EVERSFIELD

Real Estate Performance

SURVEY SERVICES

Services Overview 2019

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EVERSFIELD

SPECIALIST PROJECT SUPPORT SERVICES

Eversfield Consultants (ECL) provide specialist project support services to clients in the property sector throughout the UK. Services include project management, asset management, condition assessment, lifecycle modelling, and management services.

PBSA & PFI CLIENTS

Our clients include some of the largest companies and investors in the PFI and PBSA sectors together with many household names in the construction and asset management sector. We have worked with many of our key clients over a number of years and a variety of projects. We regard this as sound testimony to our delivery and focus.

DELIVERING SINCE 2002

Eversfield have been operating since 2002. This has been 16 years of successful delivery, and collectively several decades of expertise. Eversfield has an enviable reputation for delivering solutions in demanding or challenging circumstances.

EXPERTISE & TECHNOLOGY

Our approach combines deeply grounded technical and sector specific expertise with our own software systems, developed to support and empower our services. This delivers flexible, scalable and customisable solutions to suit a client's needs.

SUPPORT & STANDALONE

With an integrated chain of services, from on-site condition surveys to data analysis, our services can be used to support project administration, or to supply fully formed services. These services can be combined to create full "end-to-end" solutions, as well as used on their own where required.

DATA

DATA CAPTURE

In a data-driven world, data itself is an asset. There is an increasing realisation that exercising ownership of data is a pre-requisite for success in any industry, property and asset management included. However significant on-site data is unrecorded, and therefore lost. This is a consequence of inappropriate tools and methodologies for data capture. Once lost, this data is irretrievable. The potential loss of value is hard to estimate, however for reasons outlined below, it can be assumed to be significant.

Collected data adds some value by its existence. In many cases it is required to demonstrate compliance, service levels or to arbitrate disputes. It's sought after to produce cost and component databases on which models and estimations are built. It's also used as support when management and performance need to be assessed against the record. Potentially its greatest value is as the foundation for analysis and value extraction. This is doubly important, as it can be analysed now, but it is also in place for future more powerful analysis which may not exist yet. Given that uncaptured data is irretrievable, this is impossible to correct retrospectively.

VALUE ADD

Data alone does not necessarily add value for management and strategy decisions for asset owners and operators. There is a distinction between data and insights. The latter uses data, and allows value-add. Effective analysis gives managers and decision-makers actionable insights which lets them use their expertise to improve asset performance. This involves providing them with clear, relevant and concise information which answers their questions and highlights significant trends. Done effectively, this can reduce risk, optimise management, predict issues before they arise and highlight areas for savings and improvements which might otherwise have gone unidentified.

Value added through effective and comprehensive data analysis gives companies a competitive advantage. It enables better performance, higher service levels, and lower costs. Ultimately, this translates into better returns.

TOOLS FOR THE JOB

An awareness and intent to add value through data is not enough on its own. The scope of the task makes the use of the right tools a necessity. Specialised and dedicated tools have made this increasingly accessible. In order to gain the greatest benefit, these tools have to enable their users. They need to reduce manual repetitive tasks, capture more data and set it out in a way that plays to the strengths of the user.

The Eversfield LCMS tool is an end-to-end system which addresses these issues. We have designed and built it internally with industry users in mind. It enables rapid, accurate data capture on-site, comprehensive analysis in an asset-replicating database, and presentation which empowers the user. This process can be taken in parts, without necessitating use of the full end-to-end. The survey aspects of the system are outlined below, with further information on our processing and analysis capabilities available in our Lifecycle Services documentation.

SURVEY SERVICES

We offer a number of different onsite surveying services, all of which we have significant experience and success in, for clients in a range of sectors.

CONDITION SURVEYS

Both Fabric and M&E surveys are carried out by our team, with specifically trained surveyors. Components are recorded as observed onsite, allocated a condition score (pre-approved with the client, but conventionally on a 1-5 scale). Alongside this, they will also collect quantity in any given location, as well as barcodes if required. Surveyors record noteworthy aspects of the component, which is mandatory when logging condition scores indicating an issue. Surveyors collect photographic evidence to support observations, which are also mandatory for components where an issue is recorded. Onsite documentation, and maintenance and lifecycle logs are reviewed to establish accurate ages for all components.

This can be varied depending on the client's required data granularity and specific needs e.g. recording of additional information on components. We conduct surveys for a variety of purposes, through contractual compliance, management audit, or general check-up and best practice.

DEFECT REPORTS

Usually conducted alongside a site survey, defects reports are conducted at specific points in the project where liability will pass from one party to another for issues arising from the original build. Defects reports are supplied alongside survey returns, and the strength of their findings are increased through detailed review of data on the ground. These follow a strict layout, documenting the observations on an elemental basis (using the BCIS hierarchy), thereby covering all aspects of the asset. We have gone on to support our clients with pursuit and settlement of issues arising as a consequence of on-site defects reports. Our team have significant experience in this area.

ASSET REGISTERS

We are also able to conduct the creation of, or update of existing asset registers. This provides a more granular level of detail than a condition survey, though isn't necessarily exclusive of condition allocation. The end output of an asset register treats each specific item distinctly for others even in the same location, so that a unique identifier can be allocated to it. The level of specificity can be configured to a clients needs.

Asset registers may also include the provision of a new tagging or barcoding system, or the integration of an existing one into the system. This is an effective way of enabling specific item identification between the facility and the database, and ensures that highly mobile items can be tracked accurately over time.

Asset Registers are undertaken by our experienced survey team, and supported by our off-site team. We are also able to supply advice and support in implementing a maintenance and tracking regime on the basis of a newly-created register.

SURVEY PROGRAMME PLATFORM

Eversfield also makes its survey platform available for third parties to conduct surveys and asset register exercises with their own staff or suppliers. This may make sense if there is no need for external objectivity, or a tight timeframe requiring specialist input. It makes it possible to conduct live updates or gradual evaluation of a facility from resources and staff onsite who may have occasional ability to contribute. For this, clients supply facility data as specified at engagement. Eversfield configures this into their survey platform, and returns it for completion. When completed, the survey file is returned to Eversfield for extraction, checks and final delivery. This is a supported service, but places the surveying aspect of the task with the client.

SYSTEM OVERVIEW

The below gives an overview of how the Eversfield Survey solution works, and where it fits into the broader Eversfield process.

DATA COLLECTION

Eversfield has undertaken asset surveys for clients for over 10 years. In that time, we have set out to solve some fundamental issues in the way that data is collected and processed.

Initially we used spreadsheets and notebooks, (which is still common today). This is time consuming and gives fundamental issues of data integrity; some projects with asset capture have spreadsheets in excess of 400,000 of lines of data, all manually handled. Our system was developed as a single solution to these issues. Our system works on a database which has built in advantages for data security and integrity. All aspects of a project or multiple projects within a portfolio sit within a single data system purpose built for handling information of that type and scale.
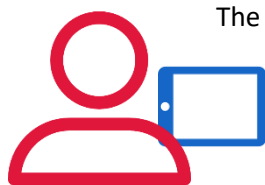
The data collection system enables the quick and accurate capture of on-site condition data through a survey. It allows direct population of components into the database. This is done through the custom Eversfield survey software, optimised for this work and used independently for contract compliance by a number of the UK's leading PFI groups.

Output from this includes accommodation schedules, survey templates, survey capture data, photographic evidence, and asset bar coding (if available). Survey data is entered by the surveyor directly into the system via single of multiple iPads depending on the number of surveyors. This produces a database with granular project data, down to the component level.

We facilitate the use of our system for third parties in a supported capacity, where with the supply of the requisite site data, we setup and configure surveys for use by clients themselves on site. We can then return the results from this as a most cost-effective deployment.

DATABASE & REPORTING

Survey templates and data are constructed, issued from and returned to a central database. It is possible on the return of the survey data to issue results at this point. Wider application, and the use of the surveys as part of an end-to-end process would analyse and handle the data within the database. This can form the basis of on-going asset management if required, where the model can be kept up to date based on information provided by the client, or through the survey solution. This directly updates the reporting in the dedicated interface, to allow smooth and seamless updates. This also makes use of our powerful reporting tool. More information on the database and reporting are available in our Lifecycle Services documentation.

METHODOLOGY

There are a number of steps and approaches taken within all of our survey based services. The process diagram below lays out the core structure of all activities, though there are slight variants depending on the exact needs of the project.
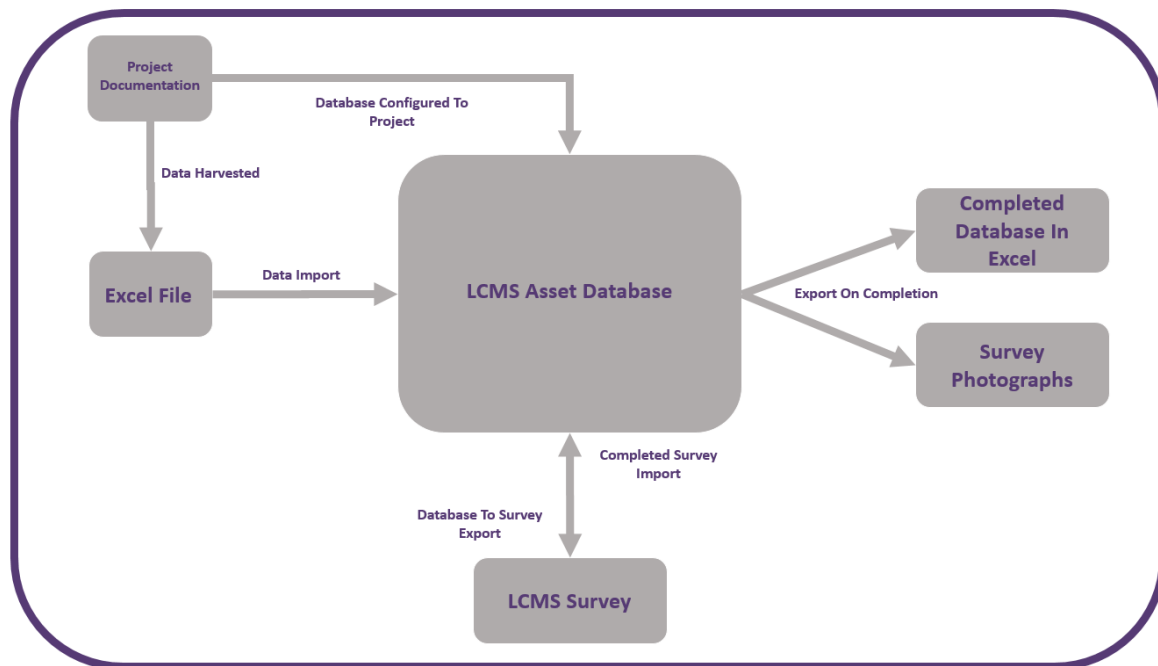
The first step of all projects is a desktop review of the supplied project documentation. This is necessary to setup and configure the surveys, as well as to establish any issues likely to be encountered, as well as providing a first opportunity to review supplied details.

The next step is to create survey templates from the project data. It is possible to accommodate client specific templates if they are supplied and required for us. This will involve the creation of a survey file which allocates components using a pre-agreed data taxonomy (in most cases BCIS, however other taxonomies such as NRM3 can be used as well). This allows for a combination of efficient and comprehensive data collection on site, ensuring greater accuracy and speed.

These surveys are issued to surveyors on hand-held devices. The survey team then conduct the survey onsite. We use a highly experienced team of surveyors who have years of experience, as well as technical grounding. As well as quantitative data, on-site document review and staff interviews are conducted where required. Surveyors pass through all locations, and record assets observed, allocating data as set out in the survey template. Where creating an asset register, surveyors will conduct all interactions (such as affixing barcodes) in one pass of the component.

Once survey data has been collected, it is returned to the database and extracted. At this stage a number of checks and primary analysis are undertaken to ensure output is correct, as well as to draw client attention to notable aspects of the returned data. If conducting a defects report, a follow-up visit to site is arranged. This uses the qualitative data collected on-site, as well as quantitative analysis to indicate whether any defects are evident in the records.

We also support third party use of our survey system to conduct surveys with their own staff. In this instance, the software process steps outlined in the diagram above, and in the above steps need to be carried out. This includes supply of correctly structured project data, as well as the desired data taxonomy (though this can be supplied if no strong preference is felt). Surveys can then be issued to the client to conduct the surveys with their own staff or in their own time. Once completed, surveys are returned to ECL for extraction and supply of the data.

EXPERIENCE

The Eversfield team is a small, highly experienced and able group of professionals. Each year, we conduct in excess of 1 million m2 of on-site surveys, as well as supply consulting and data analysis services on many additional projects. We have extensive experience in the PFI and PBSA sectors in particular, although we supply services to a wide range of facility types. We have supplied our services in a diverse range of use cases:

- Contractual compliance
- Regular condition checks
- Management plan updates
- Defect Reports
- Objective evaluation in multi-party disputes
- Management system implementation and upgrades
- Existing survey rectification
- As part of the full Eversfield LCMS system for analysis and reporting on assets

The above list is indicative rather than exhaustive. We are able to support a range of uses.

Every member of our on-site survey team has significant experience, some with decades of experience. Several of them have high levels of technical skills, and are highly motivated with an individual work ethic, ensuring they conduct their onsite work diligently, accurately and efficiently. Our subject area experts support specific issues flagged and conduct and compile defects reports.

This is supported by the use of our own system, which has the benefits of creating a highly optimised process. This has been developed by our off-site team, and equips surveyors with a customised and highly efficient framework for data collection at that facility. This also has the benefits of increased data accuracy. Together this makes our rates highly competitive, as well as giving us flexibility in our offerings.

Our clients include some of the largest companies and investors in the PFI and PBSA sectors together with many household names in the construction and asset management sector. We have an enviable reputation for delivering solutions in demanding or challenging circumstances. We have worked with many of our key clients over a number of years and a variety of projects. We regard this as sound testimony to our delivery and focus.

FULL LCMS PROGRAMME

The survey programme developed by Eversfield is the on-site data collection module of the full data collection, analysis and reporting system. These surveys are integrated into the database, and form the first step of an end-to-end process, where site data is collected, passed to the database and analysed and made available through our BI tool for uses to assess. This enables greater value extraction from collected data, and can form the basis for long term planning, works scheduling and optimisation, detailed risk analysis or disposal planning. For more information, please review our Lifecycle Services documentation.