

Facilities Management

FM Key Performance Indicators



NORTHWESTERN
UNIVERSITY

February 15, 2016

Key Performance Indicators

Process/Function	KPI	Goal	Actual	Trend
Energy Conservation	Energy Usage Index (BTU/SF)	- 5%	- 2% YTD	Improving
Waste Reduction	Waste to Landfill	- 3%	- 1% YTD	Improving
Emission Management	GHG Emissions	- 10%	- 12% YTD	At Goal
Recapitalization	R&R* Capital Encumber Rate	3 Years	4 Years	Improving
Utilities Management	Recapitalization Rate	33 Years	112 Years	Improving
Preventive Maintenance	Percent on time completion	100%	61%	Flat
Operating Budget Execution	Variance to Budget	+/- 1%	+1% YTD	At Goal
Utility Budget Execution	Variance to Budget	+/- 5%	+16% YTD	Declining
Service Request Completion	Open More Than 30 Days	<25%	83%	Flat
Local Resident Employment	Compliant Contracts	95%	78%	Improving

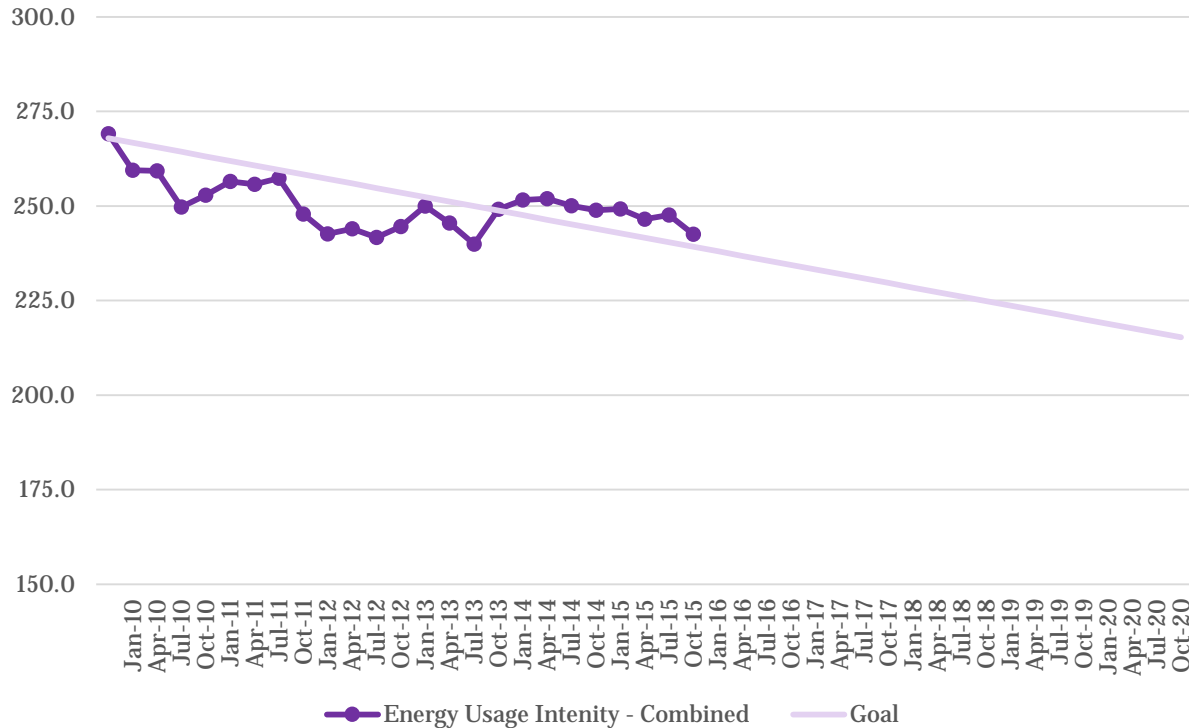
*R&R is Renewal and Replacement, an annual capital allocation applied to buildings, grounds and installed equipment to extend the service life of Northwestern facilities.

Process/Function	KPI	Goal	Actual	Trend
MBE/FBE** Use	Compliant Contracts	95%	86%	Improving
Inlease/Outlease Management	Review Time	<10 Days	3 Days	At Goal
Move Inspection Execution	Service Rating	>90%	100%	At Goal
Digitization	Scanned Documents per Month	>800	1,458	At Goal
Planning Data Access	Request Fulfillment Time	<1 Day	0.5 Days	At Goal
Planning Data Accuracy	Data Deficiencies	78,000 sf	145,655 sf	Improving
Injury Management	Annual OSHA Injuries	<8/year	0 YTD	At Goal
Capital Plan Execution	Actual at or below Budget	>95%	95%	At Goal
Project Cash Flow	Actual to Plan	+/- 5%	- 11%	Improving
Design Quality	Receive Major Design Award	1/year	0 YTD	Flat

**MBE/FBE are Minority and Female Business Enterprises.

Energy Conservation

Energy Usage Intensity (KBTU/ sf)*

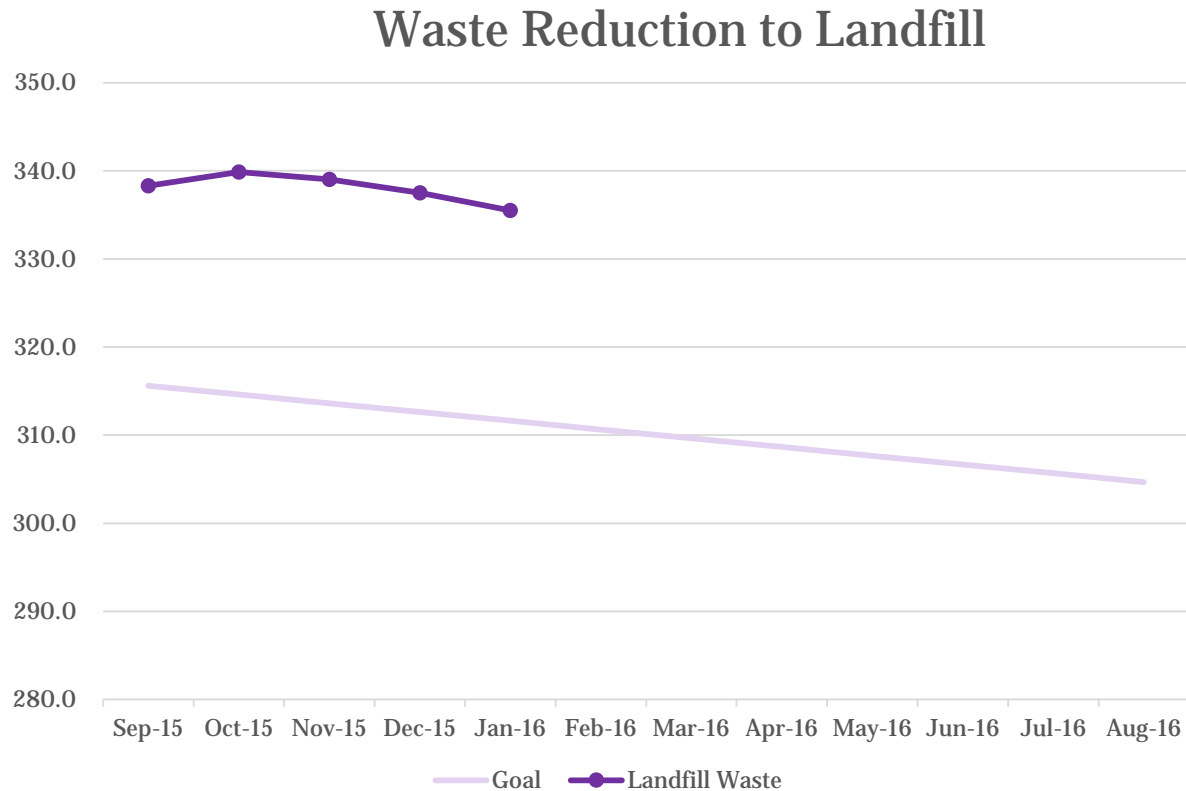


Campus	% Reduction (2010 Baseline)
Evanston	13.5%
Chicago	11.9%
Combined	13.6%

- **f(design, construction, technology, operations, occupant behavior)**
- **KPI goal is 20% reduction by 2020 (5% reduction in FY16)**
- **Initiatives: Design specifications; retro-commissioning; audits; occupant engagement**
- **FM Leader: Julie Cahillane**

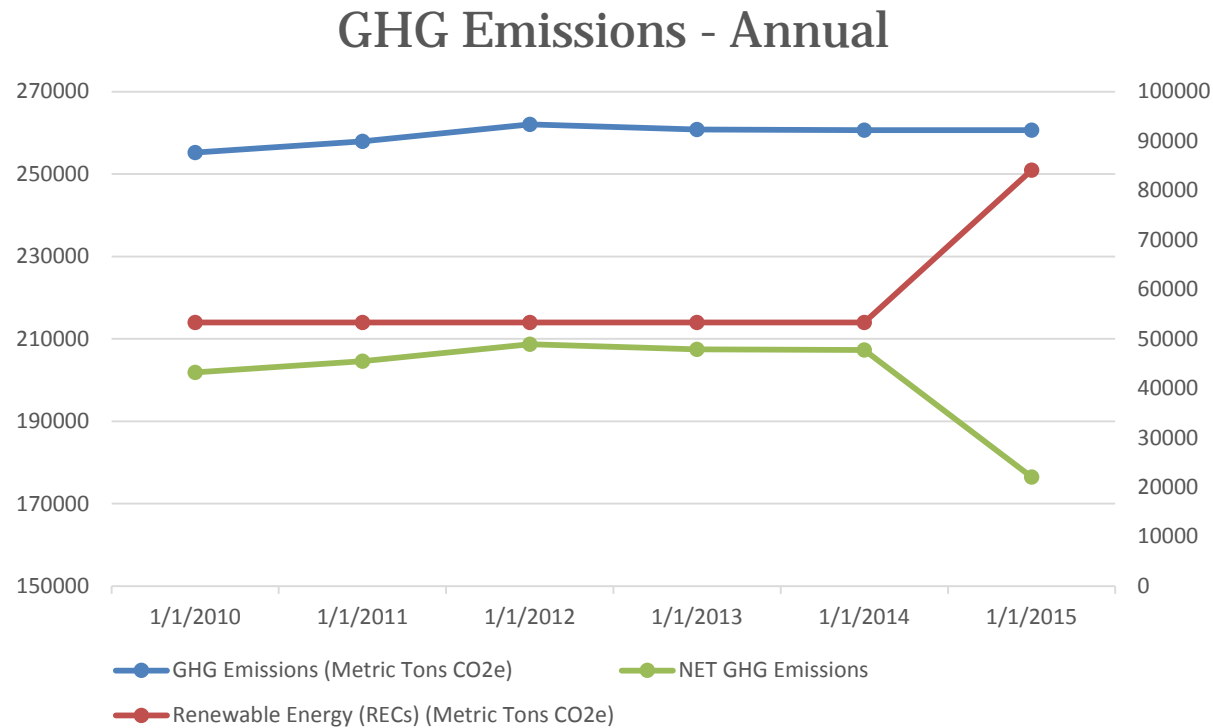
*Note: Energy Use Intensity is an internationally recognized standard where all energy inputs are converted to thousand British Thermal Units and divided by the portfolio square footage.

Waste Reduction



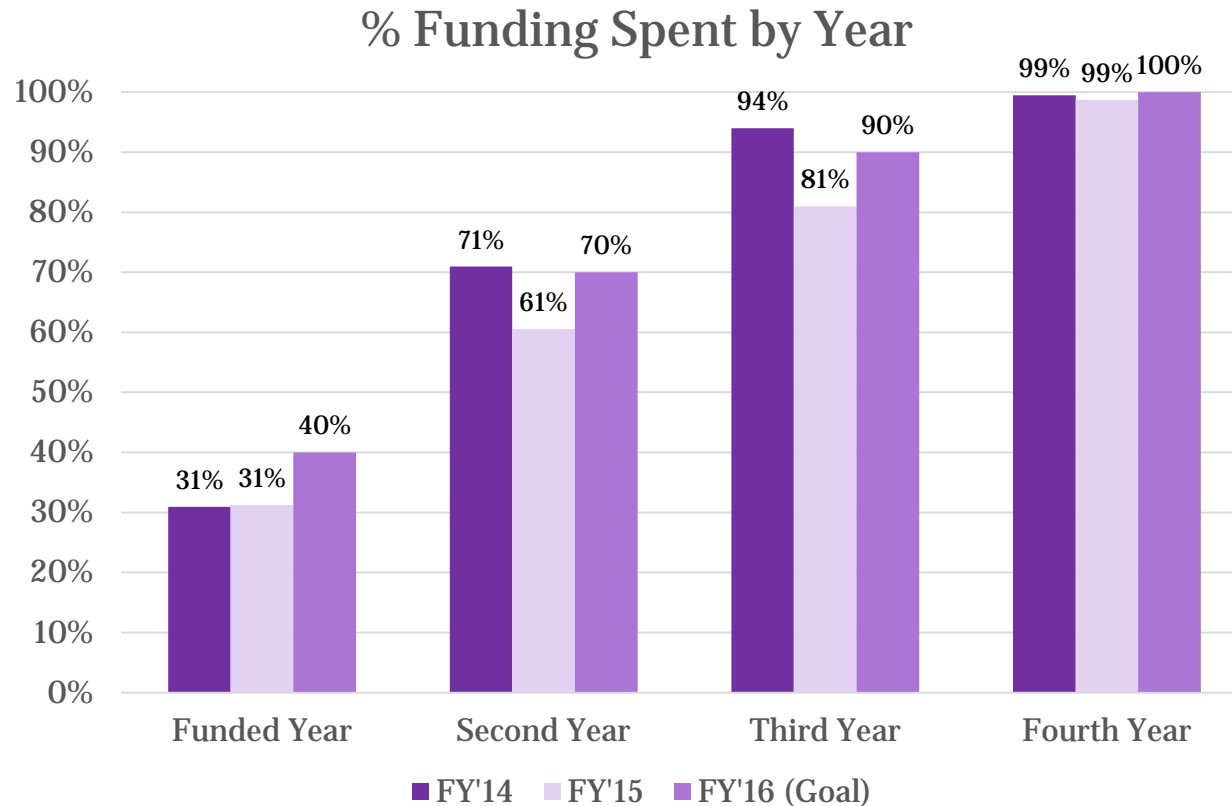
- **f(purchasing, reuse, recycling, diversion, occupant behavior)**
- **KPI goal is 30% reduction in waste to landfill by 2020 (3% reduction in 2016)**
- **Initiatives: Improve reuse programs; single-stream recycling; bin location; engagement and education**
- **FM Leader: Julie Cahillane**

Emission Management



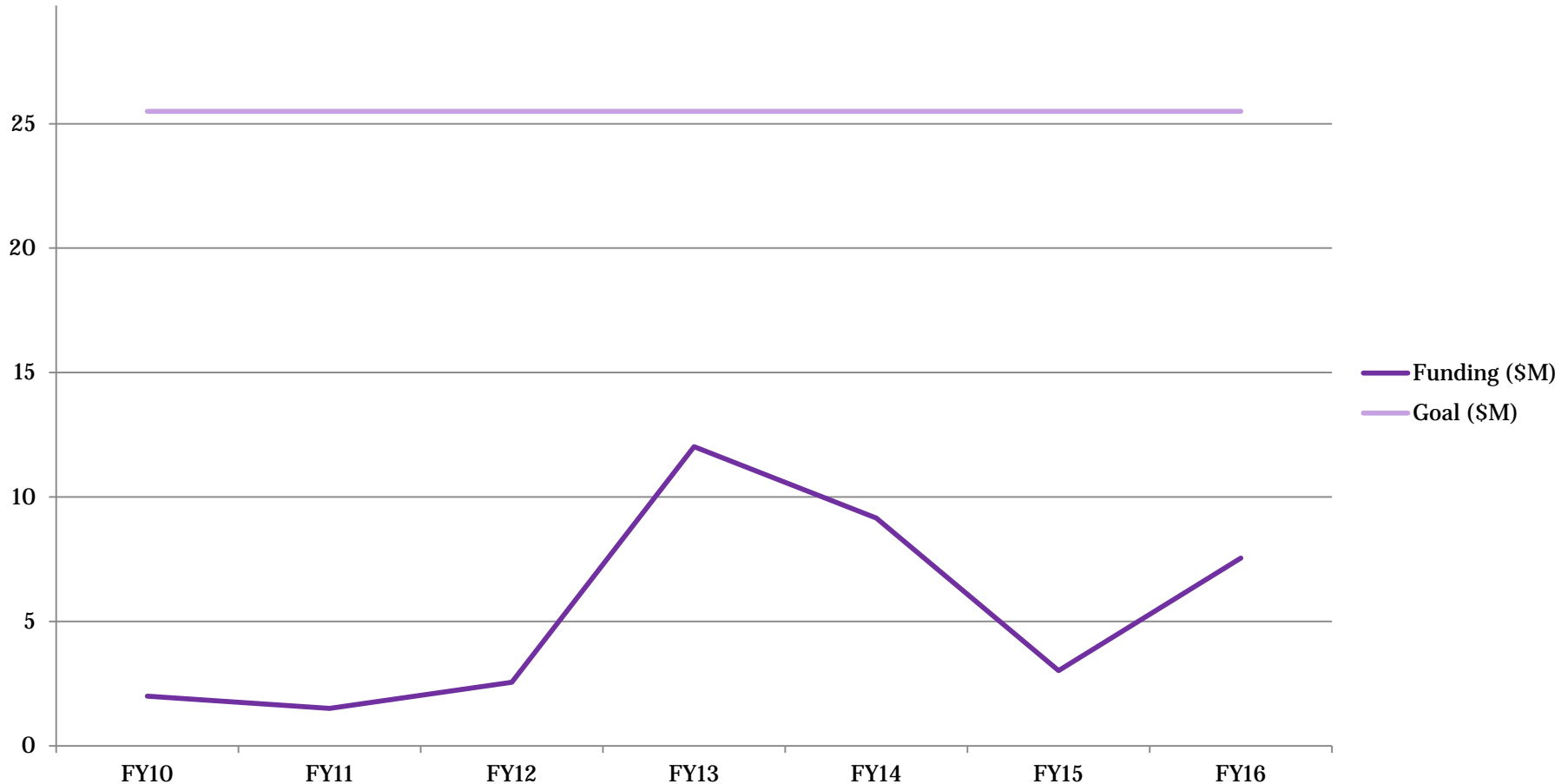
- **f(design, construction, operation, fleet, commuting, sources, offsets)**
- **KPI goal is 30% reduction vs 2010 by 2020, carbon neutral by 2025 (10% reduction in 2016)**
- **Initiatives: PPA, renewable certificates; carbon offsets; cogeneration; efficiency; commuter incentives**
- **FM Leader: Julie Cahillane**

Recapitalization



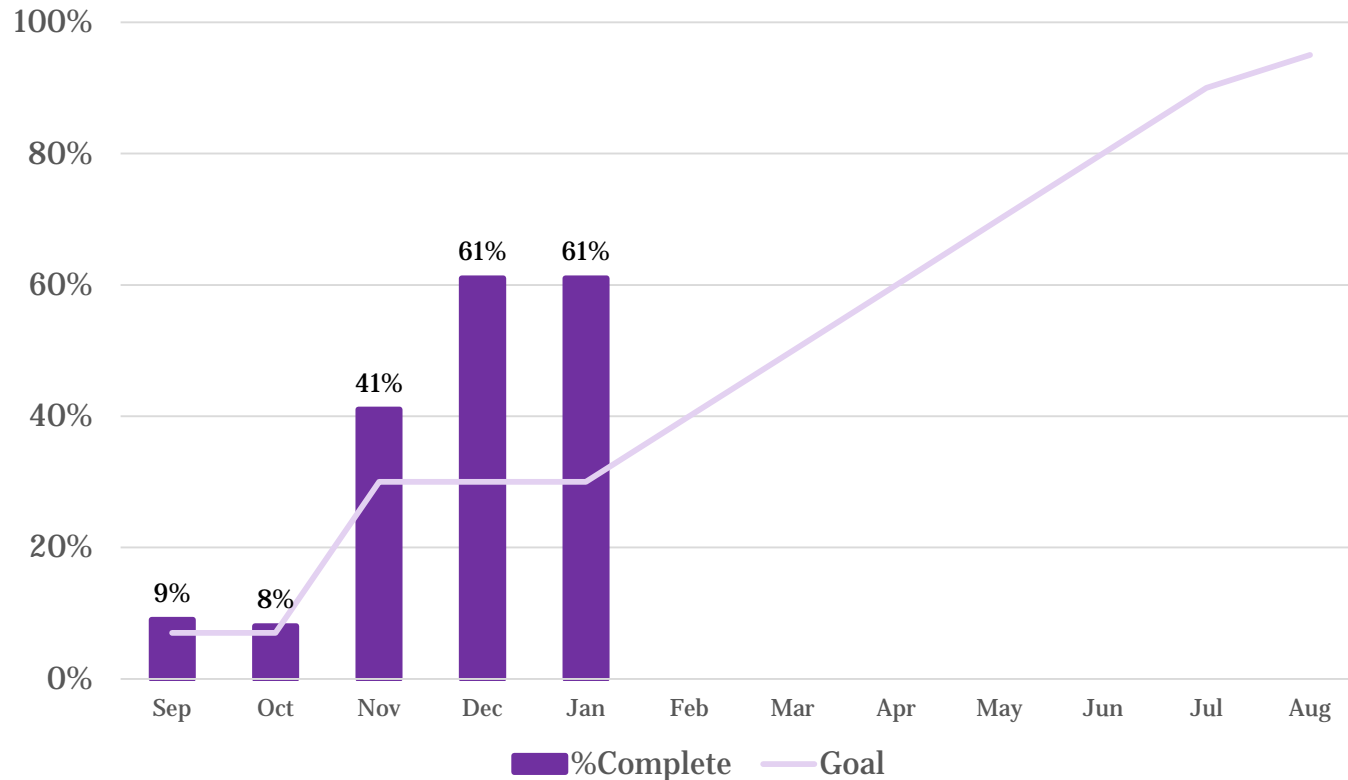
- **KPI goal is 100% of R&R funding spent within 4 Years of issue date**
- **f(staffing, contracting, space/system access, permitting)**
- **Initiatives: Early Design; Early Permitting; Indefinite Delivery, Indefinite Quantity (IDIQ) Contract Vehicles**
- **FM Leader: Gary Wojtowicz**

Utilities Management - Life Cycle Renewal



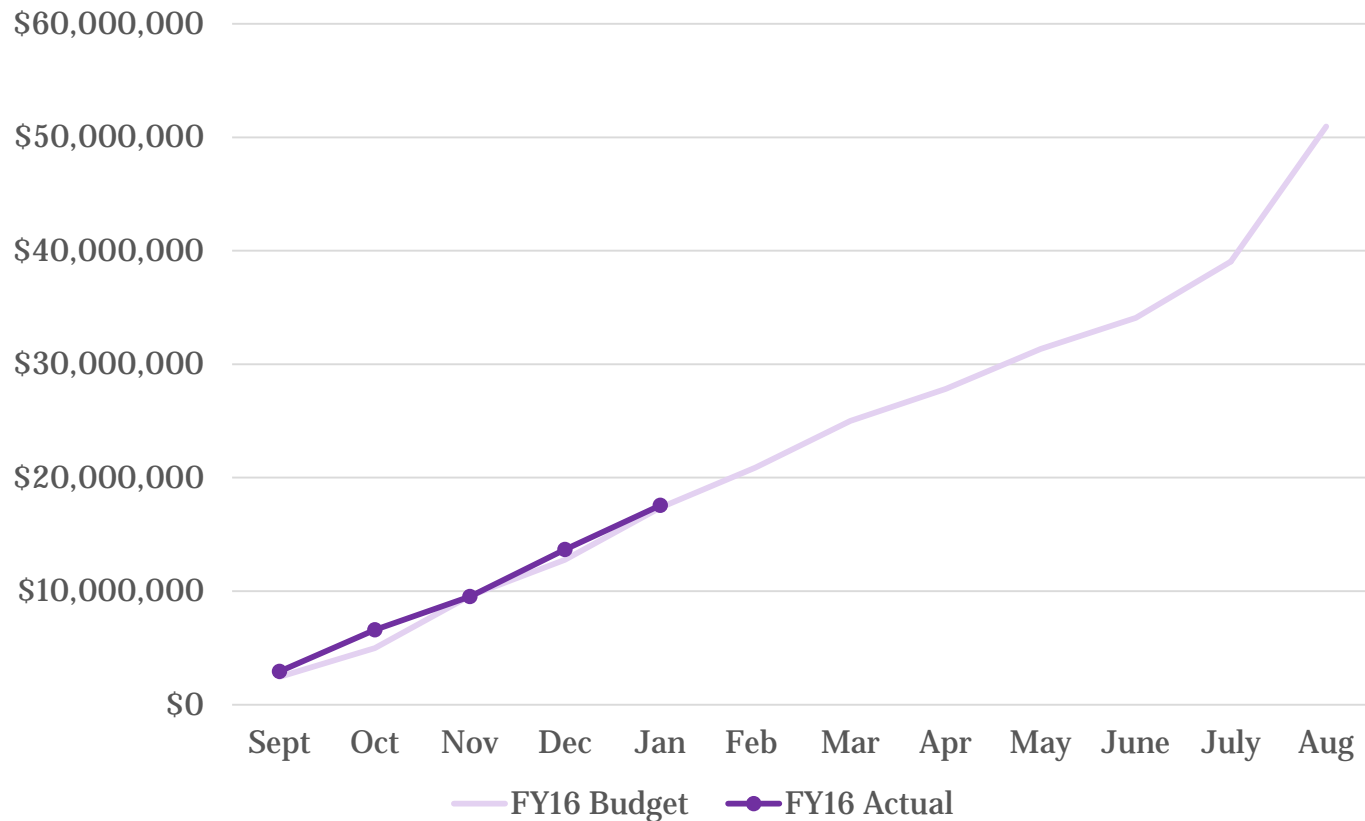
- **KPI goal is replacement recapitalization rate of 33 years (3% renewal per year on \$850M plant value)**
- **f(staffing, funding, shut-down feasibility, site access)**
- **Initiatives: site services inventory, GIS**
- **FM Leader: Gary Wojtowicz**

Preventive Maintenance Completion



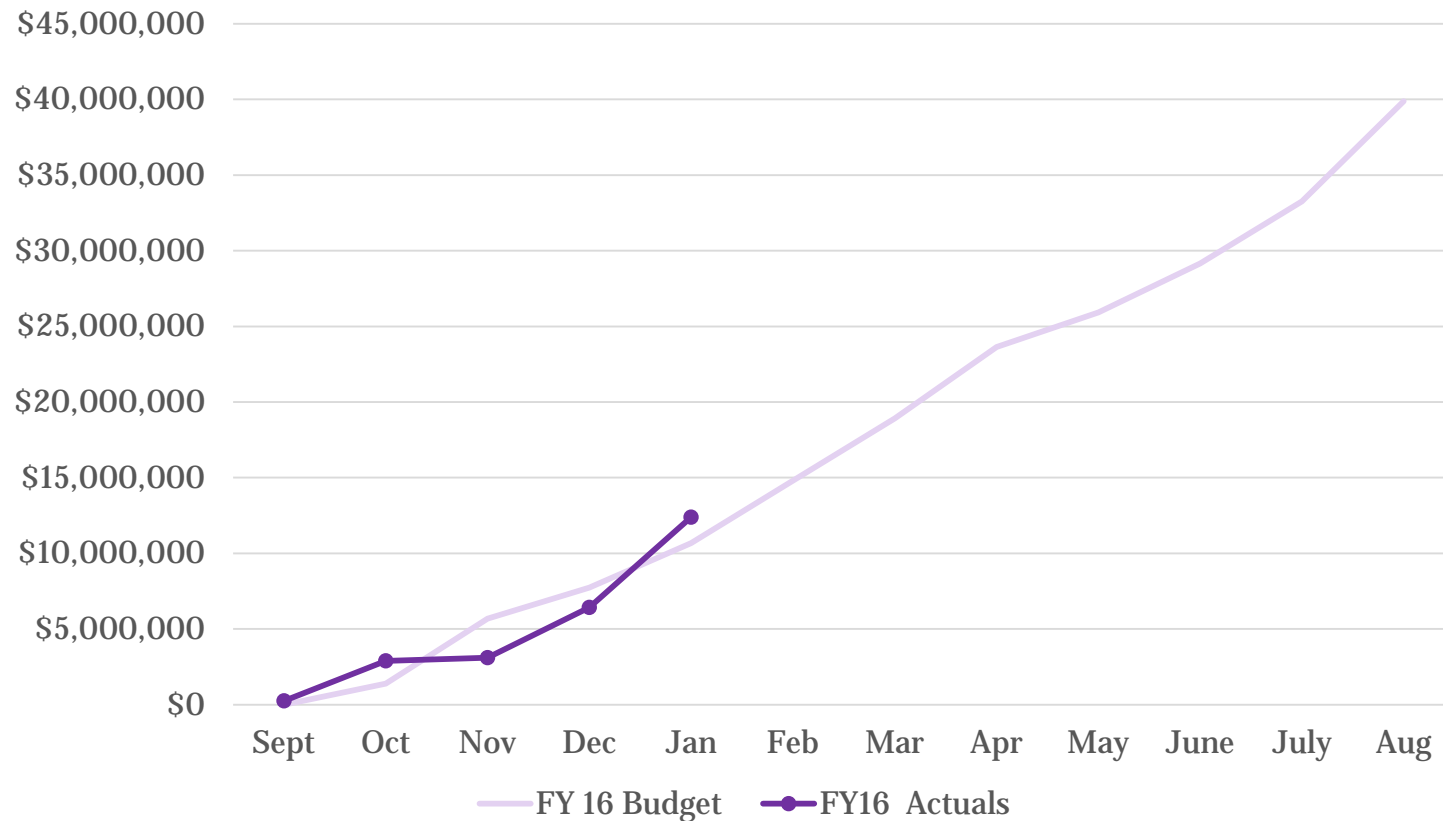
- **KPI goal is 95% completion of PM work orders within 30 days of scheduling**
- **f(staffing, funding, CMMS functionality, shut-down feasibility)**
- **Initiatives: Nov'15 EVENG PM restart, improve workflow with FAMIS mobile app, planning, scheduling, and real-time monitoring of work by RE, schedule adjustment**
- **FM Leader: Gary Wojtowicz**

Monthly Operating Budget Execution



- **KPI goal is +/- 1% (historical annual trend is -4.3% to +10.9%)**
- **f(work orders, forecasting, labor, materials, sf, scheduling, planning, contractor, contracts)**
- **Initiatives: improve payment process; improve reporting; monthly variance justification**
- **FM Leader: Liz Schaps**

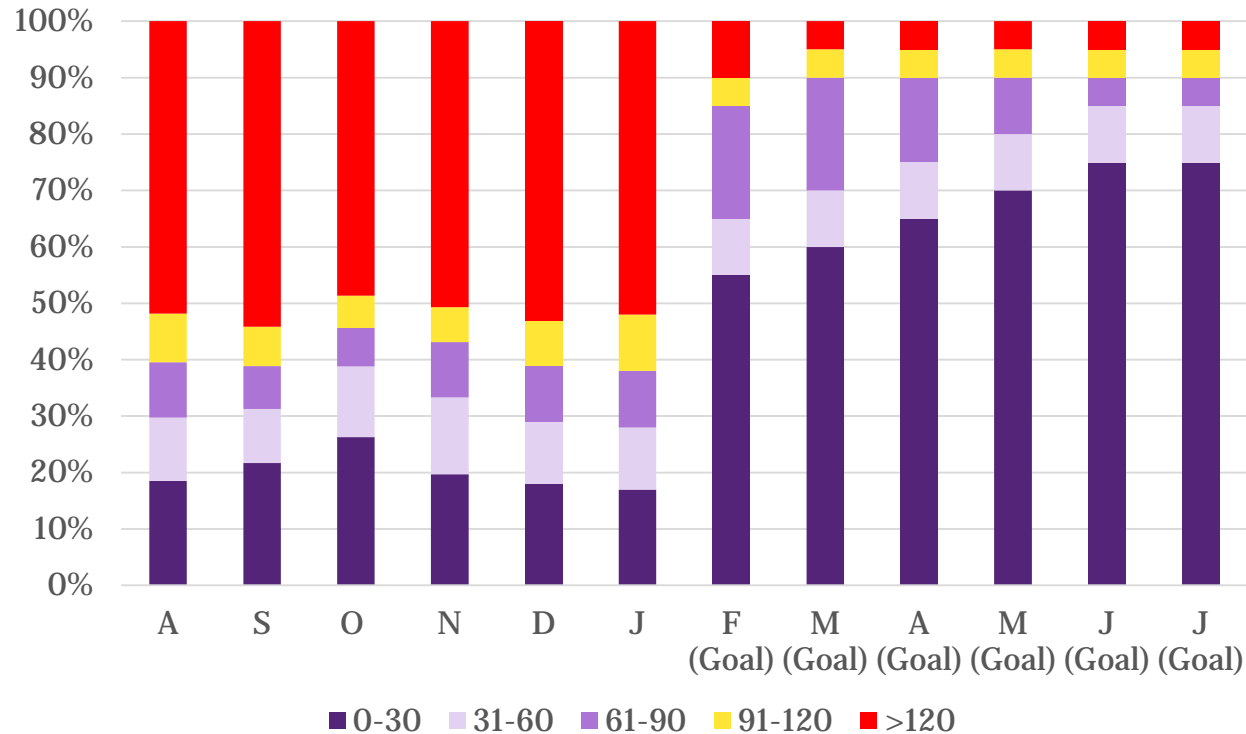
Monthly Utility Budget Execution



- **KPI goal is +/- 5% (historical annual trend is -6.3% to +7.7%)**
- **f(unit cost, forecasting, usage)**
- **Initiatives: sourcing strategy; improve reporting; monthly variance justification**
- **FM Leader: Liz Schaps**

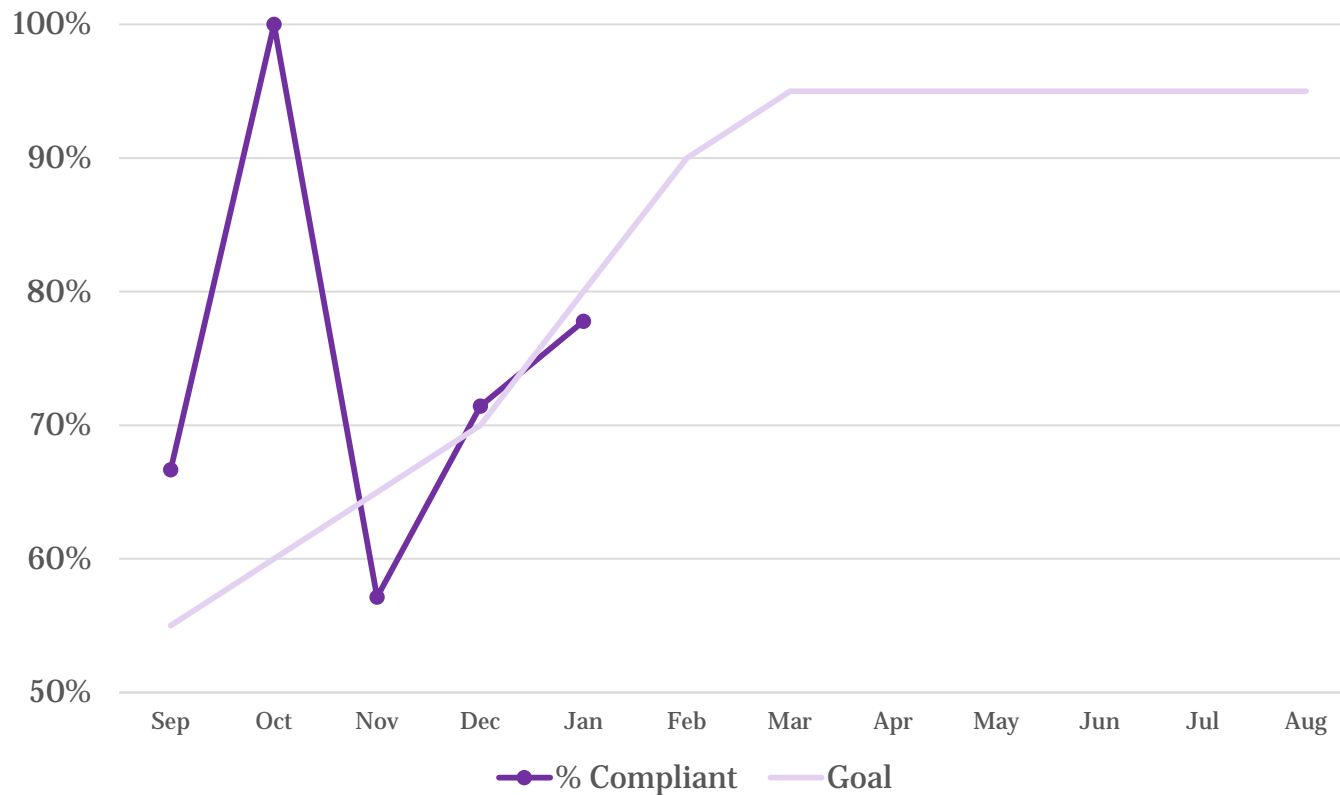
Service Request Tracking

Work Orders by Number of Days Open



- KPI goal is < 25% open more than 30 days
- f(staffing, planning and scheduling, space/system access, close out procedures)
- Initiatives: FAMIS mobile app, revise close out procedures, real-time monitoring of closing rates
- FM Leader: Gary Wojtowicz

Monthly Local Resident Employment



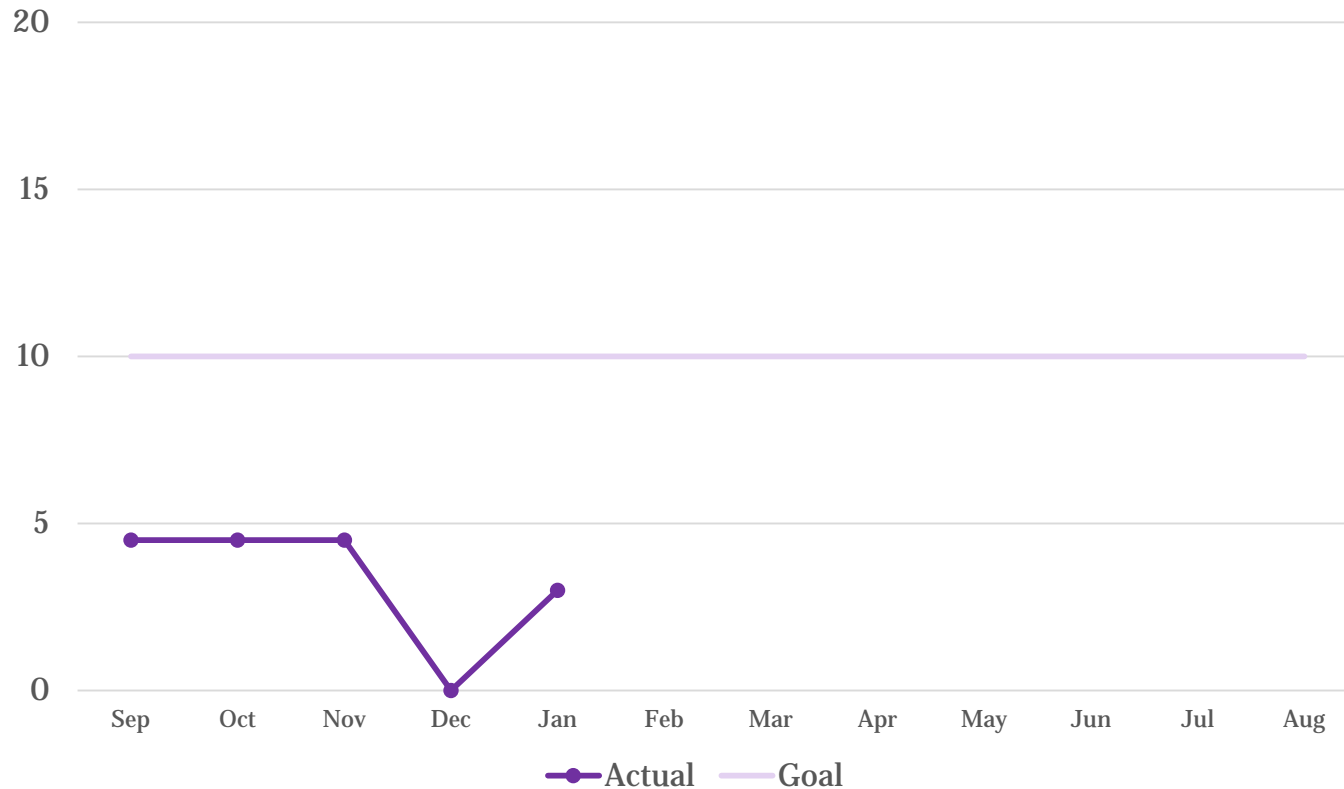
- **KPI goal is > 95% of Contracts Compliant with Policy**
- **f(contracts \$, labor market, labor hours, Evanston effort, NU/Contractor effort)**
- **Initiatives: Data collection in order to ensure improved compliance**
- **FM Leader: Liz Schaps**

Monthly Minority and Female Business Enterprise Use



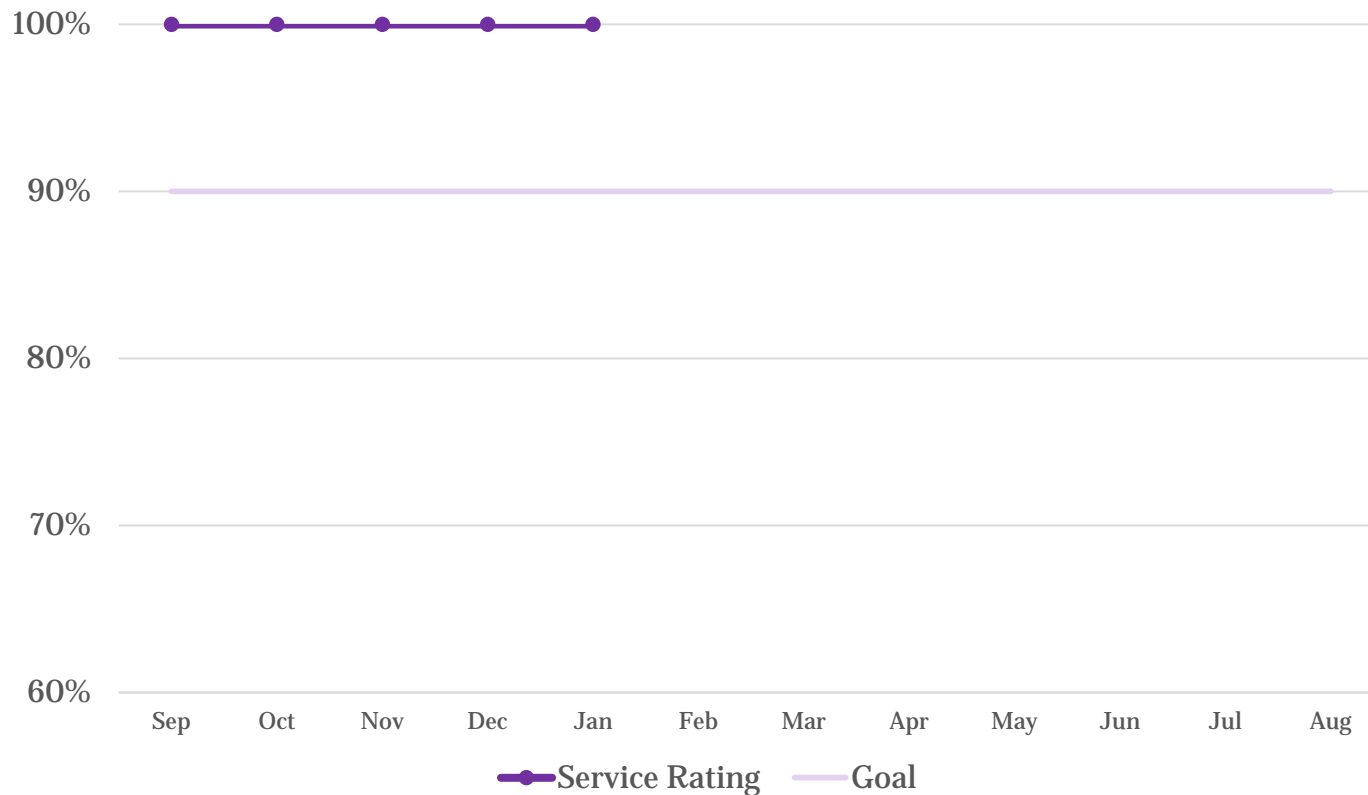
- **KPI goal is 95% of Contracts Compliant with Policy**
- **f(contracts, bids, labor market)**
- **Initiatives: TBD – new program**
- **FM Leader: Liz Schaps**

Inlease/Outlease Management - Contract Review Time



- **KPI goal is to complete contract reviews in 10 days or less**
- **f(schools requirements, landlords response, attorney response)**
- **Initiatives: Adding staff capacity, development of staff, lease management software**
- **FM Leader: Ranee Berliant**

Move Inspection Execution - Property Readiness



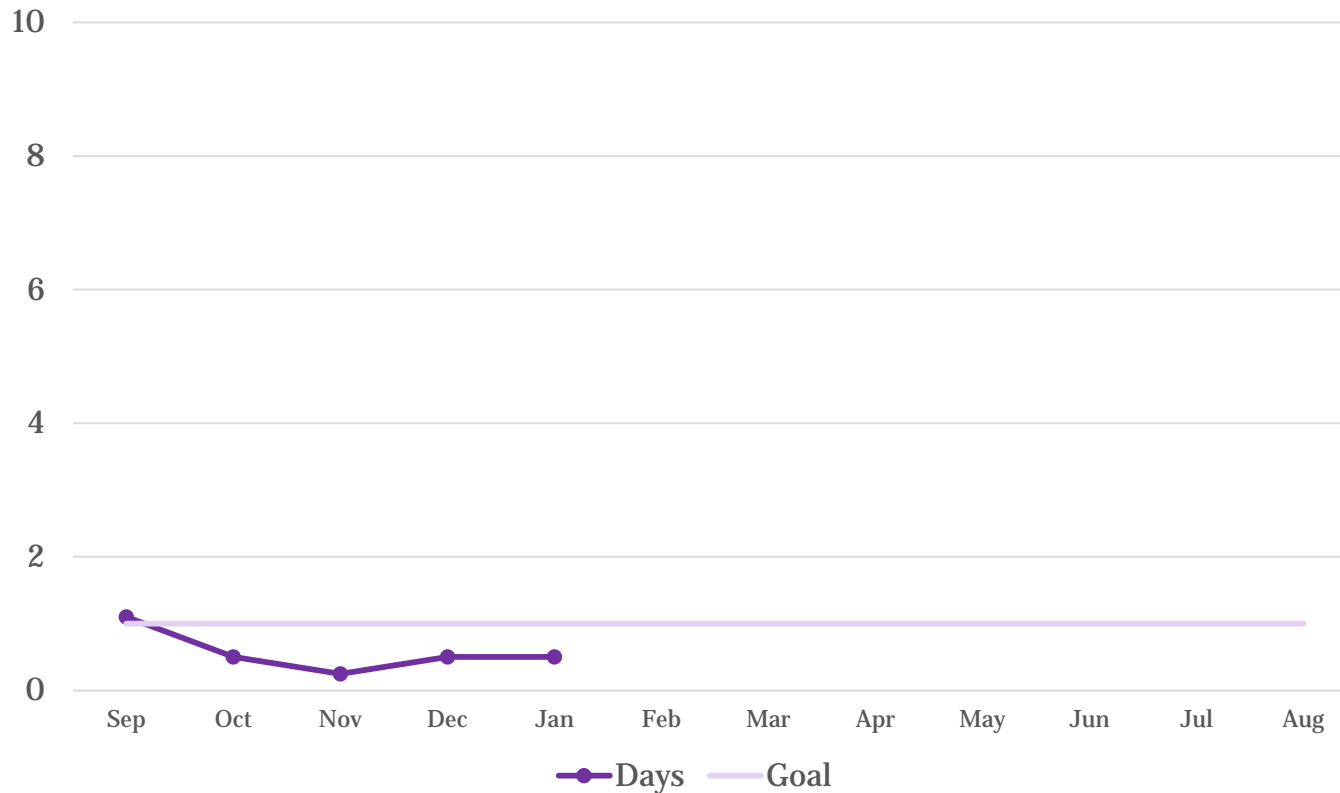
- **KPI goal is service rating of “Good” or “Excellent” of 90% or higher as a percentage of total responses**
- **f(effective communication with tenant, capacity and capability of staff)**
- **Initiatives: Commitment of staff to execute and management to track**
- **FM Leader: Ranee Berliant**

Digitization- Number of Documents Scanned per Month



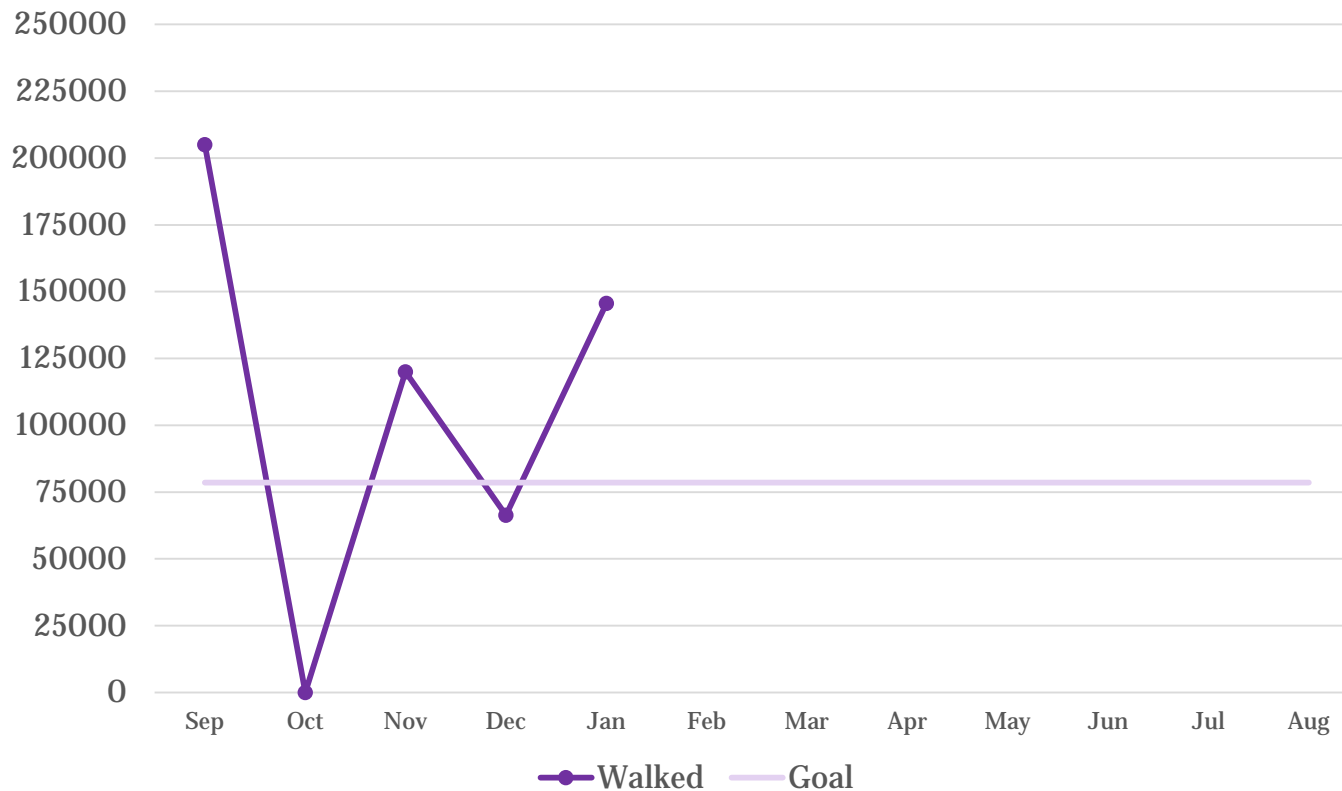
- **KPI goal is 800 documents per month.**
- **F(Number of documents scanned)**
- **Initiatives: Accessibility/Distribution of Space, Building & Campus Information**
- **FM Leader: Paul Weller**

Document Requests- Average Fulfillment Time (Days)



- **KPI goal is to have document requests fulfilled within one business day.**
- **f(timely provision of information)**
- **Initiatives: Responsiveness to Customer Requests for Documents**
- **FM Leader: Paul Weller**

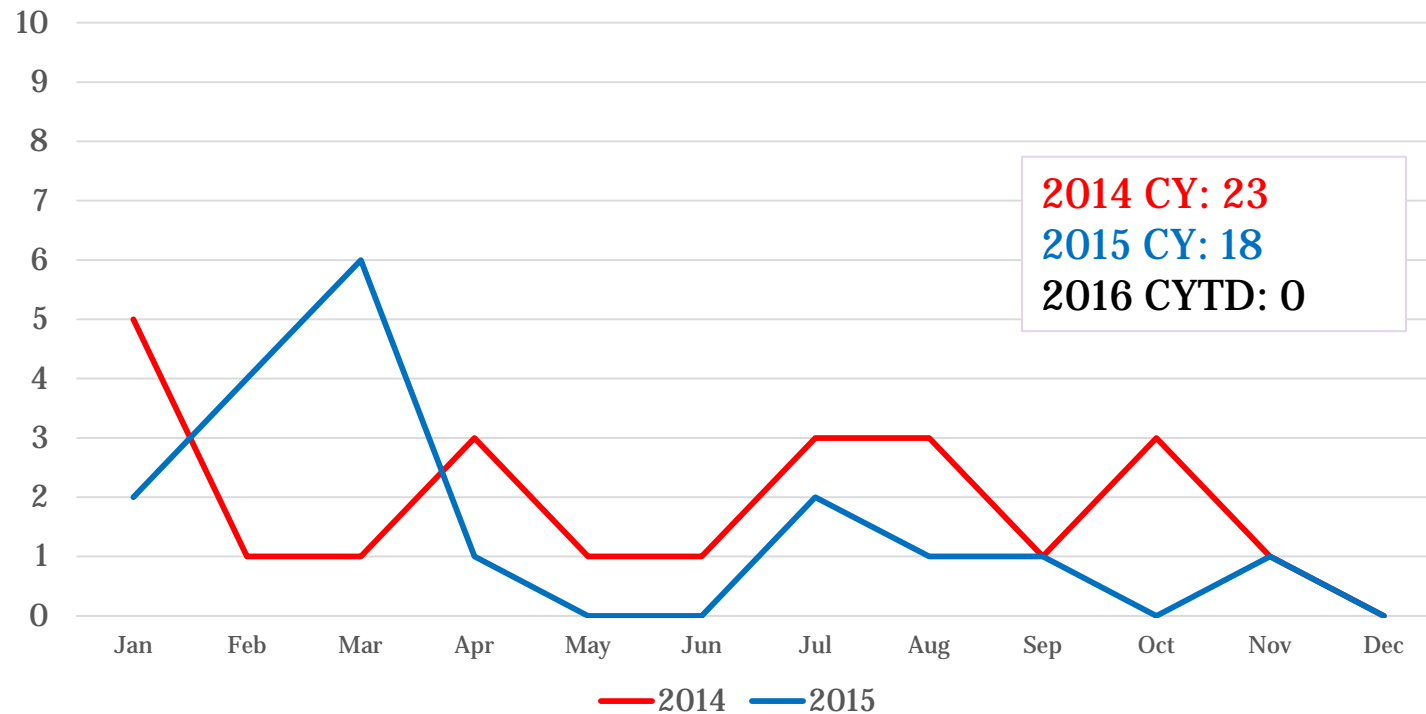
Planning Data Accuracy - Square Footage Walked



- **KPI goal is to walk 78,000 SF per month.**
- **f(Square Footage walked)**
- **Initiatives: Accuracy & Reliability of Space Information**
- **FM Leader: Paul Weller**

Injury Reporting by Calendar Year

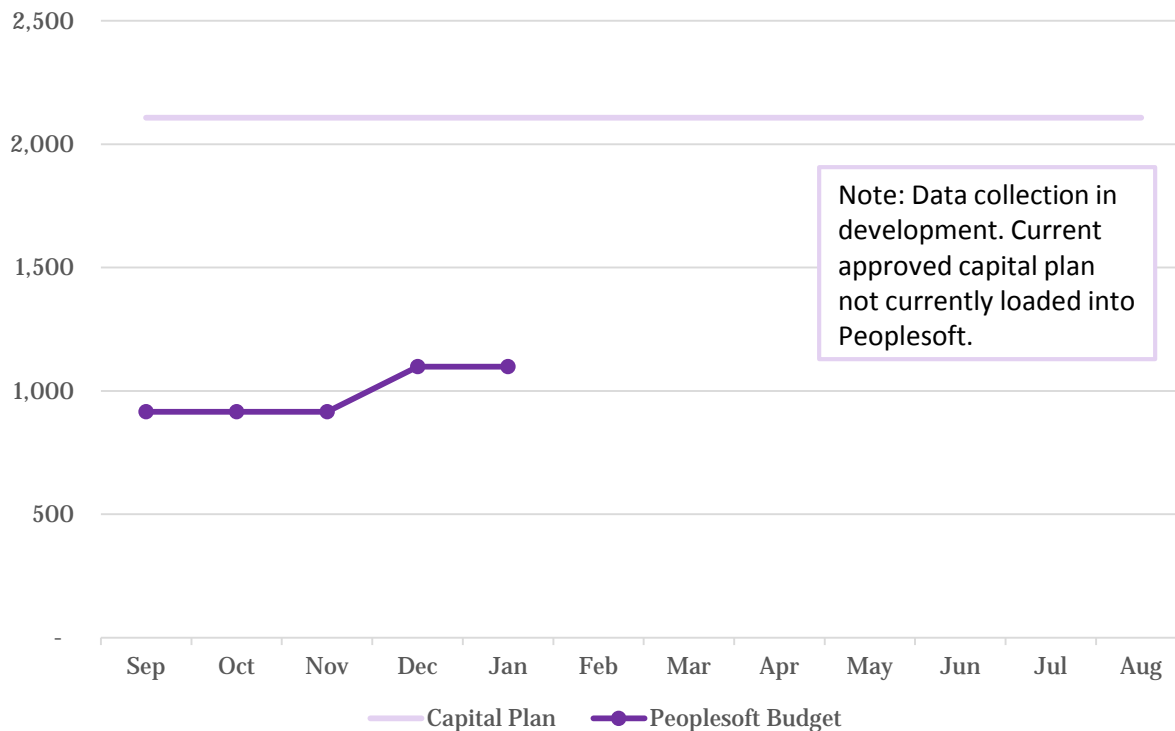
Reported Injuries by Type and Month



- KPI goal is <4 Reportable Cases per 100 FTE (<8 injuries per year)
- f(Equipment, Behavior, PPE)
- Initiatives: Equipment - Environment Inspections, PPE Inventory - Usage Tracking, Training
- FM Leader: Steve Kindrick

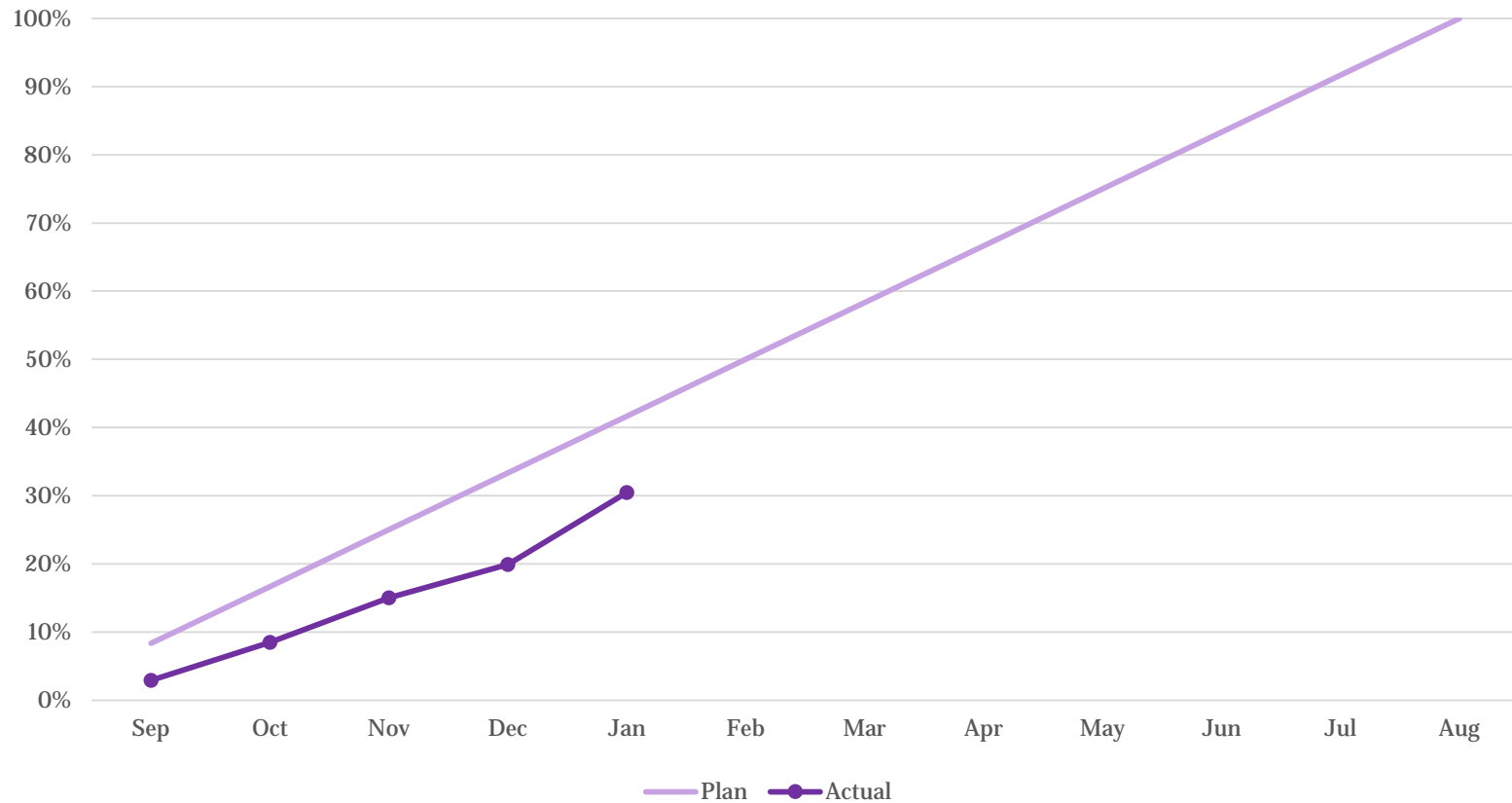
Capital Plan Execution

Current Budget compared to Plan



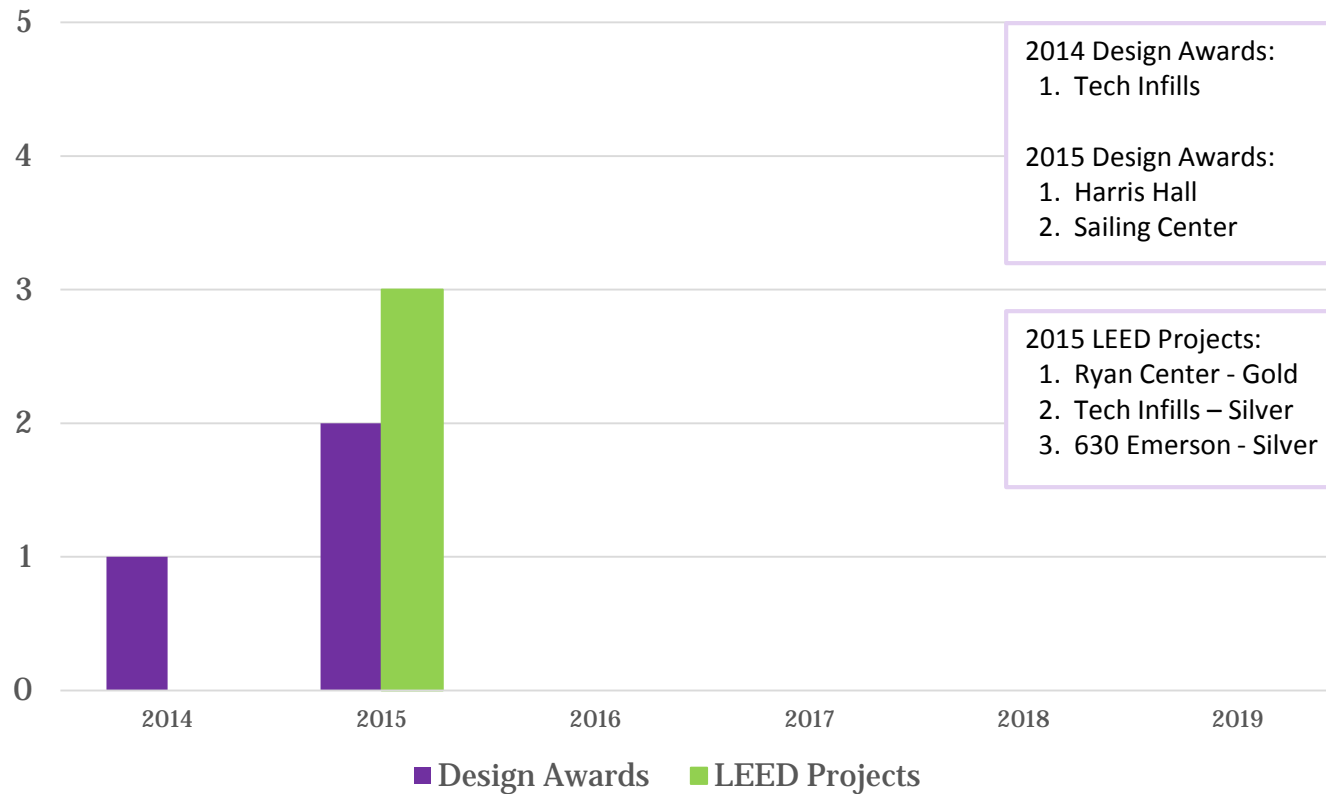
- **KPI goal is Completing 95% of all projects on or under original approved capital plan budget**
- **f(accurate scope, infrastructure requirements, initial estimating, manage scope creep)**
- **Initiatives: Improved budget approval tracking and fully loaded budgets into Peoplesoft**
- **FM Leader: Bonnie Humphrey**

Capital Project Cash Flow Management



- **KPI goal is Cash Flow within 5% of Plan**
- **f(manage scope creep, reduce unforeseen, real time financial monitoring)**
- **Initiatives: Improve Financial Reporting Tools**
- **FM Leader: Bonnie Humphrey**

Design to Enhance Campus Image and Functionality



- **KPI goal is to Receive at least one Major Design Award and 2 LEED Project Certifications per Year**
- **f(High Quality Design Professionals, Client Collaboration, adequate budgeting)**
- **Initiatives: Architect Selection Process**
- **FM Leader: Bonnie Humphrey**