

The Changing Infrastructure of Tertiary Education

Quebec, Canada, 25-28 October 1999

An international seminar organised by the OECD Programme on Educational Building (PEB), the *Ministère de l'Éducation du Québec* and the Association of Institutional Property Managers, with the participation of the OECD Programme on Institutional Management in Higher Education (IMHE)

Estate Management Performance Measures for the Higher Education Sector in England

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The Higher Education Funding Council for England commissioned a research project into the development of estate management statistics for the higher education sector. The key tasks of the research were to identify key estate management “performance indicators”, develop robust definitions for the statistics underlying these PIs, and produce preliminary comparative information.

The study arose because it was recognised that there was a need to develop a coherent, consistent, relevant and usable set of data, which could assist estate managers and senior managers of institutions in improving the management of their institutions further. The study was not intended to generate statistics for the benefit of the Funding Councils, but to produce a management tool for the higher education sector.

The study was carried out with 39 “Sponsor” higher education institutions (HEIs), and directed by a Steering Group representing the various interests of the sector. The approach adopted was needs based, and involved a combination of literature review, analysis of questionnaires developed and issued as part of the project, detailed data collection, and an extensive consultation process. The overall process was strongly approved by both the Steering Group and Sponsors.

The key outputs of the project have included the development of an **Estates Data Matrix** and a set of **Key Estate Ratios (KERs)**. The Estate Data Matrix provides a logical, consistent and comprehensive approach to linking the information collected on 156 estate-related key statistics to each other, as well as to other aspects of the operation of a HEI such as income or students. Detailed definitions on the 156 key statistics were developed as part of the project and are expected to form the basis of measurement in the sector in the future. The Estates Data Matrix should thus enable an institution to interrogate estates data on a consistent basis to other institutions.

The KERs are based on 14 priority subject areas that institutions wish to focus upon from an estates perspective, as determined by Vice Chancellors/Principals, Directors of Estates and Directors of Finance. The 14 types of KER should help HEIs to assess their operational performance internally, as well as allowing comparison with other HEIs on a consistent basis, and are based on the data collected for the 156 key statistics mentioned above. These ratios include building condition, property costs per square metre, student and £ revenue, space utilisation ratios for different types of space and estate management ratios of various kinds.

Data was collected for each of the 156 key statistics from each of the Sponsor institutions. The results of the data collection have been positive in terms of a relatively high level of availability of data, acceptable levels of variability in the results, and in the internal consistency of the data. Sponsors also viewed the results, and the overall process, as highly satisfactory.

The report and recommendations of the research have been issued to the higher education sector for consultation. A key proposal is that the approach and framework developed should form the basis of data returns to the various Higher Education Funding Councils from 1999 onwards. In addition, an on-going programme of refinement and improvement in data definitions and in developing new KERs has been recommended.