HEFMA CONFERENCE 2026 · OCTOBER 2026

# How well does your campus really perform?

## Combining FM cost benchmarks with student experience evidence to drive better investment decisions

BETAPOINT

AGENDA

# Two lenses on campus performance

| 00:00 | 00:03 | 00:09 | 00:27 |
|---|---|---|---|
| Introductions | Building a benchmarking database | Assessing campus performance | From findings to action |
| 3 MIN | 6 MIN | 18 MIN | 3 MIN |

THOUGHT LEADERS

# Three perspectives: South Africa, the United Kingdom and Australia

## Adam Sargent

BETAPOINT · SOUTH AFRICA

Leads Betapoint's campus benchmarking practice

## Mike Packham

BETAPOINT ASSOCIATE · UNITED KINGDOM

Chartered surveyor and FM consultant; lead author of the IWFM Good Practice Guide to Benchmarking

## Sam Hall

BETAPOINT ASSOCIATE · AUSTRALIA

Campus experience researcher

THE QUESTION

# Most institutions know what their campus costs. Few can say how well it performs

01

## Are we over-spending?

COST AGAINST PEERS

02

## Are we under-maintaining?

CONDITION AND BACKLOG

03

## Are we spending where it matters?

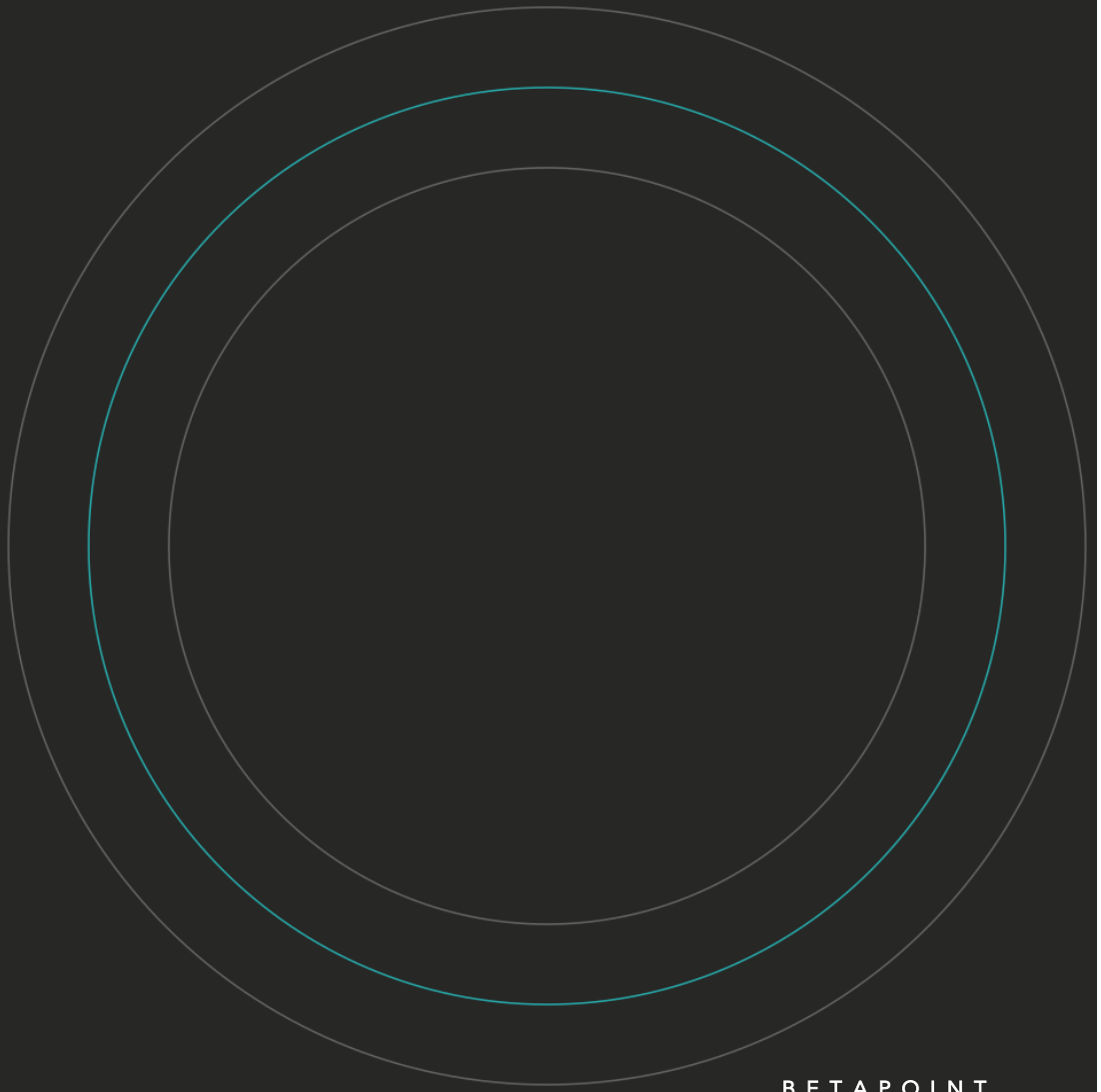
LIVED EXPERIENCE

Without a reference point, none of the three can be answered with confidence.

# 01

# Building a benchmarking database

Before comparing with anyone else, trust your own numbers



# African campuses are under pressure, and need a reference point

## R25bn+

of outstanding maintenance across South Africa's university system, from a DHET audit

*"Many colleges did not have maintenance plans in place…" Parliament's Portfolio Committee on Higher Education, October 2025*

## R3.5bn

DHET infrastructure transfers to universities and TVET colleges, 2024/25

## 500 000+

student beds short in South Africa

Sources: DHET University Macro-Infrastructure Framework, 3rd ed. (2021); PMG ATC251030 (October 2025); PSHA via IOL (February 2025). South African figures as an example

# Same label, different measure: check the definition before you compare

FACILITY CONDITION INDEX

**0.95** = GOOD

## TEFMA

1 minus backlog ÷ replacement value. Higher is better

**0.05** = GOOD

## APPA

Backlog ÷ replacement value. Lower is better

**Mix them up and your worst buildings rank as your best.** The same trap applies to floor area and replacement value

Sources: TEFMA Benchmark Survey definitions (2022); APPA, The Facilities Condition Index

# Four kinds of data, and a first baseline in six to eight weeks

### 1 Estate

Floor area, replacement value, students

### 2 Cost and inputs

Spend by service line, consumption, labour, unit rates

### 3 Condition

Grade per building, costed backlog

### 4 Experience

Satisfaction and importance, by space

1 **Scope** — WEEK 1

2 **Collect** — WEEKS 2 TO 4

3 **Validate** — WEEKS 5 TO 6

4 **Compare** — WEEKS 7 TO 8

**Most of it already exists:** ledger, contracts register, space and asset registers, national returns

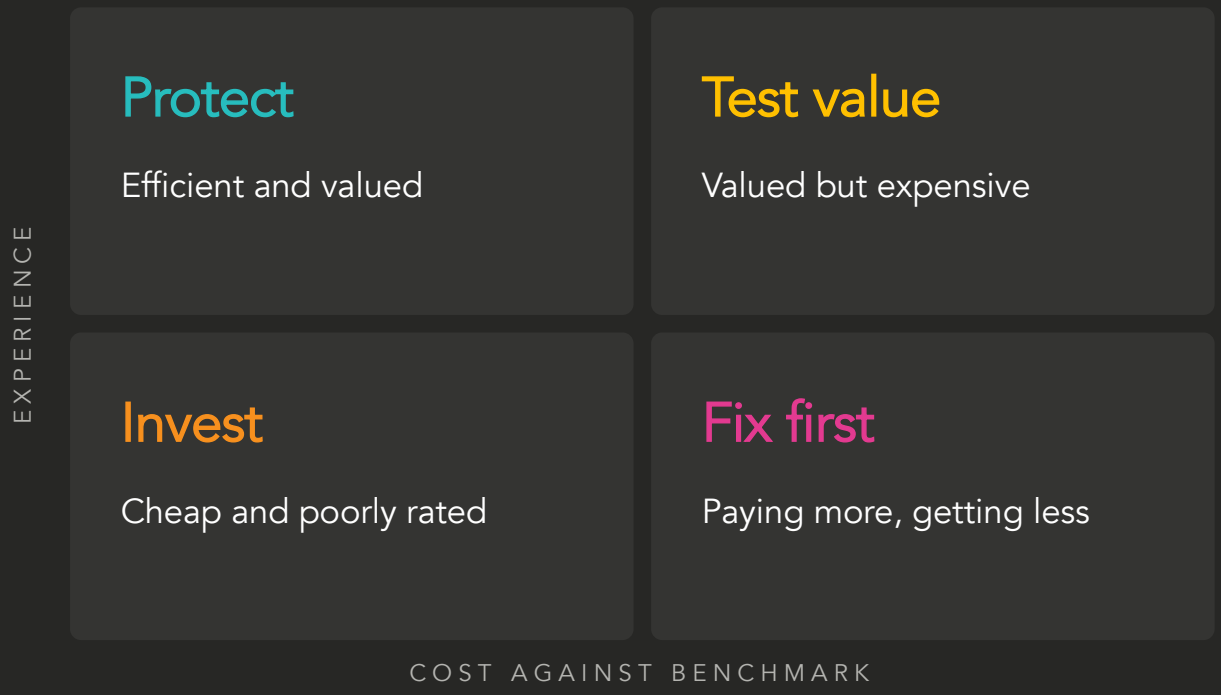
Indicative timings for one institution's first cost baseline

# 02

# Assessing campus performance

Cost efficiency and lived experience, read together

# Two lenses, one decision: read cost against experience




One dot per building, campus or service line

**Cost** from the benchmark

**Experience** from the people who use it

**The quadrant** sets the action

# Five ratios every estates team should know

## R/m²

Cost per m², by service line

## % T/O

FM cost as a share of turnover

## % ARV

Maintenance against replacement value

## FCI

Facility Condition Index

## R/FTE

Estate cost per student

# Benchmarking is comparison with a purpose

> Benchmarking is the process of comparing a product, service, process - indeed any activity or object - with other samples from a peer group, with a view to identifying 'best buy' or 'best practice' and targeting oneself to emulate it

Mike Packham in the RICS Certificate in Corporate Real Estate and Facilities Management

# Five steps to a fair comparison

1

## Select the peer group

Similar product, motivations, conditions

2

## Set the parameters

Per m², per capita, per item

3

## Classify and measure

One protocol: what's in, what's out

4

## Gather the data

Audited spend, consumption, labour, satisfaction

5

## Compare

Against peer minimum, mean and maximum

Steps 1 to 4 exist so that step 5 compares like with like. Best of breed may be in another sector or country

Source: Mike Packham. RICS Certificate in Corporate Real Estate and Facilities Management

# A gap from the benchmark is not automatically waste

Six groups of resource drivers sit behind every unit cost

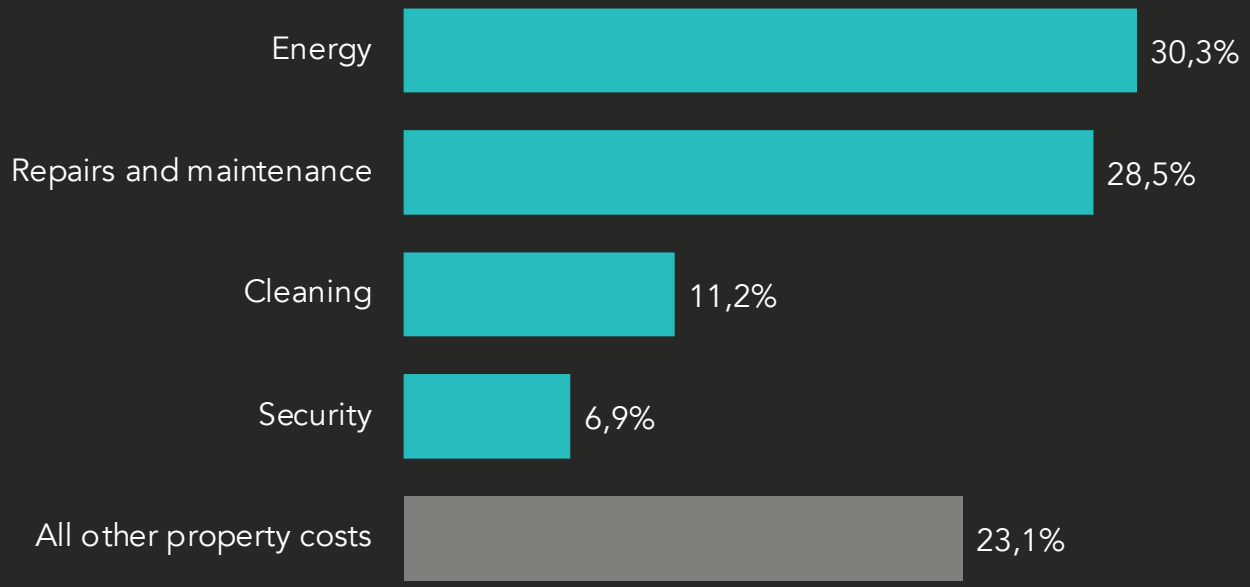
| 1 | 2 | 3 | 4 | 5 | 6 | → |
|---|---|---|---|---|---|---|
| **Business** | **Quality** | **Local factors** | **Operational** | **Quantitative** | **Economic** | **Total cost** |
| What the institution needs | Specification of works | Frequency, time of day | Access, occupation, design | Areas, head-count, volume | Tariffs, wages, markets | |

**Choices:** 1 to 3 are set by the institution. **Circumstances:** 4 to 6 largely are not

Source: Mike Packham. RICS Certificate in Corporate Real Estate and Facilities Management

# What comparable campuses pay, by service line

Share of total property costs, UK higher education sector, 2023/24




## Where African campuses are likely to differ

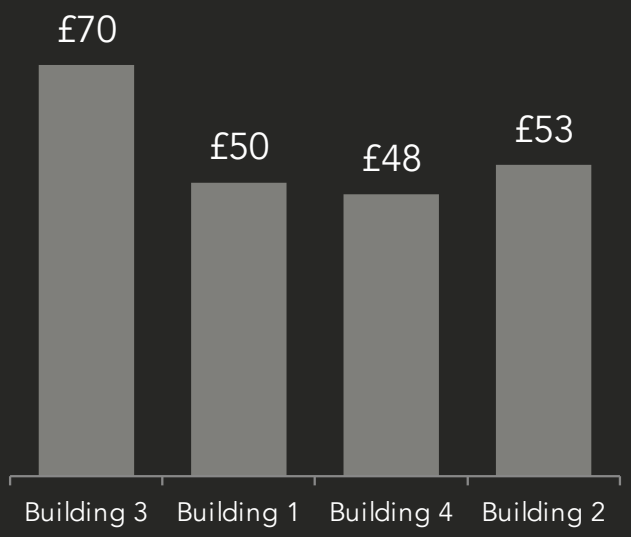
- Security
- Energy and water resilience
- Labour model for cleaning
- Age of the estate

Source: AUDE Higher Education Estates Management Report 2025. 'All other' is the remainder, calculated

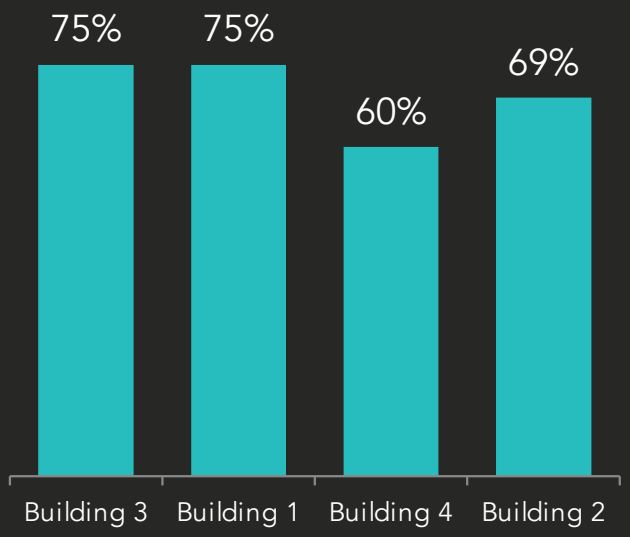
# Set cost beside satisfaction to see where the money is working

Worked example: office furniture across four buildings

COST PER CAPITA




USER SATISFACTION




**Building 1**
Same satisfaction as Building 3, for £20 less per head

**Building 4**
A little cheaper, and much less satisfying

*Sam has done this across whole campuses, with students*

Source: Mike Packham. RICS Certificate in Corporate Real Estate and Facilities Management. Example data from Mike's course material

# The Campus Experience Index asks students about places, not services

**62**

campuses, 5 countries

**~7 min**

to complete

**400 to 12,000**

comments per campus

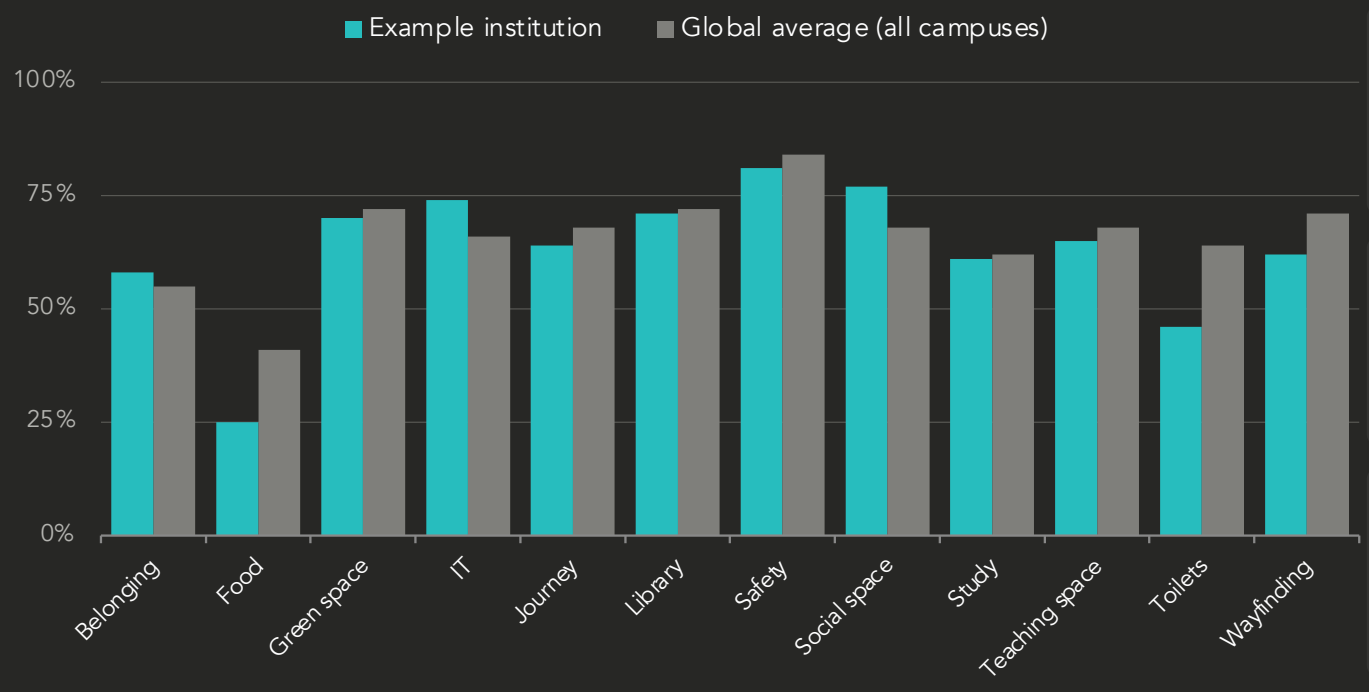
01
Ask the right questions

02
Connect FM to users

03
Create a feedback loop

Source: Sam Hall, Campus Experience Index

# Benchmarking shows where a campus falls behind its peers




**−18** Toilets
46% against 64%

**−16** Food
25% against 41%

**+9** Social space
77% against 68%

Source: Sam Hall, Campus Experience Index. Example institution, illustrative. Points difference from the global average

# Case study: the University of Sydney

**2,400**
students

**23,000**
comments

**2024**
**1 campus**
Pilot

**2025**
**9 campuses**
Rollout

**2027**
**15 campuses**
Repeat

Source: Sam Hall. University of Sydney, Campus Experience Index 2024 and 2025. Photo: Carslaw Learning Hub

# What students love, and what they don't

LOVE

Green space · Heritage buildings · Libraries

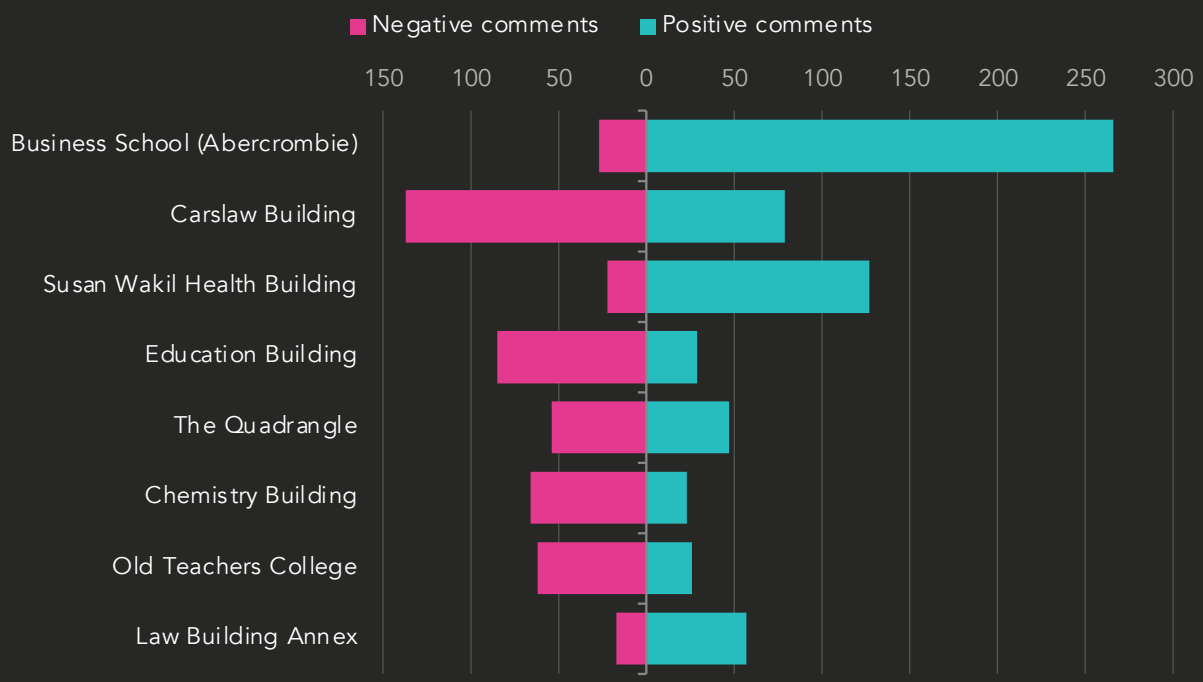
DON'T

Toilets · Food cost · Ageing buildings

*"Crowded, hot, noisy study spaces like the libraries."*

Source: Sam Hall. University of Sydney, Campus Experience Index 2024 and 2025

# Older buildings are harder to learn in, and the comments show where



*"Cramped, hard to move around the room"*

Often furniture and layout, not the building fabric

Source: Sam Hall. University of Sydney, Campus Experience Index 2024 and 2025

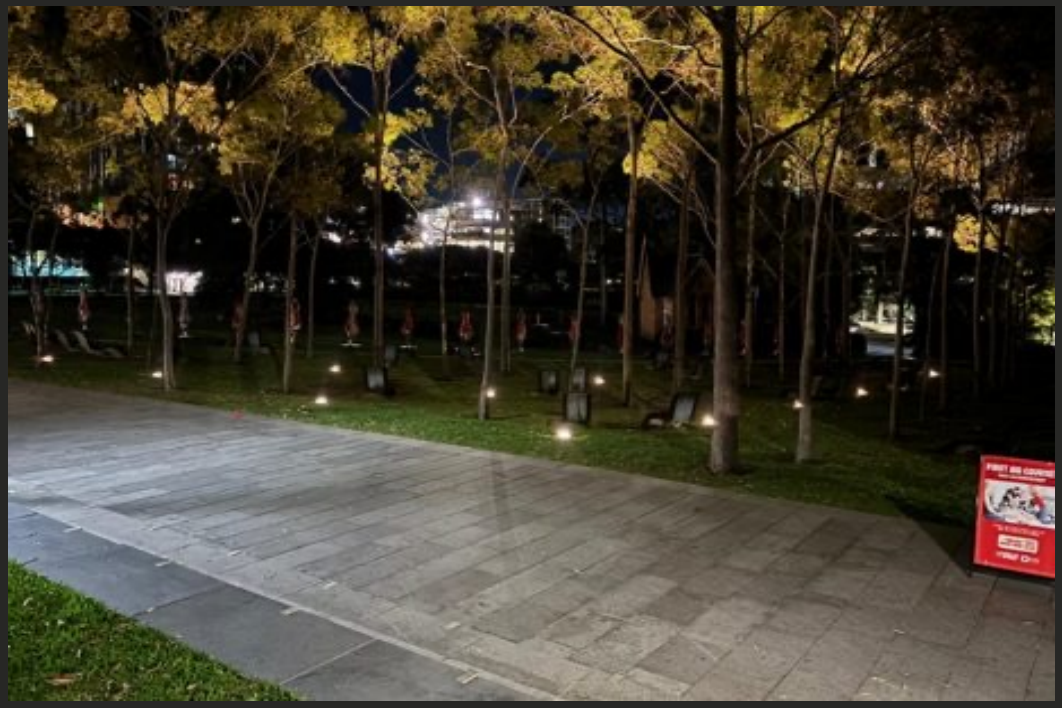
# A low safety score led to a lighting audit, and new lighting

**76%**

safety score, against 84% for peer research universities

**192**

comments named poor lighting, the top concern by far



Source: Sam Hall. University of Sydney, Campus Experience Index 2024 and 2025. Peer set: Go8 and Russell Group

# The evidence got projects funded

## Toilet upgrades

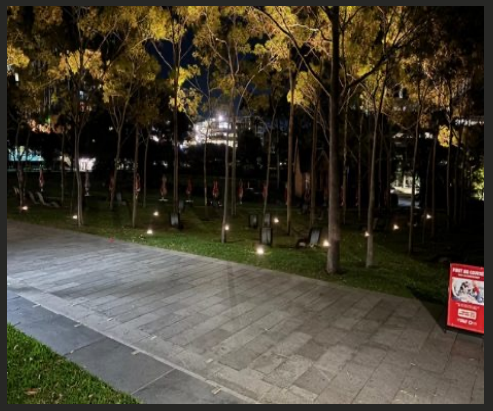
138 negative comments at one library showed where to start

## Teaching spaces

Upgrades backed by student comments

## A $5 canteen

Cost complaints fell from 4 in 10 to 3 in 10



## Lighting and safety

A lighting audit and new lighting

*Findings also informed leasing, masterplanning and investment priorities*

Source: Sam Hall. University of Sydney, Campus Experience Index 2024 and 2025

# France, October 2026: the backlog reaches the street

*"The heaviest toll in decades paid by the school system"* Prime Minister Sébastien Lecornu, 6 October 2026

## THE ESTATE

| | |
|---|---|
| 65 years | average age of France's school buildings |
| 14% | of secondary schools renovated in the past ten years |
| €1.5bn a year | needed until 2050 to renovate secondary schools |

## THE RESULT

| | |
|---|---|
| 735 | schools disrupted on a single day, 2 October |
| 24 | schools burned or ransacked |
| 6,100 | arrests, most of them minors |

Leaks, rats, collapsing ceilings, overheated and overcrowded classrooms. **Every complaint would have shown up in a condition survey or a user survey, years earlier**

Sources: Reuters via TimesLive (6 Oct 2026); Al Jazeera (6 Oct 2026); France 24 (6 Oct 2026); The Week (5 Oct 2026). Figures as reported

# Benchmarking is only stage one of four

1

## Review

Benchmark cost, condition and experience

2

## Strategy

Protect, test, invest, fix

3

## Implementation

Contracts, budgets, maintenance plan

4

## Monitoring

Measure again. Did it move?

A benchmark that stops at stage 1 is a cost, not an investment

Four stages: Mike Packham

# Three questions to take back to your institution

01 Which service line do you trust your own numbers on least?

02 Who owns estate data in your institution, and who actually uses it?

03 What would it take to share data with peer institutions?

BETAPOINT

# Thank you

**Adam Sargent**
adam.sargent@betapoint.co.za
www.betapoint.co.za

The full deck is available on request.

**Disclaimer and use**

© 2026 Betapoint Management Consultants (Pty) Ltd. All rights reserved. This presentation was prepared for delegates of the HEFMA 2026 Conference and is shared for their information and internal, non-commercial use. It may not be reproduced, distributed or adapted, in whole or in part, without prior written permission from Betapoint. Third-party material, including benchmarking methodology, case study data and photographs, remains the property of its respective owners and is used with permission. Figures from published sources are cited as reported and have not been independently verified. The content is general in nature and does not constitute professional advice. Betapoint accepts no liability for decisions made on the basis of this material.