

Making the Business Case for Space

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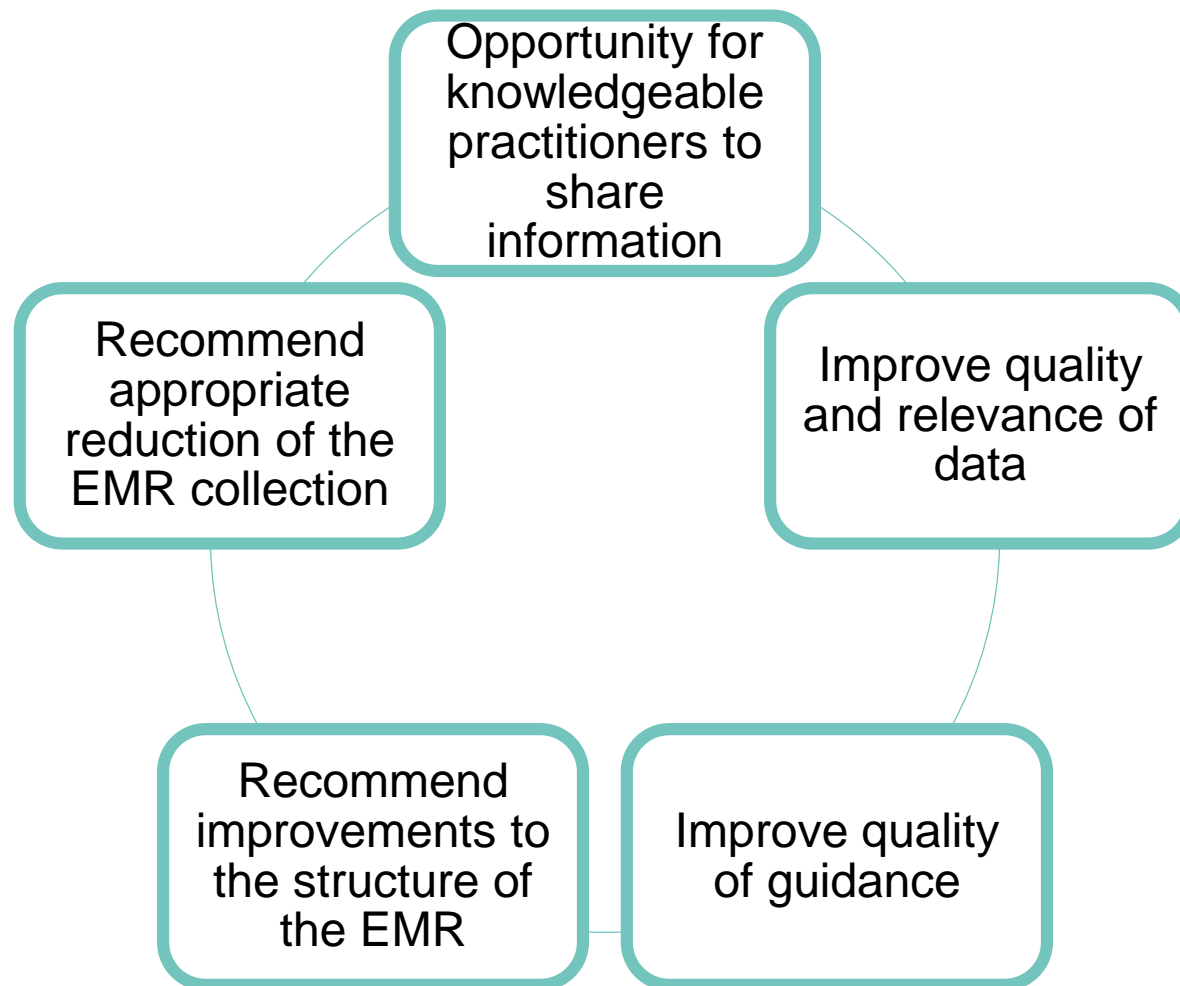




Changes to the record – 2016/17 and onwards



EMR Technical Groups: Aims



Changes for 2015/16

- Started technical groups work by focusing on reducing the burden of health and safety section
- Worked with USHA to create proposals for change
- HESA circulated consultation on fire data
- Circulated to EMR contacts and USHA fire groups
- 48 responses received – strongly in favour of reduction of fields

Outcome of consultation – removal of **127** fire data fields

EMR Technical Groups – what next?

- Gradual review by section
- Looking to get experts in each area involved

Health and
safety

Environmental,
energy,
emissions and
waste

Space
measurement

Buildings and
functionality

Finance, staff &
student counts

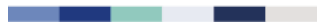
Data items no longer collected

- **Space Charging System:**
Non-residential space charging system (SMNRSCS)
- **Health and Safety section**
- Note: we are no longer going to produce a PDF version of the data items... thoughts?

Accurate and Estimate flags

- Providers are encouraged to only return accurate data and to avoid the use of estimate flags
- *The definition of accurate data for the purposes of the Estates Management record is that the value is accurate within a tolerance of 5%. Where data is assumed to be outside of the 5% tolerance but within 15% then it should be recorded as estimate.*
- Where the data item is mandatory and you only have estimated data then you will need to return it
- Where data is optional, you should consider the benefits case of returning 'estimate' data versus returning null
- Longer-term, HESA is aiming to only collect accurate data and will remove the flag and ability to submit estimated data

HESA



Space measurement



Net Internal Area

- Net Internal Area being GIA less the balance areas e.g. corridors, lifts
- The preference for measuring NIA is through the Room Area Basis methodology...
- ...this is a change to the recommendation in previous years which stated RICS as the preferred method
- HE Providers are still able to return data by either the NIA RICS or Room Area Basis methodology for the **time being**
- Where space is used for different purposes, for example teaching and research, the space should be attributed to a purpose through its predominant use **or** each purpose using a timetable approach. Providers should note which approach they have used in the Method of space apportionment

Specialist Academic Area (last year)

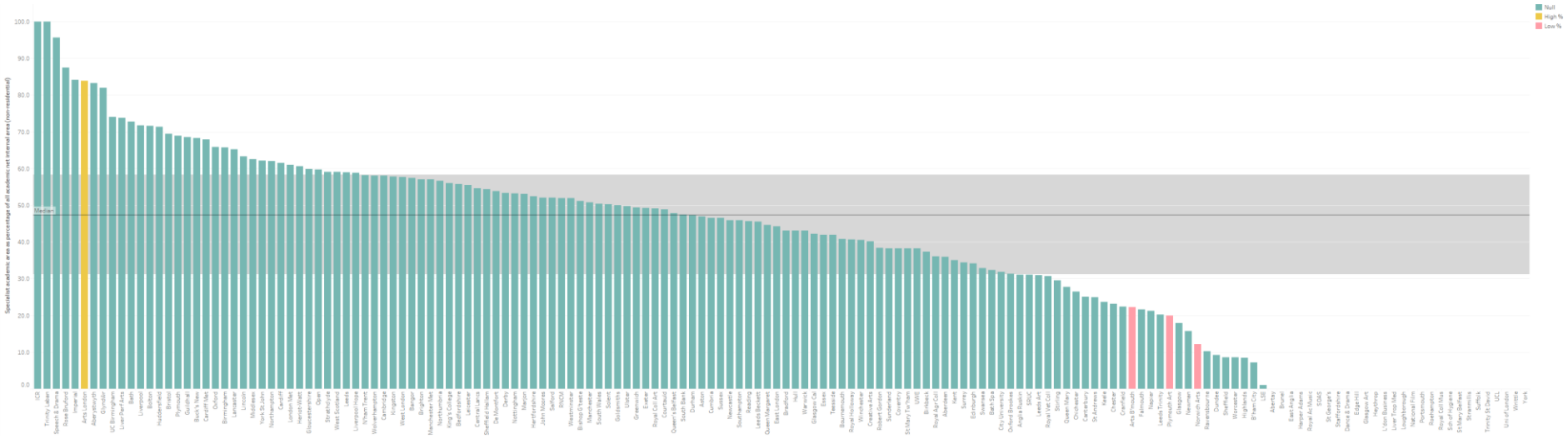
- The total amount of academic floor space (i.e. teaching and research space) that can be classified as 'specialist' in terms of its use **for a limited number of academic disciplines** i.e. NIA designed for specialist use (either teaching or research) and which **cannot easily be used for other non-specialist activities**. It includes rooms or facilities with abnormal or exceptional equipment where such a feature inhibits the use of the room for other non-specialist activities, such as general teaching.
- Types of space included in this category may include laboratories, specialist theatres and drama studios, catering facilities used as part of academic courses, dark rooms, recording studios etc. Exclude all general seminar and classrooms, lecture halls and lecture theatres (raked or non-raked).

Specialist Academic Area

- Space is considered “specialist” where it is designed for a specialist purpose and which cannot easily be used for other non-specialist activities. It includes rooms or facilities with **abnormal or exceptional equipment** where such a feature **inhibits the use of the room** for other non-specialist activities, such as general teaching. We would expect this space to be aligned with space returned by providers as **specialist in TRAC**.
- Types of space included in this category may include laboratories, specialist theatres and drama studios, catering facilities used as part of academic courses, dark rooms, recording studios etc.

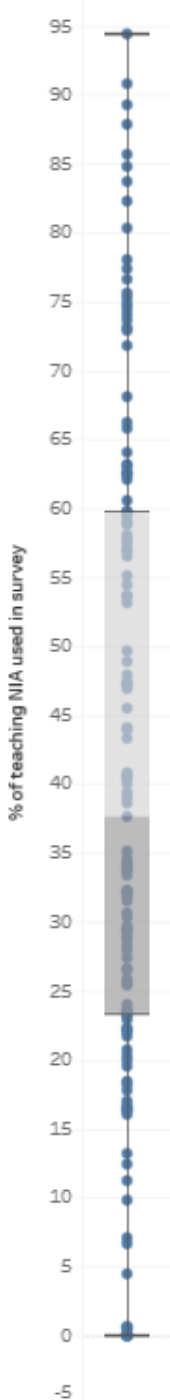
What is therefore specialist space...

- Important to divorce academic discipline from the physical attributes of the space...
- ...Space that has been ring fenced for specific departments or activities should **not** be classified as specialist e.g. a seminar room that can only be used by the medical school
- IT labs are not specialist academic space, however labs containing servers for the purposes of teaching might be



Frequency and Occupancy rates

- For both frequency and occupancy rates a survey-based return is preferred
- In the longer-term, HESA will standardise this approach with only survey-based data being collected
- A reminder – the survey date should be a date within the reporting period!!!...
- ...where you elect to undertake several surveys through the year to give a more even understanding of space utilisation, you are advised to return the survey date as July in the reporting year you surveyed



HESA



Commercial space



Previous definition

- The term commercial space/property refers to buildings **(or part buildings)** or **land** intended to generate a **profit or strategic benefit to the HEP**, which might be from capital gain, rental income or collaboration benefits, i.e. intellectual property rights **or other**. The arrangements **may be** by licence, lease or other formal arrangement. In general, commercial space would be let to a third party, whose aims and objectives are not an integral part of the **core function of the HEP**. The floor area of any commercial space that is currently vacant, even if it has been let previously and may be again, should not be separately identified as commercial if the costs associated with that space are included elsewhere within the Estates management record.

2016/17 definition

- A commercial space is regarded as one where the **occupant** of the specified space **is a third party** and **not the HE provider or a subsidiary** of them (A subsidiary is wholly or partly owned by the provider, and the provider holds a controlling interest). The third party **does not have to be paying rent**. In addition, the occupying staff would **not be expected to be on the provider payroll**.
- Where a provider lets accommodation, and the accommodation **can be** rented by any third party, even if provider staff are renting the accommodation, this should still be returned as commercial space.
- The commercial space should be a longer-term allocation, rather than a short-term leasing of for example, a lecture theatre hired out for a conference. Typically, there would be a lease agreement in place.

Principles

- Commercial space that can be separately identified as a discrete area together with all associated costs, for example energy, waste, and emissions should be **excluded** from the EMR.
- Where the associated costs, such as waste and energy cannot be separately identified for a commercial space area, this is when the commercial space area should be **included** in the EMR. Providers should return the commercial space area as per other areas under the appropriate space measurement field, for example Residential GIA. The associated costs should also be included in the return. Providers should also return the space as part of the total commercial space fields for GIA and NIA. This way, the total commercial space area can be distinguished from either Total GIA or Total NIA.

Applying this to the real world...

- Land (as opposed to buildings) considered to be commercial space e.g. a football pitch?
- Where commercial space is used for both commercial and non-commercial purposes?

Fields in which **returnable** commercial space should be included:

Teaching offices NIA (SMNIATEO).

Teaching not offices NIA (SMNIATE).

Teaching NIA total (SMNIATET).

Research offices NIA (SMNIAREO).

Research not offices NIA (SMNIARE).

Research NIA total (SMNIARET).

Support offices NIA (SMNIASO).

Support not offices NIA (SMNIAS).

Support NIA total (SMNIAST).

Support NIA associated with catering (SMNIACS).

Support NIA learning centre space (SMNIALC).

Non-residential NIA vacant (SMNIANRV).

Non-residential NIA other (SMNIANRO).

Non-residential NIA total (SMNIANRT).

Residential NIA (SMNIAR).

Total NIA (SMNIAT).

Non-residential GIA (SMGIANR).

Residential GIA (SMGIAR).

Total GIA (SMGIAT).

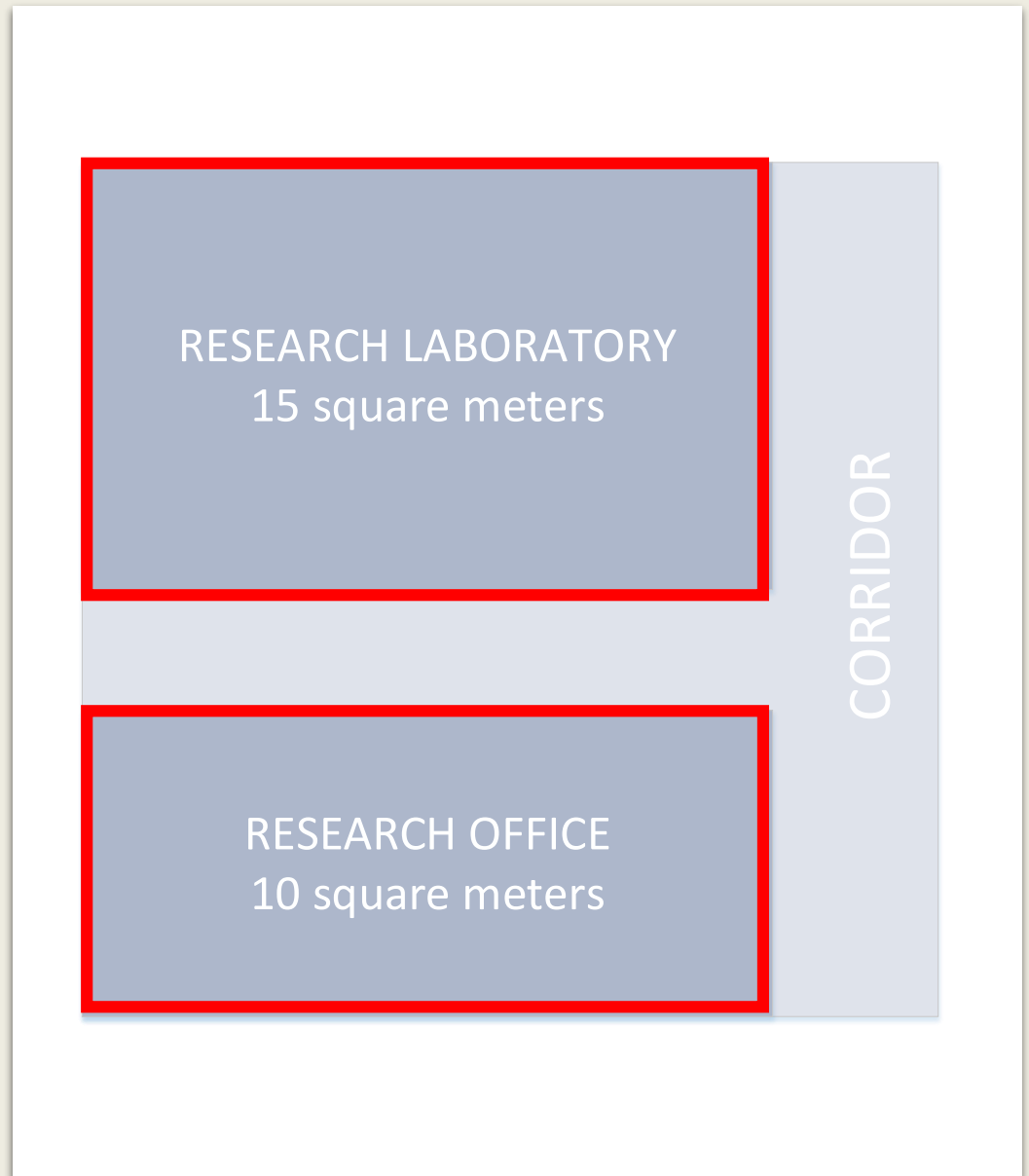
Returning Commercial space

- Returnable commercial space must be reported within each relevant space measurement field...
- ...and will therefore be included in the sub and overall totals for NIA and GIA
- In addition, there are separate total fields for commercial space:
 - Total GIA commercial space (SMGIACT)
 - Total NIA commercial space (SMNIACT)
- HESA no longer collect the split between residential and non-residential

So for example

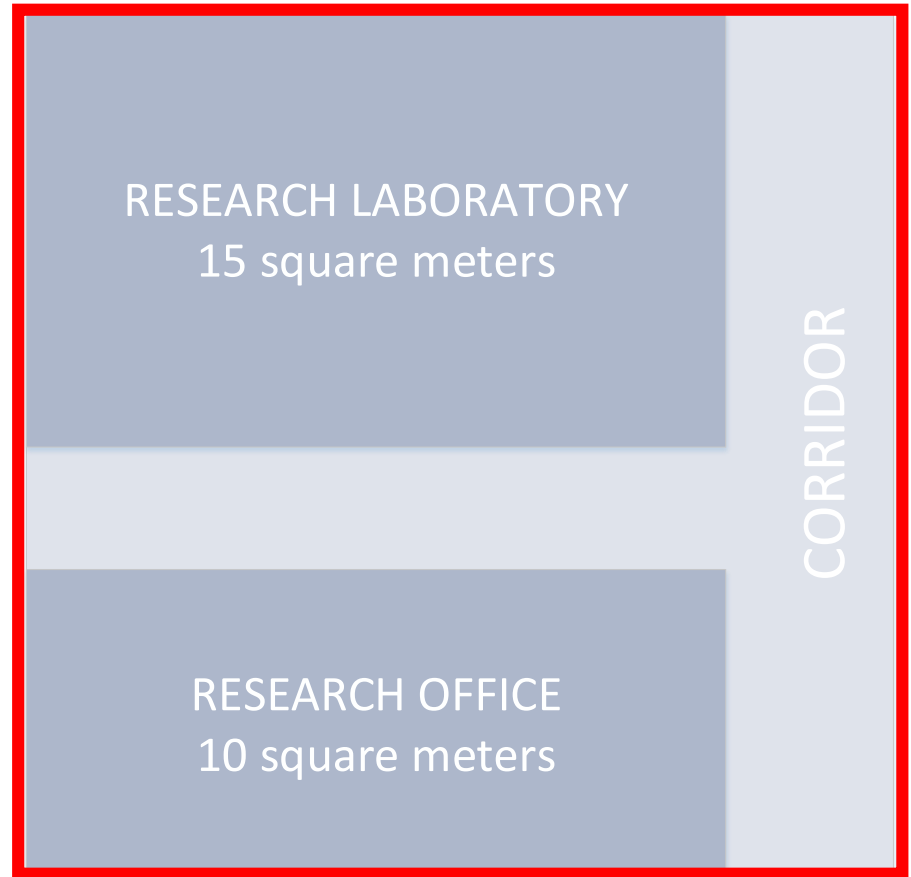
Poppleton University lease out a research laboratory and office to University of Cornwall on a 24 month contract...

FIELD	VALUE
Research offices NIA	15m ²
Research not offices NIA	10m ²
Research NIA total	25m ²
Non-residential NIA total	25m ²
Total NIA	25m ²
Non-residential GIA	?
Total GIA	?
Total GIA commercial space	?
Total NIA commercial space	25m ²



Commercial space and GIA

- How should we treat corridors and other balance areas?
- Is the commercial space only part of the overall building?
- Apportion or ignore?



Impact on ratios

- Due to providers returning 'returnable' commercial space within the relevant space measurement fields (e.g. Research not offices) there will be some ratios that include commercial space and others that do not

RATIO	CALCULATION	COMERCIAL INCLUDED	IMPACTED
HEP income per meter ² of NIA	Total NIA – Total NIA commercial space	NO	NO
Research NIA as % of Total NIA	Research total /Total NIA	YES	NO
Specialist academic area as % of all academic area	Specialist area/(Research not offices + Teaching not offices)	YES	YES

Scope1 & 2 emission baseline for 2005

- HEP's scope 1 and 2 emission baseline in total greenhouse gas emissions (tonnes) for 2005 that the target returned in Total carbon reduction target is set against.
- Prior to the 2011/12 Estates Management Statistics record, the conversion factor used was based on carbon dioxide (CO₂) per unit. However, from the 2011/12 Estates Management Statistics record onwards, the alternative Defra measure of equivalent carbon dioxide (CO₂e) is used instead. This change accounts for additional Greenhouse Gases, including CH₄ and N₂O.
- NEW quality rule for this year that will flag where the data looks like it has been returned in kilograms rather than the correct tonnes

Training support

If you require additional training help, including bespoke visits to your institution, get in touch with the training department...

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e: training@hesa.ac.uk

t: 01242 211452