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the property world



eMandate 2011

a guide for colleges

June 2011

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This guide outlines the key requirements for engagement in eMandate during 2011. It offers some fundamental guidance for colleges.

Reference to this guide will help ensure colleges are aware of processes, are able to focus their effort efficiently and meet requirements. Colleges should seek to ensure best value is delivered for their engagement.

IPD recommends reference to this guide.

The guide references data requirements, process for data transfer, validation, outputs and key dates/timetable.

The guidance and notes presented in this document should help to:

1. improve the efficiency of data assembly,
2. the accuracy of information and,
3. support effective engagement.

Benefits and objectives

Context

eMandate helps college estate managers understand, compare, improve and measure the performance of their estates. eMandate provides a comprehensive and consistent information resource to support decision making, encourage proactive management and clearly report key areas of estate and facilities management performance.

The principle aim of this resource is to provide colleges with access to performance metrics and data to facilitate improved management, improve building quality & efficiency through awareness and support an objective approach to college estate management

Commitments to data accuracy, compliance and creating transparent reporting underpin the value of this resource and, through eMandate, colleges are collectively able to secure ongoing progress in terms of data access and reliability.

Benefits

Key benefits to your organization should include:

1. Enabling the like for like comparison of college estates;
2. Facilitating a better understanding of how your estate is performing in key areas;
3. Identifying where savings can be made;
4. Enabling colleges to set and monitor realistic targets;
5. Allowing colleges to assess its impact on the environment.

Objectives

The main aim of the eMandate programme, which remains a free service to colleges, is to provide a vital 'benchmarking' tool for measuring colleges' efficiency and identifying best practice. Sector wide participation further enhances the value, credibility of this resource by capturing the diversity and experiences within the sector.

Some basics

Colleges are required to provide data:

- For their total college estate.
- For two years (2008/09 and 2009/10) in 2011.
- In the standard IPD data collection template issued to colleges participating in eMandate

2011 reporting

All participant colleges will be able to access their own data and measures together with benchmark value measures via online reporting. This service will be accessed via the eMandate website.

www.emandate.co.uk

7 key steps for success ...

1. **Review the data requirement.** The 2011 eMandate service requires participant colleges to provide data about their college estate. As a nominated college contact your key responsibility is to assemble the required data. The dataset required for 2011 is a subset of previous eMandate programmes.
2. **Establish where and who in your college can provide the data required.** Having reviewed the performance data required (see page 7) contact key individuals within college who may need to contribute (ie finance, environmental team, principal, etc). Bear in mind that you are **required to provide data for FY 2008/09 and 2009/10.**
3. **Set early internal deadlines.** If you are reliant on others to provide parts of the data ensure they understand why they are being asked to help and are clear by what data they need to provide it.
4. **Get started!** All data should be transferred using the data template to IPD by **29th July 2011.** This target date has been set to encourage colleges to engage early.
5. **Focus on accuracy.** Review outputs carefully and observe the validation checks which are built into the data assembly template. Endeavour to action any subsequent points about data quality raised by IPD. If your college can return its data by 29th July **there will be ample time thereafter to refine and tidy up** potential data errors.
6. **Communicate and share results** within your college to ensure use and to raise questions. Exposure and transparency will help ensure and develop data quality as well as raise performance across the estate.
7. **Go online.** All data provided by your college will be accessible via online reporting on www.emandate.co.uk. Data is presented in standardised performance metrics and is therefore comparable directly with the results for other colleges. Find out how your college compares! Is there scope for change?

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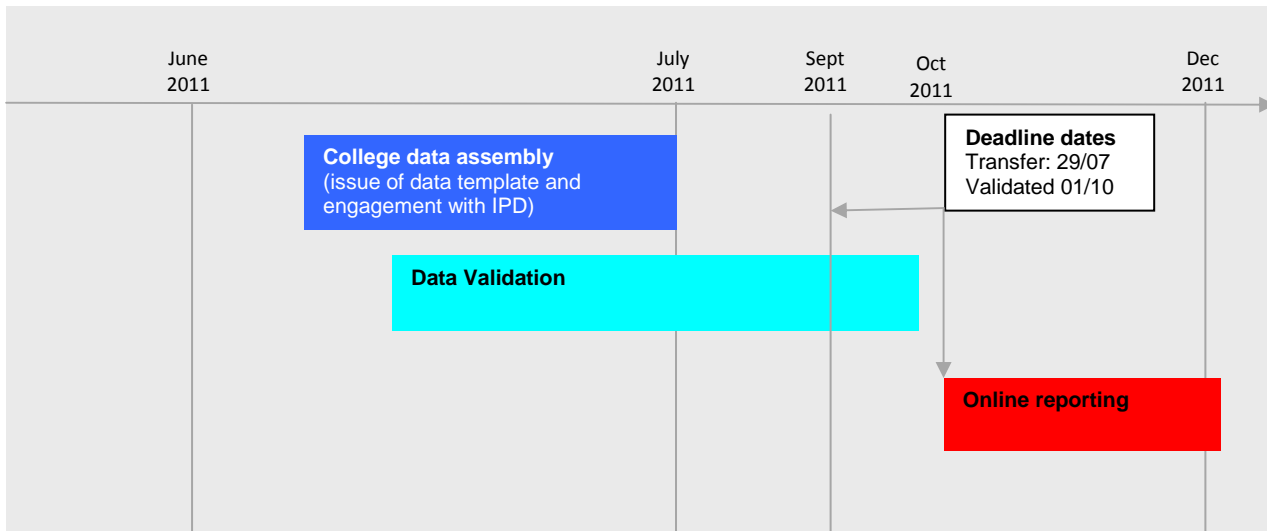
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Programme phases

Principal phases: 2011 eMandate programme



The chart above illustrates the three key phases for eMandate during 2011. Colleges should anticipate active engagement in terms of assembling and validating college data during the data assembly and validation phases above.

College data assembly phase

Data assembly phase will commence upon receipt of the data collection template. Each college has been issued with a bespoke Excel template. The template shows all data required, has some areas pre-populated and shows details of any historic data return (ie. 2007/08) your college may have made for eMandate.

A guide to the template is provided on page 8 of this document but colleges are expected to complete values for each data item in the Basic Input sheet. **The completed template should be saved and sent via e-mail to emandate@ipd.com by 29th July 2011.**

The 29th July data transfer date has been set to ensure colleges and IPD have sufficient time after the initial data transfer to work together to validate and to improve the accuracy of data. Colleges will be able to augment their initial data return up until September 2011.

Data validation

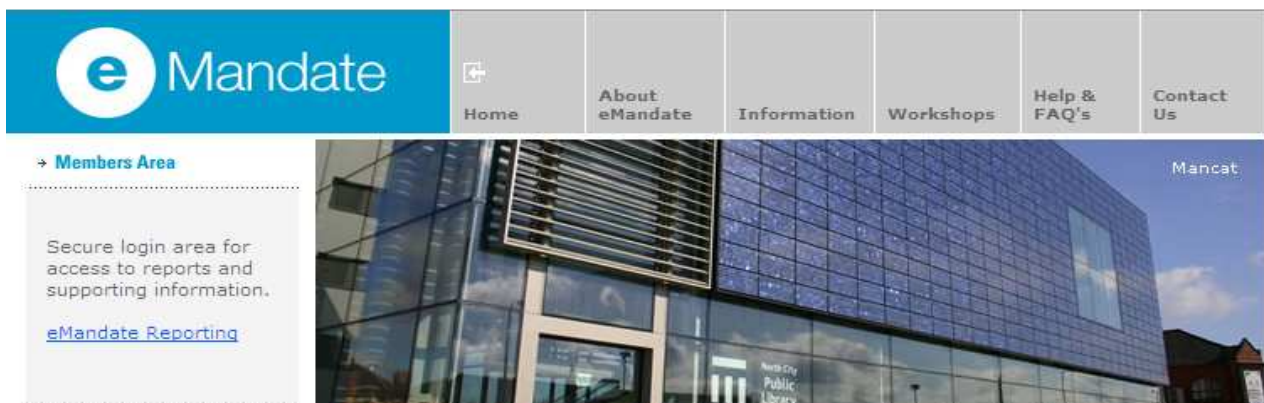
Colleges are responsible for the accuracy and reliability of data submitted to eMandate. IPD will respond to each data template received highlighting any issues which may characterise data.

Additionally, prior to sending your template to IPD please review any data validation checks which may be shown on sheets 'Basic' and 'Secondary Validation'.

Reporting

Once a comprehensive dataset has been assembled for 2008/09 and 2009/10 the results will be accessible to colleges via www.emandate.co.uk

Principles for 2011



1. Data to be collated and transferred using the eMandate data template to IPD by 29th July 2011.

The deadline for receipt of data during 2011 is the 29th July. Colleges are encouraged to return data template by that date. **Early submission creates more time for data validation** and IPD will work with colleges for another two months to tidy up and augment data.

2. 2008/09 and 2009/10 financial years.

Data is to be provided for two years. Columns for both years data are provide in the 2011 data collection template. Any fixed point data (ie occupied space) should be as at year end.

3. VAT. All costs should be provided including VAT unless fully recoverable.

4. Cost definitions are based on those in the IPD Cost Code.

Definitions for each eMandate data item are available on www.emandate.co.uk The IPD Cost Code is also downloadable at www.ipdoccupiers.com/costcode.

5. Estimated data.

In some cases it may be necessary to attribute costs. We recommend using space as a way of attributing cost. A consistent approach is important so year on year comparison of data are reliable.

6. Zero and null data values.

There may be data for some areas you are unable to access (ie energy consumption data in some colleges may be difficult to access). Please do not enter a zero (0) to identify a “not known” value. If you are unable to provide data leave a “null response” in the data template.

7. Mandatory data.

In order to provide effective analysis for each college, a minimum dataset is required. The minimum dataset represents a refinement of previous datasets requested for eMandate. There are less data items to assemble and previously “difficult to obtain data” has been omitted.

Data requirements 2011

- All eMandate data is to be entered into the data collection template issued to your college. The completed data template is to be returned to IPD via e-mail (emandate@ipd.com).
- Data is required for **2008/09 and for 2009/10**.
- The dataset required for eMandate in the 2011 service is made up from significantly less data items. The **refined dataset** supports a refined set of key indicators to establish performance in varied areas for the college estate.

The data requirement falls into several distinct categories. These are outlined below. Full details of the entire dataset are available on www.emandate.co.uk.

- 1. Descriptive data.** Much of this data will be already completed in your college template (if the college has previously engaged in eMandate). Please be sure to check and revise any inaccuracies.
- 2. Space data.** Space data records fundamental data to report and understand the size and space profile of the college estate. It is important to understand how many buildings you manage, how much space, the type of space (tenure) and the age profile of that space.
- 3. Environmental data.** Energy, water and waste. To report environmental performance of the estate some fundamental consumption data is required. Some level of detail is required in this section to permit a more accurate assessment of the profile of energy use within the college.

4. Condition & Suitability Data. Year on year assessment and reporting of the condition of the college estate is important – it helps report progress and can also help secure more investment if condition is behind peer colleges. While a condition review will not be carried out annually an internal revision of data should be conducted to ensure data is as up-to-date as possible.

5. Cost data. The cost data requirement has been reduced to capture key operating costs driven by the size, type and profile of each college estate. The costs required are,

- ▶ Leasehold rent paid
- ▶ Insurance premium costs
- ▶ Net service charges
- ▶ Energy costs
- ▶ Water/sewerage costs
- ▶ Cleaning
- ▶ Security
- ▶ Waste disposal
- ▶ Maintenance costs (split by planned and reactive)
- ▶ Internal estate management costs
- ▶ External advisor costs (estate management)

6. Other business data. Additionally IPD will utilise other data which the college is already required to provide annually to funding agencies. Fields to illustrate this data are included in the data template but you are not expected to enter these. The fields include,

- ▶ Total operating income
- ▶ Total college expenditure
- ▶ Capital expenditure
- ▶ Staff numbers
- ▶ Learner numbers

Completing the data template

All eMandate data is to be entered into the data collection template issued to your college. The following notes should help ensure this is a straight forward task.

- 1. Template format.** The data template issued to your college is saved as a Microsoft Excel 2003 format file. This should open and be functional across all colleges.

The template is protected and you will only be able to enter data in those parts of the Basic Input sheet where it is required. Please do not attempt to unprotect the template; this may create problems when your college data is reloaded to IPD systems.

- 2. Unique data.** If your college has previously participated in eMandate the template will contain the data for the 2007/08 year. This should act as a very useful reference point as you aim to build up the data to present a picture of how the estate may have evolved in the years since.
- 3. Basic Input sheet.** The template is made up from several sheets. **You are only required and only able to enter the required data in the Basic Input sheet.** Data cannot be entered on any other sheet.

Data is required for 2008/09 in column E and for 2009/10 in column F. Both columns are shaded in blue.

- 4. Data validation.** The template contains two sheets which will highlight to you, as you enter data, any issues surrounding your data. **Please refer to data validation sheets and action any issues before sending your template to emandate@ipd.com.**

- 5. Basic and advanced validation sheets.** The Basic Validation sheet simply highlights any missing data items. Advanced validation checks will only be visible if the data entered in the Basic Input sheet is inconsistent (ie does not total correctly, is out of range).

- 6. Estate ratios sheet.** The estate ratio sheet simply uses the data entered by the college to present all key metrics and performance indicators. If no subsequent changes to data are made, the results for your college will remain unchanged. The following data is presented,

- ▶ **Measure.** This value represents the result in each area for the college.
- ▶ **Median.** The median value is the average across all UK colleges. The median is based on 2007/08 data (the last complete year of eMandate) and helps set your own measure in context.
- ▶ **Difference.** The difference in % between the measure and the median average.
- ▶ **Lower quartile.** The value (for each measure) below which only 25% of all UK colleges fell in 2007/08. This level helps colleges identify any extreme data values.
- ▶ **Upper quartile.** The value (for each measure) above which only 25% of all UK colleges fell in 2007/08.
- ▶ **Validation.** Any entries in this column identify issues about measures we suggest are investigated.

- 7. Return the template.** The template should be completed, saved and e-mailed to IPD using emandate@ipd.com

Once IPD have received the template we will run a series of other checks across data. We will be back in touch with colleges to highlight any other issues surrounding data quality. **Please action any requests to review and refine data.**



IPD and funding agencies



The Skills Funding Agency and the Young People's Learning Agency has re-launched **eMandate**, the estates management data collection programme for further education colleges. The service is funded by these agencies who, together with colleges who have previously engaged in the service, have found the information valuable in planning capital works and investment.

About IPD

- Property performance measurement is IPDs **only** business.
- IPD is **independent**
- IPD provides **trusted and reliable data** to the UK and international property market
- IPD Occupiers operates **leading real estate performance measurement systems** across both private and public sector

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IPD's indices are the basis for the developing commercial property derivatives market, and the most authoritative measures of real estate returns worldwide.

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Established in 1994, we hold the largest independent database of annually updated corporate real estate information in the UK.