

State University System of Florida

ROPA+ Presentation

October 2017

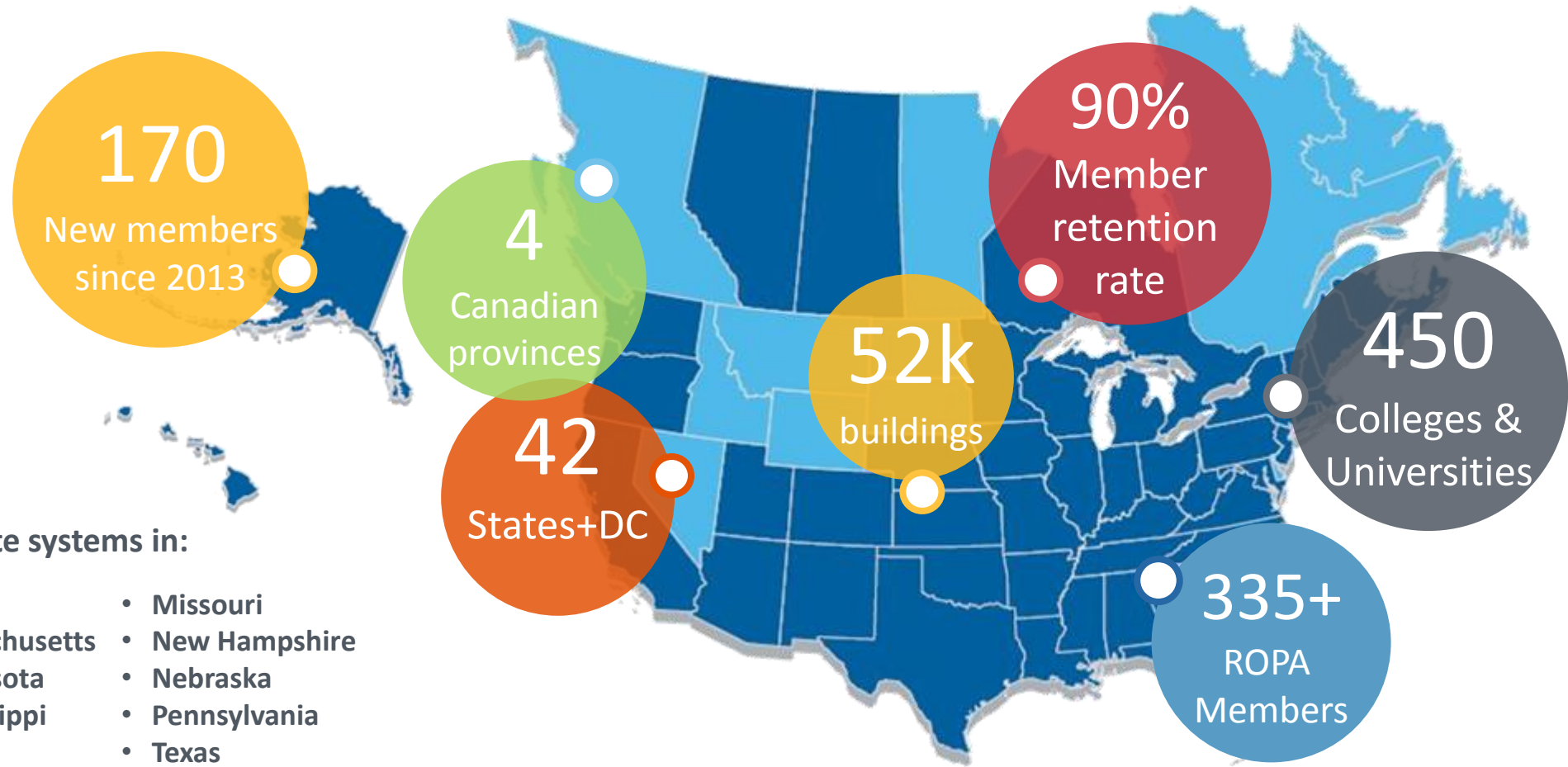
Presenters: Kevan Will & Mike Sabol

University of the Sciences in Philadelphia
University of Toledo
University of Vermont
University of Washington
University of West Florida
University of Wisconsin - Madison
Vanderbilt University
Virginia Commonwealth University
Wake Forest University
Washburn University
Washington State University
Washington State University - Tri-Cities Campus
Washington State University - Vancouver
Washington University in St. Louis
Wayne State University
Wellesley College
Wesleyan University
West Chester University
West Virginia Health Science Center
West Virginia University
Western Oregon University
Westfield State University
Widener University
Williams College
Worcester Polytechnic Institute



Sightlines by the Numbers

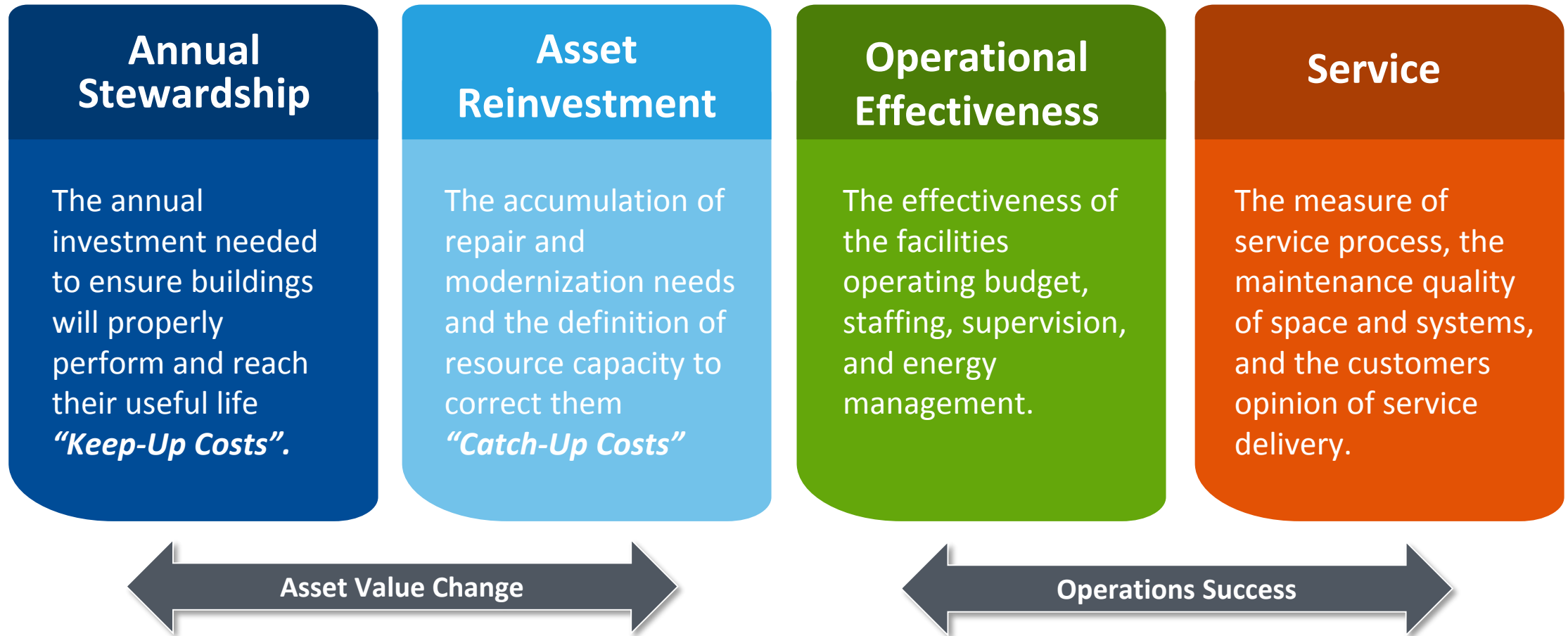
Robust membership includes colleges, universities, consortiums and state systems



Sightlines advises state systems in:

- Alaska
- California
- Florida
- Hawaii
- Maine
- Massachusetts
- Minnesota
- Mississippi
- Missouri
- New Hampshire
- Nebraska
- Pennsylvania
- Texas

Creating a Common Vocabulary





Segmenting the SUS of FL¹ by Carnegie Class

Institution	2015 Carnegie Basic Classification ²	
Florida International University	Doctoral Universities: Highest Research Activity	SUS of FL: R1
Florida State University	Doctoral Universities: Highest Research Activity	
University of Central Florida	Doctoral Universities: Highest Research Activity	
University of Florida	Doctoral Universities: Highest Research Activity	
University of South Florida	Doctoral Universities: Highest Research Activity	
Florida Agricultural and Mechanical University	Doctoral Universities: Higher Research Activity	SUS of FL: R2+
Florida Atlantic University	Doctoral Universities: Higher Research Activity	
University of West Florida	Doctoral Universities: Moderate Research Activity	
Florida Gulf Coast University	Master's Colleges & Universities: Larger Programs	
University of North Florida	Master's Colleges & Universities: Larger Programs	

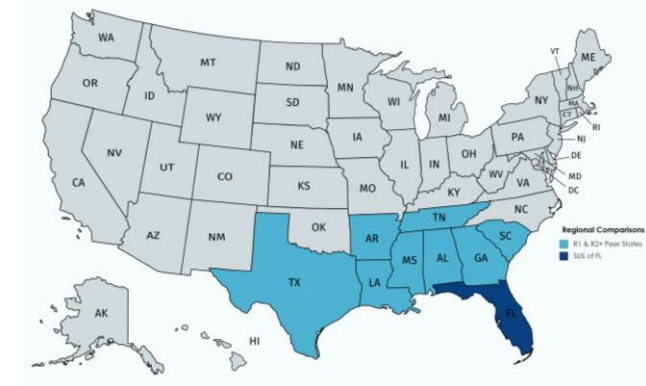
¹New College of Florida has recently joined Sightlines. Though data is not currently available, it is expected before end of 2017.

²Information from 2015 Update: <http://carnegieclassifications.iu.edu/>

Segmenting Regional Peers by Carnegie Classification

SUS of FL: R1 Peers	Location
Clemson University	Clemson, SC
Georgia Institute of Technology	Atlanta, GA
Louisiana State University	Baton Rouge, LA
The University of Alabama at Birmingham	Birmingham, AL
The University of Mississippi	Oxford, MS
The University of Tennessee	Knoxville, TN
University of Arkansas	Fayetteville, AR
University of Georgia	Athens, GA
University of Missouri	Columbia, MO
University of North Texas	Denton, TX
University of Texas at Austin	Austin, TX
University of Texas at Dallas	Richardson, TX

SUS of FL: R2+ Peers	Location
Auburn University	Auburn, AL
Delta State University	Cleveland, MS
Jackson State University	Jackson, MS
Mississippi State University	Starkville, MS
Missouri University of Science and Technology	Rolla, MO
Tennessee Technological University	Cookeville, TN
Texas A&M University – Corpus Christi	Corpus Christi, TX
The University of Alabama	Tuscaloosa, AL
University of Missouri – Kansas City	Kansas City, MO
University of Missouri – St. Louis	St. Louis, MO
University of Southern Mississippi	Haittesburg, MS
University of Texas – Rio Grande Valley	Brownsville, TX



Primary Considerations for Selection

- Public/Private
- Carnegie Classification
- Region

R1 Peers Carnegie Classification(s)
 Doctoral Universities – Highest Research Activity

R2+ Peers Carnegie Classification(s)
 Doctoral Universities – Higher Research Activity
 Doctoral Universities – Moderate Research Activity
 Master's Colleges & Universities – Larger Programs

How Does the SUS of FL Compare?

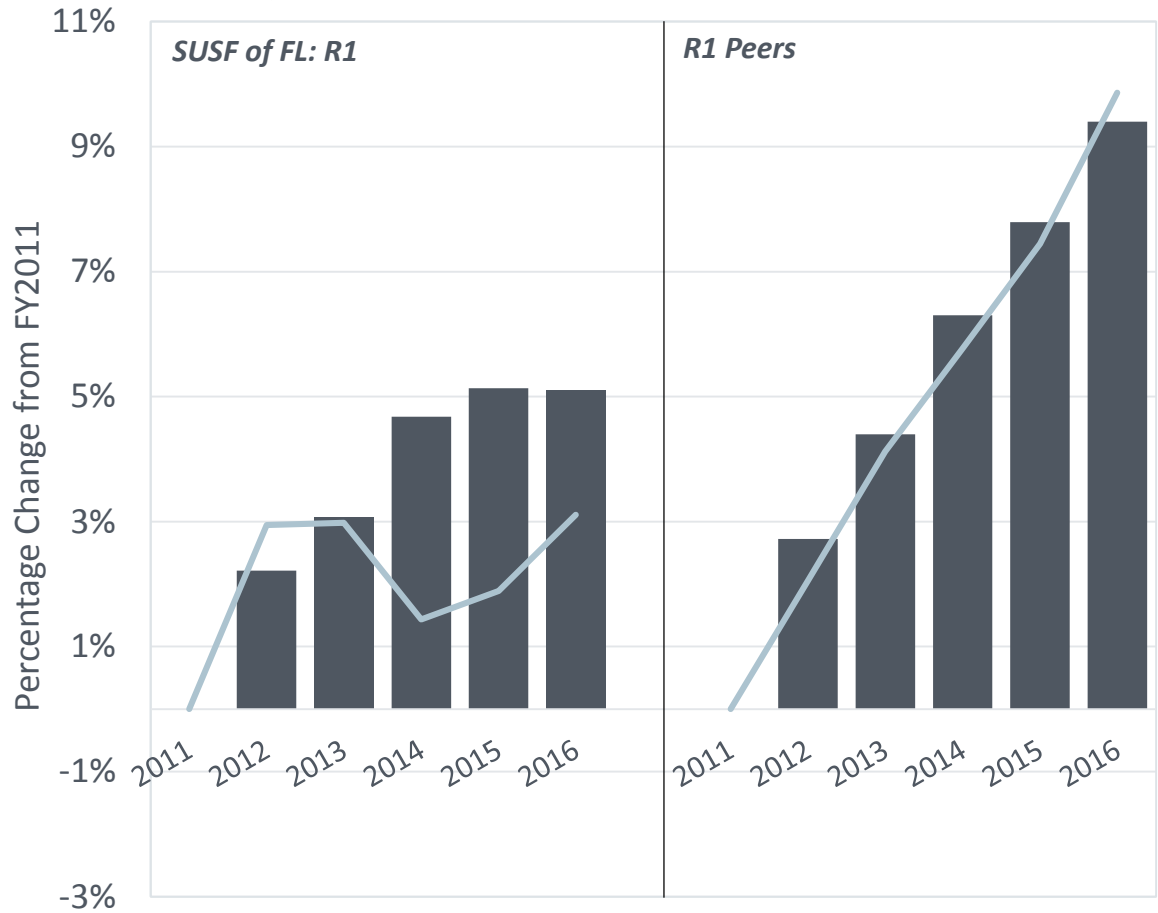
Specific Areas of Comparison and Focus

- ✓ Space Per Student
- ✓ Construction Vintage of Buildings
- ✓ Campus Renovation Age & Risk Implication
- ✓ Existing Space Capital Investment
- ✓ Deferred Maintenance Backlog
- ✓ Immediate & Future Renewal Needs

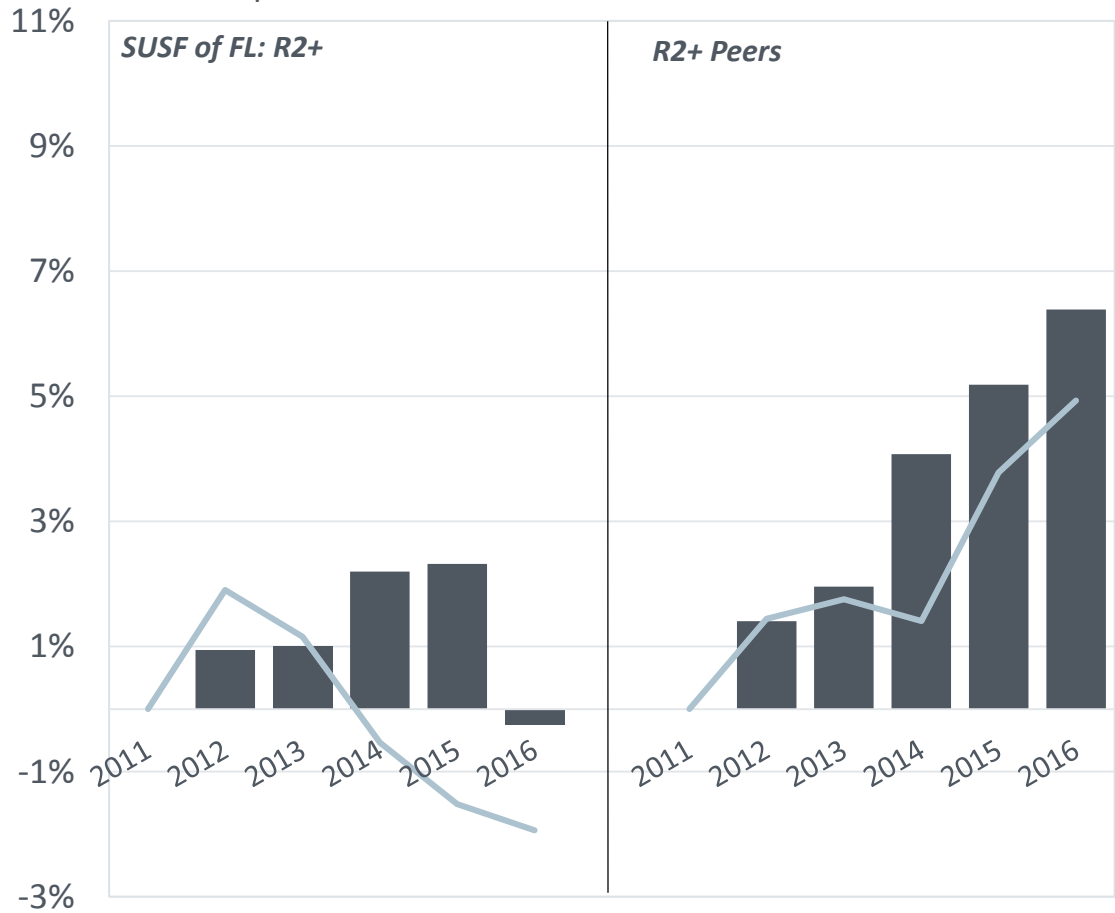


Comparing Space Growth vs. Enrollment Growth

Space vs Enrollment – SUS of FL: R1 vs R1: Peers



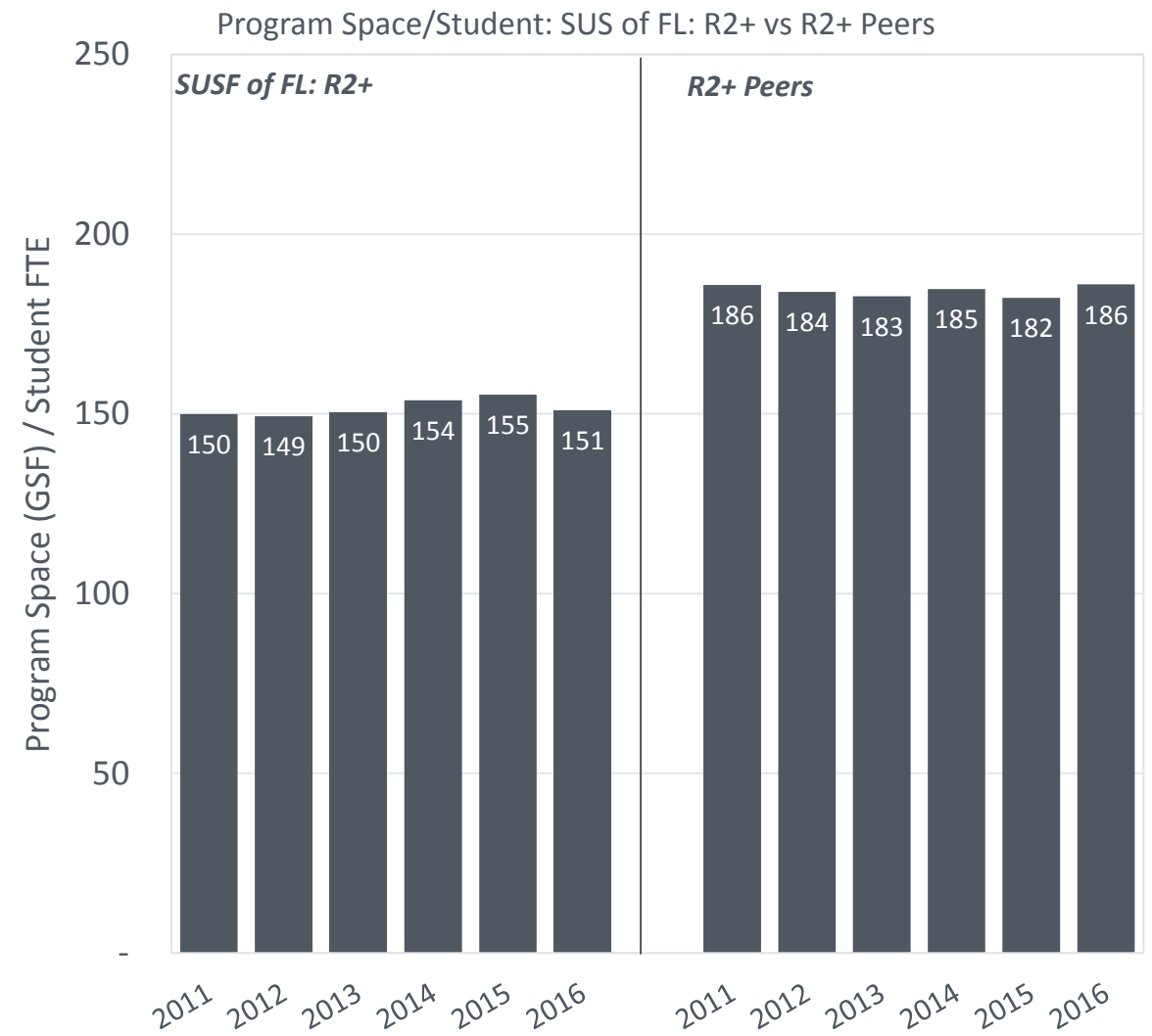
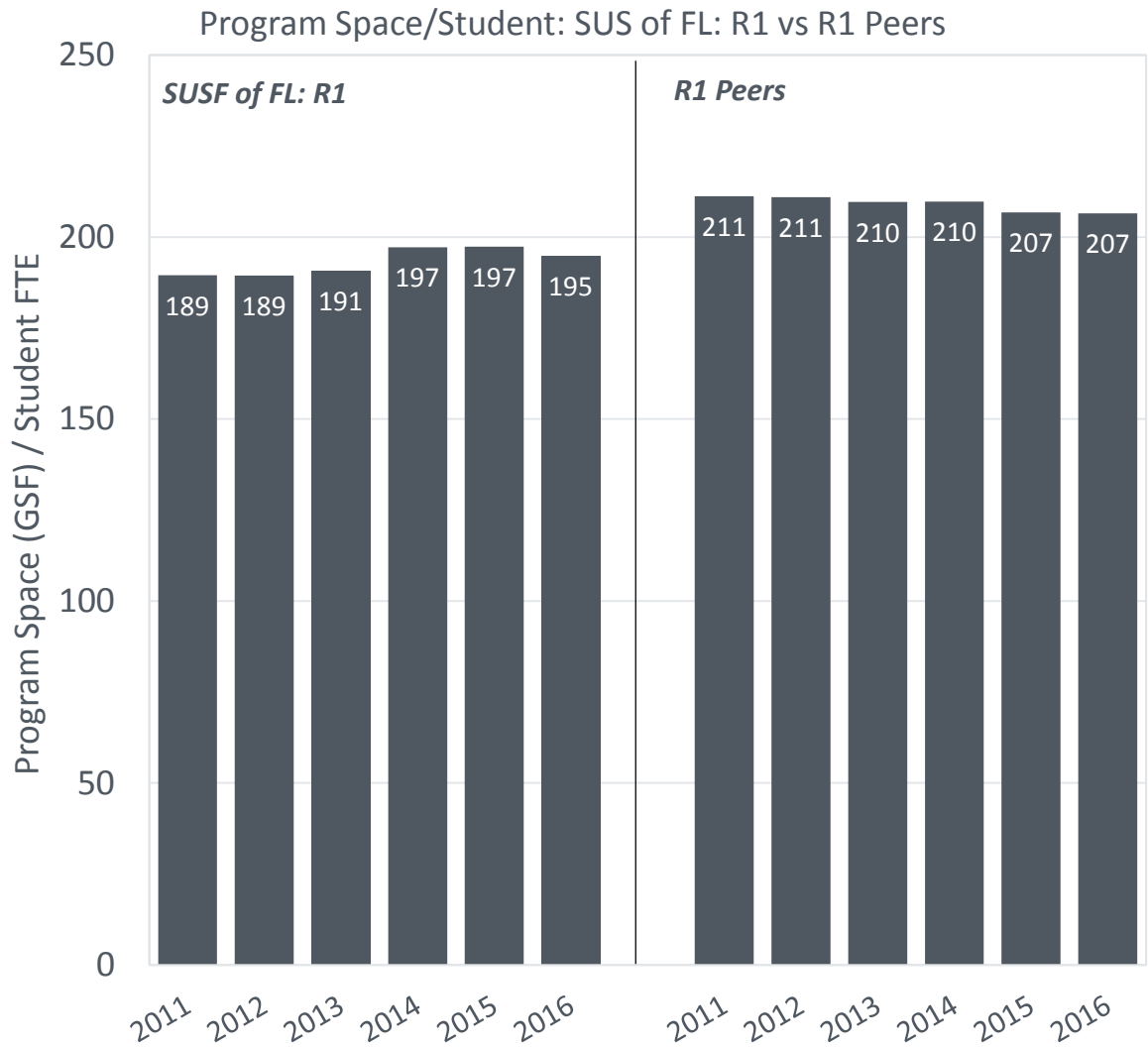
Space vs Enrollment – SUS of FL: R2+ vs R2+: Peers



■ GSF Change — Enrollment



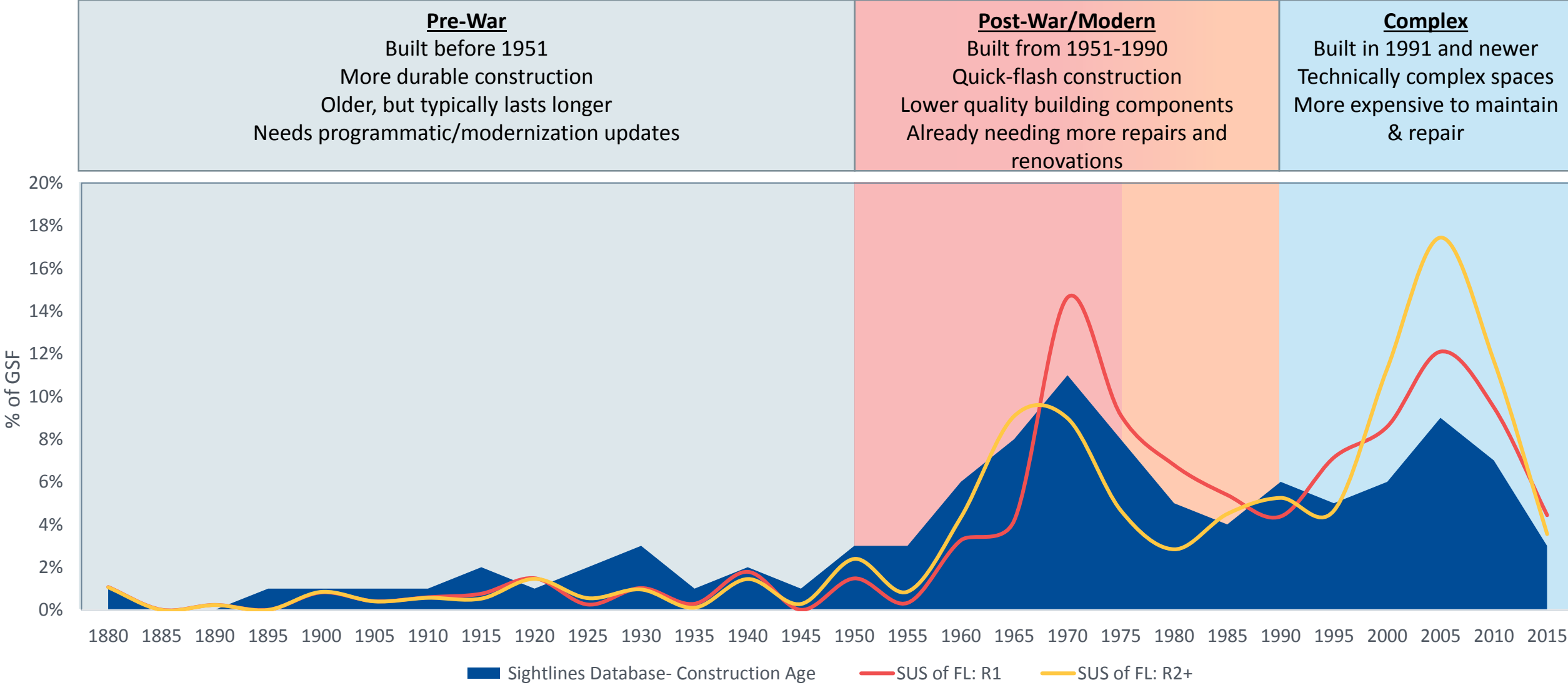
Examining Program Space Per Student – Impact of Research Demonstrated



Program Space functions include: Academic, Administrative and Science Research

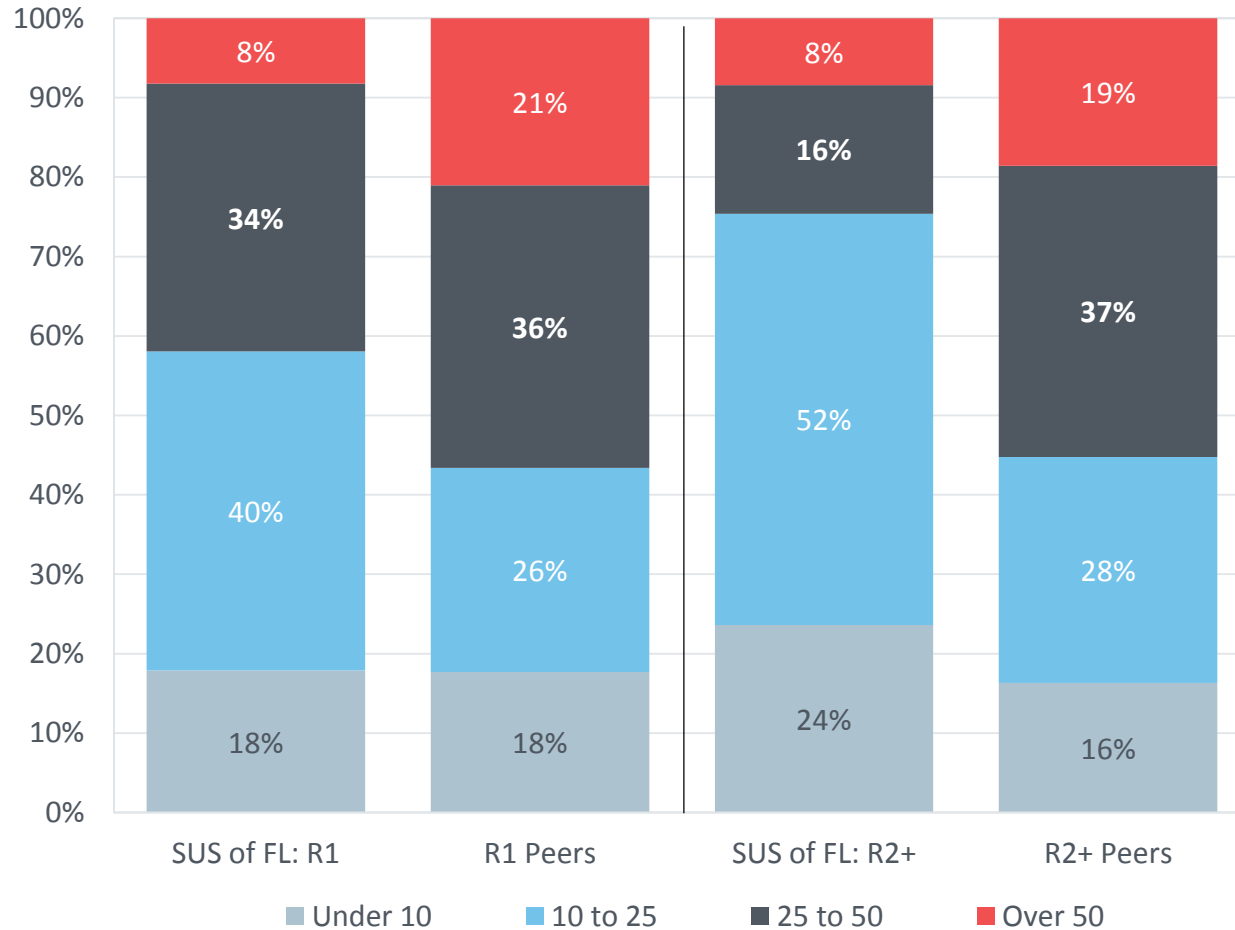


Putting Your Campus Building Age in Context



Campus Renovation Age Profile: SUS of FL vs. Peers

Renovation Age by Category



Buildings Over 50

Life cycles of major building components are past due. Failures are possible. Core modernization cycles are missed.

Highest risk

Buildings 25 to 50

Major envelope and mechanical life cycles come due. Functional obsolescence prevalent.

Higher Risk

Buildings 10 to 25

Short life-cycle needs; primarily space renewal.

Medium Risk

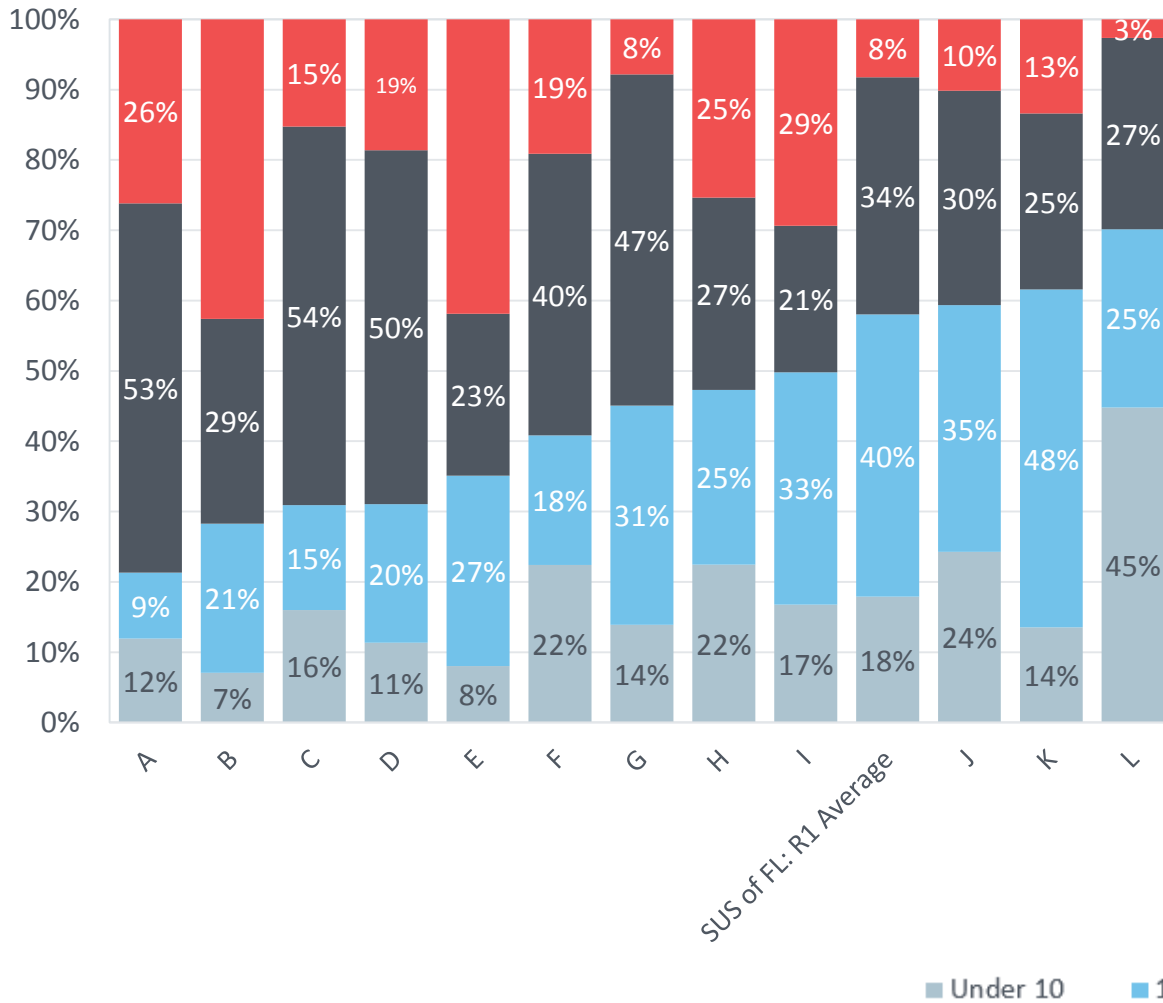
Buildings Under 10

Little work. "Honeymoon" period.

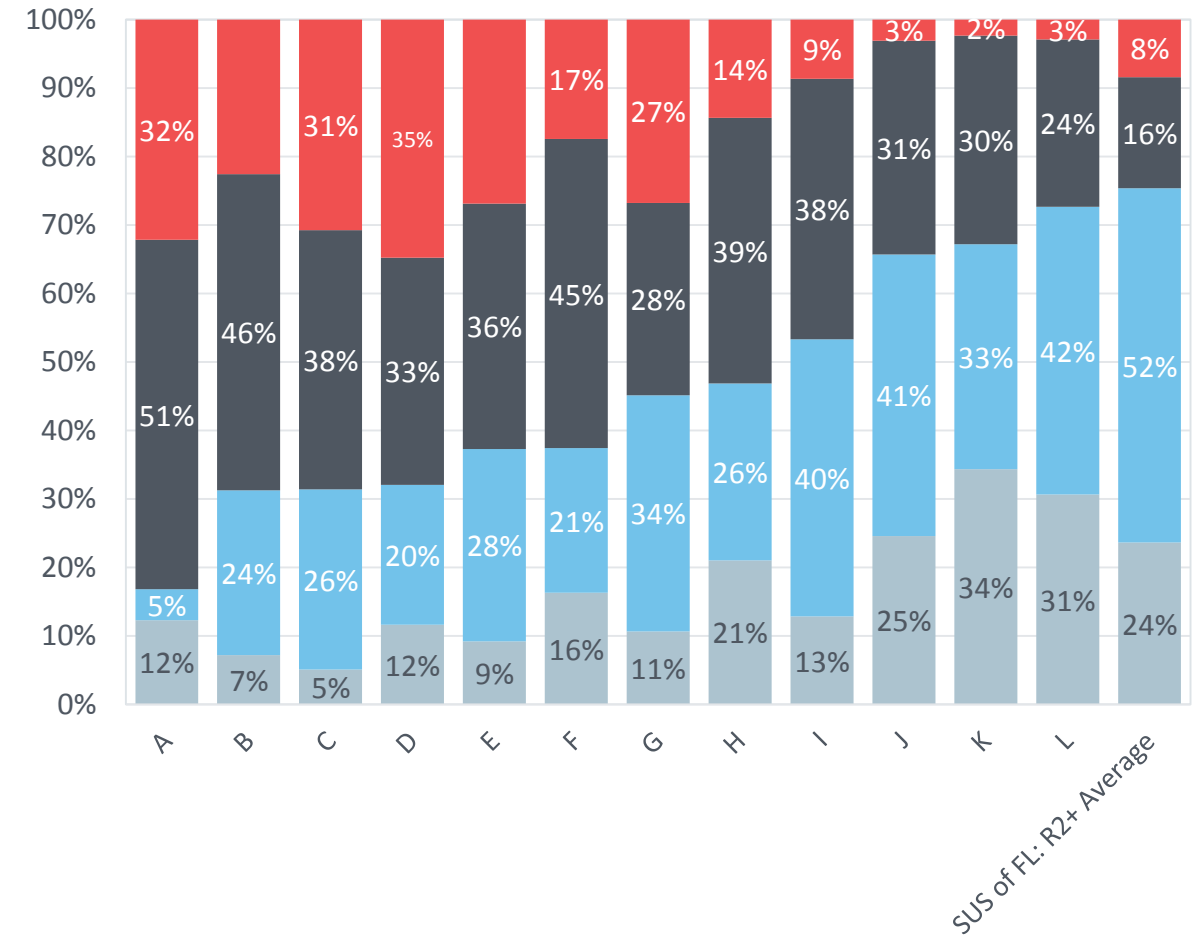
Low Risk

Deep Dive: Renovation Age Category Comparisons

Renovation Age - SUS of FL: R1 vs. R1 Peer Institutions

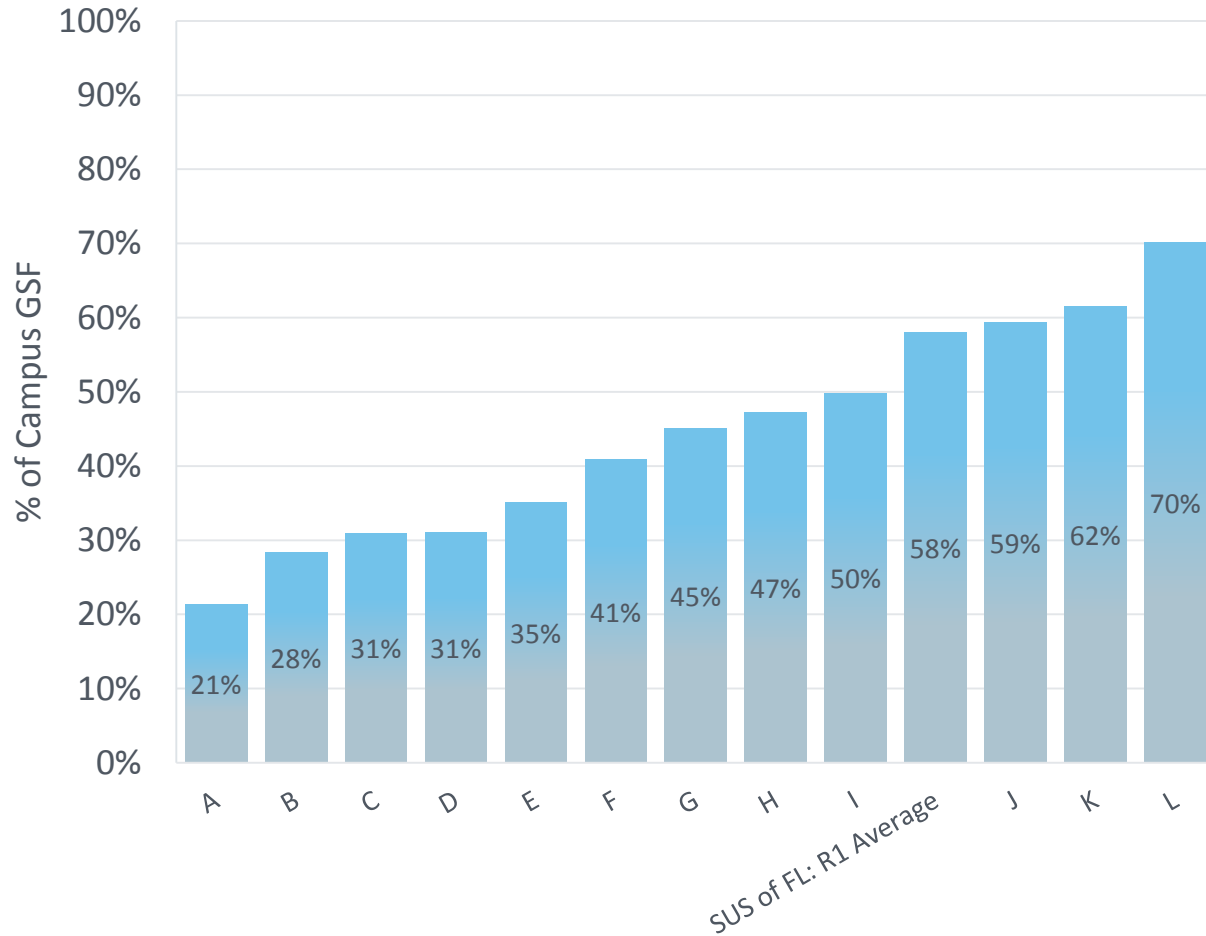


Renovation Age - SUS of FL: R2+ vs. R2+ Peer Institutions

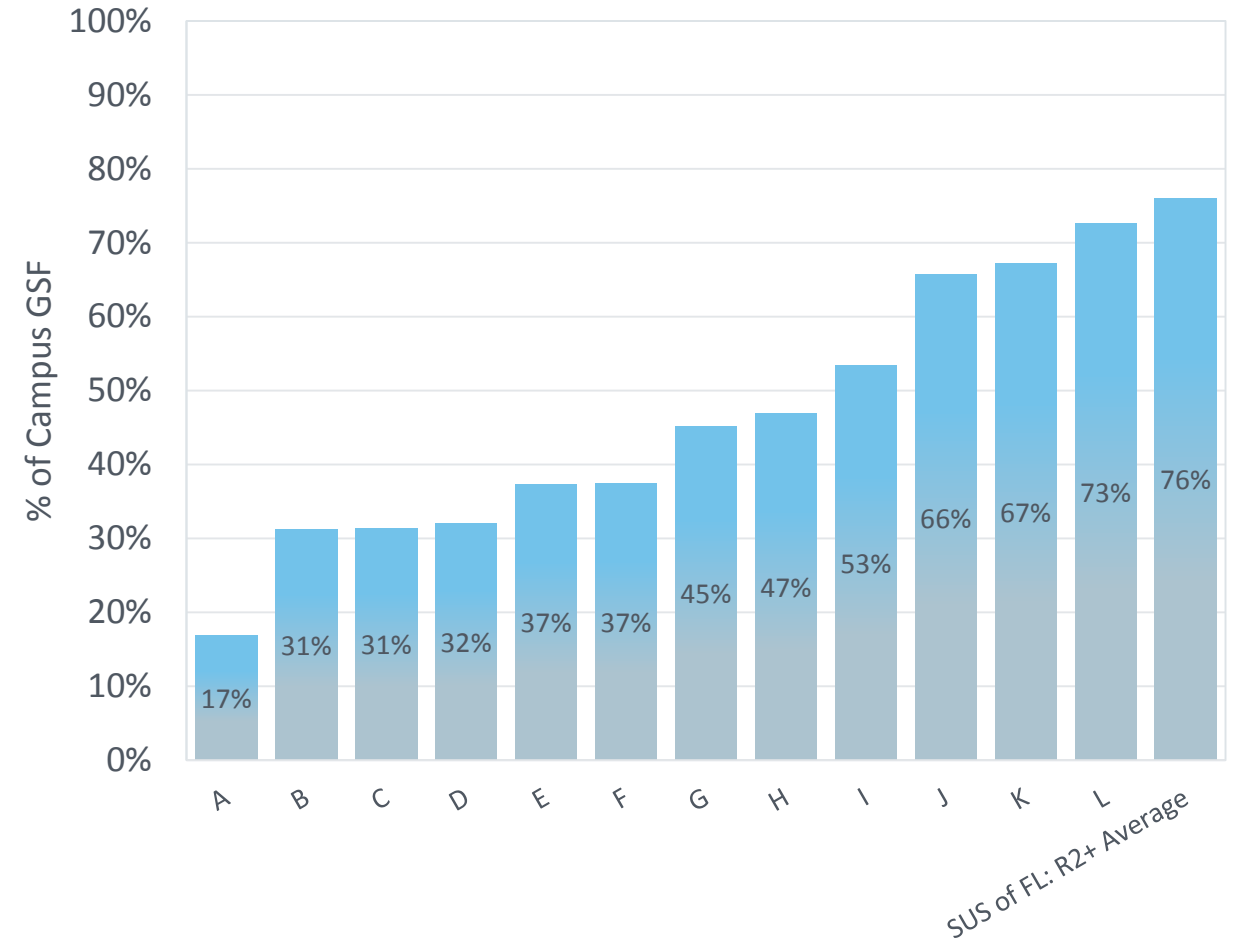


Comparison of “Young Space” (Under 25 Years Old)

% of Space Under 25 Years Old: SUS of FL: R1 vs. R1 Peer Institutions

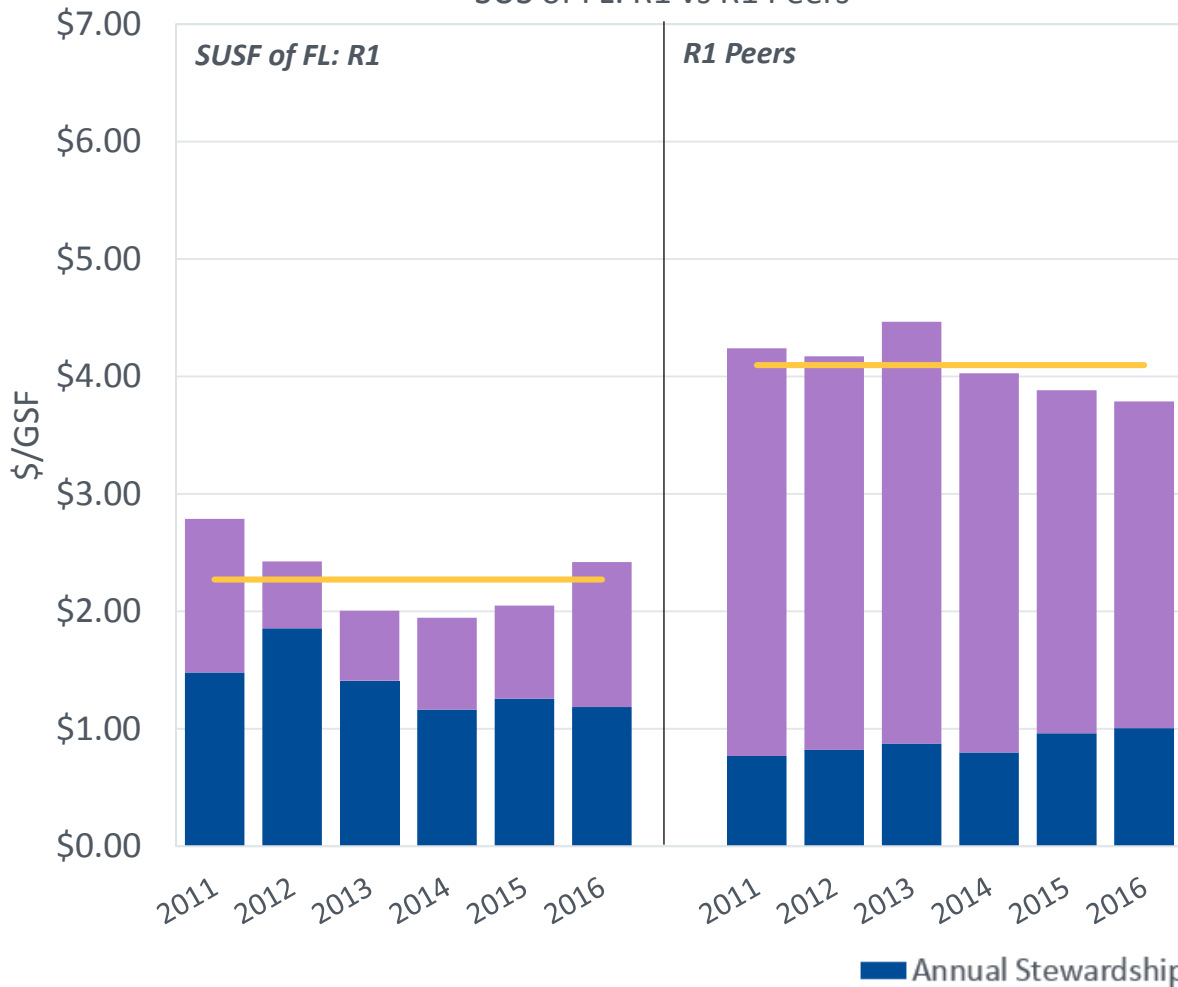


% of Space Under 25 Years Old: SUS of FL: R2+ vs. R2+ Peer Institutions

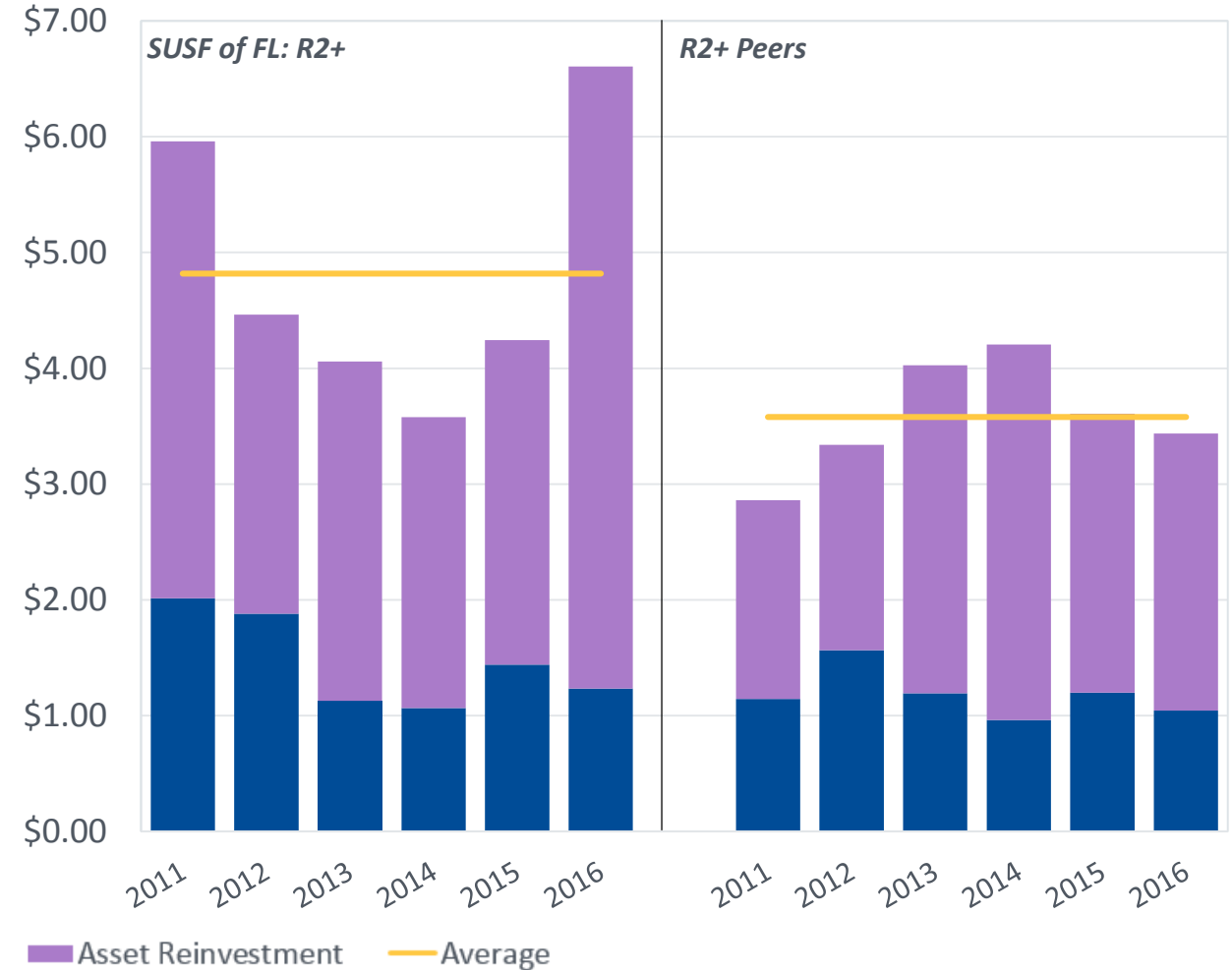


Comparison of Existing Space Capital Investment

Total Capital Investment into Existing Space –
SUS of FL: R1 vs R1 Peers



Total Capital Investment into Existing Space –
SUS of FL: R2+ vs R2+ Peers

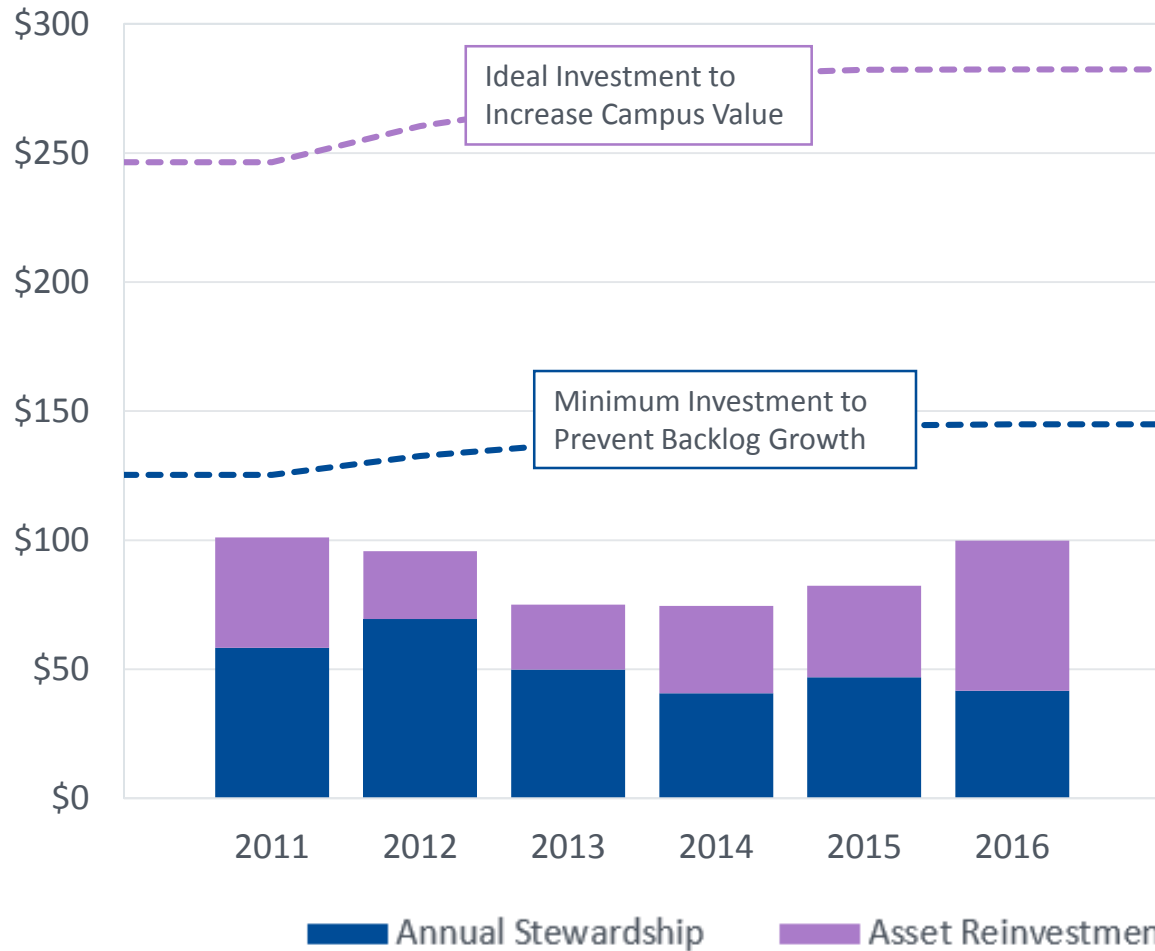


Investment amounts shown do not include Grounds + Utility Infrastructure

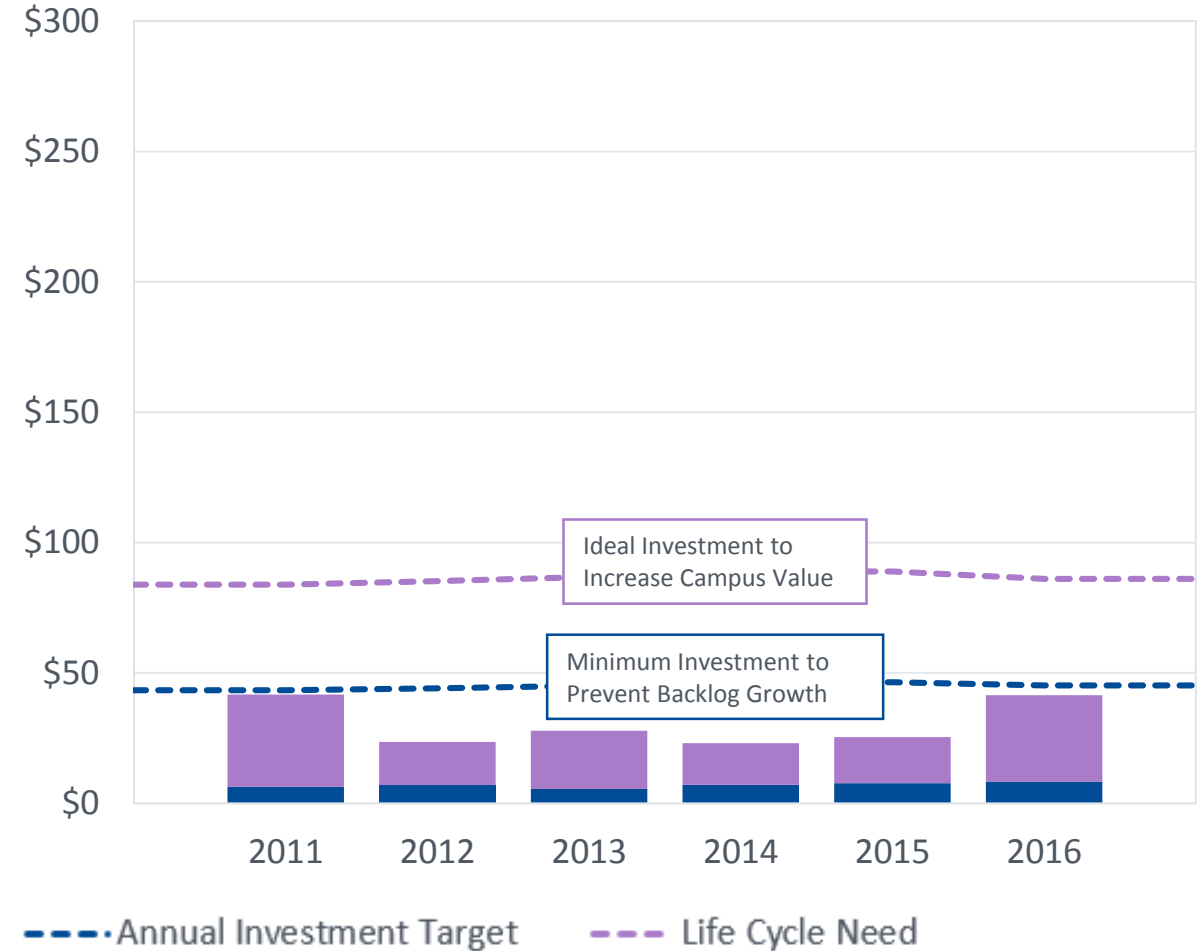


How Much Should the SUS of FL Spend on Existing Capital Investment?

Total Capital Investment vs. Funding Target – SUS of FL: R1

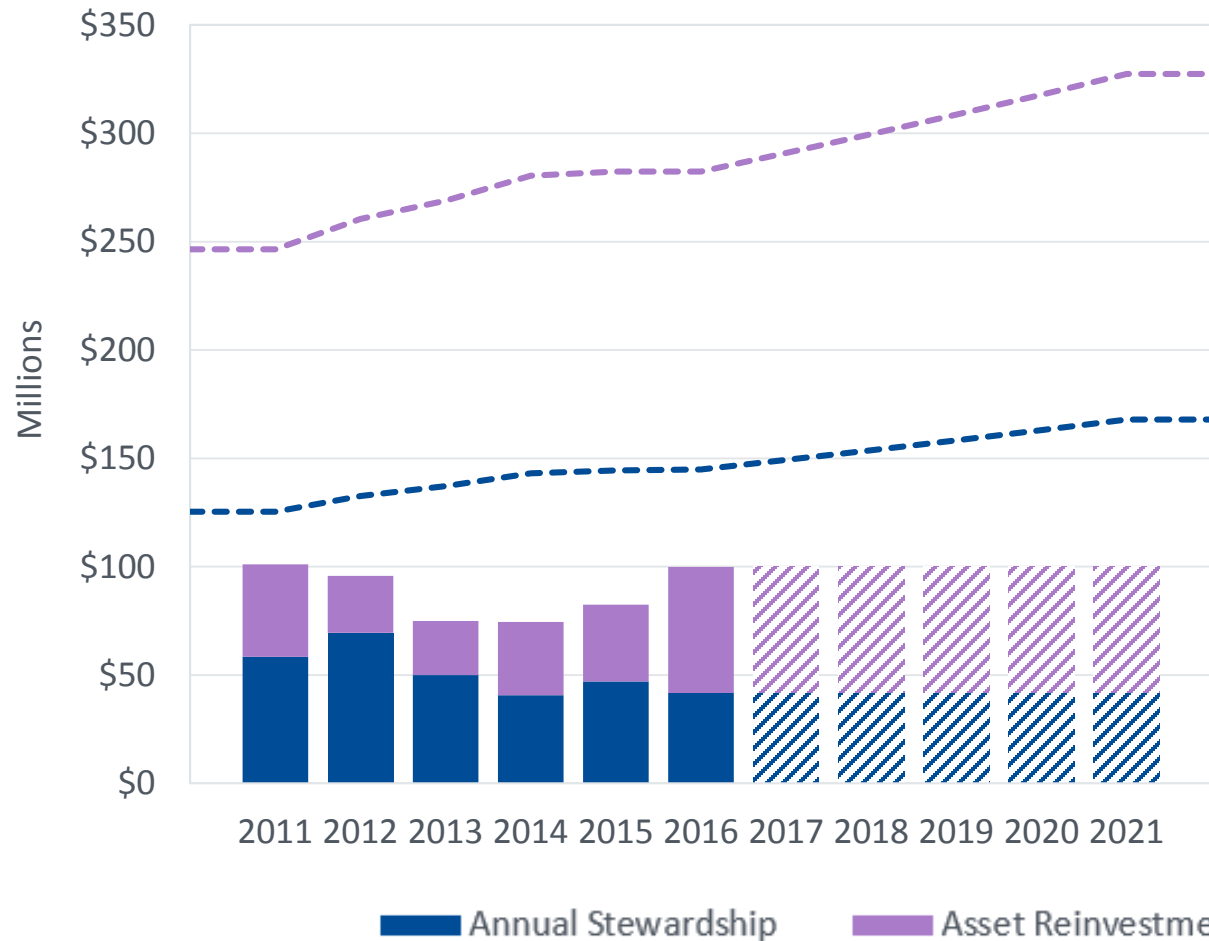


Total Capital Investment vs. Funding Target – SUS of FL: R2+

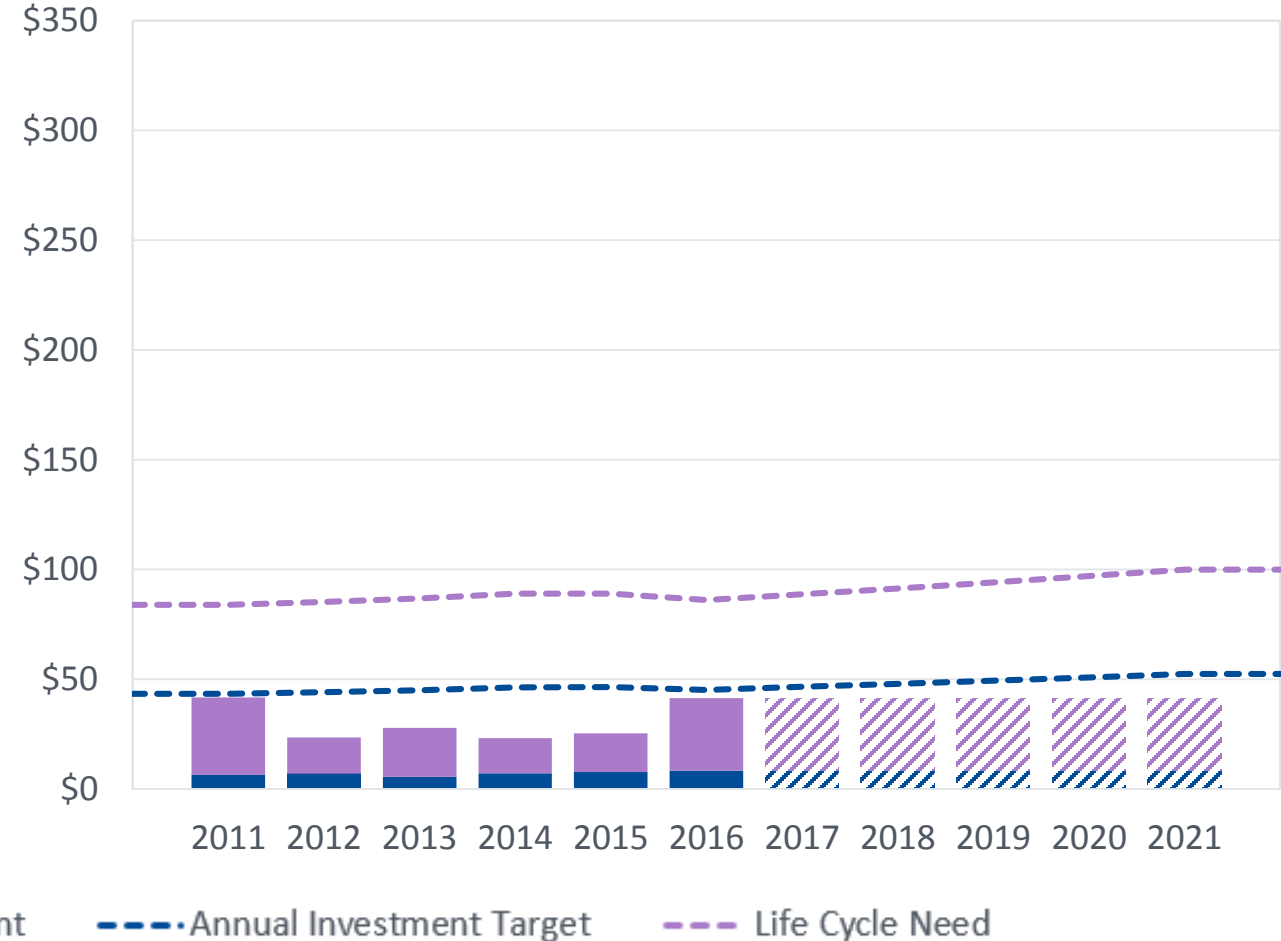


How Much Should the SUS of FL Spend Moving Forward?

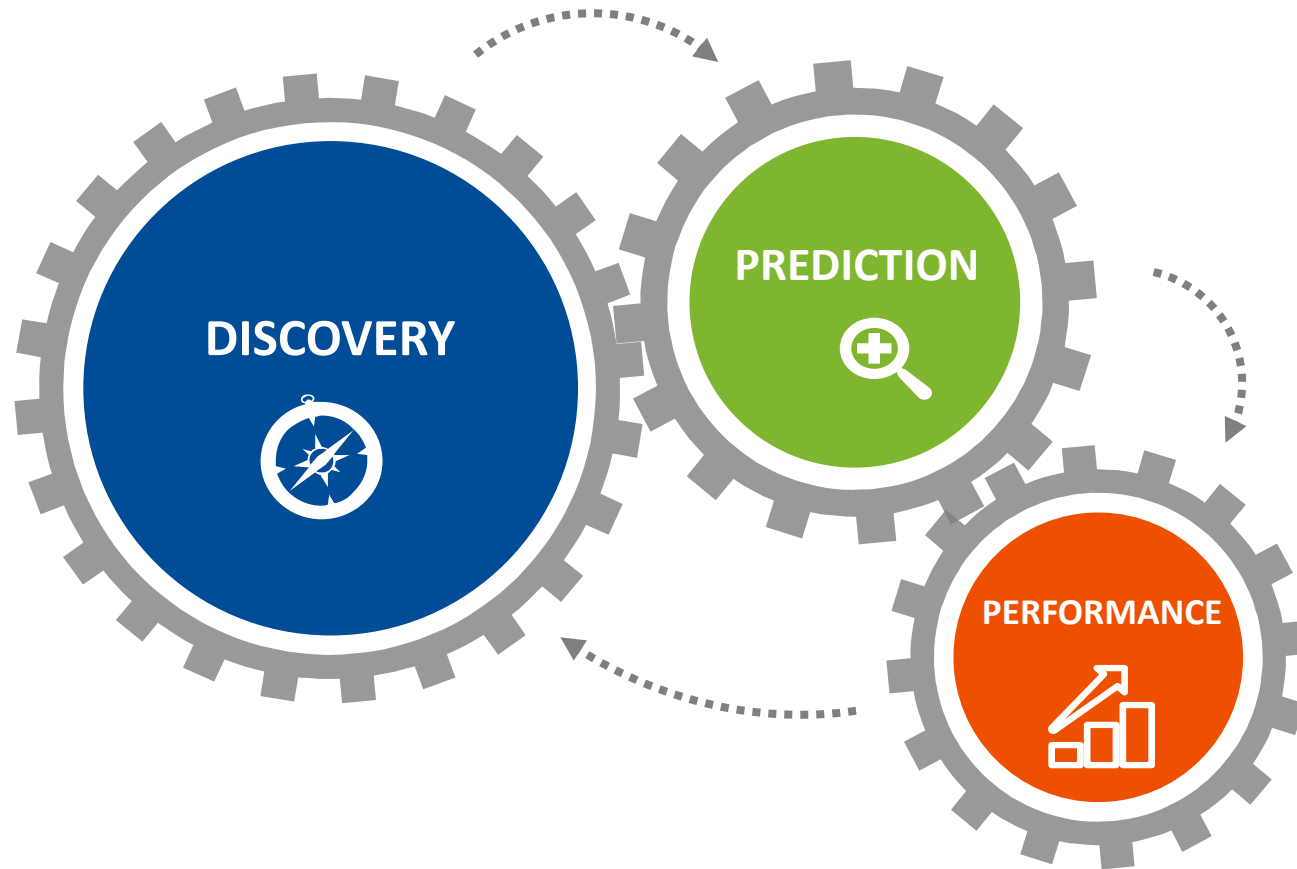
Total Capital Investment vs. Funding Target – SUS of FL: R1



Total Capital Investment vs. Funding Target – SUS of FL: R2+



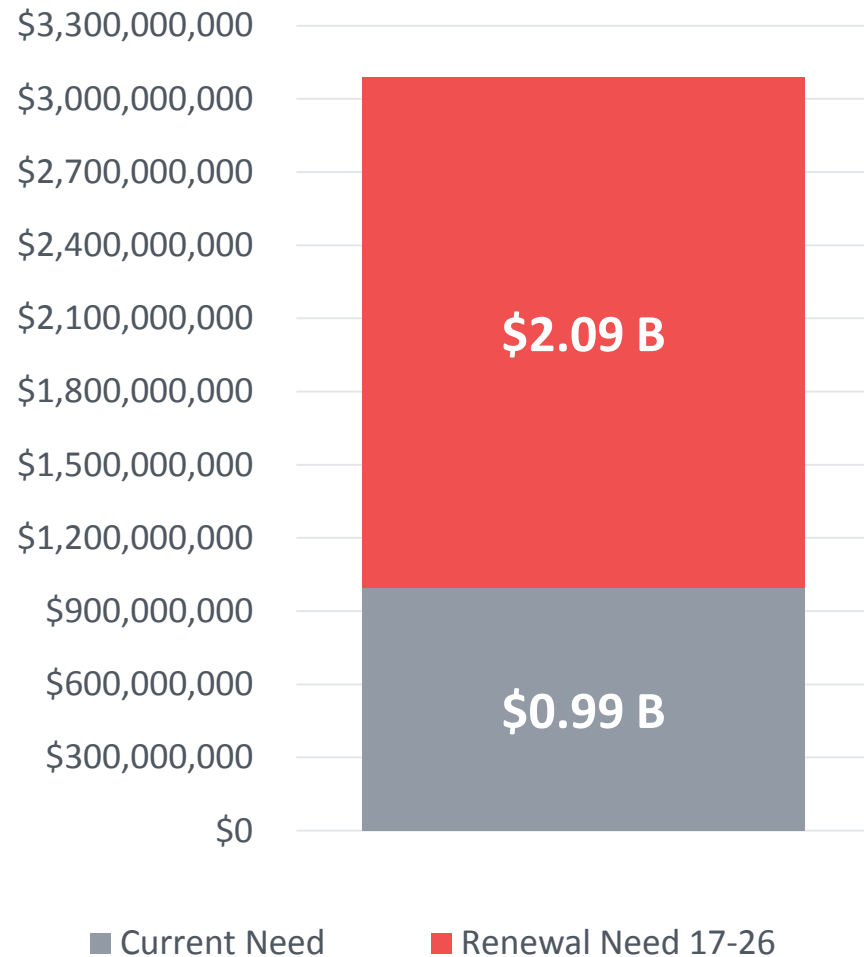
Introducing ROPA+ Prediction¹



Sub-Systems Reviewed

1. HVAC
2. Electrical
3. Plumbing
4. Building Exteriors
5. Roofing
6. Building Interiors
7. Small Building Renovations

SUS of FL: Current + Renewal Need¹



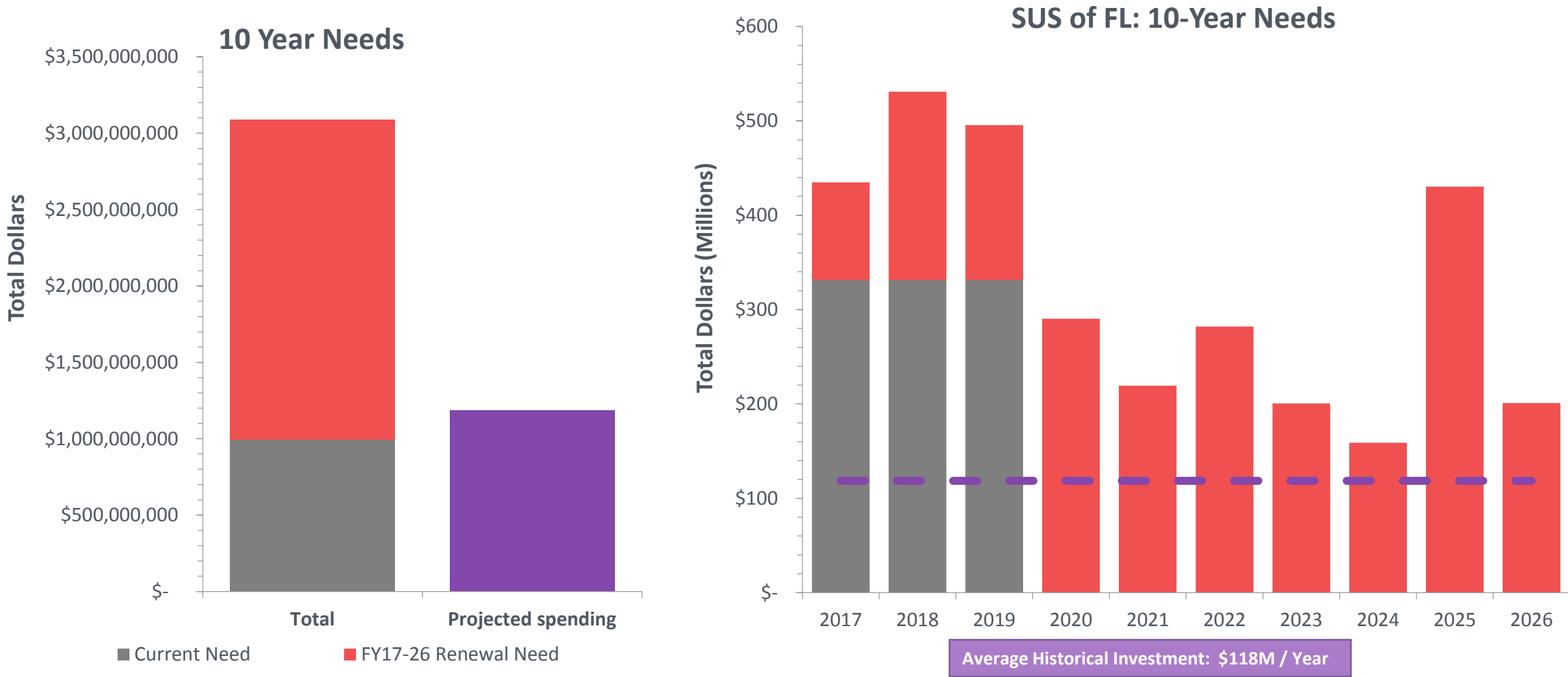
Remaining Renewal Need:

- Life cycle needs coming due between 2017-2026.

Current Need:

- The subsystem has already failed
- The subsystem is functioning with substantial degradation of efficiency or performing at increased cost

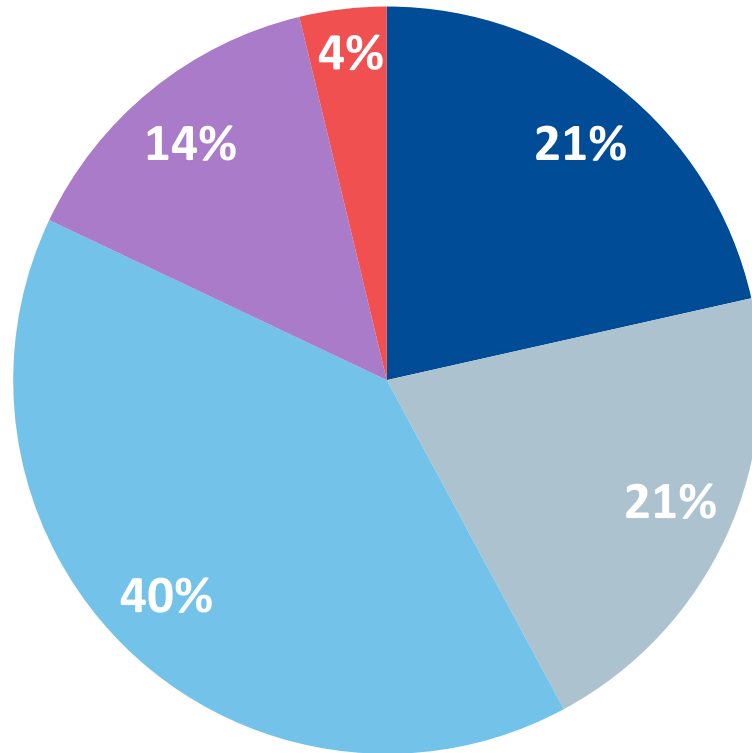
Total 10 Year Needs with Projected Investment¹



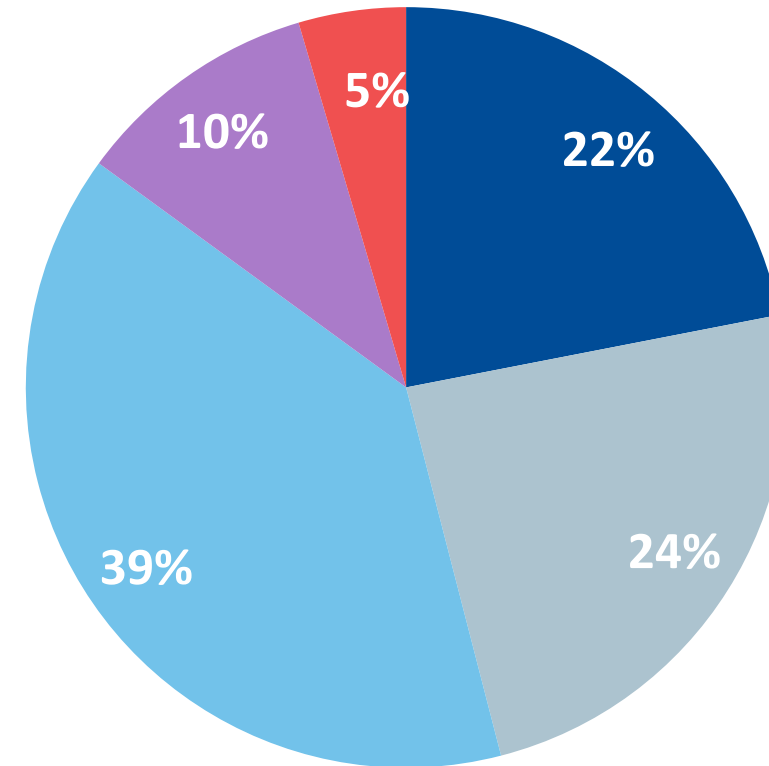
¹UCF is included, but is currently undergoing a Building Portfolios Solution project with Sightlines. This is a more in depth analysis than ROPA+ Prediction. Once complete, their component of this overall figure is expected to adjust.

Breaking Down Total Need by Group¹

Need by Sub-System – SUS of FL: R1



Need by Sub-System – SUS of FL: R2+



■ Building Exteriors

■ Electrical

■ HVAC

■ Plumbing

■ Roofing

Executive Takeaways



Executive Takeaways

Less Program Space Per Student Compared to Carnegie Class Peers

- **R1:** R1 peers average 207 GSF/Student FTE, while the SUS of FL: R1 group averages 195 GSF/Student FTE.
- **R2+:** The SUS of FL: R2+ group averages 151 GSF/Student FTE, while the R2+ peers average 186 GSF/Student FTE.

Both Groups of SUS Campuses are Younger than Carnegie Class Peers

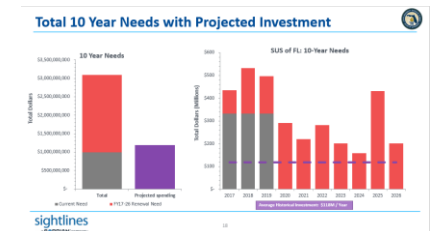
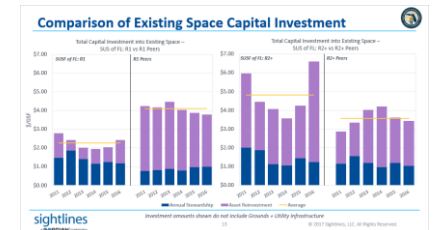
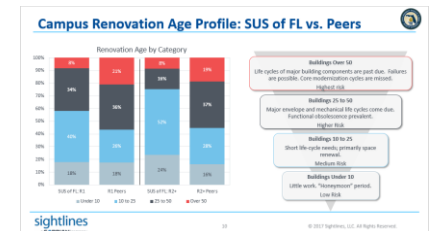
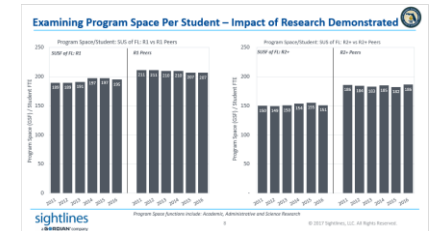
- **R1:** 58% of GSF across the SUS of FL: R1 group is less than 25 years of age, compared to a R1 Peer average of 44%.
- **R2+:** 76% of GSF across the SUS of FL: R2+ group is less than 25 years of age, compared to a R2+ Peer average of 44%.

Existing Space Capital Investments are Below Targets; Comparisons to Peers Split

- **R1:** R1 peers have averaged \$4.10/GSF over the past six years, while the SUS of FL: R1 group has averaged \$2.27/GSF. Since 2011, the SUS of FL: R1 group has not collectively hit the minimum investment required to prevent backlog growth. In 2016, this target was \$145M compared to an existing space capital investment of only \$100M.
- **R2+:** The SUS of FL: R2+ group has averaged \$4.82/GSF over the past six years, while the R2+ peers have averaged \$3.58/GSF. Despite the higher level of investment, the SUS of FL: R2+ group has not collectively hit the minimum investment required to prevent backlog growth. They came close in 2016, with a target of \$45M compared to an existing space capital investment of \$41M.

Historical Investment Levels are Not Sufficient Moving Forward

- \$3.1B of current and renewal need has been identified across the SUS of FL: R1 group and the SUS of FL: R2+ group. The historical, cumulative, investment average of \$118M/year for the 10 campuses projects to \$1.2B in total from FY17-FY26 – this will only address 38% of the current and renewal need.
- The majority of need falls in the 'HVAC' sub-system for each group. HVAC makes up 40% of the SUS of FL: R1 group's need and 39% of the SUS of FL: R2+ group's.





Questions & Discussion