

Case Study: Essex University

“No other system fitted
our needs so well”

Malcolm Fewkes,
University of Essex

Essex university extends the use of right across the estate and into academic departments. Essex University Estates Management team have been at the forefront of many developments within the universities sector for some years now. They have produced a range of initiatives using original, groundbreaking and cost-effective software tools to inform and enhance the operations of the estates team at Essex.

The Estates department has been prepared to lead the way and take a few calculated risks en route to where they are today. Examples include involvement in the early Management and Administrative Computing (MAC) initiative to produce an integrated University-wide software tool, and the selection of Planet Facilities Management software. Plans to extend and broaden the scope of Planet within the University continue to the present day.

Essex University occupies three campuses, with the main 200-acre parkland located just outside Colchester. It has over 9100 students, with the University providing accommodation for over 50%, an unusually high proportion for a university. The Estates department is responsible for all three locations which amount to 160,000 square metres gross internal area. The maintenance team is an in-house direct labour force of 140 people and covers cleaning, maintenance and grounds.

The estates management team is divided into four main areas: security and telecoms; facilities; capital and development; and purchasing and stock control.

Volume of work

The Estates team receive 2000 calls a month for reactive maintenance. Over 60% of these calls relate to the accommodation blocks. The accommodation team have access to the system and are able to raise work orders directly. These could range from simple plumbing problems to more serious health and safety issues. Help Desk calls through the Intranet now account for a growing percentage of the overall calls. Work orders are printed to one of three workshops across the campus or to contractors, directed automatically by the job type to staff with the appropriate skills of responsibilities for the particular work involved.



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SOLUTION OVERVIEW

University of Essex

International reputation for the quality of research and teaching

Industry

Higher Education

Geographies

Colchester, Essex

Business Challenges

- Outdated systems limited the Estate's ability to provide a consistent, reactive service
- Paper-based maintenance inefficient and slow
- Requirement for immediate budget information on long term maintenance projects
- Ability to integrate with other systems including accounts and MICAD Intranet Property Register
- Need for system to match proven processes in place

Malcolm Fewkes has been the Building Surveyor at Essex since 1991 and is responsible for facilities and buildings maintenance, and minor works. At the time he joined Essex, universities across the UK were facing more onerous demands for statistical information from different bodies. Essex University was deeply involved in the MAC initiative, and taking a leading role alongside Imperial College, London. The MAC initiative was set up by the UK government in 1988 for universities to improve the sharing of information and reports in this sector. Their ability to produce this information was severely hampered by restrictions in technology. By 1995, Essex University recognised that they had to change their approach.

Solution selection

Essex University began to look for a commercial facilities management system that would fit his requirements. Malcolm wanted a system that would manage and automate much of his business processes, yet be flexible enough to handle future developments and changes within the department. He undertook an extensive market review and put together a strong business case for replacing the MAC system with a true CAFM tool. He wanted a system that was asset-oriented as well as space-oriented. He evaluated 30 to 40 systems and even had some running on a trial basis. When he first looked at Planet G5, Malcolm could see that it would do exactly what he needed and manage the processes they had in place.

It wasn't just the functional fit that appealed to Malcolm. Cost was also a major issue. Some other systems would have cost 6 times as much in the first year – and would have required a complete re-engineering of their working practices! Planet G5 was installed and implemented in 1998. Malcolm particularly liked the modular nature of Planet. He only bought what he needed, which at that time was Planned Maintenance, Purchasing and Stores.

Planet

In 2002, the University performed a major "Administrative Services Review" where they took a critical look at their internal procedures. As a result, a number of significant changes were required including more sophisticated reporting requirements and the introduction of intranet-based reporting, services and communication. Although Planet G5 was no longer able to meet all their needs, its replacement, Planet FM, appeared to be able to address the majority of them.

However, Malcolm used the opportunity to conduct an extensive market review. He explored a number of CAFM systems but quickly realised that Planet FM would match all his requirements.

An increase in functionality and modules purchased with Planet FM (including Intranet and Asbestos Management modules) has produced a variety of benefits to the whole university. It has improved communication to interested parties, shortened turnaround of maintenance issues, reduced costs and improved general service and safety. Statistics and information regarding the progress of maintenance can now be pushed out directly to relevant departments. This has helped to raise the profile of the department in addition to improving the service provided.

Cost-effective option

The experience gained using Planet G5 gave Malcolm and his team the confidence to install, train and implement Planet FM themselves with minimal help from Qube Global Software. They were able to see that the combination of highly flexible, intuitive software meant that they could keep the services costs from Qube Global Software down to an absolute minimum.

Planet can link location hierarchy with MICAD Intranet Property Register. The Estates team purchased MICAD software to manage their space planning. The unique integration of MICAD with Planet has eased this task.

Such is their confidence in Planet and the benefits it has brought that it has been adopted by other departments for a variety of different uses. A number of the academic departments are now using the purchasing module for purchasing contract items such as mobile phones, furniture, protective clothing etc. The Catering department use Planet for purchasing, managing profit and loss and stock control; the grounds team use it for maintenance and cleaning; and Capital and Development will soon be using Projects module for purchasing and expenditure control.

Solution

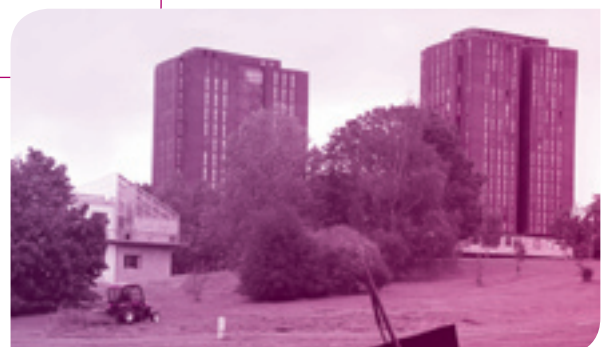
Deployed Planet G5 followed by Planet FM across three sites

Benefits

- Improved communication between Estates and University
- Easy system means more jobs are raised and resolved quicker
- Flexible reporting & information retrieval has led to widespread adoption of the system
- Improved budgetary control

Solution Components

- Structures and Management
- Help Desk
- Planned Maintenance
- Intranet module
- Stores
- Property
- Purchasing
- Projects
- Asbestos



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Managing budgets and projects

Long-term maintenance projects are managed through the Projects module for their purchasing rather than the University finance system. Budget information is input directly into Planet and then transferred to the University accounting tool, Synergy. Effectively, Planet has become the tool for managing the estates budget. Staff have access to immediate information about budget spend so they have greater control of expenditure and have reduced the tendency for over and under spends. This has worked so well that the Capital and Development team have now decided to use the Planet Projects and purchasing modules in the same way.

Benefits

Malcolm Fewkes and his colleagues have found that Planet has vastly improved the communication throughout the department and university. There has been a significant improvement in the management of jobs. Response times to customers have increased dramatically now that jobs pass through to the direct labour force instantly. He also likes the ability to retrieve information easily and particularly appreciates the table filters and the generally ability to manipulate tables as they deal with most requirements. They have proved so flexible and easy to use that colleagues across the campus are making the most of them.

Future plans

Malcolm has plans to use the property management and resource booking modules. He is currently rolling out the new Asbestos module and intends to investigate the use of handheld mobile units for managing work orders, stock control and surveying.

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