TRIBAL

# Investment & Asset Management Workshop

# NZBT+ Supporting the Sector

Robin Hallows

Wednesday 11th November 2015

# Presentation Outline

TRIBAL

- NZBT+ Overview / Refresher
- What data is currently held in NZBT+?
- Metrics / Outputs
- Looking ahead - Potential data capture and NZBT+ evolution to support I&AM

TRIBAL

- 2007 Early Adopter Group of 7 ITPs (2006 dataset)
- Rolled out to all ITPs from 2008
- Wānanga and University Participation from 2009
- Participation as a condition of funding from 2013
  - Complete TEI sector dataset from 2012+

# Overview - Process Refresher

TRIBAL

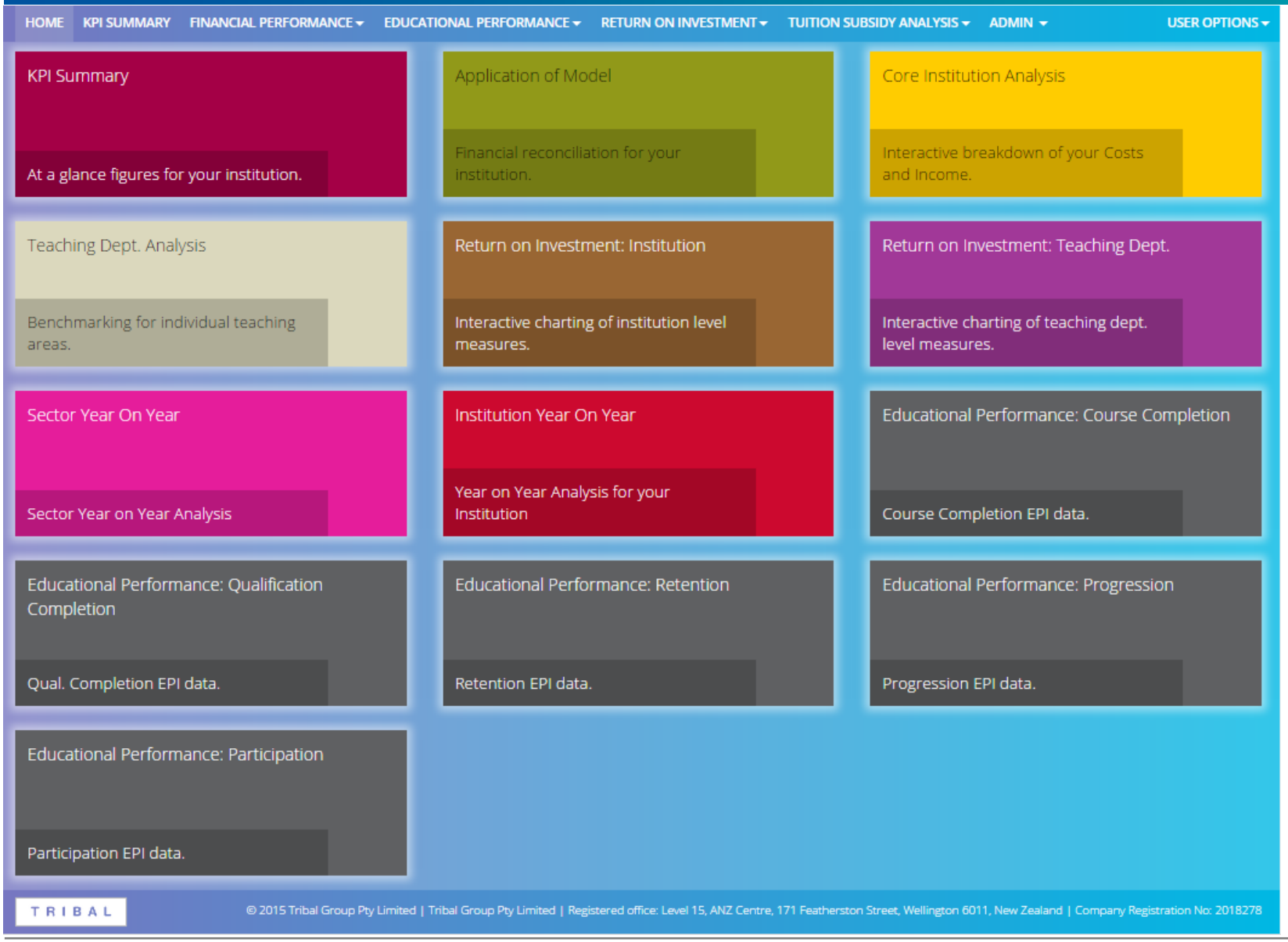
- **Providers supply** Tribal with 3 key data-sets:
  - A copy of your **accounts (P&L)** down to cost centre/business unit level
  - An extract from **payroll** detailing FTE, cost, department and job-title
  - A summary of **EFTS** by cost centre, NZSCED, funding source and funding category
    - *Supporting / contextual data around **facilities**, library, IT and your student cohort.*

- Tribal work with your staff to verify, understand and bring these 3 data-sets together and allocate it to the NZBT model in a consistent way

- A lot of data on the sector, for the sector, across many years.
- Can be accessed via the web: https://nzbit.tec.govt.nz/

# Overview - Website

TRIBAL



# Overview - Website

TRIBAL

HOME | KPI SUMMARY | FINANCIAL PERFORMANCE | EDUCATIONAL PERFORMANCE | RETURN ON INVESTMENT | TUITION SUBSIDY ANALYSIS | ADMIN | USER OPTIONS

Benchmarks | Navigation

**Select Benchmarks:**

(2014) ITP Sector Avg, (2014) TANZ Avg, (201...

**Primary Benchmark:**

(2014) ITP Sector Avg

**Comparison Basis:**

Results normalised to your Core Income

Results Table | Charts | Key Contextual Data

**Core Institution Costs**

$000s | FTE | $ pa per FTE

The data below shows a high level summary of core expenditure across the functional categories within the institution. Comparison institutions have been adjusted to the same volume of core income as your institution.

| | Your Result | (2014) ITP Sector Avg | (2014) TANZ Avg | (2014) <$30mil Core Income | Variance To (2014) ITP Sector Avg | |
|---|---|---|---|---|---|---|
| Teaching & Research | $12,861 | $12,796 | $12,677 | $13,508 | ↑ | $66 |
| Library / LRC Services | $567 | $439 | $484 | $378 | ↑ | $128 |
| Student Services | $625 | $574 | $520 | $658 | ↑ | $51 |
| Student Administration | $873 | $945 | $851 | $932 | ↓ | -$73 |
| IT Support | $1,513 | $1,583 | $1,485 | $1,427 | ↓ | -$71 |
| Central Administration | $3,351 | $3,830 | $3,703 | $4,810 | ↓ | -$479 |
| Marketing / Business Development | $2,145 | $1,907 | $1,594 | $1,971 | ↑ | $239 |
| Facilities | $2,046 | $2,639 | $2,417 | $3,084 | ↓ | -$593 |
| Depreciation | $3,441 | $2,663 | $2,846 | $2,873 | ↑ | $778 |
| **Total** | **$27,423** | **$27,376** | **$26,577** | **$29,642** | ↑ | **$47** |

TRIBAL © 2015 Tribal Group Pty Limited | Tribal Group Pty Limited | Registered office: Level 15, ANZ Centre, 171 Featherston Street, Wellington 6011, New Zealand | Company Registration No: 2018278

# Overview - Website

TRIBAL

HOME | KPI SUMMARY | FINANCIAL PERFORMANCE | EDUCATIONAL PERFORMANCE | RETURN ON INVESTMENT | TUITION SUBSIDY ANALYSIS | ADMIN | USER OPTIONS

## Facilities

**Select Benchmarks:**

(2014) ITP Sector Avg, (2014) TAN...

**Primary Benchmark:**

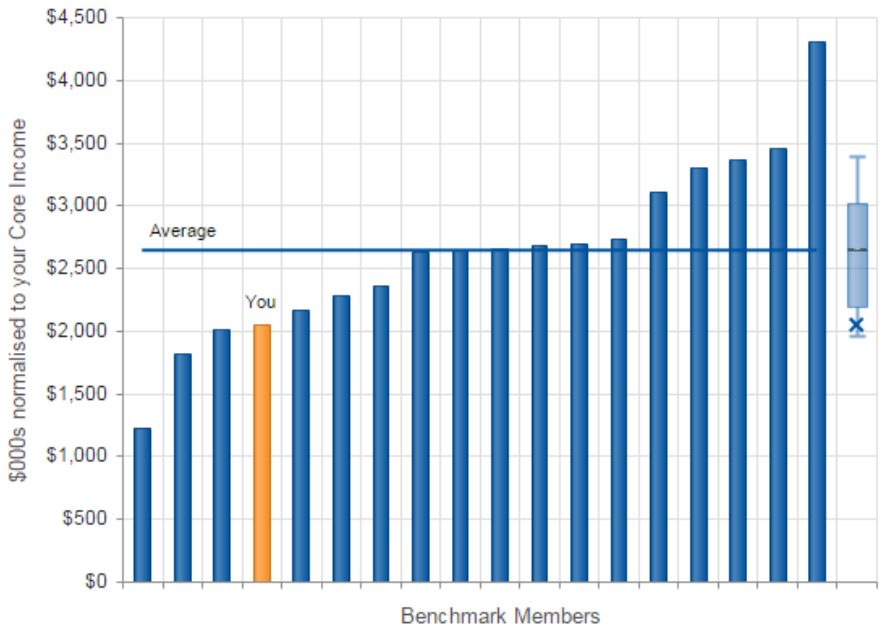
(2014) ITP Sector Avg

**Comparison Basis:**

Results normalised to your Core I...

$000s | FTE | $ pa per FTE

The data below shows the breakdown of facilities costs by both pay and non-pay, plus costs relating to short term space hire. Comparison institutions have been adjusted to the same volume of core income as your institution.




Print | Close

| | | | | | | |
|---|---|---|---|---|---|---|
| Facilities | | $2,046 | $2,639 | $2,417 | $3,084 | -$593 |
| Depreciation | | $3,441 | $2,663 | $2,846 | $2,873 | $778 |

TRIBAL

# Current Data

TRIBAL

- What data does NZBT+ currently have that might be helpful?
  - Opex facilities costs
  - Staffing FTEs, costs and taught hours*
  - EFTS
  - sqm and rooms by type
  - Offsite delivery estimates
  - Depreciation

**taught hours for ITP and Wānanga only*

TRIBAL

- Facilities costs

| | (2014) TEI Sector |
|---|---|
| Maintained Facilities Pay | $36,693 |
| Maintained Facilities Non-Pay | $303,796 |
| Short Term Space Hire | $7,560 |
| Total | $348,049 |

| | (2014) TEI Sector |
|---|---|
| Lease Costs | $60,252 |
| Energy | $45,528 |
| Cleaning | $40,539 |
| Repairs & Maintenance | $78,003 |
| Grounds Maintenance | $7,886 |
| Security | $19,724 |
| Architect Fees | $16,729 |
| Rates | $4,972 |
| Property Insurances | $22,446 |
| Water & Sewerage | $3,786 |
| Refuse Disposal | $2,315 |
| Other Costs | $1,614 |
| Total | $303,793 |

Results in $'000s

TRIBAL

- Staffing
  - 31,044 FTEs
  - 13,825 teaching and research FTEs
    - 10,185 teaching FTEs
    - 3.2million taught hours delivered (*excl. Universities*)

- EFTS
  - 229,475 Total EFTS
    - 205,577 Intramural
    - 23,898 Extramural

- Sqm (buildings)
  - 2.7mil sqm across the TEI sector including:
    - 791k sqm of teaching space
    - 134k sqm of libraries
    - 262k sqm of T&R staff workrooms
    - 276k sqm of general staff workrooms
    - 222k sqm of storage/cleaning
    - 499k sqm of corridors and toilets

  - 13,819 teaching rooms
    - 4,945 classrooms
    - 8,874 laboratories and workshops

- ‘Offsite’ activity
  - $350.1mil of estimated offsite activity
  - 504,600 taught hours delivered offsite*
  - 23,900 extramural EFTS
- Depreciation
  - $441.1mil of depreciation

**not captured for University sub-sector*

TRIBAL

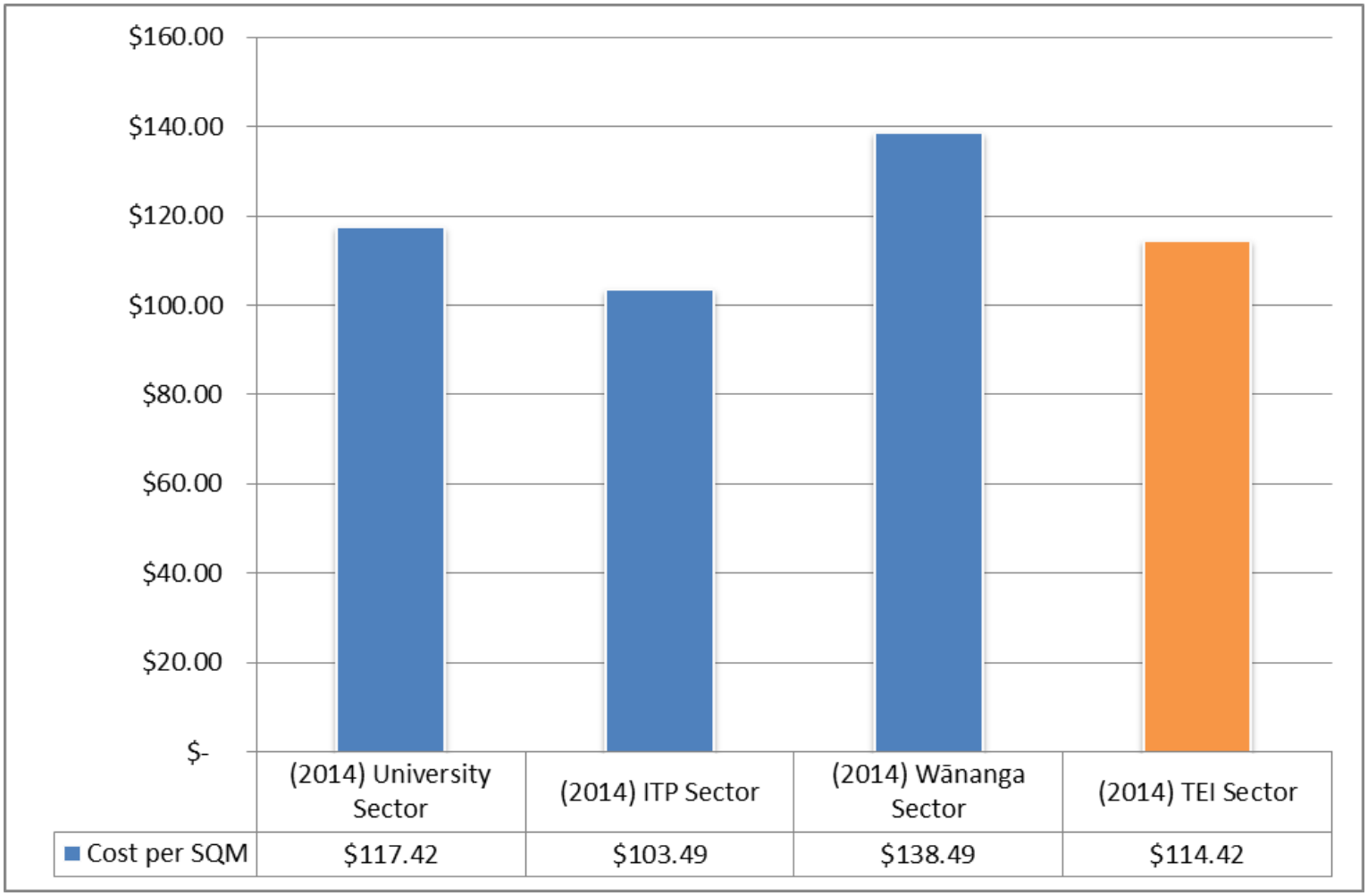
# Metrics

TRIBAL

- Metric options:
  - Currently reported via NZBT+
    - Running cost per sqm
    - sqm per $100,000 onsite core income
    - Room pressure (taught hours per room per day)

  - Not reported but calculable from NZBT+ data
    - Total sqm per Intramural EFTS
    - Total sqm per FTE
    - Total sqm per T&R FTE
    - T&R direct sqm per intramural EFTS
    - Ratio of learning sqm to non-learning sqm
    - Intramural EFTS per learning room
    - T&R FTEs per learning room

# Metrics – Running Costs




Readily available in NZBT+ for all TEIs…

# Metrics – Running Costs

NZBT+ shows the range of running costs per sqm against selectable benchmarks

# Metrics – Running Costs

TRIBAL

Repairs & Maintenance

Select Benchmarks:

(2014) TANZ Avg

Primary Benchmark:

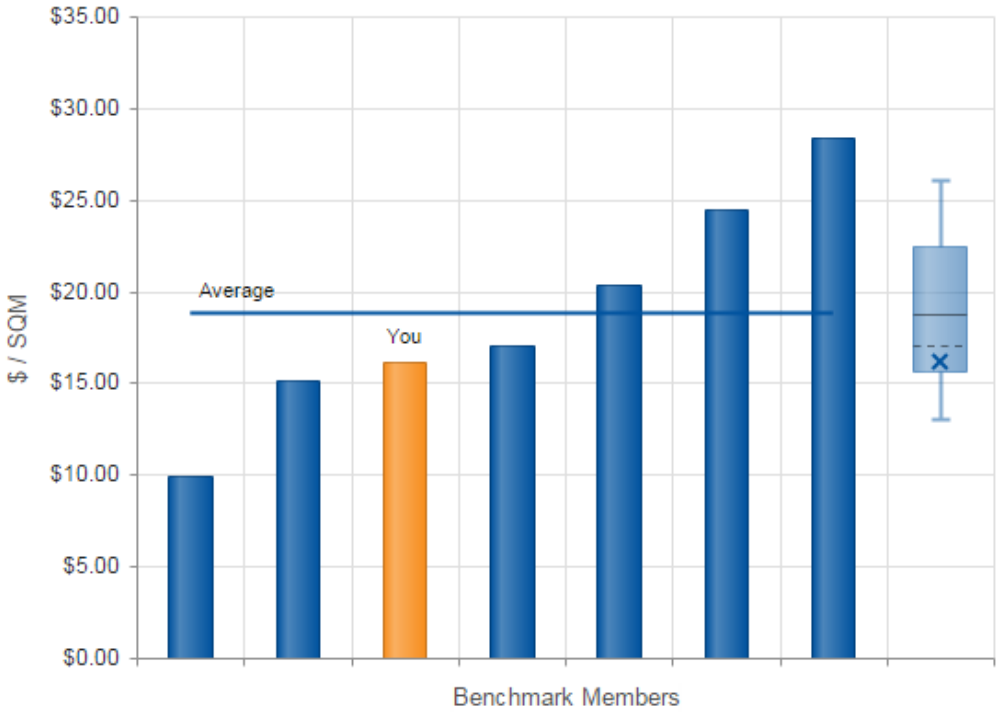
(2014) TANZ Avg

Comparison Basis:

$ / SQM

$ / SQM

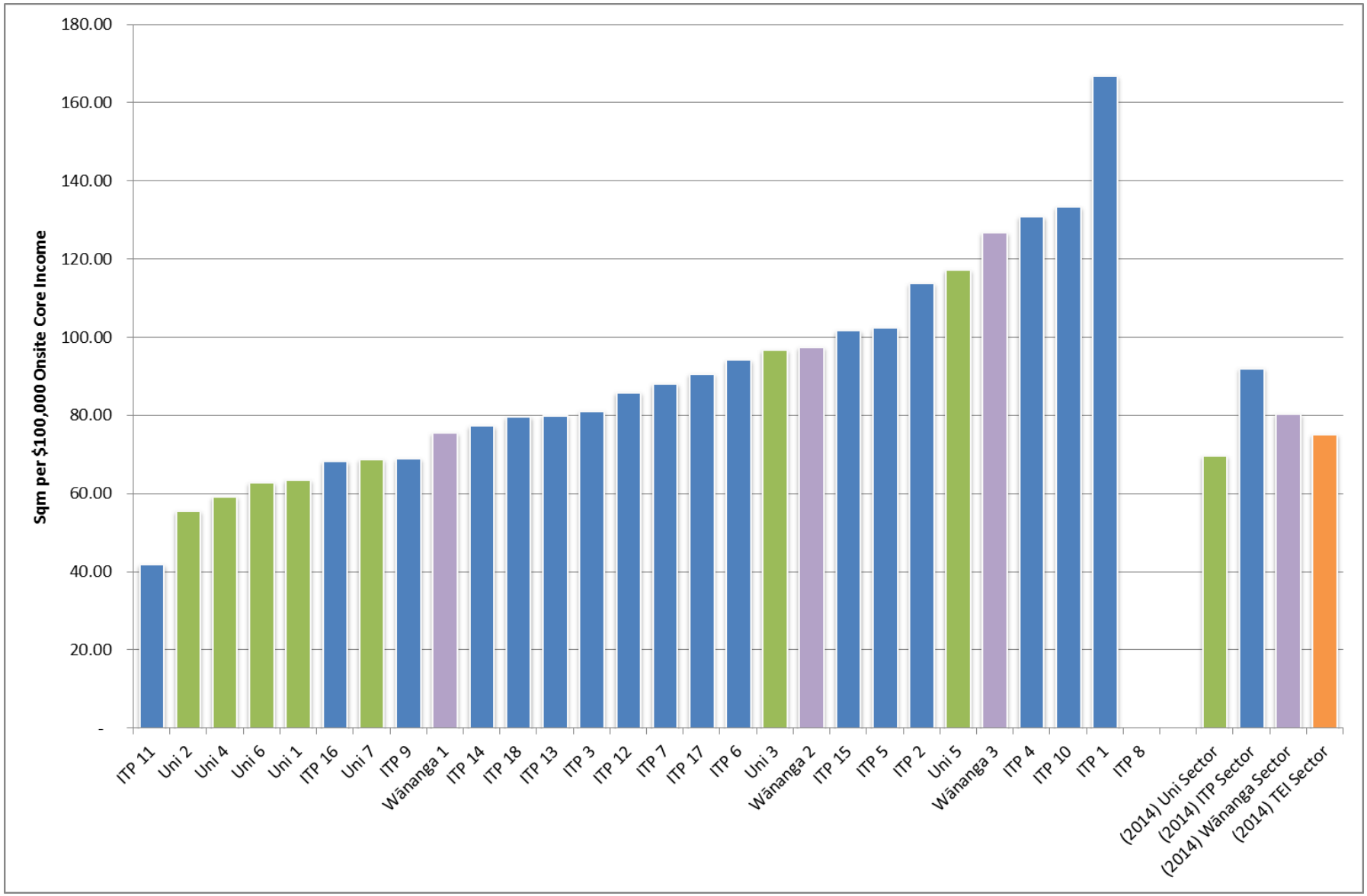
Results are expressed as a cost ($) per maintained m² basis.



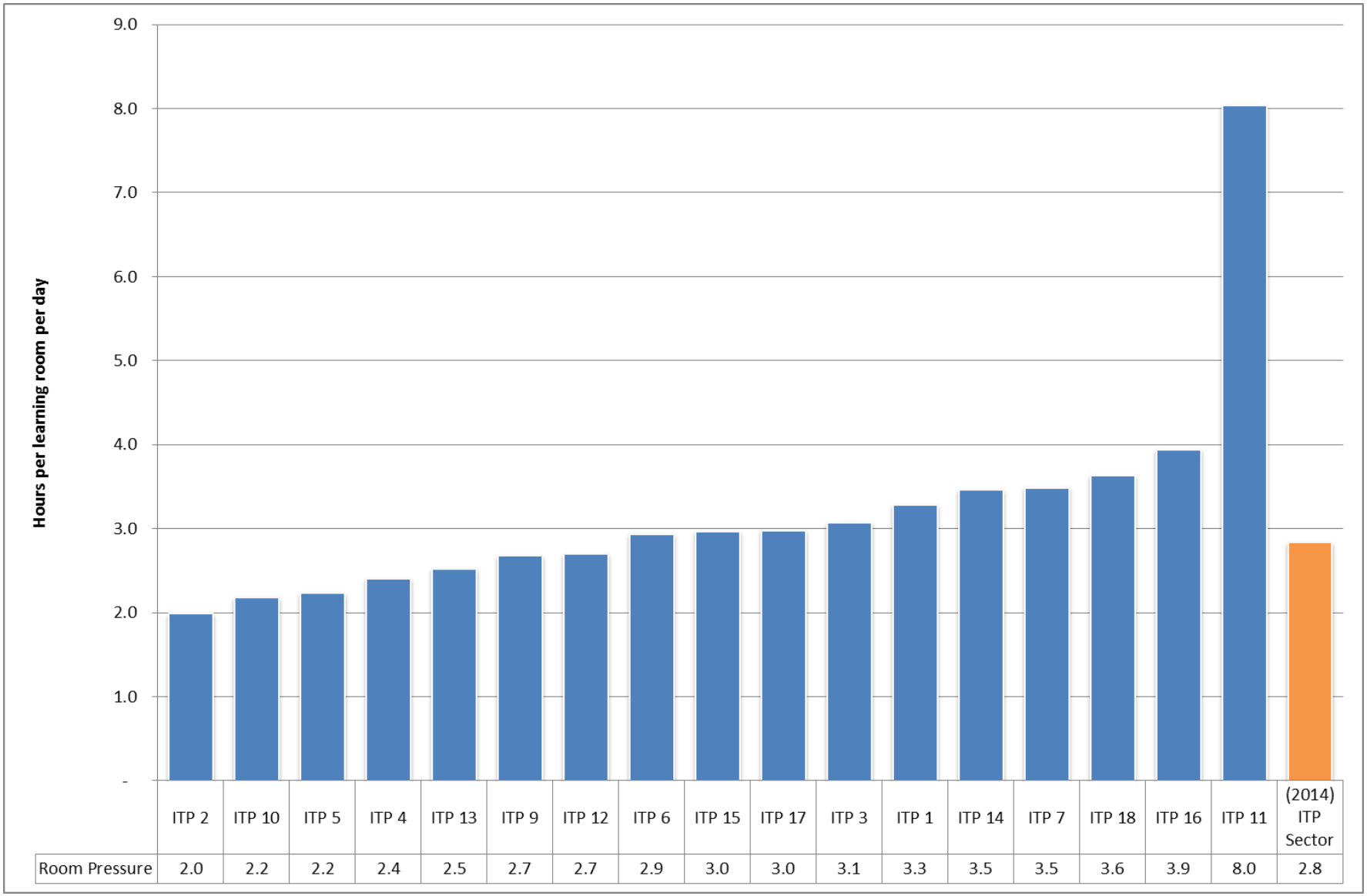

Print Close

NZBT+ shows varying levels of granularity against selectable benchmarks

# Metrics – Sqm per $100,000 Onsite Core Income

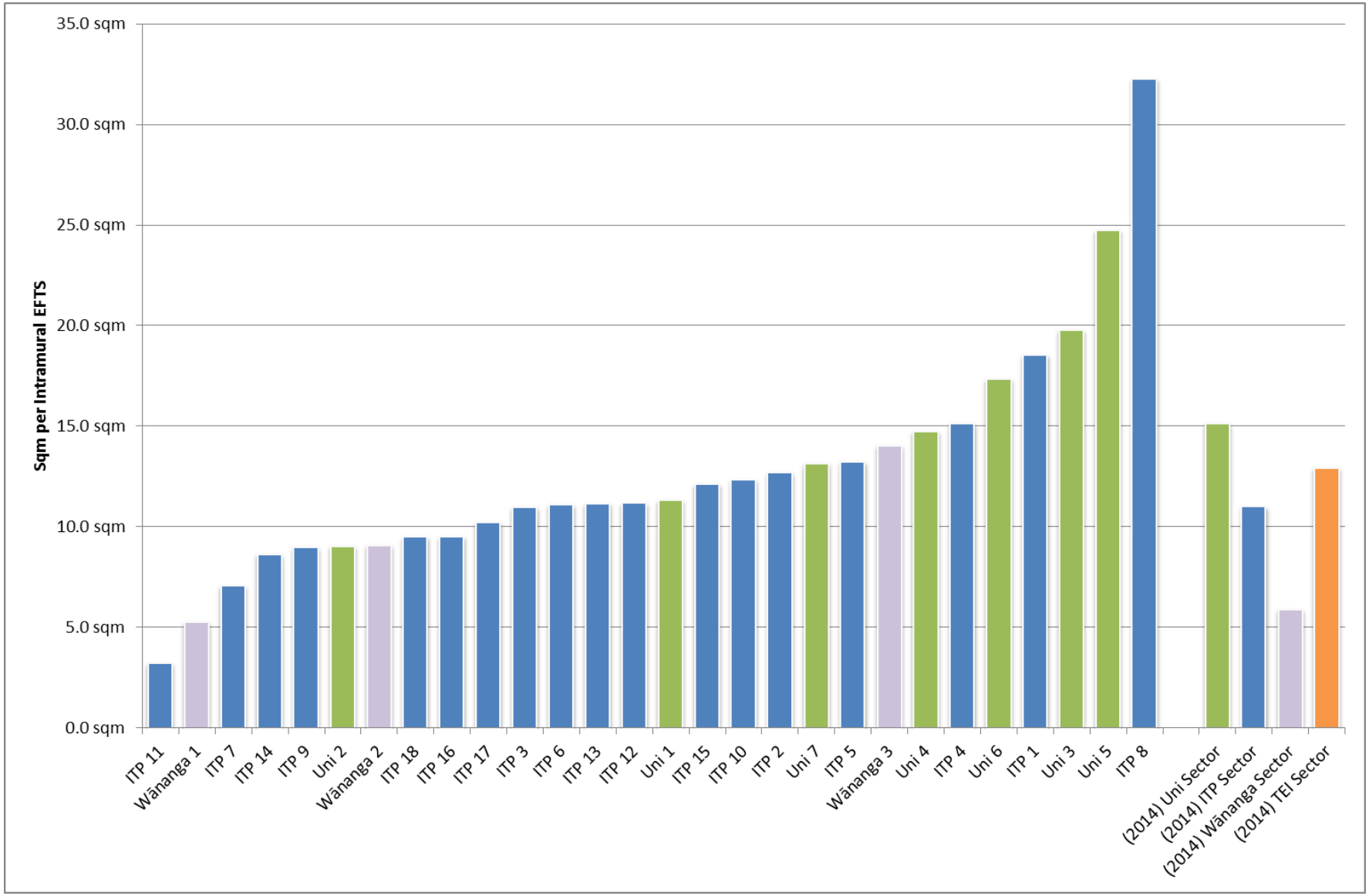


# Metrics – Room Pressure (ITPs)

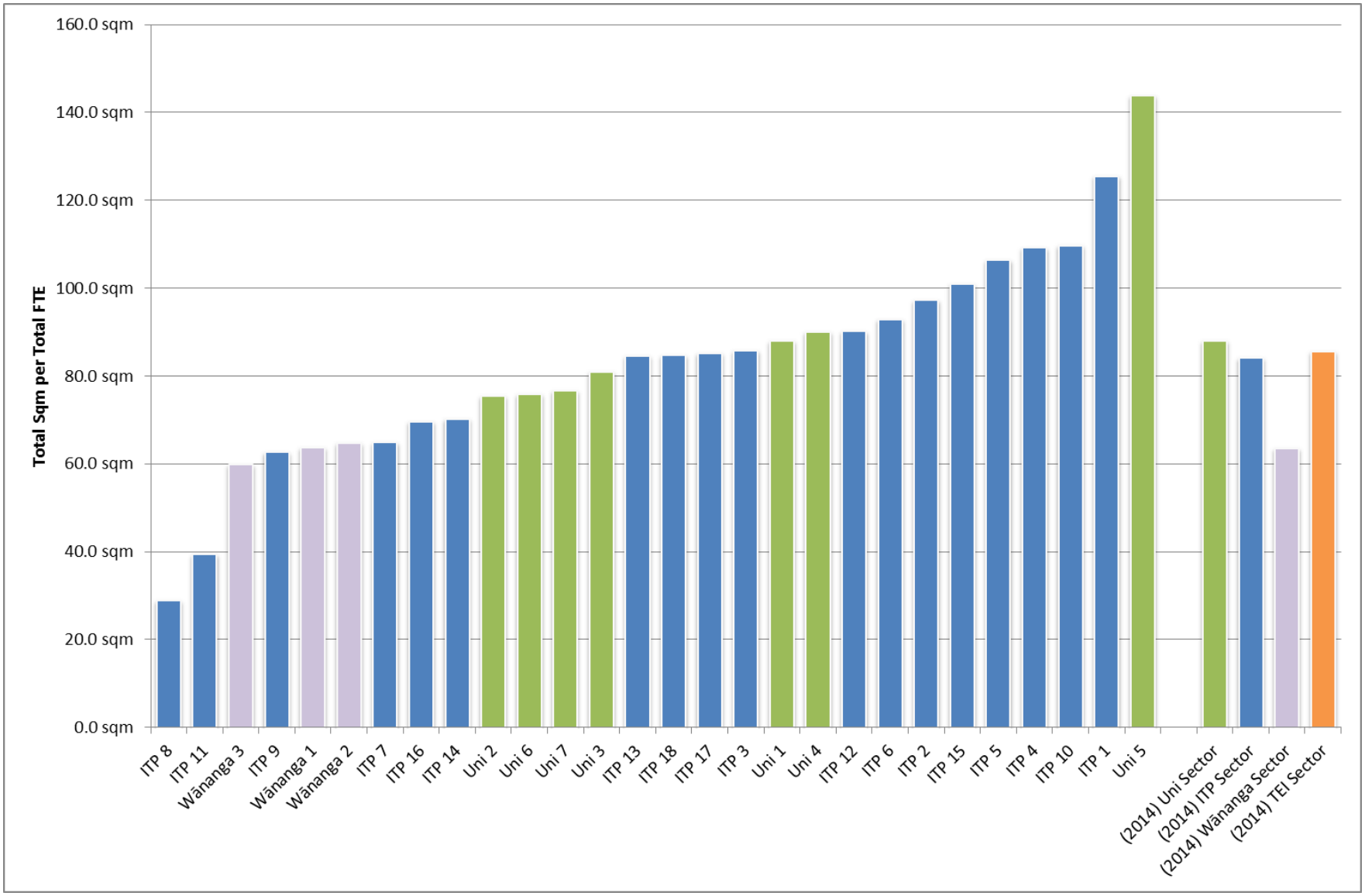



| | ITP 2 | ITP 10 | ITP 5 | ITP 4 | ITP 13 | ITP 9 | ITP 12 | ITP 6 | ITP 15 | ITP 17 | ITP 3 | ITP 1 | ITP 14 | ITP 7 | ITP 18 | ITP 16 | ITP 11 | (2014) ITP Sector |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Room Pressure | 2.0 | 2.2 | 2.2 | 2.4 | 2.5 | 2.7 | 2.7 | 2.9 | 3.0 | 3.0 | 3.1 | 3.3 | 3.5 | 3.5 | 3.6 | 3.9 | 8.0 | 2.8 |

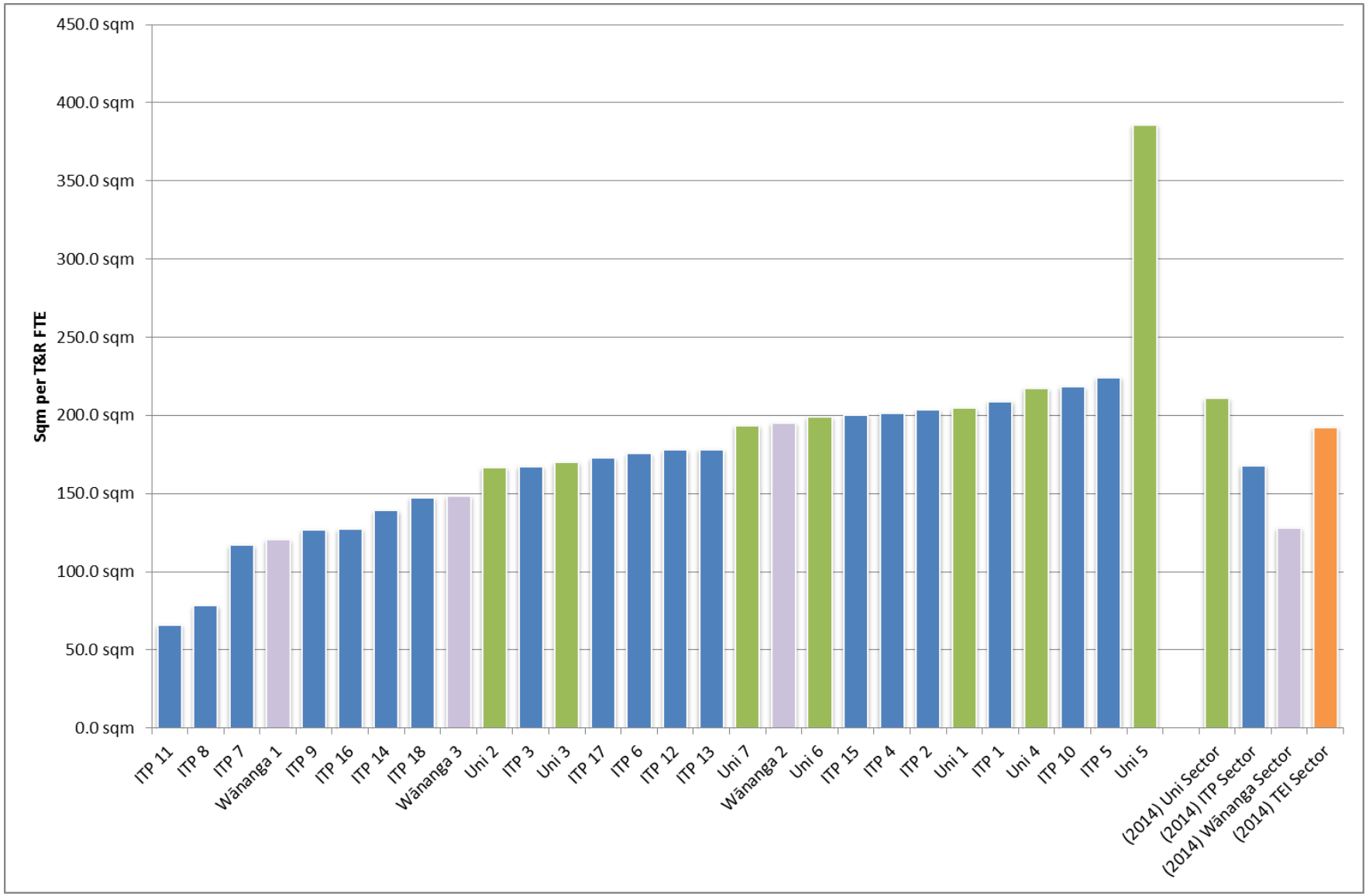
# Metrics – Total sqm per Intramural EFTS



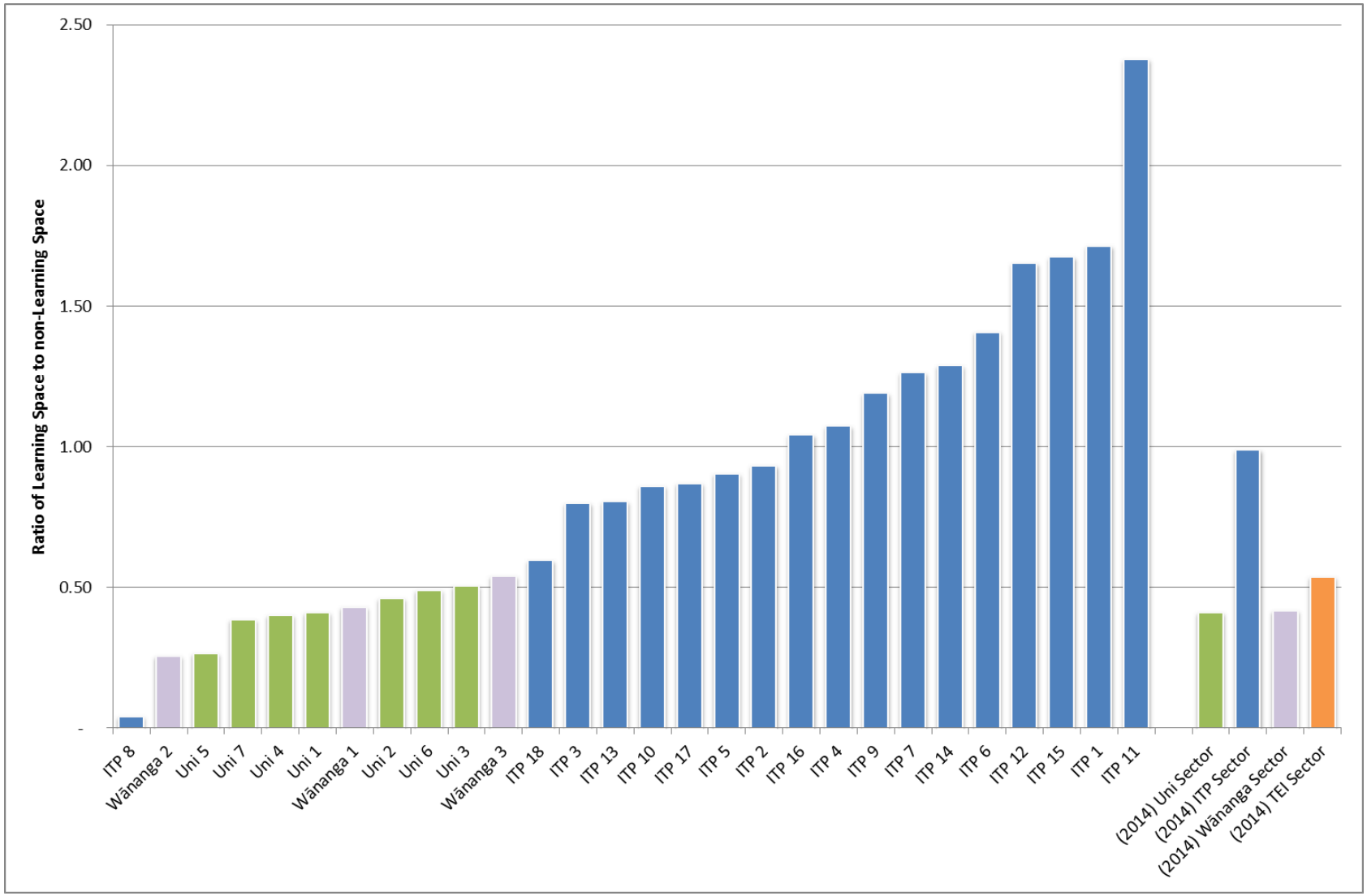
# Metrics – Total sqm per Total FTE



# Metrics –Total sqm per Teaching and Research FTE

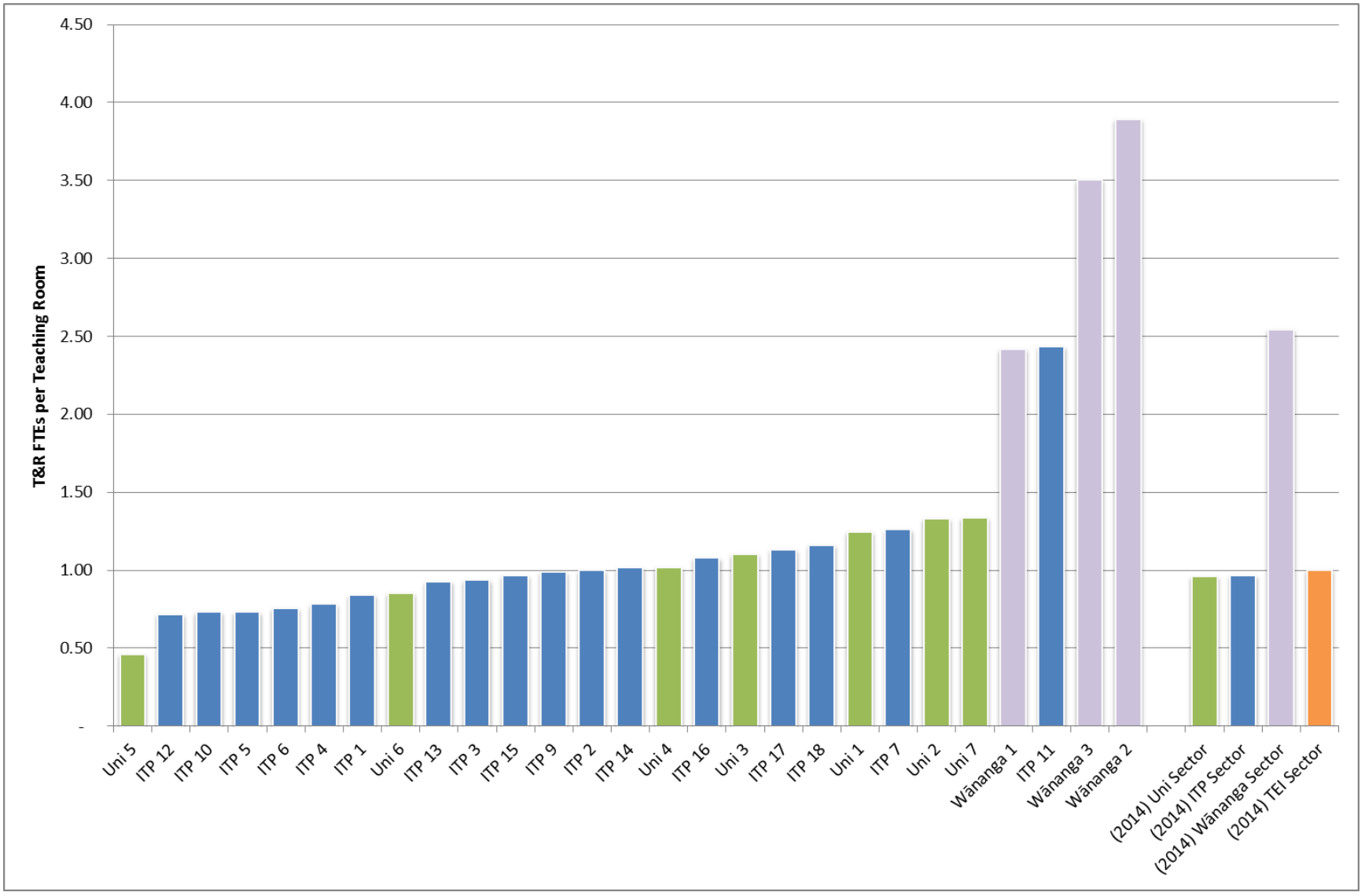


# Metrics –Ratio of Learning Space to Non-Learning Space




'Learning space' – classrooms, labs & workshops, libraries/LRCs

# Metrics – Teaching and Research FTEs per Teaching Room



# Metrics – Summary

TRIBAL

| | (2014) Uni Sector | (2014) ITP Sector | (2014) Wānanga Sector | (2014) TEI Sector |
|---|---|---|---|---|
| Cost per sqm | $ 117.42 | $ 103.49 | $ 138.49 | $ 114.42 |
| m2 per $100,000 onsite core income | 69.5 sqm | 92.0 sqm | 80.3 sqm | 75.0 sqm |
| Room pressure (taught hours per room per day) | - | 2.8 | 6.3 | 3.1 |
| Total m2 per intramural EFTS | 15.1 sqm | 11.0 sqm | 5.9 sqm | 12.9 sqm |
| Total m2 per FTE | 88.0 sqm | 84.0 sqm | 63.5 sqm | 85.5 sqm |
| Total m2 per T&R FTE | 211.0 sqm | 167.9 sqm | 127.9 sqm | 192.1 sqm |
| Ratio of learning m2 to indirect m2 | 0.41 | 0.99 | 0.42 | 0.54 |
| Intramural EFTS per teaching room | 13.39 | 14.74 | 55.51 | 14.88 |
| T&R FTEs per teaching room | 0.96 | 0.97 | 2.55 | 1.00 |
| Intramural EFTS / Teaching FTE (group size) | 23.18 | 15.93 | 23.36 | 20.18 |

TRIBAL

# Looking ahead

- Tribal, working annually with all 29 providers, is well placed to collect and report on sector wide data

- What are the most useful metrics for Sector / TEC / Treasury?
  - What does the group want?
  - Should Tribal collect the data?
  - Should we report it via NZBT+?
  - How can NZBT+ better complement TEFMA or other Analyses?