



Review of Space Needs Calculation Methodology

August 20, 2025

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

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

“The board 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 last review was conducted in 2022, concluding an extensive effort between Board staff, including a year-long review of internal policies, procedures, and historical records relating to the assessment of educational space needs within the SUS. Furthermore, all 12 universities were surveyed regarding their policies and procedures for space assignment and utilization, as well as their input for improving the current methodology. Lastly, at the time, the Florida Council of 100 was studying ways in which the SUS could manage long-term growth, which included a series of interviews with Board staff and university personnel that inadvertently enhanced the Board’s review process. In the end, a number of issues were identified, and the 2022 report listed nine recommendations for improvement, some of which have been addressed, and some remain ongoing works-in-progress. The latter is a proxy for the current review process. **In short, the 2025 review calls for the following:**

- 1) Develop and adopt formal SUS guidelines for educational facilities space planning and needs assessment.** [see s. 1013.31(1)(b)3, F.S.]
- 2) Develop and adopt equitably uniform utilization standards for all types of educational space in the SUS.** [see s. 1013.03(2), F.S.]

For more information, below is a summary of the nine (prior) recommendations, as well as the current status of each.

- 1) **Section 1013.31(1)(c)4. Florida Statutes 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.**

Recommendation: Develop and adopt Board regulations governing the Educational Plant Survey (EPS) process and providing guidelines for the determining university ‘education & general’ (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.

Status: In progress.

The original plan to add new regulations (an entire chapter) was subsequently revised to developing Guidelines instead, much like those utilized for governing capital projects (e.g., the ‘*SUS Debt Management Guidelines*’ and the ‘*SUS Public-Private Partnership Guidelines*’). A working draft of the Guidelines has been developed, and an advisory group, comprised of subject matter experts (university personnel), is helping refine content, after which the draft will be submitted to a broader university audience for review and feedback. Finalization and adoption of the Guidelines is tentatively targeted for next year.

- 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 (factors for calculating space needs) 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 and resource constraints.*

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.*

Status: See #1 above (to be incorporated in the Guidelines).

- 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...”.*** *Currently, there are cited standards for two of the nine E&G Space categories: Classrooms (minimum 40 hours per week at 60% station utilization, per s. 1013.03, F.S.), and Teaching Labs (minimum 20 hours per week at 80% station utilization, per Board records from 1995). As a basis from which to start, this leaves seven (7) space categories unaddressed (Offices, Research Labs, Study, Campus Support Services, Auditorium/Exhibition, Gymnasium, and Instructional Media).*

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 new regulations or guidelines, as appropriate.*

Status: In progress.

Space Utilization is an ‘Operational Excellence Metric’ in the ‘SUS 30’ Strategic Plan, and a workgroup has been assigned to develop goals. Furthermore, some universities are taking the initiative to improve their policies/practices concerning utilization of space. For example, University of Central Florida has leveraged technology (wi-fi network) to monitor utilization in ‘real time’, accurately, across

all E&G space types, allowing them to identify significant amounts of underutilized space and save millions (\$) in annual operating costs.

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

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.*

Status: Implemented.

- 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, effectively overstating space needs and compromising the Needs Assessment process.** In researching the Board’s EPS platform, specifically its embedded approach to assessing university space needs, it was found that FTE enrollment data was totaled for all of a university’s locations (including “branch” campuses and ancillary sites), but only considered E&G facilities/space on the main campus.

Recommendation: The Board should amend the EPS platform to include all branch campuses and sites, not just the main campus, in order to provide a complete validation of a university’s E&G space and facilitate accurate assessments of need.

Status: Implemented.

Furthermore, the Space Data Management system and EPS platform do not accommodate space needs analyses at a ‘campus’ level; it can only assess need based on a university’s entire ‘footprint’ (all sites in aggregate). Notably, this functionality was available prior to adoption of the EPS platform, thus Board staff should explore improving current systems to accommodate this functionality.

Status: In progress.

Implementation has proven challenging, but staff continue to work toward integrating 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.***

Recommendation: Amend the standard format of the Accountability Plans to accommodate the missing data, thus providing for statutory compliance and facilitating accurate projections of space needs.

Status: Implemented.

- 7) ***To account for lesser space needs 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 certain E&G Space types; Classroom, Teaching Lab, Gymnasium and Auditorium/Exhibition, to account for the lack of utilization of such space.***

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.

Status: Addressed.

Based on university feedback and subsequent discourse, no changes were deemed appropriate at this time.

- 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.***

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, when necessary, and 2) requiring the facility to be demolished within a specific period following approval of the EPS.

Status: See #1 above (to be incorporated in the Guidelines).

- 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 and utility of the Facilities Space Reports (FSR) system and the statutorily-required Educational Plan Survey (EPS) process, both of which drive the assessment of university space needs. Material inaccuracies have been observed in nearly all universities' data, negatively impacting FSR and EPS output, as well as requiring significant Board Office resources to identify issues and facilitate corrective actions by the universities.

Recommendation: 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.

Status: Addressed.

Data accuracy has improved as a direct result of Board staff incorporating data 'validations' within the Space Data Management system, effectively preventing many of the prior recurring data input errors and inaccuracies. Furthermore, quarterly workshops facilitate ongoing guidance, which helps bolster accuracy. Lastly, 'written guidance' will be addressed the Guidelines, and the 'certification of accuracy' is currently not deemed necessary, in light of recent improvements.