

CASE STUDY

Moving from spreadsheets to software 'overnight'



Background

Hastings District Council is located in New Zealand's Hawke's Bay region, and services a community of about 73,000 people. In preparing for its 2018 Long Term Plan (LTP) planning process, the Council's experienced property asset management team wanted to improve its overall approach to property asset data collection, expenditure analysis, planning, and decision-making.



Splash Planet – one of Council's assets now managed through the asset management software.

The Council's goals – their reasons why...

Hastings District Council identified the following asset management goals:

1. Develop a user-friendly, central repository for the Council's property asset management data, as all their information was stored in multiple spreadsheets.
2. Retain knowledge held by key Council staff and make it easily accessible to others.
3. Gain a more strategic view of the Council's property portfolio to help decision-making and budget development.
4. Use an evidence-based approach to develop and prioritise future renewal and maintenance works programs.
5. Implement a proven solution based on IPWEA's NAMS approach, recognised by Audit NZ.

The challenges

The Council identified two key risks:

- A heavy reliance on multiple spreadsheets dispersed throughout the organisation.
 - The fact that the spreadsheets were prone to corruption, unsecure, and lacked procedural rigour was a concern.
 - Knowledge of these spreadsheets was held only by certain people, and the potential loss of these key individuals and that knowledge bank was considered a significant risk.
- Out-dated data meant there was low confidence in long-term budget forecasts.

Other challenges were also recognised:

- Lack of internal resources was a barrier. Because of this, the Council recognised it needed to work with external providers to collect accurate property asset data and information. While the Council property team had the skills and knowledge to conduct property condition assessments, they lacked the capacity to collect this data. They recognised the clear need for practical assistance and on-going support to meet LTP planning and reporting requirements.
- The Council also wanted the potential to include asset types such as Parks and Reserves assets in the future, and needed a system with the flexibility to adequately handle this requirement.

Our solution

1. **Overnight**, SPM Assets set up the asset management software so a pilot survey data collection project could begin.
2. The SPM Assets database was set up, with a **standard off-the-shelf template** for local government, including component names, replacement rates, useful lives, criticality factors, and deterioration models.
3. A trained assessor completed the **pilot survey** on one medium-sized Council building. This confirmed the suitability of the approach, the database configuration, and the resulting information.
4. Following the success of the pilot, all **existing historical information** held in Council spreadsheets was filtered, mapped, and added to the asset database.
5. The Council property team can now **access all their data** through the software – this included asset data, analysis, photos, and reports.
6. While processing historical information, a **gap analysis** was developed for:
 - Housing for elderly; and
 - Public conveniences.The Council property team then used their knowledge of these assets to quickly fill these gaps.
7. SPM Assets staged comprehensive **training** for the property team to generate budget reports for practical use and to maintain and update their data.
8. The Council **progressively** extended **condition surveys** in stages to cover properties including:
 - **Community and facilities buildings:** Libraries, pools, leased properties, housing for older people.
 - **Corporate services buildings:** Fire stations and sheds, main offices, animal welfare.
 - **Infrastructure buildings:** Solid waste facilities, 3 Waters.
 - **Parks and reserves buildings:** Changing rooms and toilets, heritage buildings, park depots, pavilions and halls, cemeteries and crematorium.
 - **Parks and sports buildings:** Club Rooms, Halls.
9. **Work request functionality** was adopted by the property team to identify and quickly allocate immediate works needed.

Benefits

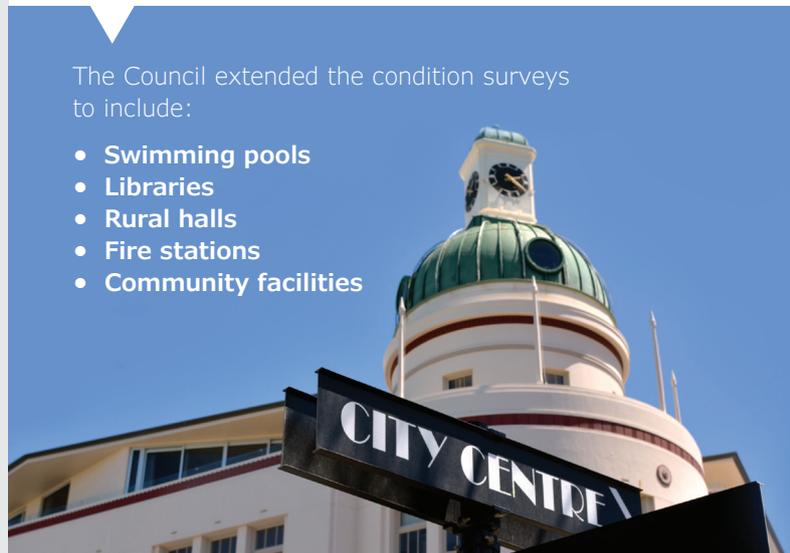
- ✓ The database is pre-populated with templates, making the Council's transition from spreadsheets to software **simple and cost-effective**.
- ✓ Information formerly held by key individuals is now **fully accessible** in an **easily searchable** centralised system.
- ✓ Critical knowledge is now **retained and efficiently managed** within the software.
- ✓ **Updated** Asset data is **securely stored and backed up** in the cloud.
- ✓ The software **enables new business processes** making the analysis, practical use, and maintenance of asset data much easier.
- ✓ Critically, Council staff can quickly generate **reliable reports** and financial forecasts.

Council is now embracing the next phase including:

- Developing property-specific performance standards and measures using the software's in-built Property Quality Standards.
- Optimising contract works by grouping similar works projects.
- Using the system proactively for new-build projects.
- Rolling out the software to include other council assets.

The Council extended the condition surveys to include:

- **Swimming pools**
- **Libraries**
- **Rural halls**
- **Fire stations**
- **Community facilities**



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assess
analyse
plan