University College Dublin

REVIEW GROUP REPORT

Periodic Quality Review

UCD Estate Services

August 2017

Accepted by the UCD Governing Authority at its meeting on 27 March 2018

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Key Findings of the Review Group

The Review Group has identified a number of key findings in relation to areas of good practice operating within UCD Estates and key areas which the Review Group would highlight as requiring future improvement. The main section of this Report sets out all observations, commendations and recommendations of the Review Group in more detail. A composite list of all commendations and recommendations is set out in Appendix 1.

Examples of Good Practice

The Review Group identified a number of commendations, in particular:

- The Unit has been very effective in managing and delivering capital projects, even with the constraints of working within national frameworks.

- The credibility of the Estates Senior Management Team (ESMT) as individuals is high, comprising professionals with a broad set of skills.

- The users who met with the Review Group acknowledged and praised the contribution made by UCD Estates in creating a beautiful and attractive campus, which has been well-planned and thought through.

- It was noted that the outsourced service providers, particularly the technical service providers, report regularly and the data is owned by UCD, which is to be commended.

- The energy-savings and reduction in CO_2 emissions achieved by UCD Estate Services are to be commended.

- Users from within UCD and external to UCD speak very positively about the unit and their interactions with the unit.

- The role played by the Estate and its appearance in attracting students and 3rd semester activity is very important.

- Projects, such as the Woodlands walks and UCD Community Garden, have promoted a corporate social responsibility within UCD.

- The SWOT sessions and focus groups provided valuable input for the review and gave the Unit opportunities to interact. Unit staff expressed a wish to continue to do these and the Review Group would support this.

- The contractors and other stakeholders who met with the Review Group reflected that their relationships with UCD Estate Services were positive, that they found UCD Estate Services very progressive and that UCD was considered to be a trail-blazer.

Prioritised Recommendations for Improvement

The full list of recommendations is set out in Appendix 1, however, the Review Group would suggest that the following be prioritised:

A. Leadership and Structure

- The Review Group recommends that the Estates Senior Management Team (ESMT) review the vision, organisation and management structure of UCD Estates. It is recommended that this be commenced through facilitated sessions. This should be an ongoing process, that is reviewed on a regular and frequent basis, allowing it to be adapted as needed.

- Consideration should be given to the management structure of the Unit, for example, the Director could be supported by three or four Heads of/Assistant Directors, with responsibility for portfolios of complementary activities.

- There appear to be limited opportunities for career progression throughout the Unit, which is having a negative impact upon staff morale. ESMT need to consider career progression, recognition and reward opportunities within and across the Unit.

- The role of marketing UCD Estate Services more effectively could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures. This individual could work closely with University Relations and could be the UCD Estate Services champion.

B. Risk Management

- The Review Group recommends that, in the case of user-managed buildings, UCD consider that all works are procured and project-managed through UCD Estate Services, whilst funding of works is still provided by the buildings occupiers. In that case, UCD Estate Services would need to be appropriately resourced to enable them to take on this role.

- Standard operating procedures (SOPs) to ensure consistent approaches to compliance and safety management in user-managed buildings should be developed, as a matter of urgency. The SOPs should clearly outline the responsibilities of all relevant parties.

- The Unit should also review the range of existing Health & Safety (H&S) policies to identify any possible gaps, with a view to developing, in conjunction with the UCD Safety, Insurance, Operational Risk and Compliance (SIRC) Office, stand-alone policies to address specific H&S issues for example, a legionella policy. These policies should be reviewed on a systematic basis.

- The current approach to the provision of out-of-hours supports for residences puts a lot of responsibility on the Residential Assistants (RAs), Senior Residential Assistants (SRAs) and Duty Managers. The roles and responsibilities of RAs, SRAs, Duty Managers, Residences staff and front-of-house, in particular outside core-working hours, need to be clearly defined and

communicated to all relevant stakeholders. The Review Group supports the Student Residences Review Working Group (SRRWG) project to define the role and responsibilities of RAs and SRAs and recommends that the project be extended to include the roles and responsibilities of the other groups listed above.

- While the SRRWG continues its review, the Review Group supports the need to make immediate provision for the support and training of incoming RAs and SRAs. The Review Group recommends that the proposed role responsible for training and management of RAs and SRAs, reporting to the Director of Estates or nominee, be filled as quickly as possible.

- Increased out-of-hours supports for RAs, SRAs and Duty Managers should be put in place, as a matter of urgency.

C. Finance and Procurement

- The Review Group acknowledges the existing financial constraints, however, the budget needs to be reviewed and when the opportunity is right, efforts should be made to seek to increase this.

- The balance of in-sourcing and out-sourcing should be reviewed on a periodic basis to ensure that what is in place is delivering the appropriate product for UCD and the student body. The value for money of outsourcing should be established. Issues around quality for some services and the impact on staff morale were raised, especially in those areas where a mixture of UCD staff and out-sourced staff are working together.

1. Introduction and Overview of UCD Estate Services

Introduction

1.1   This Report presents the findings of a quality review of UCD Estate Services, University College Dublin, which was undertaken on 3-6 April 2017. The Review Group was unable to meet the Director of UCD Estate Service due to illness, and thank the other members of the Unit for engaging so effectively with the process. The Unit response to the Review Group Report is attached as Appendix 2.

The Review Framework

1.2   Irish Universities have collectively agreed a framework for their quality review and quality improvement systems, which is consistent with both the legislative requirements of the Qualifications and Quality Assurance (Education and Training) Act 2012, and international good practice (e.g. Standards and Guidelines for Quality Assurance in the European Higher Education Area, 2015). Quality reviews are carried out in academic, administrative and support service units.

1.3   The purpose of periodic review is to assist the University to assure itself of the quality of each of its constituent units, and to utilise learning from this developmental process in order to effect improvement, including:

- To monitor the quality of the student experience, and of teaching and learning.

- To monitor research activity, including: management of research activity; assessing the research performance with regard to: research productivity, research income, and recruiting and supporting doctoral students.

- To identify, encourage and disseminate good practice, and to identify challenges and how to address these.

- To provide an opportunity for units to test the effectiveness of their systems and procedures for monitoring and enhancing quality and standards.

- To encourage the development and enhancement of these systems, in the context of current and emerging provision.

- To inform the University's strategic planning process.

- The output report provides robust evidence for external accreditation bodies.

- The process provides an external benchmark on practice and curriculum.

- To provide public information on the University's capacity to assure the quality and standards of its awards. The University's implementation of its quality procedures enables it to demonstrate how it discharges its responsibilities for assuring the quality and standards of its awards, as required by the Universities Act 1997 and the Qualifications and Quality Assurance (Education and Training) Act 2012.

The Review Process

1.4 Typically, the review model comprises four major elements:

- Preparation of a self-assessment report (SAR)

- A visit by a review group (RG) that includes UCD faculty and staff and external experts, both national and international. The site visit normally will take place over a two or three day period

- Preparation of a review group report that is made public

- Agreement of an action plan for improvement (quality improvement plan) based on the RG report's recommendations. The University will also monitor progress against the improvement plan

   Full details of the review process can be found on the UCD Quality Office website: www.ucd.ie/quality.

The Review Group

1.5 The composition of the Review Group for UCD Estate Services was as follows:

- Associate Professor Aoife Ahern, UCD School of Civil Engineering (Chair)

- Ms Maura McGinn, UCD Director of Institutional Research (Deputy Chair)

- Ms Diana Hampson, University of Manchester, UK (Extern)

- Mr Andrew Burgess, Loughborough University, UK (Extern)

1.6 The Review Group visited the Unit from 3-6 April 2017 and held meetings with Unit staff; undergraduate and postgraduate students; external stakeholders; the SAR Co-ordinating Committee; other University members of staff, including the UCD Bursar. The site visit schedule is included as Appendix 3.

1.7 In addition to the Self-assessment Report, the Review Group considered other documentation provided by the Unit and the University during the site visit, including: the UCD Strategic Campus Development Plan; UCD Estates Strategy; UCD Travel Plan; Energy

Policy; Residential Master Plan; Report on Mail Room Operation 2016; Technical Design Guidelines; University and Unit Risk Registers; Capital Projects management documentation; and focus group feedback.

Preparation of the Self-assessment Report (SAR)

1.8   Further to briefings by the UCD Quality Office, a Quality Working Group (QWG) was formed within Estate Services to prepare the Self-assessment Report. Initially formed as a support group to plan and prepare work for the review, the members of the QWG were also members of the Self-assessment Report Coordinating Committee (SARCC).

1.9   The SARCC group was responsible for sign-off on the approach taken and the development of the resulting Self-assessment Report. The SARCC members were chosen in order to represent as many areas and staff grades of the Unit as possible. The Committee members were encouraged to seek input from managers and colleagues.

1.10   The SARCC met every 1 to 2 weeks, depending on the workload and inputs were invited from members of the UCD Estates unit and other stakeholders including students, UCD staff, members of the community and suppliers in the following ways:

   •   Focus interviews with key groups selected for their significant levels of interaction with the operation of the Unit

   •   University Surveys

   •   Catering, UCD Culture and Engagement Staff Survey, Commuting Survey

   •   Internal SWOT analysis sessions

   •   Facilitated Session with Estate Services Management (October 2016)

   •   Updates provided locally by members of the SARCC

   •   Internal distribution of the SAR for comment and feedback with line managers

   •   Circulation to the Bursar and UCD Quality Office for feedback

   •   Making drafts of the SAR available on an internal portal

The University

1.11   University College Dublin (UCD) is a large and diverse university whose origins date back to 1854. The University is situated on a large modern campus about 4 km to the south of the centre of Dublin.

1.12   The University Strategic Plan (to 2020) states that the University's mission is: "to contribute to the flourishing of Dublin, Ireland, Europe and the world through the excellence and impact of our research and scholarship, the quality of our graduates and our global engagement; providing a supportive community in which every member of the University is enabled to achieve their full potential".

The University is currently organised into six colleges and 37 schools:

- UCD College of Arts and Humanities

- UCD College of Business

- UCD College of Engineering and Architecture

- UCD College of Health and Agricultural Sciences

- UCD College of Social Sciences and Law

- UCD College of Science

1.13   As one of the largest universities on the island of Ireland, UCD supports a broad, deep and rich academic community in Science, Business, Engineering, Health Sciences, Agriculture, Veterinary Medicine, Arts, Law, Celtic Studies and Social Sciences. There are currently more than 27,869 students on our UCD campus (approximately 16,684 undergraduates, 8,202 postgraduates and 2,983 Occasional and Adult Education students) registered on over 70 University degree programmes, including over 7,012 international students from more than 131 countries.   The University also has over 5,591 students studying UCD degree programmes on campuses overseas.

UCD Estates

1.14   UCD Estate Services was formed through the merging of Buildings and Services with the Commercial, Residential and Hospitality Units in 2013. Newman House joined in 2016. The University Estate comprises circa 390,000m^2 of accommodation and includes residences for 3,169 students.

1.15   The key role of the Unit is the management and care of the Estate. In the case of UCD, the scope of Estate Services is broadly as follows:

- Management and operation of academic building portfolio

- Management and operation of student accommodation

- Provision of catering and hospitality services

- Management and provision of support services such as mail, telephones, photocopying and bulk printing, merchandising etc

- Energy Management, including the procurement of utilities

- Delivery of the Capital Programme for both new builds and refurbishment

- Maintaining the grounds of the University, including grass based pitches

Commendations

1.16   The Review Group acknowledges the considerable work put into the SAR and the valuable and open contributions made by the participants in all the meetings.

2. Planning, Organisation and Management

2.1   As described in 1.14 above, UCD Estate Services was formed through the amalgamation of Buildings and Services with the Commercial, Residential and Hospitality Unit, and Newman House joined the Unit in 2016. The activities of these units are complementary and the rationale for bringing these units together is clear. The overall re-organised structure has been in place for 4 years and it is timely to reflect on how the amalgamation has progressed and how the Unit is functioning. There has been a shift in emphasis from purely commercial services to a more student-focussed and reputational-focussed service. The Review Group supports this change.

2.2   UCD Estates Services has a complicated organisational structure, albeit with a flat management structure. The Unit is headed by the Director of Estates, who reports to the UCD Bursar. An Estates Services Management Team (ESMT) is in place, comprising the heads of the various sub-units within the Estate Services portfolio. This Team leads on the operational and strategic activities of the Unit. The ESMT do not meet as a group.

2.3   Membership of the ESMT includes the Director of Estates, Campus Services Manager, HR Partner, Residential Services Manager, Senior Projects Coordinator, Building Planning Manager, Hospitality Services Manager, Senior Project Accountant, Technical Services Manager, Business Development Manager and the Assistant Buildings Officer. Apart from the HR Partner and the Senior Project Accountant who belong to other UCD units, all of the members of the ESMT report directly to the Director of Estates. The Review Group concluded that the current management structure is too flat for the amount and variety of activities undertaken. There is also some duplication of functions, especially concerning commercial activity.

2.4   In addition to the complexity of the organisational structure, there is scope for greater clarity about the roles of members of staff within the Unit. In particular, job titles are unclear and this makes it difficult for users to know whom to contact.

2.5   The staff complement of Estate Services comprises 78 FTE, 4 part-time permanents and 20 temporary contracted employees. During the financial downturn in Ireland, a strategic decision was made to outsource many of the services that had previously been delivered by Estate Services. This strategy has, in the main, been effective, however, to ensure provision of services at current levels or enhancement of delivery, this strategy may require further consideration. The streamlining of Estate Services functions has resulted in a reduction of staff numbers which was beneficial in the downturn, however, the risks to long-term service provision or development of new activities without recruitment needs assessment. In addition, the staff age-profile within UCD Estates presents a risk in terms of losing key skills from the Unit, if recruitment does not take place.

2.6   The complexity of the Unit structures can make communication and community within the Unit challenging. The Unit is aware of this and is working to develop a positive shared community across all of its sub-units through, for example, increased communication and cross-Unit social events. Members of staff within the Unit noted the positive impact this has had on both building new and strengthening existing relationships within and across sub-units.

Commendations

2.7   The Unit has been very effective in managing and delivering capital projects, even with the constraints of working within national frameworks.

2.8   The amalgamation of the two pre-existing units (UCD Buildings & Services and UCD Commercial Office) has brought together a wide and valuable skill-set.

2.9   The credibility of the Estates Senior Management Team (ESMT) as individuals is high, comprising professionals with a broad set of skills.

2.10   The rollout of a Business Calendar is seen as a positive development.

2.11   Significant effort has gone into creating a community within Estate Services and this is ` having a positive impact.

Recommendations

2.12   The Review Group recommends that the ESMT review the vision, organisation and management structure of UCD Estates. It is recommended that this be commenced through facilitated sessions. This should be an ongoing process, that is reviewed on a regular and frequent basis, allowing it to be adapted as needed.

2.13   Consideration should be given to the management structure of the Unit, for example, the Director could be supported by three or four Heads of/Assistant Directors, with responsibility for portfolios of complementary activities.

2.14 As stated in 2.1 above, it would now be timely that a review of the amalgamation should take place, including a review of structures and integration.

2.15 There were reports of some staff having very heavy workloads with some individuals carrying the burden of large projects – some analysis of workloads should be carried out as part of a review of the Unit's structures.

2.16 The titles of various roles within the Unit are not clear and need to be more descriptive in terms of the duties they represent and this will help the UCD community to identify respective portfolios.

2.17 The ESMT should set in place formal structured meetings, which should run in parallel to, and complement, the existing themed project meetings. Terms of reference for the ESMT should be formalised. A formal procedure should be established for cascading messages from ESMT to all parts of UCD Estates and the outsourced units.

2.18 The Unit have identified benchmarking as a need. The Review Group recommends that the Unit should seek ways of doing this e.g. further pursue AUDE membership.

2.19 With the growing breadth of activities covered by the amalgamated Unit, the Review Group supports the Unit's intention to review the current approach to the provision of the Help Desk function and the consideration of adopting a Contact Centre approach (see also 5.13). The review could include, for example: consideration of how user information is managed, filtered and addressed; what users are directed through the Help Desk; what level of cover is required; how the Help Desk interfaces with other Estate Services functions; as well as how follow-up information is communicated.

2.20 The Review Group recommends that the timing of campus projects be planned to prioritise the student experience, ensuring that all students have a high-quality learning environment and consistent experience, across all Colleges.

2.21 Measureable objectives, KPIs and targets used for individuals and sub-units should be well-defined, reflect the Unit's change in emphasis, and should be clearly articulated to staff.

2.22 The Review Group recommends that the Unit work closely with UCDHR to plan recruitment and succession.

3. Functions, Activities and Processes

3.1 UCD Estate Services provides a wide and varied set of services and supports to the UCD community. From the maintenance and development of a beautiful campus, to the development of new building infrastructure, provision of numerous support services including room bookings, commuting and printing, to student residences, Summer @ UCD, catering and hospitality, conference and events, UCD College Collection, Energy and Newman House.

3.2   Responsibility for delivery of a number of functions is now outsourced, e.g. telephones, security, landscaping. Estate Services work very hard to ensure seamless delivery for end-users on campus. In addition, a number of buildings are user-managed.

3.3   The Unit has a very important strategic part to play in the University, in terms of the development of physical infrastructure, the enhancement of the student experience and energy use on campus.   Members of Estate Services sit on a number of University Committees and Working Groups and the Unit supports the University in achieving its strategic objectives.

3.4   The opening of campus to third semester activities, while offering many development opportunities for the Unit, brings its own challenges and demands on maintenance and other services.

3.5   Estate Services are aware of, and actively engaged with, Health and Safety (H&S) processes and procedures, however, Estate Services should review existing H&S policies to ensure that there are clear and easily accessible for all members of the UCD community. The Review Group had concerns about consistent approaches to compliance and safety management in user-managed buildings and noted some ambiguities regarding responsibility for compliance and health and safety in these buildings.

Commendations

3.6   It was noted that the outsourced service providers, particularly the technical service providers, report regularly and the data is owned by UCD, which is to be commended.

3.7   The energy-savings and reduction in CO_2 emissions achieved by UCD Estate Services are to be commended.

3.8   The efforts being made to achieve a Green Flag award are very positive.

3.9   Other University units were very complimentary about the role of UCD Estate Services in supporting their activities e.g. UCD Registry – Assessment praised the effectiveness of supports provided to manage the assessment process and the close relationship with Room Bookings.

Recommendations

3.10   The Review Group recognise the positive contribution being made by UCD Estates staff and recommend that a more formalised acknowledgement of achievements for individual staff members and teams should be established.

3.11   There needs to be a consistency of service provision across the user-managed buildings in order to enhance the student experience. There is perception amongst the students that met with the Review Group that access to these buildings was inconsistent.

3.12 The Review Group recommends that, in the case of user-managed buildings, UCD consider that all works are procured and project-managed through UCD Estate Services, whilst funding of works is still provided by the building occupiers. In that case, UCD Estate Services would need to be appropriately resourced to enable them to take on this role.

3.13 Standard operating procedures (SOPs) to ensure consistent approaches to compliance and safety management in user-managed buildings should be developed, as a matter of urgency. The SOPs should clearly outline the responsibilities of all relevant parties.

3.14 The quality control of some outsourced functions currently rests with the provider. The Review Group recommend that UCD Estate Services become more actively involved with quality control.

3.15 The Unit should also review the range of existing H&S policies to identify any possible gaps, with a view to developing, in conjunction with the UCD Safety, Insurance, Operational Risk and Compliance (SIRC) Office, stand-alone policies to address specific H&S issues for example, a legionella policy. These policies should be reviewed on a systematic basis.

3.16 Third semester activities have potential to promote the University and to provide significant commercial activity for the institution. The Review Group recommends that a planning or oversight group be considered to ensure all relevant parties, for example, residence management, room allocations, catering etc. are included and informed of the planning process.

4. Management of Resources

4.1 The financial downturn in Ireland and the associated impact on the institutional budget, along with the introduction of a National Employment Control Framework, had a significant impact on the resourcing, both human and financial, available to UCD Estate Services (see also 2.5 above). Estate Services made the strategic decision to outsource delivery of some services, which has required the development of effective procurement expertise.

4.2 Despite the financial constraints, the Unit has managed to deliver excellent services and supports, while continuing to develop the campus infrastructure. However, the significant cuts of recent years make it difficult to continue delivering services and developing the campus at the same level without increased investment, both in staff and budgets.

4.3 While staff were very positive and engaged, the impact of financial constraints on staff numbers and opportunities for staff development were noted. The knock-on effect on staff morale was evident and while the Unit has endeavoured to mitigate this as much as possible, this should be addressed sooner rather than later. In addition, some members of the Unit feel undervalued and isolated.

4.4   Thirty percent of the UCD building portfolio was built in the 1960s and '70s. Thirty-four per cent of the building portfolio is in condition C or D (requiring major refurbishment), which represents an improvement from the situation in 2008, when 47% of the portfolio was in condition C or D. The current sector condition rating, from the latest UK Higher Education Statistics Agency (HESA) Estates Management Record report, shows a sector benchmark that a minimum of 80% should be condition A/B with no more than 20% being condition C/D. The Review Group note that the maintenance budget of the Unit appears to be low relative to the size and complexity of the estate and acknowledge the challenge to benchmark in the absence of access to national/international data, for example, the Estate Management Record in the UK.

4.5   The University budget model allows for units/schools to accumulate surpluses. Units with surpluses can afford to get works done but may not be the units/schools with the most pressing need for works.

4.6   There are currently 3,169 students living in campus in purpose-built accommodation. The University is planning to double this provision in the next 5 years. The current structure to manage this provision is led by the Residential Services sub-unit of UCD Estate Services and out-of-hours support is provided by a combination of student Residential Assistants, external Service Provider staff, with escalation supports provided by the Estate Services on-call Duty Managers. The Review Group was very concerned about the level of responsibility currently taken on by Residential Assistants (RAs), in particular Senior Residential Assistants (SRAs).

4.7   The UMT Student Experience Group has set up a Student Residences Review Working Group (SRRWG) to consider the student experience of student residents, especially in light of the planned growth in student resident numbers. The SRRWG are reviewing, *inter alia*, the role of the S/RA and the residence disciplinary process. The SSRWG outlined some of the developments currently under consideration, including changing the focus of the RA and SRA roles to a more pastoral approach, increasing the number of RAs and appointing a member of staff with specific responsibility for managing and training the RAs.

4.8   While the Review Group supports the review of student residences, it is concerned that the supports currently being considered may not provide the level of after-hours support required. Appropriately resourced, professional, residential back-up should be considered and the wardenial model used in many UK institutions bears review. Consideration should also be given to embedding the management of the pastoral care of student residents within other student supports e.g. Student Advisers service.

Commendations

4.9   The users who met with the Review Group acknowledged and praised the contribution made by UCD Estates in creating a beautiful and attractive campus, which has been well-planned and thought through.

4.10   In a time of severe financial constraints, the Unit has managed its budget well and delivered major projects on time and within budget. Reducing the percentage of the building portfolio in condition C or D from 47% to 34% in under 10-years is to be commended.

4.11   Strong procurement skills and expertise are evident within Estate Services.

4.12   The professionalism and expertise of the Unit is recognised. The Unit has been very effective at implementing the UCD Strategy and Vision, as demonstrated by the transformation of the Estate. At this stage of the Unit's maturity, there are opportunities for them to use that expertise to develop a leadership and advocacy role.

4.13   The decision to maintain budgets for landscaping throughout the financial crisis has been a successful strategy with a resulting campus which is attractive to the community.

Recommendations

4.14   The Review Group acknowledges the existing financial constraints, however, the budget needs to be reviewed and when the opportunity is right, efforts should be made to seek to increase this.

4.15   A target should be set for improving the condition of the building portfolio within an agreed, realistic, timeframe.

4.16   The Review Group noted a large number of suppliers. This should be reviewed, using the in-house procurement expertise, where possible. This role could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures.

4.17   The balance of in-sourcing and out-sourcing should be reviewed on a periodic basis to ensure that what is in place is delivering the appropriate product for UCD and the student body. The value for money of outsourcing should be established. Issues around quality for some services and the impact on staff morale were raised, especially in those areas where a mixture of UCD staff and out-sourced staff are working together.

4.18   There appear to be limited opportunities for career progression throughout the Unit, which is having a negative impact upon staff morale. ESMT need to consider career progression, recognition and reward opportunities within and across the Unit.

4.19   While the Unit is very supportive of staff development, a more structured approach to identifying training and development needs should be implemented, with input from UCDHR.

4.20   The SRRWG should continue its work and further consideration should be given to the approaches currently being discussed, as well as where responsibility for the pastoral care of student residents should lie.

4.21   To date, Residences has focused on a Facilities Management (FM) model and there is recognition that there is a need to consider the end-user and develop customer-facing elements of the service. There is some disagreement on how the residences are viewed – is it a commercial activity or a student facility?   Clarity on the goals, targets and the development of a strategy for residences should be developed. This should not only include commercial objectives but also emphasise the need to create a student community which would be to the long-term benefit of UCD's mission, values and strategic objectives.

4.22   Currently, there are no FM services within residences. Due to the current number and plan to further increase student residences, the Review Group recommend that Estates Services should provide additional dedicated FM services to the residences.

4.23   The Review Group recommends that the role of staff in the 'Front of house building' who supply the 'bridge' services be reconsidered. Currently, these staff are out-sourced and consideration should be given to whether these may better serve the students, S/RAs and the University if they were UCD staff.

4.24   In addition, the Review Group feel duty managers should get additional support for their roles. The additional supports could include training and development opportunities, as well as formal pastoral care following incidents.

4.25   The current approach to the provision of out-of-hours supports for residences puts a lot of responsibility on the RAs, SRAs and Duty Managers. The roles and responsibilities of RAs, SRAs, Duty Managers, Residences staff and front-of-house, in particular outside core-working hours, need to be clearly defined and communicated to all relevant stakeholders. The Review Group supports the SRRWG's project to define the role and responsibilities of RAs and SRAs and recommends that the project be extended to include the roles and responsibilities of the other groups listed above.

4.26   While the SRRWG continues its review, the Review Group supports the need to make immediate provision for the support and training of incoming RAs and SRAs. The Review Group recommends that the proposed role responsible for training and management of RAs and SRAs, reporting to the Director of Estates or nominee, be filled as quickly as possible.

4.27   Increased out-of-hours supports for RAs, SRAs and Duty Managers should be put in place, as a matter of urgency.

4.28   Concerns were raised by some residential students regarding perceived inequity in the outcomes of disciplinary procedures. The Review Group recommend that there is clear and consistent message given to residential students regarding disciplinary procedures.

4.29   Decisions on numbers of residences to be allocated to different groups of students must be made in a timely manner. The Student Residences Review Working Group (SRRWG) and Residence Management should agree a timetable for these activities to ensure residences can be allocated on time and to full capacity (as defined by relevant KPIs).

4.30   There is a stated potential to develop conference activities, however, there is competition between third semester activities for room allocations. Estate Services should investigate whether there are any efficiencies to be gained which could allow further activities.

5. Users' Perspective

5.1   As described above, the work of Estate Services is diverse and there are many activities and services. It was noted by the Review Group that users find it difficult to know whom they should contact with particular issues. It was also noted that there are differences in user perspectives and what is happening within Estate Services. For example, due to a perceived lack of security on the part of users, there was a need to spend additional funds on additional security staff over the winter months. Due to the breadth of activities and the range of users, the commendations and recommendations below are stand-alone.

Commendations

5.2   Users from within UCD and external to UCD speak very positively about the Unit and their interactions with the Unit.

5.3   A number of projects within UCD (for example, the Woodlands walks) have created a campus that is attractive to not only students and staff but also members of the wider, local community.

5.4   The role played by the Estate and its appearance in attracting students and 3rd semester activity is very important.

5.5   The Review Group notes the active role played by UCD Estate Services in marketing the estate to international students in a very positive and engaging manner.

5.6   Projects, such as the Woodlands walks and UCD Community Garden, have promoted a corporate social responsibility within UCD.

5.7   The SWOT sessions and focus groups provided valuable input for the review and gave the Unit opportunities to interact. Unit staff expressed a wish to continue to do these and the Review Group would support this.

5.8   Considerable efforts have been made to collect feedback from Access students about their experiences in residences in order to make improvements.

5.9   The contractors and other stakeholders who met with the Review Group reflected that their relationships with UCD Estate Services were positive, that they found UCD Estate Services very progressive and that UCD was considered to be a trail-blazer.

Recommendations

5.10   The Review Group recommend that the Unit explore how they can more effectively market themselves and their considerable achievements to the rest of UCD and to the outside world. Regular newsletters with updates would be beneficial for both UCD and the wider, local community.

5.11   The role of marketing UCD Estate Services more effectively could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures. This individual could work closely with University Relations and could be the UCD Estate Services champion.

5.12   Guidelines ('How-To' Documents) for units outside of UCD Estates on who to contact and how to go about interacting with the relevant sub-unit of UCD Estates, should be provided more clearly online.

5.13   The proposed Contact Centre/reconfigured Help Desk function should enable the interactions between UCD Estates and the rest of UCD to be managed more effectively. In addition, a single point of contact for each College within UCD Estates would facilitate communications for more complicated, non-routine issues. This could be similar to the UCD HR Partner model. However, the Review Group is cognisant of the resource implications and recommends that this be considered as part of the future strategic development of the Unit.

5.14   Efforts to identify liaison persons within schools and buildings would be beneficial for communications and management of activities.

5.15   There are unrealised opportunities to promote UCD to students and staff through the Estate and how it is cared for.

5.16   The review of signage and wayfinding for visitors to the campus should be continued, with emphasis on enhancing the user experience in UCD.

5.17   Student clubs and societies and those running student events should be able to access clear information about the services provided, and those not provided, by Estate Services. Misunderstandings have arisen due to a lack of clarity about acceptable and unacceptable requests so clear and consistent service information needs to be communicated. Many student activities moved to the Student Centre when it opened which coincided with service desks being removed from buildings. It is now perceived to be difficult to organise student activities in rooms outside the Student Centre.

5.18   Students reported inconsistent interpretation of Estates policies by different Campus Service colleagues. The Review Group recommends that training be put in place to ensure a more consistent experience for students.

5.19   Access to buildings for wheelchair users should be kept under constant review and, in particular, wheelchair accessibility should be consistent across all residences. The Review

Group is aware that efforts (see 5.8) have been made to improve the residential experience for Access students and a review of residences wheelchair accessibility should be conducted.

UCD Estate Services – Full List of Commendations and Recommendations

This Appendix contains a full list of all commendations and recommendations made by the Review Group for UCD Estate Services and should be read in conjunction with the specific chapter above. *(Please note that the paragraph references below refer to the relevant paragraphs in the report text)*

Introduction and Overview

Commendations

1.16   The Review Group acknowledges the considerable work put into the SAR and the valuable and open contributions made by the participants in all the meetings.

Planning, Organisation and Management

Commendations

2.7   The Unit has been very effective in managing and delivering capital projects, even with the constraints of working within national frameworks.

2.8   The amalgamation of the two pre-existing units (UCD Buildings & Services and UCD Commercial Office) has brought together a wide and valuable skill-set.

2.9   The credibility of the Estates Senior Management Team (ESMT) as individuals is high, comprising professionals with a broad set of skills.

2.10   The rollout of a Business Calendar is seen as a positive development.

2.11   Significant effort has gone into creating a community within Estate Services and this is ` having a positive impact.

Recommendations

2.12   The Review Group recommends that the ESMT review the vision, organisation and management structure of UCD Estates. It is recommended that this be commenced through facilitated sessions. This should be an ongoing process, that is reviewed on a regular and frequent basis, allowing it to be adapted as needed.

2.13   Consideration should be given to the management structure of the Unit, for example, the Director could be supported by three or four Heads of/Assistant Directors, with responsibility for portfolios of complementary activities.

2.14   As stated in 2.1 above, it would now be timely that a review of the amalgamation should take place, including a review of structures and integration.

2.15   There were reports of some staff having very heavy workloads with some individuals carrying the burden of large projects – some analysis of workloads should be carried out as part of a review of the Unit's structures.

2.16   The titles of various roles within the Unit are not clear and need to be more descriptive in terms of the duties they represent and this will help the UCD community to identify respective portfolios.

2.17   The ESMT should set in place formal structured meetings, which should run in parallel to, and complement, the existing themed project meetings. Terms of reference for the ESMT should be formalised. A formal procedure should be established for cascading messages from ESMT to all parts of UCD Estates and the outsourced units.

2.18   The Unit have identified benchmarking as a need. The Review Group recommends that the Unit should seek ways of doing this e.g. further pursue AUDE membership.

2.19   With the growing breadth of activities covered by the amalgamated Unit, the Review Group supports the Unit's intention to review the current approach to the provision of the Help Desk function and the consideration of adopting a Contact Centre approach (see also 5.13). The review could include, for example: consideration of how user information is managed, filtered and addressed; what users are directed through the Help Desk; what level of cover is required; how the Help Desk interfaces with other Estate Services functions; as well as how follow-up information is communicated.

2.20   The Review Group recommends that the timing of campus projects be planned to prioritise the student experience, ensuring that all students have a high-quality learning environment and consistent experience, across all Colleges.

2.21   Measureable objectives, KPIs and targets used for individuals and sub-units should be well-defined, reflect the Unit's change in emphasis, and should be clearly articulated to staff.

2.22   The Review Group recommends that the Unit work closely with UCDHR to plan recruitment and succession.

Functions, Activities and Processes

Commendations

3.6   It was noted that the outsourced service providers, particularly the technical service providers, report regularly and the data is owned by UCD, which is to be commended.

3.7   The energy-savings and reduction in CO_2 emissions achieved by UCD Estate Services are to be commended.

3.8   The efforts being made to achieve a Green Flag award are very positive.

3.9   Other University units were very complimentary about the role of UCD Estate Services in supporting their activities e.g. UCD Registry – Assessment praised the effectiveness of supports provided to manage the assessment process and the close relationship with Room Bookings.

Recommendations

3.10   The Review Group recognise the positive contribution being made by UCD Estates staff and recommend that a more formalised acknowledgement of achievements for individual staff members and teams should be established.

3.11   There needs to be a consistency of service provision across the user-managed buildings in order to enhance the student experience. There is perception amongst the students that met with the Review Group that access to these buildings was inconsistent.

3.12   The Review Group recommends that, in the case of user-managed buildings, UCD consider that all works are procured and project-managed through UCD Estate Services, whilst funding of works is still provided by the building occupiers. In that case, UCD Estate Services would need to be appropriately resourced to enable them to take on this role.

3.13   Standard operating procedures (SOPs) to ensure consistent approaches to compliance and safety management in user-managed buildings should be developed, as a matter of urgency. The SOPs should clearly outline the responsibilities of all relevant parties.

3.14   The quality control of some outsourced functions currently rests with the provider. The Review Group recommend that UCD Estate Services become more actively involved with quality control.

3.15   The Unit should also review the range of existing H&S policies to identify any possible gaps, with a view to developing, in conjunction with the UCD Safety, Insurance, Operational Risk and Compliance (SIRC) Office, stand-alone policies to address specific H&S issues for example, a legionella policy. These policies should be reviewed on a systematic basis.

3.16   Third semester activities have potential to promote the University and to provide significant commercial activity for the institution. The Review Group recommends that a planning or oversight group be considered to ensure all relevant parties, for example, residence management, room allocations, catering etc. are included and informed of the planning process.

Management of Resources

<u>Commendations</u>

4.9   The users who met with the Review Group acknowledged and praised the contribution made by UCD Estates in creating a beautiful and attractive campus, which has been well-planned and thought through.

4.10   In a time of severe financial constraints, the Unit has managed its budget well and delivered major projects on time and within budget. Reducing the percentage of the building portfolio in condition C or D from 47% to 34% in under 10-years is to be commended.

4.11   Strong procurement skills and expertise are evident within Estate Services.

4.12   The professionalism and expertise of the Unit is recognised. The Unit has been very effective at implementing the UCD Strategy and Vision, as demonstrated by the transformation of the Estate. At this stage of the Unit's maturity, there are opportunities for them to use that expertise to develop a leadership and advocacy role.

4.13   The decision to maintain budgets for landscaping throughout the financial crisis has been a successful strategy with a resulting campus which is attractive to the community.

<u>Recommendations</u>

4.14   The Review Group acknowledges the existing financial constraints, however, the budget needs to be reviewed and when the opportunity is right, efforts should be made to seek to increase this.

4.15   A target should be set for the condition of the building portfolio within an agreed, realistic, timeframe.

4.16   The Review Group noted a large number of suppliers. This should be reviewed, using the in-house procurement expertise where possible. This role could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures.

4.17   The balance of in-sourcing and out-sourcing should be reviewed on a periodic basis to ensure that what is in place is delivering the appropriate product for UCD and the student body. The value for money of outsourcing should be established. Issues around quality for some services and the impact on staff morale were raised, especially in those areas where a mixture of UCD staff and out-sourced staff are working together.

4.18   There appear to be limited opportunities for career progression throughout the Unit, which is having a negative impact upon staff morale. ESMT need to consider career progression, recognition and reward opportunities within and across the Unit.

4.19   While the Unit is very supportive of staff development, a more structured approach to identifying training and development needs should be implemented, with input from UCDHR.

4.20   The SRRWG should continue its work and further consideration should be given to the approaches currently being discussed, as well as where responsibility for the pastoral care of student residents should lie.

4.21   To date, Residences has focused on a Facilities Management (FM) model and there is recognition that there is a need to consider the end-user and develop customer-facing elements of the service. There is some disagreement on how the residences are viewed – is it a commercial activity or a student facility?   Clarity on the goals, targets and the development of a strategy for residences should be developed. This should not only include commercial objectives but also emphasise the need to create a student community which would be to the long-term benefit of UCD's mission, values and strategic objectives.

4.22   Currently, there are no FM services within residences. Due to the current number and plan to further increase student residences the Review Group recommend that Estates Services should provide additional dedicated FM services to the residences.

4.23   The Review Group recommends that the role of staff in the 'Front of house building' who supply the 'bridge' services be reconsidered. Currently, these staff are out-sourced and consideration should be given to whether these may better serve the students, S/RAs and the University if they were UCD staff.

4.24   In addition, the Review Group feel duty managers should get additional support for their roles. The additional supports could include training and development opportunities, as well as formal pastoral care following incidents.

4.25   The current approach to the provision of out-of-hours supports for residences puts a lot of responsibility on the RAs, SRAs and Duty Managers. The roles and responsibilities of RAs, SRAs, Duty Managers, Residences staff and front-of-house, in particular outside core-working hours, need to be clearly defined and communicated to all relevant stakeholders. The Review Group supports the SRRWG's project to define the role and responsibilities of RAs and SRAs and recommends that the project be extended to include the roles and responsibilities of the other groups listed above.

4.26   While the SRRWG continues its review, the Review Group supports the need to make immediate provision for the support and training of incoming RAs and SRAs. The Review Group recommends that the proposed role responsible for training and management of RAs and SRAs, reporting to the Director of Estates or nominee, be filled as quickly as possible.

4.27   Increased out-of-hours supports for RAs, SRAs and Duty Managers should be put in place, as a matter of urgency.

4.28   Concerns were raised by some residential students regarding perceived inequity in the outcomes of disciplinary procedures. The Review Group recommend that there is clear and consistent message given to residential students regarding disciplinary procedures.

4.29   Decisions on numbers of residences to be allocated to different groups of students must be made in a timely manner. The Student Residences Review Working Group (SRRWG) and Residence Management should agree a timetable for these activities to ensure residences can be allocated on time and to full capacity (as defined by relevant KPIs).

4.30   There is a stated potential to develop conference activities, however, there is competition between third semester activities for room allocations. Estate Services should investigate whether there are any efficiencies to be gained which could allow further activities.

Users' Perspective

Commendations

5.2   Users from within UCD and external to UCD speak very positively about the Unit and their interactions with the Unit.

5.3   A number of projects within UCD (for example the Woodlands walks) have created a campus that is attractive to not only students and staff but also members of the wider, local community.

5.4   The role played by the Estate and its appearance in attracting students and 3rd semester activity is very important.

5.5   The Review Group notes the active role played by UCD Estate Services in marketing the estate to international students in a very positive and engaging manner.

5.6   Projects, such as the Woodlands walks and UCD Community Garden, have promoted a corporate social responsibility within UCD.

5.7   The SWOT sessions and focus groups provided valuable input for the review and gave the Unit opportunities to interact. Unit staff expressed a wish to continue to do these and the Review Group would support this.

5.8   Considerable efforts have been made to collect feedback from Access students about their experiences in residences in order to make improvements.

5.9   The contractors and other stakeholders who met with the Review Group reflected that their relationships with UCD Estate Services were positive, that they found UCD Estate Services very progressive and that UCD was considered to be a trail-blazer.

5.10   The Review Group recommend that the Unit explore how they can more effectively market themselves and their considerable achievements to the rest of UCD and to the outside world. Regular newsletters with updates would be beneficial for both UCD and the wider, local community.

5.11   The role of marketing UCD Estate Services more effectively could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures. This individual could work closely with University Relations and could be the UCD Estate Services champion.

5.12   Guidelines ('How-To' Documents) for units outside of UCD Estates on who to contact and how to go about interacting with the relevant sub-unit of UCD Estates, should be provided more clearly online.

5.13   The proposed Contact Centre/reconfigured Help Desk function should enable the interactions between UCD Estates and the rest of UCD to be managed more effectively. In addition, a single point of contact for each College within UCD Estates would facilitate communications for more complicated, non-routine issues. This could be similar to the UCD HR Partner model. However, the Review Group is cognisant of the resource implications and recommends that this be considered as part of the future strategic development of the Unit.

5.14   Efforts to identify liaison persons within schools and buildings would be beneficial for communications and management of activities.

5.15   There are unrealised opportunities to promote UCD to students and staff through the Estate and how it is cared for.

5.16   The review of signage and wayfinding for visitors to the campus should be continued, with emphasis on enhancing the user experience in UCD.

5.17   Student clubs and societies and those running student events should be able to access clear information about the services provided, and those not provided, by Estate Services. Misunderstandings have arisen due to a lack of clarity about acceptable and unacceptable requests so clear and consistent service information needs to be communicated. Many student activities moved to the Student Centre when it opened which coincided with service desks being removed from buildings. It is now perceived to be difficult to organise student activities in rooms outside the Student Centre.

5.18   Students reported inconsistent interpretation of Estates policies by different Campus Service colleagues. The Review Group recommends that training be put in place to ensure a more consistent experience for students.

5.19   Access to buildings for wheelchair users should be kept under constant review and, in particular, wheelchair accessibility should be consistent across all residences. The Review

Group is aware that efforts (see 5.8) have been made to improve the residential experience for Access students and a review of residences wheelchair accessibility should be conducted.

UCD Estate Services – Response to the Review Group Report

UCD Estate Services is a relatively new Unit of the University, following the merger in 2013 of UCD Buildings and Services with UCD Commercial Residential and Hospitality. A significant reorganisation was undertaken immediately following the merger, which was nearing completion at the time of the self-assessment exercise.

The task of developing the Self-assessment Report was a valuable reflective exercise following that time of change. The preparation of the Self-assessment Report was coordinated by a committee that dedicated significant time and effort to the undertaking. Their work was complemented by the engagement of a large cohort of University staff and students who are stakeholders in the quality of Estate Services, and their participation in the process is gratefully acknowledged. The visit of the Review Group made a further positive contribution to the organisational planning of the Unit. Estate Services wishes to thank the members of the Review Group for their time, expertise and constructive comments, both during the site visit and in their well-considered and helpful Report. The Review Group commendations and observations that arose from the self-assessment are welcomed by the Unit and will be addressed during the Quality Improvement phase.

With specific reference to the prioritised recommendations identified by the Review Group, the Unit's initial responses are as follows:

A. Leadership and Structure

- The Review Group recommends that the Estates Senior Management Team (ESMT) review the vision, organisation and management structure of UCD Estates. It is recommended that this be commenced through facilitated sessions. This should be an ongoing process, that is reviewed on a regular and frequent basis, allowing it to be adapted as needed.

  Response: The Unit will put in place measures aimed at improving organisation and structures. This will be addressed further in the Quality Improvement Plan and the Bursars Office Service Delivery Plan, which is currently underway, with the next stage due for completion in Quarter 4 2017.

- Consideration should be given to the management structure of the Unit, for example, the Director could be supported by three or four Heads of/Assistant Directors, with responsibility for portfolios of complementary activities.
- There appear to be limited opportunities for career progression throughout the Unit, which is having a negative impact upon staff morale. ESMT need to consider career progression, recognition and reward opportunities within and across the Unit.

Response: Improving Unit structures, along with the other HR related recommendations of the Review Group, will be a key focus in the Quality Improvement Plan. Through the recently launched HR Job Families initiative, Estate Services is now reviewing roles across the Unit as a starting point to mapping the roles within the Unit. We will also consider other recent HR initiatives to address this recommendation for example the University Staff Development, Reward and Recognition committee outputs, the Internal Mobility Policy, and the outputs of the recent Staff Survey. Separately, Estate Services will arrange a process to provide all staff with the opportunity to discuss feedback from the Quality Review Process and contribute to the Unit's plans to address the recommendations.

- The role of marketing UCD Estate Services more effectively could be allocated to a single individual, recognising a reallocation of some of their other duties would be required, taking place as part of the recommended review of management and structures. This individual could work closely with University Relations and could be the UCD Estate Services champion.

  Response: Estate Services communicates to the leadership of academic units and wider academic community through identified and established channels. The Unit acknowledges internal communication could be further strengthened. Estate Services will continue to explore how to improve internal communication structures, both formal and informal, through reorganisation and dedicating resources to market and promote the activities of the Unit.

B. Risk Management

- The Review Group recommends that, in the case of user-managed buildings, UCD consider that all works are procured and project-managed through UCD Estate Services, whilst funding of works is still provided by the buildings occupiers. In that case, UCD Estate Services would need to be appropriately resourced to enable them to take on this role.

  Response: Estate Services currently works in conjunction with, and provides operational and project management services to, user-managed buildings in the scoping and delivery of "works". Procedures for the delivery of such works will be regularly reviewed for opportunities for improvement and the Unit will seek to improve the links, information flow and co-operation between units who commission, fund and arrange for works. This will be addressed further in the QIP.

- Standard operating procedures (SOPs) to ensure consistent approaches to compliance and safety management in user-managed buildings should be developed, as a matter of urgency. The SOPs should clearly outline the responsibilities of all relevant parties.

  Response: The Unit will liaise with user–managed buildings regarding this recommendation. In circumstances, where compliance and safety management overlap with Estates functions, policies and procedures to define roles and responsibilities will be reviewed or developed, as required. This will be further addressed in the QIP.

- The Unit should also review the range of existing Health & Safety (H&S) policies to identify any possible gaps, with a view to developing, in conjunction with the SIRC Office, stand-alone policies to address specific H&S issues for example, a legionella policy. These policies should be reviewed on a systematic basis.

Response: The Unit has a strong track record in management of the Estate within available resources. The Unit will continue to update relevant policies and work with user operated buildings management to provide building/area specific policies. The Unit's safety statement is currently being updated.

- The current approach to the provision of out-of-hours supports for residences puts a lot of responsibility on the RAs, SRAs and Duty Managers. The roles and responsibilities of RAs, SRAs, Duty Managers, Residences staff and front-of-house, in particular outside core-working hours, need to be clearly defined and communicated to all relevant stakeholders. The Review Group supports the SRRWG's project to define the role and responsibilities of RAs and SRAs and recommends that the project be extended to include the roles and responsibilities of the other groups listed above.

Response: Significant progress has been made in the area of RAs and SRAs to date, along with the recruitment of a Community Liaison role for the Unit. The potential to include these recommended additional groups of staff e.g. Duty Managers, Residences staff and front-of-house in the SRRWG terms of reference or other work-streams will be explored with UCDHR and the SRRWG.

- While the SRRWG continues its review, the Review Group supports the need to make immediate provision for the support and training of incoming RAs and SRAs. The Review Group recommends that the proposed role responsible for training and management of RAs and SRAs, reporting to the Director of Estates or nominee, be filled as quickly as possible.

Response: Estate Services has consulted on, devised and advertised a new role of Community Liaison Manager, which includes as a significant portion of its duties and responsibilities, supports and requirements aimed at addressing the above recommendation. It is anticipated that this person will assist in the training for S/RAs 2017/18 and will continue to provide additional training and support over the year, as required.

- Increased out-of-hours supports for RAs, SRAs and Duty Managers should be put in place, as a matter of urgency.

Response: Estate Services will review the current out of hours supports with a view to increasing availability, where required. The Duty Manager role has operational responsibility for the campus, but currently does not have a 24/7 presence. The Unit will review the role that the Duty Manager System can play and the potential to develop a full 24/7 Duty Manager presence on campus, as a professional support to first responders and an escalation route to appropriate out of hours supports. This will be considered further in the QIP.

C. Finance and Procurement

- The Review Group acknowledges the existing financial constraints, however, the budget needs to be reviewed and when the opportunity is right, efforts should be made to seek to increase this.

  Response: Estate Services will continue to monitor budgets against other similar institutions to assess sector norms. Estate Services budget preparation will be based upon the requirements to deliver the service provision required by the University, and will form part of the overall Bursar's Service Delivery Plan.

- The balance of in-sourcing and out-sourcing should be reviewed on a periodic basis to ensure that what is in place is delivering the appropriate product for UCD and the student body. The value for money of outsourcing should be established. Issues around quality for some services and the impact on staff morale were raised, especially in those areas where a mixture of UCD staff and out-sourced staff are working together.

  Response: The Unit has a long history of service delivery using a blend of in-house and procured resources. The Unit will explore the extent to which value for money and service delivery quality indicators can be used to benchmark and track performance over time to allow objective decision-making in this regard. This will be addressed further in the QIP.

UCD Estate Services Site Visit Timetable

3-6 April 2017

Monday, 3 April 2017 - Pre-Visit Briefing Prior to Site Visit

17.00-19.00   RG meet in the Hotel to review preliminary issues and to confirm work schedule and assignment of tasks for the site visit – **RG and UCD Quality Office only**

19.30   Dinner for the Review Group hosted by the UCD Registrar and Deputy President – **RG, UCD Deputy President and UCD Quality Office only**

Day 1: Tuesday, 4 April 2017 Venue: Robing Room, UCD O'Reilly Hall

08.30-09.00   Private meeting of Review Group (RG)

09.00-09.45   RG meet with **UCD Bursar**

09.45-10.00   Break

10.00-10.45   RG meet with **SAR Co-ordinating Committee Chair and Senior Project Coordinator**

10.45-11.00   Tea/coffee break

11.00-12.00   RG meet with **Estate Services Senior Management Team**

12.00-12.15   Break – RG review key observations

12.15-13.00   RG meet with **SAR Coordinating Committee**

13.00-13.45   Lunch – RG only

13.45-14.30   RG meet with **representative group of Estate Services staff** – primary focus: **Campus Development and Estate Strategy**

14.30-14.45	Break
14.45-15.30	RG meet with **representative group of Estate Services staff** – primary focus: **Operational Support Services and Building Care; Academic Support; Residences; Campus Services; Hospitality Services; Technical Services; Copi Print; Managed Campus; Contact Centre; Changing demands on Estate Services**
15.30-15.45	RG tea/coffee break
15.45-16.30	RG meet with key University stakeholders: UCD Vice-President for Development; UCD Vice-President for Global Engagement; College Principal, UCD College of Arts & Humanities; Head of Financial Management
16.30-16.45	Break
16.45-18.30	**Tour of facilities**
18.30	RG depart

Day 2: Wednesday, 5 April 2017
Venue: Robing Room, UCD O'Reilly Hall

08.30-09.00	Private meeting of the RG
09.00—09.45	RG meet with **representative group of Estate Services staff** – primary focus: **3rd Semester; Events; Hospitality; Meeting demands of non-academic activity; Retail; Newman House**
09.45-10.00	Break – RG review key observations
10.00-10.45	RG meet with **representative group of Estate Services staff** – primary focus: **Estate Services; Sustainability; Compliance; Communications; Marketing of ES; HR; Managed Campus Estate**
10.45-11.00	RG tea/coffee break
11.00-11.45	RG meet with **representative group of Estate Services staff** – primary focus: **Staff, Student, and Community Experience of Estate Services and Campus (i) currently, and (ii) in future with projected increased campus population**
11.45-12.00	Break - RG review key observations
12.00-12.45	RG meet with **representative group of suppliers/service providers**
12.45-13.00	Break - RG review key observations

13.00-13.45	Working Lunch – Review Group and **external representatives**
13.50-14.20	RG meet with **representative group of clients**
14.20-14.30	RG private meeting - review key observations
14.30-15.15	RG meet with **representative group of Users - students**
15.15-15.30	RG tea/coffee break
15.30-16.15	RG meet with **representative group of Users - staff**
16.15-16.30	RG private meeting - review key observations
16.30-18.00	RG available for private individual meetings with staff
18.15-19.00	RG meet with **Dean of Graduate Studies/Deputy Registrar/Chair UCD Student Residences Review Working Group**
19.00-19.15	RG private meeting – review key observations/findings
19.15	RG depart

Day 3: Thursday, 6 April 2017
Venue: Robing Room, UCD O'Reilly Hall

08.45-09.05	Private meeting of RG
09.05-09.30	RG meet with **HR Partner**
09.40-09.50	RG available for private individual meetings with staff
10.00-10.30	RG meet with **Chair of SARCC and Capital Projects Manager**
10.30-10.45	Break
10.45-12.30	RG begin preparing draft RG Report
12.30-13.15	Lunch
13.15-15.00	RG finalise first draft of RG Report and feedback commendations/recommendations
15.00-15.15	RG teleconference with **VP for Campus Development** to feedback initial outline commendations and recommendations
15.15-15.30	Break

15.30-15.45   RG meet with **SARCC Chai**r and Senior Project Coordinator to feedback initial outline commendations and recommendations

16.00-16.15   Move to Moore Auditorium, O'Brien Centre for Science

16.15   **Exit presentation** to <u>all available staff of the unit</u> to feedback initial outline commendations and recommendations

16.45   Review Group depart