and Criminology), but it is not widespread. The EPS is becoming more important because no project can be on the approved list without an EPS recommendation.
- No
- No, there have been no curriculum or modality changes due to the current EPS.
- Space deficits have directly impacted our curriculum offerings in *Classrooms, Teaching Labs* and *Research Labs*. These shortages have also informed the prioritization of PECO projects. There are not enough (STEM) *Teaching Lab* facilities with specialized equipment to meet student demand, resulting in significant waitlists and, in some cases, students taking courses via our Direct-Connect partner institution, Valencia College, and transferring their credits.
  The shortfall of *Research Labs* has resulted in researchers utilizing Teaching Labs when classes are not in session, which limits accessibility to students who need additional lab time to complete their assignments. It such instances, it restricts researcher's use of space to conduct activities to meet deadlines for contracts and grants, as well as risks damage to expensive equipment by students subsequently using the space for coursework.
  The lack of *Classroom* space has been abated somewhat by online and mixed-mode course offerings, but updated building code and ADA standards have reduced seating capacities, and increased active

learning coursework has further impacted Classroom space, reducing capacities and requiring students to work online, visiting the classroom in sections to complete group work.

- Yes, student demand for online learning opportunities remains higher than pre-pandemic percentages.
- Not applicable to our institution.
- Not yet, but we are reaching our max allowable space in the *Teaching Lab* and *Office* categories. Lab space is slowly becoming a critical issue. In several disciplines, notably engineering and health sciences, professional accreditation standards do not support virtual lab experiences; switching modalities is not an option. Modifications to curriculum offerings in the past have come from the quality and size of teaching spaces.

9) For Online FTEs, the current space need calculation applies a .20 factor (i.e. 80% discount) to space categories Classroom, Teaching Lab, Gymnasium and Auditorium. In light of the pandemic, and our subsequent return to normalcy, does this adjustment for Online remain appropriate? If not, explain why.

- The current space need calculation for online FTEs is not appropriate, as students in online courses still end up in classroom space for testing integrity purposes.
- The current practice seems appropriate.
- At our institution, undergraduate students taking “some distance education” has increased; 37.1% (2018) to 53.9% (2021), with more student preferring a mix of both online and in-person classes. The “exclusively distance education” category only grew from 7.5% (2018) to 12.7% (2021). Students in both categories are spending more time on campus and using facilities, and some of our live-remote fully-online options also permit students to attend class in-person. It may make sense to increase the factor (i.e. reduce the discount) to ensure full accounting of campus utilization by online students.
- We have very little on-line activity, so it hurts our space needs calculation.
- The .20 factor should change to .10 (i.e., 90% discount). Remote instruction during the pandemic accelerated wider acceptance of online learning. Covid-19 has revealed that the fantasy college life; i.e. living on campus and studying together on the grounds, does not match the reality of many of our students, suggesting fewer online FTEs will utilize the physical campus. Changing the factors should be evaluated annually after the final enrollment numbers are available.
- The adjustment is no longer appropriate, as we have more students taking a mix of online and face-to-face classes, and those taking face-to-face classes are using physical spaces, particularly non-classroom space. It is reasonable to apply a discount to fully online students, but students who are partially online have similar space needs as fully in-person students.
- Due to our unique mission, we do not usually provide online programs.
- The online FTE .20 factor is still valid. There are no plans to increase online offerings, and there is still a need for these space types for students who take a combination of in-person and online courses
- The .20 factor should be increased to .25 to account for increasing online FTEs over the last 5 years. Space needed for production of high quality online delivery should increase with growing online FTEs; therefore, the .25 factor for online FTE is requested.
- An adjustment is likely appropriate, but we need to monitor student demand for online courses system-wide to determine what the discount should be.

- The pandemic has increased the use of technology in the classroom as well as the preference for hybrid, flipped classrooms and active learning. The appropriate factor for those learning options should be 50% discount which is the Federal definition of online. And it is inappropriate for Teaching Lab to be at an 80% factor since these classes mostly require hands-on interaction.
- No, online students may occupy campus dorm rooms, library/study space and gymnasium space; therefore, online FTE's should be used in the calculations for space in those categories.

10) Since 2019, there have been no periodic workshops to discussed facilities and/or space-data issues. Would reinstituting periodic workshops be beneficial? If so, how often? Should they be separate or is there a benefit to combining facilities and space into the same meeting?

- Reinstituting periodic workshops will be beneficial, meeting at least once or twice a fiscal year. There is a benefit to combining facilities and space, as they impact each other.
- Reinstituting periodic workshops would be beneficial. Schedule two meetings per year; one in-person and one virtually. Facilities Planning should include Space Planning, as these areas work closely in identifying space needs and project planning for master plans, facilities programs, LBR, etc.
- The need for periodic workshops to discuss facility and/or space-data issues is paramount to the evolution of space use in the SUS. Facilities and space should meet on a yearly basis, and bringing them together will allow for open discussion and improve overall accuracy of space use reporting.
- Space workshops were beneficial and should be reinstituted. They provide a way to meet SUS peers, discuss needs and issues, and vet solutions. Meeting every other year seems appropriate. The Space workshop was most efficient since it focused on Space issues; combining it with other meetings may not be effective.
- There is some benefit to a yearly workshop including both facilities and space. That said, it would be helpful to recognize differences in space needs between universities and not a "one size fits all" approach.
- In-person space workshops provide an opportunity to network and discuss issues with colleagues in Space, Facilities, and Data Administration. In the absence of a full workshop, regular group meetings of Board and university staff could be beneficial.
- Yes, the workshops should continue. Combine meetings to encourage a sense of community among peers. However, breakout meetings of the two disciplines allows more in-depth discussions on specific topics.
- It would be highly beneficial to meet at least once annually. Data workshops allow space administrators to voice concerns directly with Board staff and vetted more efficiently. Also, the workshops are an opportunity to hear how peer institutions are handling space needs, get legislative updates, and discuss changes to statutes/regs and the EPS process. If agenda topics are relevant to Facilities, all the more reason to include them.
- It would be beneficial to hold regular workshops, provided the content is valuable and helps train university staff in the correct methods to arrive at consistent data for Board use. Workshops should be separate for Facilities and Space groups, and held annually. Combining the groups would not permit adequate discussion of topics in a meaningful and constructive matter. Furthermore, in addition to Board policy, legislative, and business updates, the agenda should include open dialog forums for universities to present issues, recommendations, and success stories for improvement and efficiencies to the overall SUS and its support processes.
- Yes. Annually. Separate.

- Yes, reinstitution of the workshop is recommended to ensure all SUS institutions are addressing space issues and policy updates using a common understanding. Bi-annual meetings recommended, first meeting to interpret the new requirements and the second one to evaluate implementation and effect. A focused meeting between University Planners and Space Data Managers would be advantageous.
- Yes! Reinstituting SUS Data Workshops would be beneficial for SUS Space Management staff. They provide a great opportunity to compare notes with peers, build rapport between Board and university staff, as well as provide an effective platform to review new/revised state requirements. In-person meetings provide the optimal environment for sharing/comparing ideas with peers.

11) You are encouraged to provide recommendations regarding the current space needs calculation methodology to make the process more accurate, efficient, and meaningful.

- Encourage Presidents, Provost, Vice Presidents, Deans, Chairs, Research Personnel to keep the Space Management and/or Facilities staff in the loop for program planning, space moves and usages, changes to space usages, research projects, and staff new hires. Space planning is affected by all of these.
- Encourage Institutional leaders to put Space guidelines in place that are strictly enforced and align with Board requirements. Utilize Space Committees to help guide decision making.
- Ensure that Institutional leaders understand the use and implications of the Campus Master Plan, the EPS process (and Needs Analysis), and the Capital Improvement Plan. These tools should be used by campus leaders for future planning and programming of institutions.
- Consider changing the online FTE factor/discount for the remaining space categories (i.e., office, research, study), contingent upon increased virtual learning.
- The current space needs calculation methodology is not ideal for our university, as there is misalignment between our space needs and the EPS Form B [Needs Analysis]. We understand the Form-B is a tool for the Board to regulate growth of each university; however, we suggest customization of the formula to adapt to the needs of our university.
- Revise Form B [EPS Needs Analysis] to allow each university to select and increase 1 of the 9 Space Categories; one that is helpful in meeting strategic goals, and then reduce other Categories accordingly, thus not increasing total space needs for the university.
- Provide clarity as to the creation of the Space Factors used in calculating space needs across the 9 Space Categories.
- Enhance the EPS system/platform so it can be updated to create a Spot [amended] Survey when needed.
- We would like to have the flexibility to add projects to our Capital Improvement Plan (CIP) without requiring a Supplemental EPS. To accomplish this, a Standard Recommendation could be included in the EPS as follows: “All projects in the approved Campus Master Plan are hereby recommended provided that: 1) proposed projects are listed on the annual Capital Improvement Plan (CIP-2) submittal; 2) the CIP-2 reflects a calculation of proposed NASF for each project deducted from the balance of survey generated space needs; and 3) the cumulative deduction of space proposed for each project must not deplete the cumulative balance of generated space needs below the total survey recommendation.”
- Consider modifying the factors and/or how FTE is defined. Any such change will produce a mathematically accurate space needs. Also, the EPS process could be made more meaningful if the Survey Team considers suitability of space rather than just if it is in satisfactory condition.
- Allow FL Poly to use space factors that more closely resemble those of other STEM universities.

- *Teaching Lab* need to be adjusted for specific disciplines. While sciences can share teaching labs, the fine arts cannot.
- *Research Lab* need to be adjusted for discipline, and Contracts and Grants awarded should be part of the calculation.
- *Research Lab* needs clarification - what is pure [sponsored] research vs educational research?
- *Office* should be based on position/employee FTE, not on student FTE.
- *Auditorium/Exhibition* space needs to be adjusted for fine arts, as performances and the exhibition of work are part of the program. Also, the distance learning deduction should not apply (or should be reduced) as a showing of work requires in person viewing.
- *Instructional Media* should include all technology required to support classrooms and teaching labs, and pulled out of the service areas. All distance learning areas for development, production, and broadcast should be in this category and the distance learning percentage should be added to the *Office* category.
- The prorating of space use between different Space Categories may help in the accuracy, but may be challenging. While space is coded based on how it is primarily used, how do you capture space (such as music) where a professor's *Office* becomes a teaching lab half the day? Also, assigning two room numbers to the same space causes confusion to students and first responders.
- Evaluate how the EPS treats service areas for *Teaching Labs*, particularly for performing arts where the square footage of service area (e.g. dressing rooms and prop storage) is often larger than the area dedicated for teaching.
- None at this time.
- The [PECO scoring] process would be more meaningful if the State would fund university projects based on most demonstrated need, regardless of private source funding. For example, if the EPS Needs Analysis indicates a university is significantly underbuilt, and represents one of the largest deficits in the system, its projects should be given priority for PECO funding. Also, the PECO Scoring Matrix Space Needs Met criteria (3) should be modified to assign more points to institutions that have a greater space need. The current calculation penalizes a [large] university for not substantially maximizing the percentage of space needs met with a new construction project. As a consequence, our institution is least favored by the current methodology – an institution with broad, substantial space needs is harmed rather than aided, at present.
- Recommend that we meet as a system to discuss any applicable peer institutions space standards recommendations found in the OPPAGA and SmithGroup reports.
- Consider using headcount (instead of FTE) for one or more Space Factors. For example, headcount would be used for 110-coded Classrooms - two "heads" totaling 1.0 FTE would need two (2) classroom seats/stations. However, use FTE for graduate students in Research Labs, rather than headcounts, to reduce space needs.
- Evaluate the Space Factor for *Instructional Media*; it may be too high. Technology has changed media production, such that workstations in *Study* or faculty *Offices* support instructional media, likely resulting in space for *Instructional Media* becoming overbuilt.