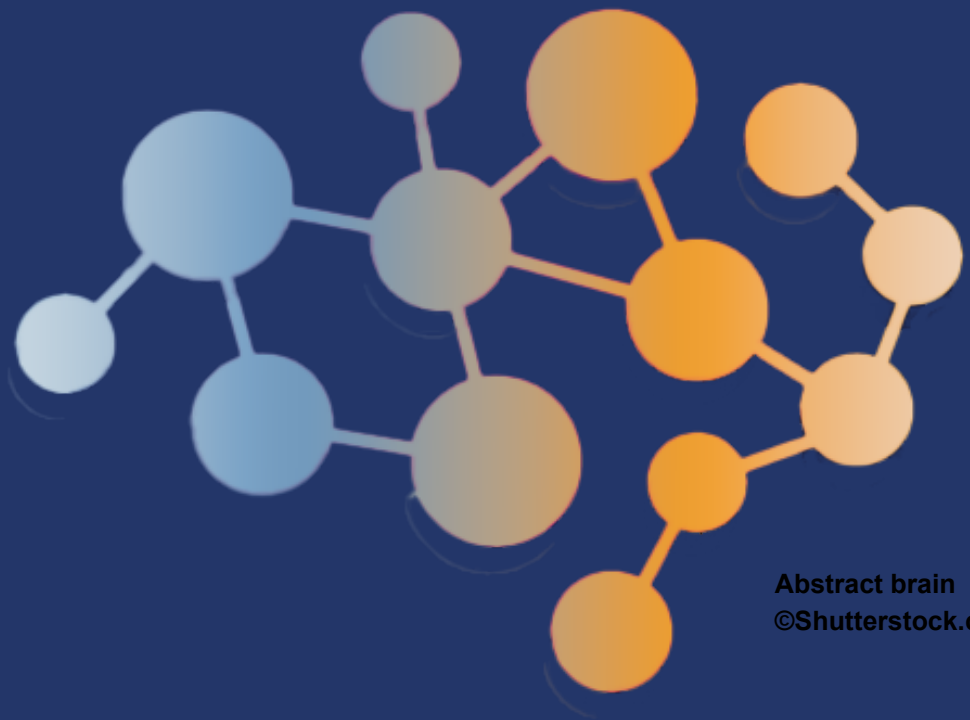
provelio

A Fresh Approach to Rationalising your HE Estate

Case Studies in Digital and Data Led Savings and Efficiencies



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“The estate is the glue that holds a university together and the greatest enabler of transformation.”

Paul Wilson, Provelio Chair

University Lecture Hall
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EXECUTIVE SUMMARY

The latest Office for Students (OfS) update[1] regarding financial sustainability in Higher Education is showing a worse picture than earlier forecasts. The OfS made clear the steps that universities must take, if not already underway, cannot be delayed any longer. The OfS stress that those **actions need to be bold and transformative**. Given the depth of the financial issues facing a growing number of universities, commercial lenders will also revise their lending policies to some universities. This would have been unthinkable in the past but as cashflow alarms are raised there will be no other option.

University task forces who have been given the job of finding cost savings, need rapid and dynamic option generating and decision-making techniques to achieve their objectives. These options need to be scenario tested, sensitivity analysed and to act as a clear record of robust decision-making. The prioritised change projects need to be identified, cashflowed and controlled to ensure that the rationalisation plans and anticipated benefits are achieved.

The estate is often the second biggest cost after salaries to a university. Space is expensive to provide and maintain but is also an **enabler to a transformed and financially sustainable future**. Bold and transformative changes will include mergers, acquisitions, rethinking space allocation, course planning and delivery, and campus withdrawals alongside all the normal avenues of estate cost reduction.

This will need to be done whilst simultaneously maintaining progress on critical existing strategies and policies. Effective transformation will mean these changes still need to maintain sight of the longer-term goals such as space utilisation, capital development, backlog maintenance and achieving net zero targets to avoid further issues in the future.

Provelio have created a unique approach to integrate estates data across business and estates teams. The result is **meaningful and actionable business intelligence** for effective decision-making for rationalising their estates. Robust and auditable models are implemented in eight to twelve weeks to respond quickly to the rapidly changing demands and environment. This digitisation provides an enduring legacy for managing the estate in the future as well as taking the critical first steps, in the right direction, for the creation of a digital and AI estate.

This document presents case studies of how Provelio have developed a rigorous digital and data led method to help HE leaders and managers get more from their estate. The case studies provide some background, explain the approach, highlight the benefits and define the longer term legacy of implementing a digital and data led approach.

[1]*OFS (2024) Financial sustainability of higher education providers in England: November 2024 Update.*

The estates team will play a critical role in the current financial crisis. Integrating estates data with the operational and finance teams will create unparalleled new capability to rationalise the estate.

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INTRODUCTION

The financial situation facing universities is a national and international crisis for the UK economy. The Office for Students has updated previous forecasts regarding the depth of the crisis. The November update states:

- Nearly three quarters (72 per cent) of higher education providers could be in deficit by 2025-26, and 40 per cent would have fewer than 30 days liquidity.
- Many universities have already taken steps to secure their long-term sustainability. For those that have not, the time to do so is now.
- Increasingly likely to involve bold and transformative action to reshape institutions for the future – while continuing to deliver for the students of today and tomorrow.

Universities have recently submitted actual student numbers for the current academic year. Should these numbers prove that earlier estimates were too optimistic then the picture will worsen again.

It is also clear that the government, whilst supporting the importance of universities to the UK economy, are not prepared to simply provide more funds. In July 2024, higher education minister Baroness Jacqui Smith told Sky News it is “in the hands of universities to take the action necessary in order to be as efficient as possible”. The OfS have further indicated that their role is to ensure that universities prove that they are financially sustainable and well managed.

The increase in student fees evaporated alongside the introduction of the increase to national insurance payments. The cash flow position has further worsened, and it is reasonable to speculate that the commercial lenders will review their lending policies with many universities.

The financial state of the higher education sector is both deep and long lasting. There is no easy solution and both the universities, and the government must work together to create a financially sustainable model for the future. In the short to medium term universities need to rationalise their organisations to maintain business as usual and protect long term capability whilst also proving to the government that they are well run and deserving of any future funding.

BOLD AND TRANSFORMATIVE ACTIONS

The OfS have stated that there can be no more delay to the actions that universities need to take. And that these actions need to be bold and transformative. The actions need to consider previously unthinkable options. Trimming revenue costs, delaying capital investment and squeezing income generation will not be sufficient. Taking radical actions at pace will create an added pressure to an already difficult task.

Radical choices will need to include:

- Mergers
- Acquisitions
- Rethinking how space is used
- Shared services
- Outsourcing
- Rethinking course planning and delivery
- Large scale campus rationalisation
- Spend to save initiatives
- Revised masterplans and estate strategies
- Revenue generation

These actions will require a Taskforce comprising both internal and external specialists. There will be a need to collaborate and integrate thinking to develop robust options and choices. Core capabilities must be protected and efforts made to ensure unintended barriers and consequences are not created. This needs to be done quickly whilst simultaneously exploring multiple options to determine optimal solutions.

The Taskforce will need to include business intelligence, academics, finance team and other support services. The estate is the second biggest cost after salaries and is a potential enabler to realising the bold and transformative actions.

SENIOR TEAM MEETING TO LAUNCH A TASK FORCE

We are constantly faced with new and significant challenges and issues. We must be able to act and prove we have taken appropriate action. We need to build a Taskforce of our internal and external specialists to develop turnaround strategies and strategic choices.

We must understand the implications of the options available and be sure that they can be robustly implemented. We do not want to carry out actions now that will prevent our future aspirations, despite the crises we face.

The Taskforce should comprise our business intelligence people, estates, academics and finance professionals. We need them to collaborate to give us strategic choices from which we can develop our strategy.

We must consider all opportunities and pursue options that may have been unthinkable, impossible or challenging in the past. We must still protect our future capability and ensure no unintended consequences.

We need cost saving efficiency gains as well as income generation. We need to integrate our thinking between academia and support services.

And we want this done quickly. We do not have time to waste and cannot wait many months for a static report. We want high quality management information, quickly, that we can scenario test and have confidence in the answers.

If we get this right, we can weather the current storm whilst also embedding good habits for us to thrive in the future.

RATIONALISING AN ESTATE

In higher education Provelio are witnessing estates where:

- Space utilisation remains stubbornly challenging.
- Capital programmes are stalled or cancelled.
- Net zero targets are being postponed or ignored.
- Backlog maintenance burden is rapidly increasing.
- Compliance surety is declining.
- Facilities management services are being further eroded.

Rationalisation in estates is the process of:

- Optimising the use of university facilities and resources to improve efficiency.
- Reducing costs and generating savings.
- Enhancing the overall quality of the campus environment.
- Evaluating the current estate portfolio.
- Identifying underutilised or redundant spaces.
- Making strategic decisions to repurpose, consolidate, or dispose of assets.
- Protection of the value generating capabilities of the organisation.
- Ensuring that the estate is the right size for the academic demand.

All this must be achieved whilst still maintaining a live estate, that is legally compliant and representing a positive staff, student and visitor experience. Reputation must be maintained whilst tackling complex and challenging issues.

The goal is to create a more sustainable, functional, and financially viable estate that supports the university's mission and long-term objectives. In normal times, the estates strategy responds to the academic plan to contribute to the university strategic plan. In this current financial crisis, all three elements of this approach are being radically re-thought in real time and yet still need to dynamically respond to each other.

The key question that most Directors of Estates must ask themselves is:

"Is this the right estate for the current and future demands of the university?"

The university estate is the public representation of what a university contributes locally, nationally and internationally. The bricks and mortar reflect longevity and reliability that have to date survived the passage of time. The rationalisation activities being undertaken will ensure that universities remain viable now and will thrive in the future.

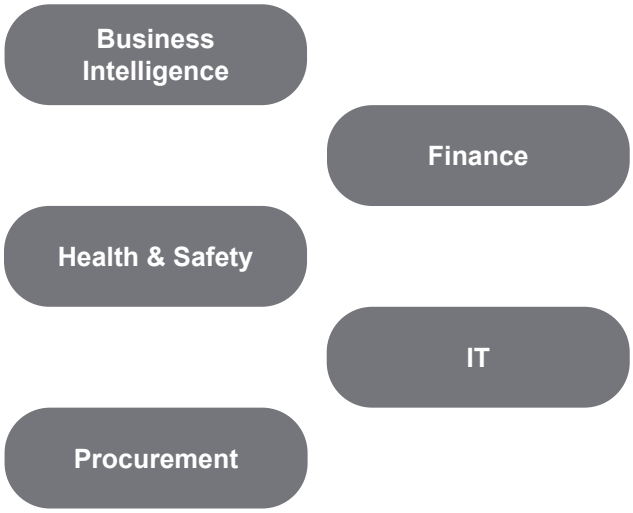
There is a need and opportunity for the estates team to contribute to rationalisation activities that universities are facing. The strategic nature of the rationalisation decisions being made will undoubtedly impact the estate both directly and indirectly. The estate is typically the second biggest cost to most organisations. It is the largest contributor to long term debt, highest risk to overspending and a significant draw of available cash. It is also a critical enabler for positive change and creates the environment for staff, students and visitors to thrive.

The estate has the potential to be a critical source for generating cost savings, efficiencies and value generation. The route to finding those savings is through the capture and integration of the untapped value in the Estates Intelligence – the Estate data.

INTEGRATING THE ESTATE FUNCTIONS

Whilst all estates are different, they are typically managed and organised in a similar way and split into functions such as:

These functions work alongside others such as:



To think in transformational terms the university needs to think beyond the boundaries of these typical functions. It is necessary to understand the wider business functions and their ways of working. The cost and provision of space and issues such as capital investment, carbon reduction and backlog maintenance, creates a complex web of interdependencies. Integrating this with issues such as finance, IT and timetabling requires mental agility that is only possible using data.

How is it possible to rationalise space without understanding the pedagogy of teaching, the numbers of students and the cost of space provision?

These key elements need to be integrated with the estates data to be able to create options and choices for the university.

These is a need for a platform that integrates all functions and enable them to inform each other.

Without a method or platform to integrate this data, it can be challenging to achieve a meaningful picture of the management information and data. This in turn can frustrate efforts to pursue logical and critical insight into what may be possible to change and what the implications might be. The result being that the university and its estate is seen as a static and impenetrable black box.

The university estate is frequently seen as data rich but management information poor.

By integrating these data sets it is possible to then use the data in a systematic manner to generate meaningful insights to rationalise the estate.

University Atrium
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DIGITAL AND DATA LED APPROACH

The **adoption of a systematic digital and data led approach** will achieve a more efficient, cost-effective, and sustainable estate portfolio that will align with strategic goals and enhance overall performance of the organisation to achieve:

- Improved space utilisation
- Optimised estate assets
- Implement energy efficiency measures
- Generated new revenue streams
- Reduced costs
- Investment in sustainable practices
- Creation of partnerships and collaborations
- Prioritised capital and revenue spend

Provelio have developed a platform for the systematic capture, analysis and implementation of your data to create robust data driven decision making. There are three broad steps:

1. Estates Baseline

- Generation of a data model of your estate
- Capture the facts as they are
- Identify and gap fill as necessary

2. Scenario and Decision Engine

- Work with senior team and rationalisation taskforce to identify strategic options and choices
- Model the scenarios and sensitivity test
- Determine optimal projects to deliver the rationalisation plan

3. Prioritised Actionable Plans

- Automatic generation of a digital project management office (DPMO) for the transparent and robust delivery of the investments
- Tracking to ensure all the benefits are monitored and realised
- Consistent method of reporting and delivery

The key message is that, in our significant experience, we have concluded that all estates have untapped value hidden in their existing data. This data can be transformed to create strategic decision making models for the estate and the wider enterprise. Case studies have been created to explain the application of digital and data in more detail, but the approach can be applied to a limitless range of management tasks.

- Mergers & Acquisitions
- Centralised Estates & Project Reporting
- Estates Strategies
- Estates Rationalisation
- Investment Management
- Resource Planning
- Transformation Programme
- Improvement Plans & Healthchecks
- Due Diligence & Audit
- Value for Money Studies
- Asset Management
- Business Case & Benefits Mapping
- Masterplanning
- Procurement & Framework Strategies
- Estates Turn-around
- Estates Data Assessment & Maturity
- Timetabling and Space Management
- Performance & Benchmarking

University Campus
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CASE STUDIES

The following case studies show how Provelio have worked with universities to successfully use estates data for their strategic investments and projects.

These case studies demonstrate how a digital and data led approach can be swiftly and cost effectively implemented (in eight to twelve weeks) to transform the estate, whilst also creating an enduring legacy system for the future.

Making full use of digital and data will increase the senior teams ability to find the hidden value and savings opportunities that lie within existing estates. Your understanding of, and ability to get more from your estate will be unparalleled.

Due to the sensitive nature of the work some of our clients have preferred to remain anonymous in the following case studies.

"OPAL played a pivotal role in resolving a critical compliance issue in our organisation. This data-driven approach not only resolved the compliance issue but also strengthened our compliance framework, reducing the risk of future issues."

Director of Property and Estates,
City, University of London

"OPAL provided a comprehensive view of our estate portfolio, allowing for data-driven decision making and scenario testing."

Assistant Director Strategic Programme Management,
Oxford Brookes University

"The creation of a bespoke digital PMO tool has given us the ability to integrate capital project reporting, performance, data, and targets into one operational system, streamlining our project management processes."

Head of Capital Projects,
Royal United Hospitals Bath NHS Foundation Trust

SPACE BENCHMARKING AND UTILISATION

CASE STUDY - CITY, UNIVERSITY OF LONDON

IMPLEMENTATION OF A FUTURE SPACE PLANNING MODEL

BACKGROUND

The university was encountering financial challenges and had to focus on efficiency. Senior management aimed to increase student numbers by boosting enrolment in existing courses and developing new ones. However, scheduling became an issue. The timetabling team could not meet space demands, although surveys and senior staff indicated that multiple rooms were often vacant during peak times. This discrepancy raised questions about whether the timetabling team's experience accurately reflected reality or if there was actual spare capacity for growth.

University Lecture Theatre
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APPROACH

Initial Data Handling: Provelio began by extracting data from the university's timetabling software. This raw data was then carefully manipulated to facilitate a more robust analysis. Each booking was transformed into a uniform series of individual 'slots' per week.

Comprehensive Data Analysis: The team conducted an in-depth review of the booking information. They focused on various dimensions including room size, weeks booked, department, projected student numbers, and anticipated utilisation.

Insight Generation: Through meticulous analysis, Provelio identified the challenges faced by the university. The insights gathered indicated where student numbers could be increased within the current estate and pinpointed areas operating at full capacity, suggesting the potential need for additional resources.

THE BENEFITS

Optimised Space Utilisation

By analysing space availability and usage patterns, our solution helped maximise the use of existing facilities, ensuring that no classroom or laboratory remained underutilised.

Efficient Timetable Creation

The automated system significantly reduced the complexity and time required to generate timetables, making it easier to accommodate conflicting schedules and varying course requirements.

Enhanced Strategic Planning

With in-depth insights into space needs and utilisation trends, the university could make informed decisions about course development, delivery methods, and potential expansions.

Improved Student Experience

A well-structured timetable ensured that students had more balanced schedules, reducing stress and improving their overall academic experience.

Resource Allocation Assessment

The digital solution provided data-driven recommendations on whether additional spaces were needed and what types of spaces (e.g., lecture halls, laboratory, study areas) would be most beneficial.

Real-Time Adjustments

Allowed for quick reconfiguration of timetables in response to sudden changes, such as faculty availability or unexpected room closures, ensuring minimal disruption to classes.

LEGACY

The implementation of our digital solution has had a profound and lasting impact on the university's operational efficiency. By leveraging advanced data analytics, we ensure that the timetable is constantly evaluated, leading to accurate and insightful management reports.

These reports offer a comprehensive view of space utilisation, helping the university optimise its resources effectively. Furthermore, our solution provides a deep understanding of the varying demands across different segments of the teaching estate, allowing for better allocation and planning.

In addition to operational benefits, the digital solution has contributed significantly to strategic decision-making processes. Administrators now have access to real-time data and predictive models, enabling them to respond proactively to emerging trends and needs. This foresight helps maintain a balanced and adaptable academic environment, catering to both current and future educational requirements.

MERGERS AND ACQUISITIONS

CASE STUDY - CITY, UNIVERSITY OF LONDON

STATUTORY COMPLIANCE DUE DILIGENCE FOR A UNIVERSITY AND TEACHING HOSPITAL MERGER

BACKGROUND

The merger aimed to **create a unified institution** that could offer enhanced educational and healthcare services with **integrated management information.**

Provelio were appointed to analyse the estate condition for due diligence of this complex merger, utilising their expertise in estates and data to determine the level of **estates compliance** and **prepare a remediation intervention programme.**

"The insights derived from the data enabled us to identify the root cause of the issue, implement corrective measures and monitor their effectiveness"

Director of Property & Facilities (City, University of London)

APPROACH

Compliance Audit: Applied BCIS and BSRIA methods to create templates for population and to create a baseline to determine extent of compliance within the estate. This included:

- fire safety,
- health and safety,
- energy and environment,
- equipment and systems,
- water and gas,
- and accessibility.

Condition Survey: Led the briefing of the team to create the templates and data management rules to ensure that the condition survey would be of long-term useful value.

Estates Compliance Intervention Programme: Prioritised the works required to achieve full compliance within 18 months. This included the scenario testing and optimisation of all condition data to develop a programme that included:

- **Live estate impact:** Created planning constraints to ensure minimal disruption to the working hospital environment.
- **Specialist area deep dive:** Specific review of areas of technical, medical and unique nature.
- **Critical outage assessment:** Identification of critical services and areas being served to ensure all compliance works to be minimal and planned disruption.
- **Cost analysis:** Fully costed condition survey to allow cashflow modelling and budgetary control with direct links to finance team and their data.

THE BENEFITS

Strategic Decision Making

Empower senior and technical leaders with in-depth data to make critical, well-informed decisions.

Rapid Estate Insights

Gain comprehensive insights into estate conditions in just six weeks, meeting the urgent demands of legal and senior teams.

Innovative Scenario Planning

Utilise a sandbox environment to test and model alternative scenarios, “what if” strategies, and sensitivity analyses.

Inclusive Stakeholder Collaboration

Engage stakeholders in the review process to ensure their input shapes future solutions and fosters buy-in.

Enhanced Operational Efficiency

Identify inefficiencies through data analysis and implement targeted improvements to optimise savings.

Proactive Risk Management

Detect and prioritise risks associated with mergers and transitions, ensuring a smoother and more predictable process.

These benefits collectively drive a more efficient and effective merger process, enabling clients to make well-informed decisions, manage resources optimally, and minimise risks for a successful integration.

LEGACY

Having created an estates data model the university are now in a position to further develop their digital and management information capabilities from an **informed client position.**

We have created an infinitely scalable and a fully adaptable estates management model. A compatible space model is now being added for the **integration of pedagogy, timetabling and space management.**

BACKLOG MAINTENANCE PROGRAMME

CASE STUDY - UK UNIVERSITY (CONFIDENTIAL)

CREATION OF A TEN YEAR PRIORITISED BACKLOG MAINTENANCE AND CAMPUS IMPROVEMENT PROGRAMME

BACKGROUND

This campus university has a large, complex portfolio of ageing buildings that needed to be improved, to enhance the student experience, and reduce risk through **resolving historic and growing backlog maintenance.**

The task was to create a data led model that would enable the estates team to create a **robust and meaningful strategy** for board level approval.

Building Restoration
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APPROACH

Data Assessment Review: Conducted a health check of all data from across the organisation, from multiple different software and sources. Any data shortcomings were gap filled with appropriate alternatives.

Estates Analytics: The creation of a model that captured and visualised the current condition of buildings, the composition of defects and their value. This created a centralised shared understanding of the estate and provided clear visual management information to develop an improvements programme that transforms both the condition of the estate and its look and feel.

Option Testing and Modelling: The creation of a sandbox environment for the senior team to consider alternative scope, timeline, constraints and priorities. This allowed options and choices to be presented to the decision-makers.

Business Cases: The options simplified the production of business cases required for approval of funding. With clear explanation, visualisation and rigorous financial planning, the senior boards at the university were able to understand and commit; in the confidence that they had made a robust and auditable decision.

THE BENEFITS

Understanding from Visualisation

The presentation of the data in visual models of the campus gave the senior team the ability to properly understand the estate and the decisions being requested.

Speed of Business Cases

The automatic creation and population with reliable and repeatable data even when considering multiple alternatives.

High Quality Management Information

The senior team were given multiple choices and the ability to request other scenarios to be tested. The speed and reliability of the data created strategic level confidence in the management information.

Cost Savings Opportunities

The integration of estates data provided the ability to target investments in capital, maintenance, carbon and compliance. This created the ability to find duplication of costs and to create projects that achieve multiple benefits for same or less investment.

Critical Insights

There was a clear correlation between deferred maintenance and energy inefficiency. The model highlighted several high-priority buildings that were both significant contributors to the university's carbon footprint and sources of escalating maintenance costs.

The estates model enabled the **confident management resolution** of backlog maintenance and created an actionable plan in a **short space of time.**

LEGACY

The digital platform is now fully embedded within the estates team providing:

- Enduring estates model.
- Building condition insight and analysis.
- The ability to develop efficient delivery models including levering buying power (through combining small works into larger programme), rolling maintenance works into development projects and then prioritising to ensure the maximum benefit against investment.

As the university has extensive transformation plans new developments of the model are being progressed as well as new uses of the existing data:

- Data to support master planning/estates strategy.
- Embedding carbon benefit tracking into maintenance projects.
- Benefits tracking.

PROCUREMENT STRATEGY MODELLING

CASE STUDY - UK UNIVERSITY (CONFIDENTIAL)

AN INTEGRATED MODEL OF THE ENTIRE ESTATE FOR FUTURE INVESTMENTS

BACKGROUND

The university aimed to revitalise its existing estate with a comprehensive maintenance programme. To achieve this, they needed a precise **procurement strategy** to determine what to procure, when to procure it, and to understand the resource implications.

University Library
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APPROACH

Data Integration: Like most organisations, the university had estates related data held in different systems across the organisation. A model was created to automatically collect the data, regardless of software or system, from many business functions including estates, finance and carbon.

Collaboration: By presenting complex information through clear visualisations, the university was able to communicate the rationale behind its decisions effectively, securing buy-in from faculty, staff, and students. This transparency not only accelerated the approval process but also fostered a sense of collective ownership over the institution's sustainability journey.

Developing a Five Year Programme: The development of a programme of works that could cope with the complex demands and interrelationships across the estate and wider university. This avoided piecemeal planning and missing opportunities to address multiple priorities simultaneously.

Estates Performance Dashboard: The model provided a comprehensive view of the estate's performance and needs. This holistic perspective enabled the university to evaluate potential projects in the context of broader organisational goals, ensuring that decarbonisation initiatives were aligned with operational and compliance priorities.

THE BENEFITS

Identifying Quick Wins

The rapid identification of quick-win projects that could deliver immediate benefits with minimal disruption. The data gave confidence to commit to simple decisions without getting diverted by wider analysis.

Controlled Disruption

The model revealed opportunities to integrate sustainability and other drivers into compliance-driven projects. Planned fire safety upgrades were combined with energy efficiency retrofits, allowing the university to address two priorities in a single intervention. This evidence-based approach allowed the university to develop a phased implementation plan that balanced short-term disruptions with long-term benefits.

Visualised Business Cases

The data led model provided all the information required to meet the business case governance standards of the university. The visualisation of the data was particularly well received as it enabled technical professional and lay-people to gain detailed understand and insight.

Project Optimisation

The digital sandbox allowed all participants in the university to test options to create the optimum prioritisation of projects. Projects generating the most benefits relative to cashflow were able to be selected.

Economies of Scale

The model offered significant procurement benefits by identifying opportunities for efficiencies through integrated work packages. Combining carbon reduction initiatives with maintenance and compliance projects enabled the client to streamline procurement processes and set up clear framework agreements to achieve substantial cost reductions through economies of scale.

LEGACY

The enduring model has given the client an effective means for managing planning, procurement, maintenance, compliance, and sustainability projects across the estate.

With a focus on transparency and efficiency, the model ensures that procurement is not only cost-effective but also aligns with the latest industry standards and sustainability goals. This transformation has led to increased market engagement, reduced operational costs, and a more agile response to market demands, ultimately driving better outcomes for all stakeholders involved.

CAMPUS CONSOLIDATION

CASE STUDY - OXFORD BROOKES UNIVERSITY

THE RATIONALISATION FROM TWO CAMPUSES TO ONE

BACKGROUND

The client embarked on a significant project to rationalise their multiple site campus to optimise space utilisation and transform the university's infrastructure. The primary objective was to create a more efficient, cost-effective, and sustainable estate portfolio that aligned with the client's strategic goals and enhanced overall performance.

"The system was fully bespoke to our estate, therefore enhancing the quality of our strategic decision-making."

Assistant Director, Strategic Programme Management (Oxford Brookes University)

APPROACH

Data Collection and Analysis: A comprehensive data collection exercise was conducted to gather information on the current usage of spaces. This data was then analysed using advanced analytics techniques to identify patterns, inefficiencies, and opportunities for optimisation.

Strategic Planning & Logistics: The understanding of the nature and scale of the works created the ability to model alternative delivery strategies and align the existing estate improvement priorities with the transformational growth strategy of the university.

Operations & Strategies: The alignment of the day-to-day operations alongside the long-term strategic goals. Included integration with the university's ambitious carbon reduction strategy.

Logistical Planning: The model carefully analysed and forecasted the logistical requirements and implications of each move. By simulating various scenarios, it identified potential hurdles and streamlined the process, ensuring that all decanting activities were executed smoothly and efficiently. This systematic approach allowed for seamless transitions and minimised disruptions, ultimately ensuring the programme was feasible and could be delivered as intended.

Space Rationalisation: One of the primary objectives was to rationalise the space at the new campus. Data-driven insights identified underutilised areas and proposed reconfigurations to maximise space efficiency. This included repurposing existing spaces and designing new layouts to accommodate the client's needs.

THE BENEFITS

Strategic Estates Rationalisation

The model enabled the client to optimise their estate layout, ensuring effective use of space while keeping operational continuity intact.

Operational Efficiency

The model highlighted area-specific inefficiencies, leading to refined processes, better resource utilisation, and significant cost savings.

Proactive Change Management

The estate model served as a dynamic tool for adapting to changes promptly. This ensured the facilitation of smoother transitions with minimal disruption.

Benefit Tracking

It allowed ongoing monitoring of progress against strategic plans, ensuring that targets and objectives were consistently met.

Informed Decision Making

The estates model provided robust data insights, empowering confident and auditable decision-making processes.

LEGACY

The implementation of the estate rationalisation left a lasting legacy for the client in the form of:

- **Foundation for Future Growth:** The comprehensive plan provided a solid foundation for future growth and development. The client benefited from a more streamlined and informed transition process, ultimately leading to a more optimised and efficient campus.
- **Continuous Improvement:** The monitoring and reporting system enabled continuous improvement by capturing lessons learned and using them meaningfully for future projects. This ensured that best practices were consistently applied across all initiatives.
- **Remain Adaptable:** Allowed real-time response to change and understanding of implications. By reacting swiftly to changes as they happen, the client can stay ahead of potential issues and make informed decisions that ultimately leading to better outcomes.

DIGITAL PROGRAMME AND PROJECT MONITORING

CASE STUDY - ROYAL UNITED HOSPITALS BATH NHS FOUNDATION TRUST

IMPLEMENTATION OF ENTERPRISE PROJECT CONTROLS SYSTEM

BACKGROUND

With the desire to undertake a large-scale capital programme, the Trust faced numerous challenges with the transparency of their project reporting. This ultimately led to time, cost and quality issues. A lack of consistency and adherence to essential processes and governance standards meant it was difficult to clearly deliver a complex programme of works.

Provelio designed and built a full digital project management office (DPMO) solution.

"[OPAL] has provided us with a holistic view of all projects, enabling effective decision-making and resource allocation"

Head of Capital Projects, (RUHBath)

APPROACH

Knowedge & Management: The DPMO system was designed to manage and disseminate knowledge effectively. This included creating a comprehensive repository of project-related information that could be easily accessed by all stakeholders.

Project Process Tracking: The system provided visibility on the current status of each project within the standard process. It ensured that the correct steps were completed, appropriate communication and stakeholder consultation were conducted, and the correct governance took place.

Integration with Existing Systems: The DPMO was integrated with existing management systems to capture data from various functions, including estates, finance, and carbon. This integration allowed for a comprehensive view of the estate's performance and needs.

Reporting on Critical Success Factors: The DPMO system tracked and reported on critical success factors such as project delivery timelines, cash flow, resource adequacy, risk management, and safety. This reporting system had the ability to interrogate at individual project levels and roll up reports to program and enterprise levels.

Automated Notifications & Alerts: The system included automated notifications and alerts to inform relevant teams of any projects reaching the point of closure and requiring digital record updates. This ensured timely updates and maintained the integrity of the asset change management process.

THE BENEFITS

Consistency of Reporting

Standardising project updates simplified tracking progress and the process of identifying issues. Consistent reporting standards also made it easier to understand the status of projects. Furthermore, clear communication was promoted, reducing misunderstandings amongst team members.

Customisable to Client Needs

Facilitated the creation of customised solutions that precisely align with the client's unique objectives and challenges. This approach boosts client satisfaction by delivering services that meet their specific needs. Additionally, it improves flexibility and responsiveness, ensuring swift adaptation to any changes in client requirements.

Risk Mitigation

The comprehensive analysis provided by the DPMO helped identify potential risks and allowed the Trust to address them proactively. This ensured a smoother and more predictable project delivery process.

Transparency & Collaboration

The DPMO system provided clear visualisations of complex information, which facilitated effective communication and collaboration among stakeholders. This transparency accelerated the approval process and fostered a sense of collective ownership over the projects.

Identified Pressures in Client's PM Team

The system identified training and resource needs to increase team competence, reallocation of resources more efficiently, and enhanced project outcomes by addressing quality issues early.

LEGACY

The platform has left a lasting legacy, establishing a resilient foundation that supports future growth and innovation. It enabled the Trust to continually offer high-quality project management services, significantly cut down on project delivery times, streamlined the onboarding of new staff, and allowed for quicker and more efficient responses to live project issues.

DECARBONISATION

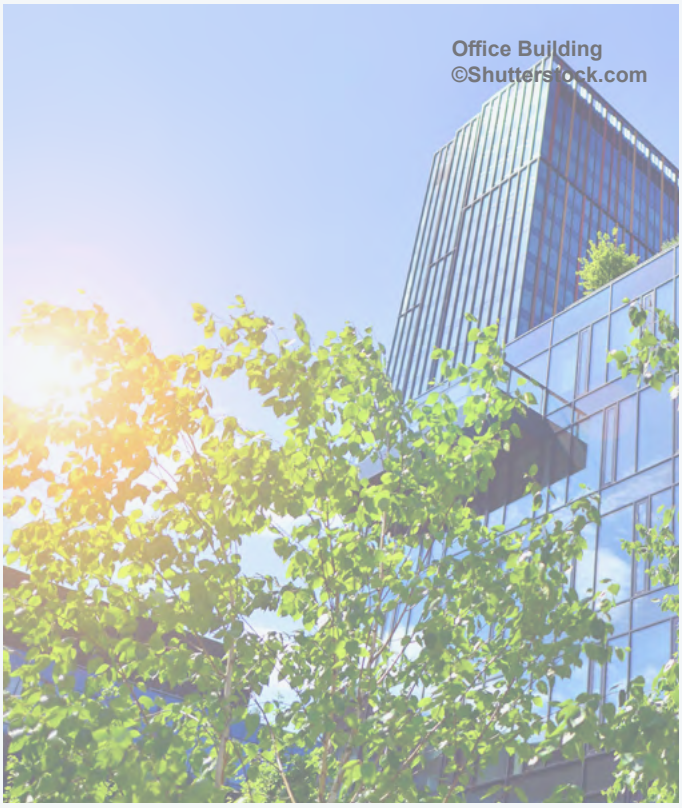
CASE STUDY - UK UNIVERSITY (CONFIDENTIAL)

SUPPORTED A HE INSTITUTION ACHIEVE ITS DECARBONISATION STRATEGY

BACKGROUND

The university struggled to make meaningful progress on implementing their decarbonisation strategy because of competing priorities from compliance, maintenance, and capital projects. They aimed to develop an actionable plan to meet carbon reduction targets by creating a roadmap to reduce their carbon footprint across their estate, focusing on decarbonising heating systems and improving energy efficiency.

Provelio used digital modelling to integrate all the university's previously siloed data to construct an actionable plan aimed at achieving the university's decarbonisation goals given these competing priorities.



APPROACH

Assessment of Existing Conditions: The first step was to conduct a thorough assessment of the existing conditions of the client's estate. This included evaluating the energy consumption, utility costs, and carbon emissions of each building. The assessment provided a detailed breakdown of the type of work required for each building to achieve the desired carbon reduction targets.

Integration with Existing Systems: The decarbonisation plan was integrated with the client's existing management systems to ensure a seamless transition. This integration allowed for the monitoring and analysis of energy and utility consumption, tracking emissions, and managing the progress of carbon projects.

Implementation of Decarbonisation Initiatives: The plan included specific decarbonisation initiatives such as boiler replacements, building fabric improvements, and the adoption of passive house standards. These initiatives were designed to reduce energy consumption and carbon emissions while maintaining the functionality and comfort of the buildings.

Development of a Comprehensive Plan: Based on the assessment, a comprehensive decarbonisation plan was developed. The plan included a carbon reduction roadmap and an implementation plan that presented various options for the university to meet their carbon reduction targets. The plan focused on the buildings on the client's main campus and provided a high-level overview of the steps needed to move towards decarbonisation.

THE BENEFITS

Enhanced Decision Making

The comprehensive assessment and detailed plan allowed the client to make informed decisions about their decarbonisation initiatives. This ensured that the chosen initiatives were effective and aligned with the client's carbon reduction targets.

Improved Energy Efficiency

The implementation of the decarbonisation initiatives resulted in significant improvements in energy efficiency across the university's estate. This led to reduced energy consumption and utility costs.

Carbon Reduction

The decarbonisation initiatives helped the university achieve their carbon reduction targets by reducing emissions from their buildings. This contributed to the university's overall sustainability goals and compliance with regulatory standards.

Cost Savings

The improved energy efficiency and reduced utility costs resulted in significant cost savings for the university. These savings could be reinvested in further sustainability initiatives or other areas of the client's operations

LEGACY

The revised decarbonisation strategy has left a lasting legacy for the university:

- **Monitoring and Reporting:** A comprehensive system that tracks progress, utility costs, carbon savings, and overall impact on the university's estate.
- **Sustainability and Compliance:** The plan lays out a clear roadmap for achieving carbon reduction targets, assisting the university in developing and implementing effective strategies for sustainability and regulatory compliance.

SUMMARY

Provelio have developed a platform and method for the rapid and cost-effective implementation of a digital and data led method for the effective management and integration of estates at enterprise level. This was created to help clients get the most from their property, estates and construction investments; whilst also being used for rationalisation to resolve today's problems and issues. A digital and data led approach also creates the blueprint for the future management of the estate, its contribution to the wider university and ensures that it is ready for a digital and AI led future.

Data is the vital ingredient to enable the integration of the functions of the estate so that universities create the right type and right amount of space for research, teaching and enterprise.

The approach requires no investment in new software, has immediate returns on investment, and is infinitely scalable for the long-term estate.

REQUEST A DEMO

If you would like a full demonstration of OPAL, we would be delighted to arrange a friendly, practical demonstration, to you and your colleagues.

We can do this online, or in person. It requires just one hour of your time and will answer all of your questions.

Phone

Call us on:

0117 302 0001

Visit

Visit us at:

www.provelio.com

Email

Email us at:

mail@provelio.com

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