

Facilities Management

FM Key Performance Indicators

Northwestern

November 15, 2016

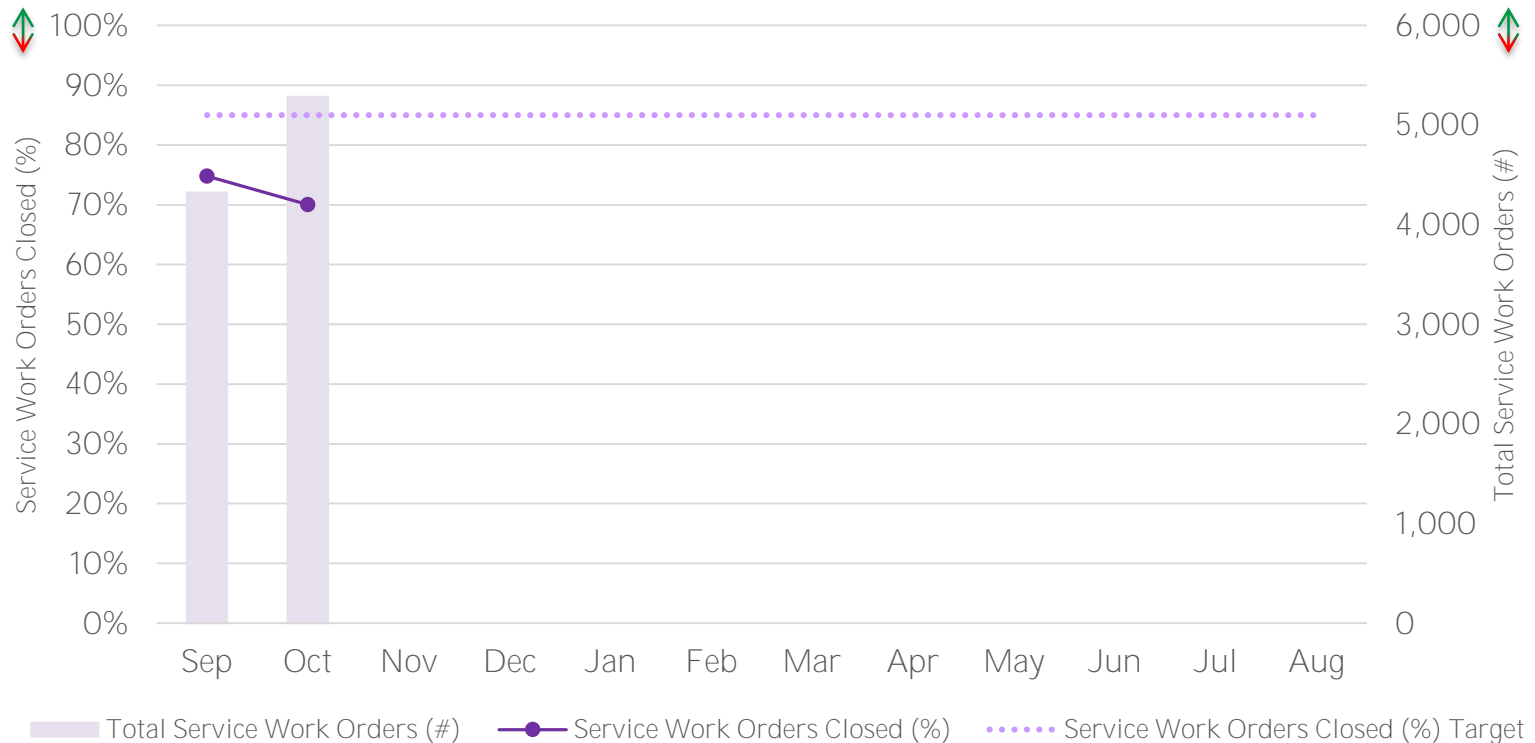
Facilities Management Key Volume Indicators

Key Volume	FM	Change	Evanston	Chicago
Full Time Equivalent (FTE)	335	0	273	62
Acres	296	0	281	15
Buildings	213	0	200	13
Square Feet	12.4M	0	9.9M	2.5M
Number of Open Projects	80	-3	67	13
Design	28	-7	26	2
Construction	15	+2	12	3
Punchlist	28	+2	22	6
Closeout	9	0	7	2
Value of Open Projects	\$2.3B	0	\$1.7B	\$.6B
Design	\$.5B	-\$0.1B	\$.4B	\$.1B
Construction	\$1.3B	0	\$.8B	\$.5B
Punchlist	\$447M	+\$15M	\$415M	\$32M
Closeout	\$29M	0	\$26M	\$3M
Work Orders Per Month	5,786	0	4,446	1,340
Work Orders Per Year	69,428	0	53,351	16,077
Operations and Maintenance	\$57M	0	\$41M	\$16M

Key Performance Indicators

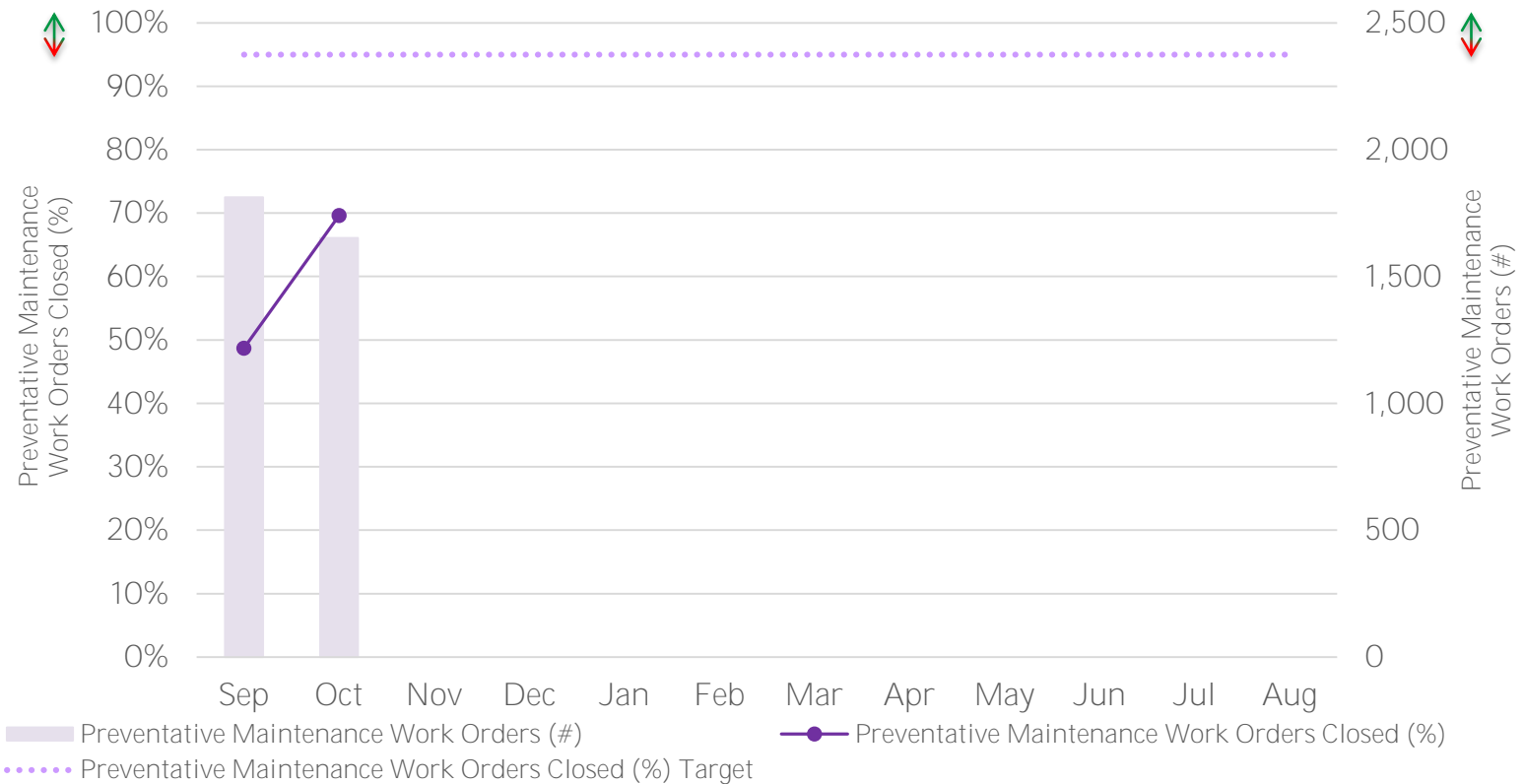
Slide #	KPI Description	Annual Goal	Oct-17 Goal	Actual	Trend
3	SD1. Service Request Closure	85%	85%	✖ 70%	✖ -5%
4	SD2. Preventative Maintenance Closure	95%	95%	✖ 70%	✔ 21%
5	SD3. Rework	<10%	<10%	✖ 19%	⚠ 0%
6	SD4. Proactivity: FM-Identified Work Orders	25%	25%	✔ 26%	✔ 7%
7	LO1. Common Space Program	5%	0.4%	✔ 0.4%	⚠ 0%
8	LO2. Integrated Workplace Management Software Implementation	100%	0%	✔ 0%	⚠ 0%
9	LO3. Engagement: Sustainability Outreach	12%	1%	⚠ -1%	✖ -2%
10	CE1. Energy Use Intensity (kBtu/SF)	-5%	-5%	✖ -1%	✖ 1%
11	CE2. Recordable Injury Incident Rate	5.60	6.77	✔ 3.22	✔ -3.00
12	CE3. Injury-Related Lost Workday Rate	2.70	2.70	✖ 3.22	✔ -3.00
13	CE4. Waste Diversion Rate	38%	38%	⚠ 37%	✔ 8%
14	CE5. Overtime	10%	19%	✔ 15%	✔ -5%
15	CE6. Minority, Female and Local Business Enterprise Use	15%	15%	✔ 25%	✔ 11%
16	CE7. Evanston Resident Employment	5%	5%	✖ 2%	⚠ 0%
17	F1. Capital Project Cash Flow Execution	+/-2%	+/-2%	✖ -42%	✖ -7%
18	F2. Operating Budget Execution	+/-1%	+/-1%	✖ -6%	✖ -2%
19	F3. Utility Commodity Budget Execution	+/-5%	+/-5%	✔ 0%	✔ 3%

SD1. Service Request Closure



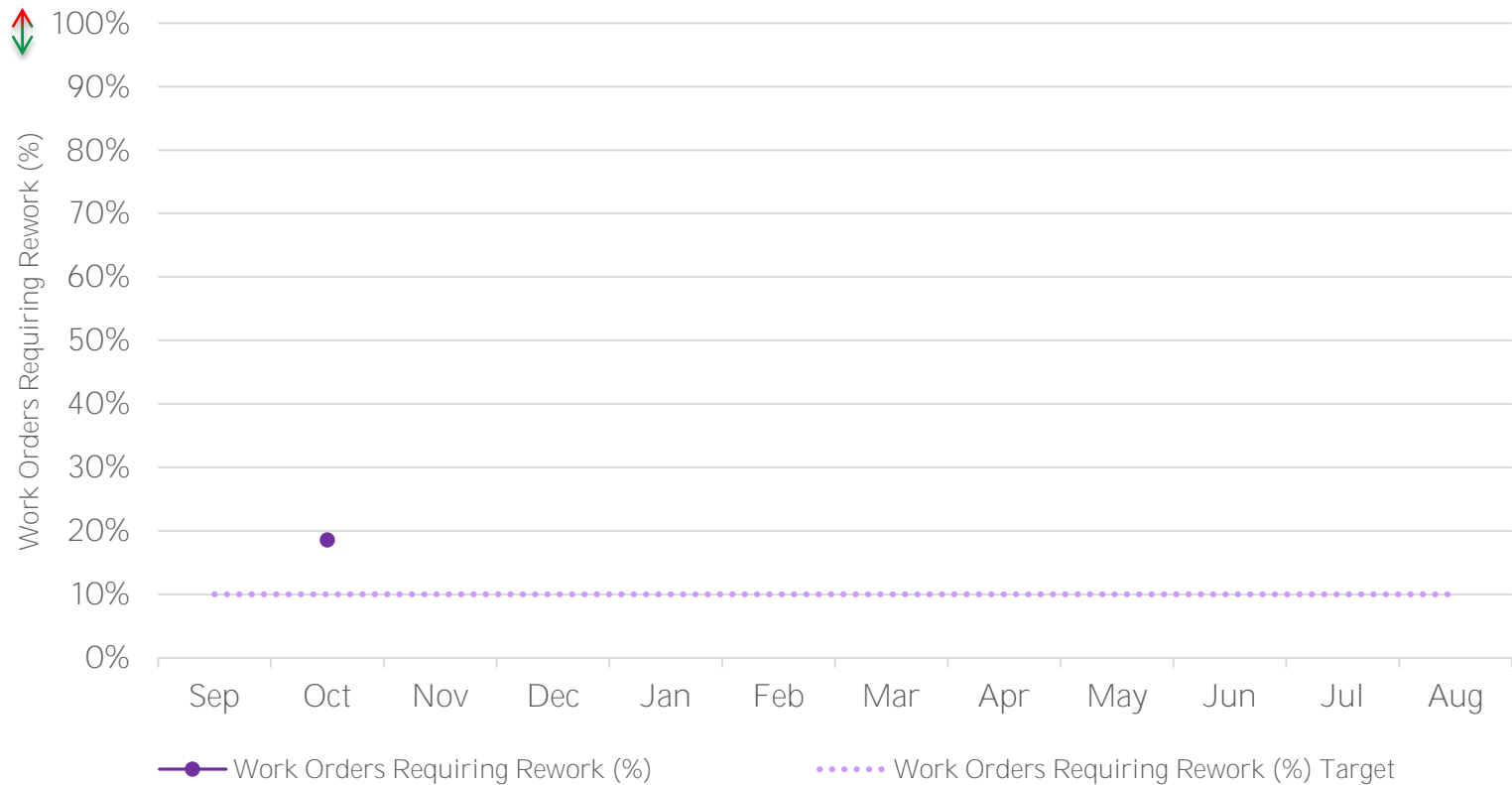
- KPI goal is to close 85% of service work orders within 30 days (excluding project-related work orders)
- f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity, parts/material availability, accessibility of work areas/equipment)
- Initiatives: increase functionality of mobile technology; plan and schedule work order assignments including estimator and kitter functions; adjust staffing levels to reflect workload; increase service provider productivity rates
- FM Leader: Gary Wojtowicz

SD2. Preventative Maintenance Closure



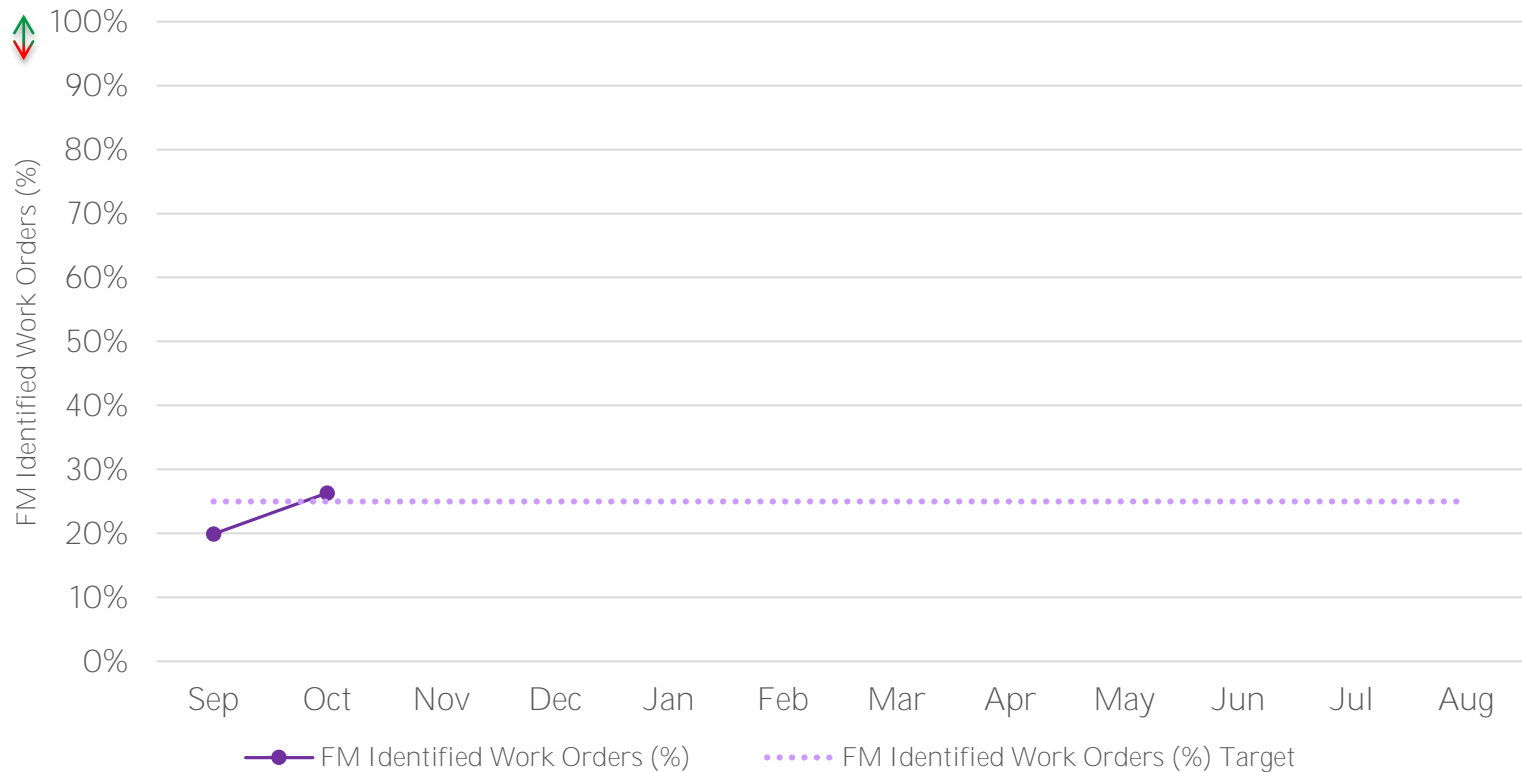
- KPI goal is to close 95% of Preventative Maintenance work orders within 30 days
- f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity)
- Initiatives: plan and schedule preventative maintenance work assignments; revise task instructions; optimize recurring task frequencies; expand equipment inventory; adjust staffing levels to reflect workload
- FM Leader: Gary Wojtowicz

SD3. Rework



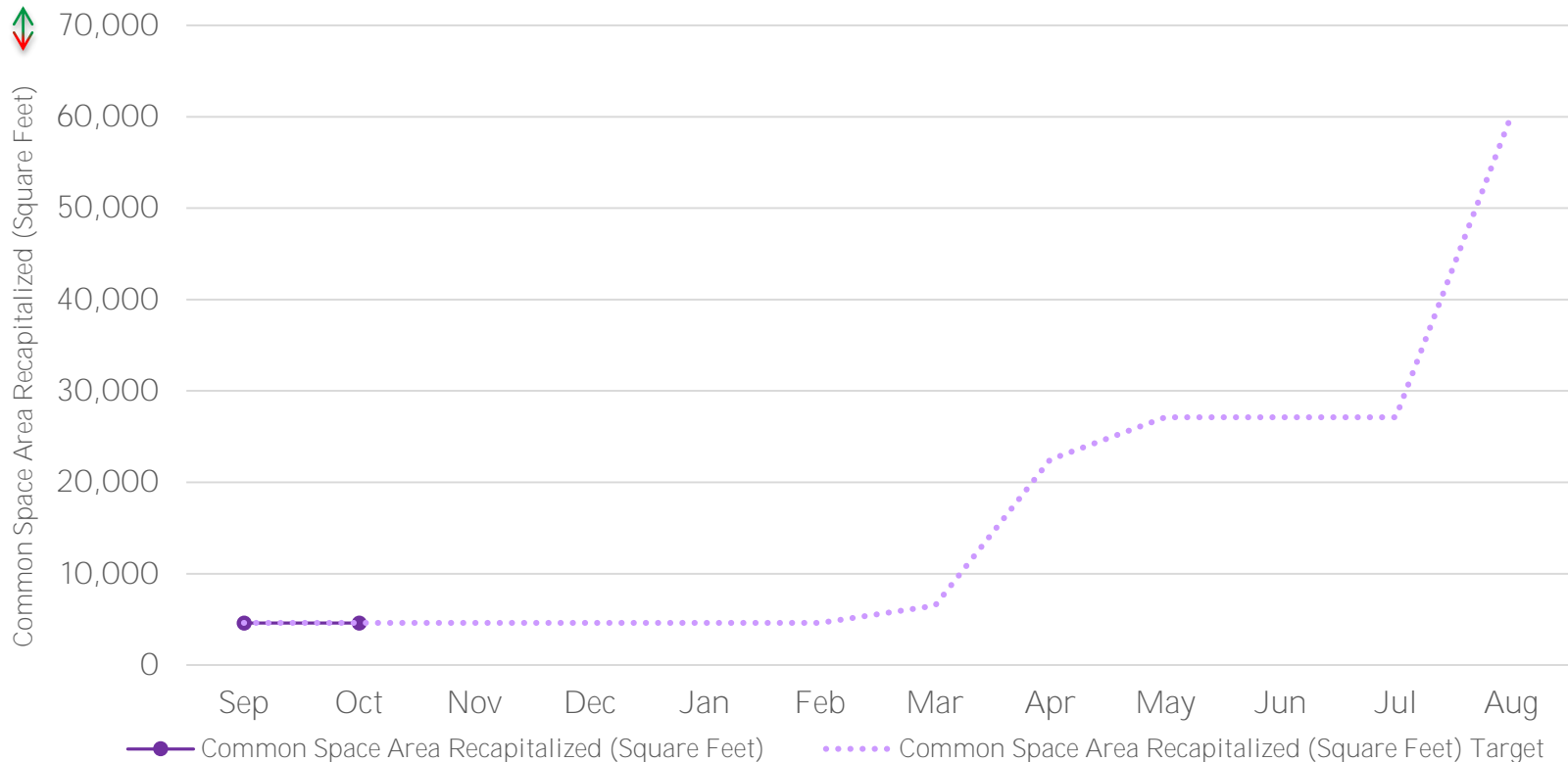
- KPI goal is to have fewer than 10% of inspected Preventative Maintenance, Corrective Maintenance and Service Call work orders require corrective rework
- f(staffing, quality of work performed, clarity of task instructions)
- Initiatives: decrease volume of contracted services; revise task instructions; institute a quality control and quality assurance program; expand service provider training programs; increase functionality of mobile technology
- FM Leader: Gary Wojtowicz

SD4. Proactivity: FM-Identified Work Orders



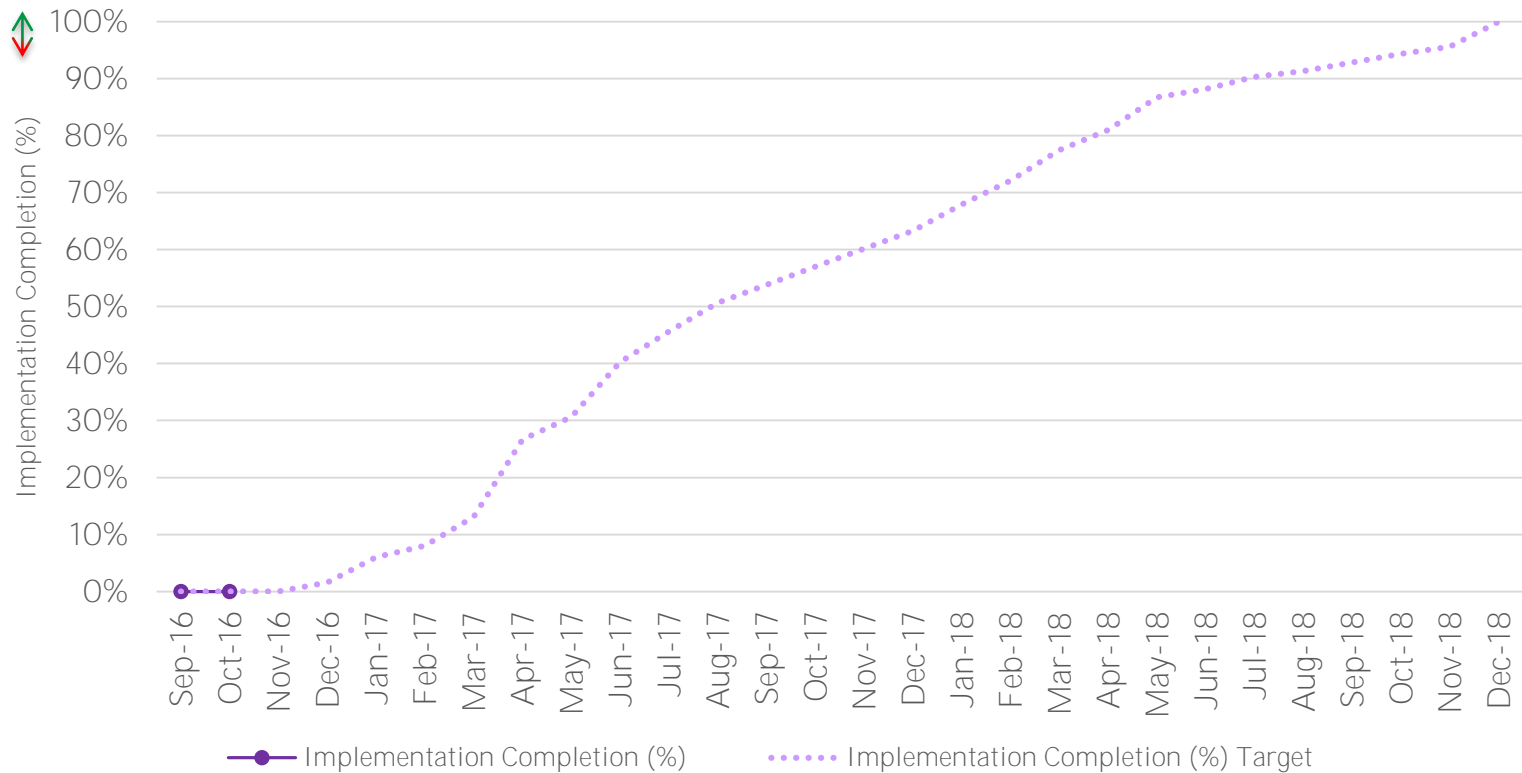
- KPI goal is that at least 25% of corrective work orders are identified by Facilities Management Staff, as a measure of proactivity
- f(staffing, functionality of mobile technology, training)
- Initiatives: expand commissioning and preventative maintenance programs; institute quality assurance and quality control programs; increase functionality of mobile technology; implement a zone service model
- FM Leader: Gary Wojtowicz

LO1. Common Space Program



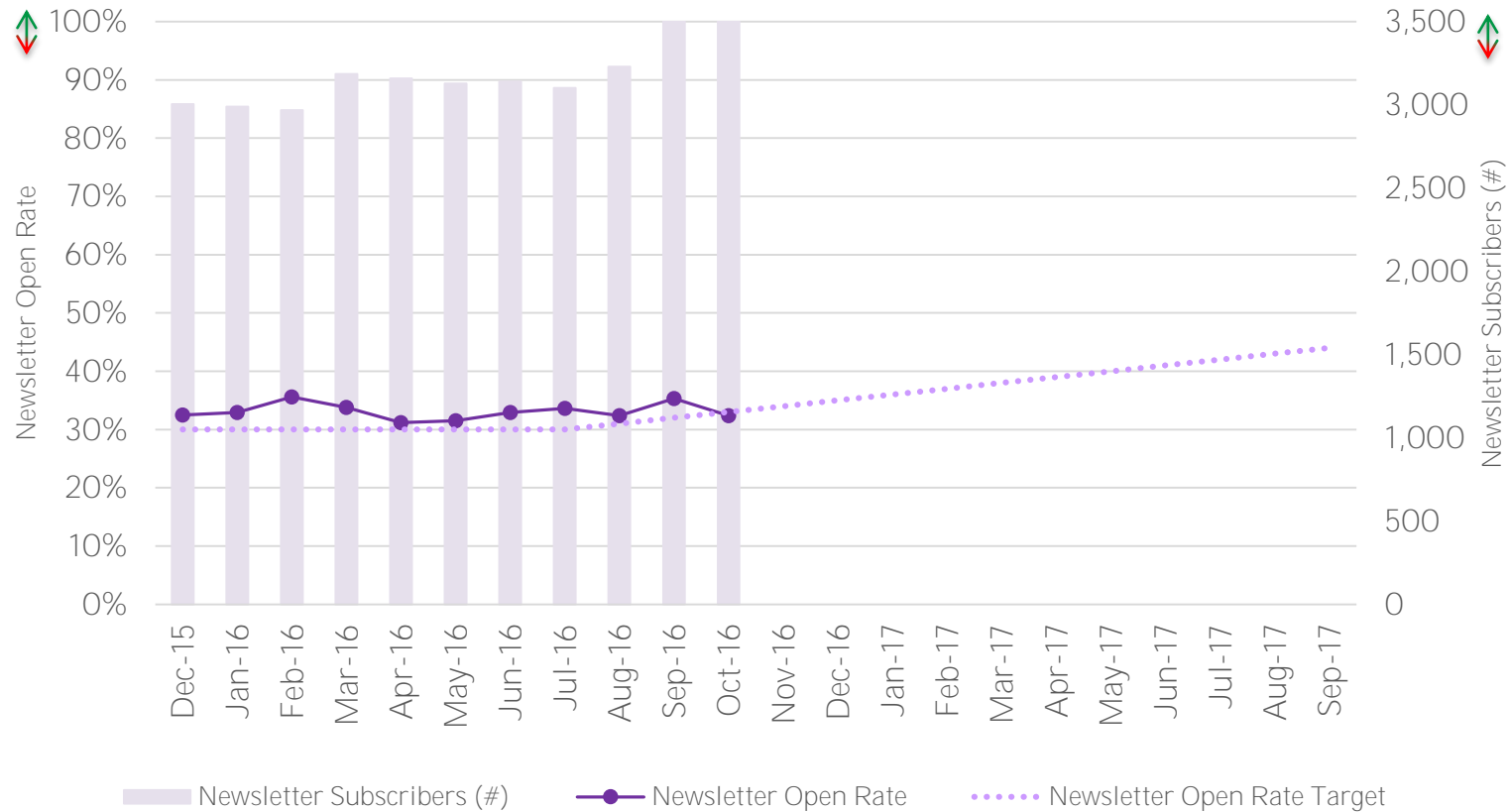
- KPI goal is to recapitalize 5% of common spaces per year, which represents 55,000 square feet in FY17
- f(funding availability, project staffing, efficient decision making, accessibility to work areas)
- Initiatives: recapitalization of campus spaces
- FM Leader: Carrie West

LO2. Integrated Workplace Management Software Implementation



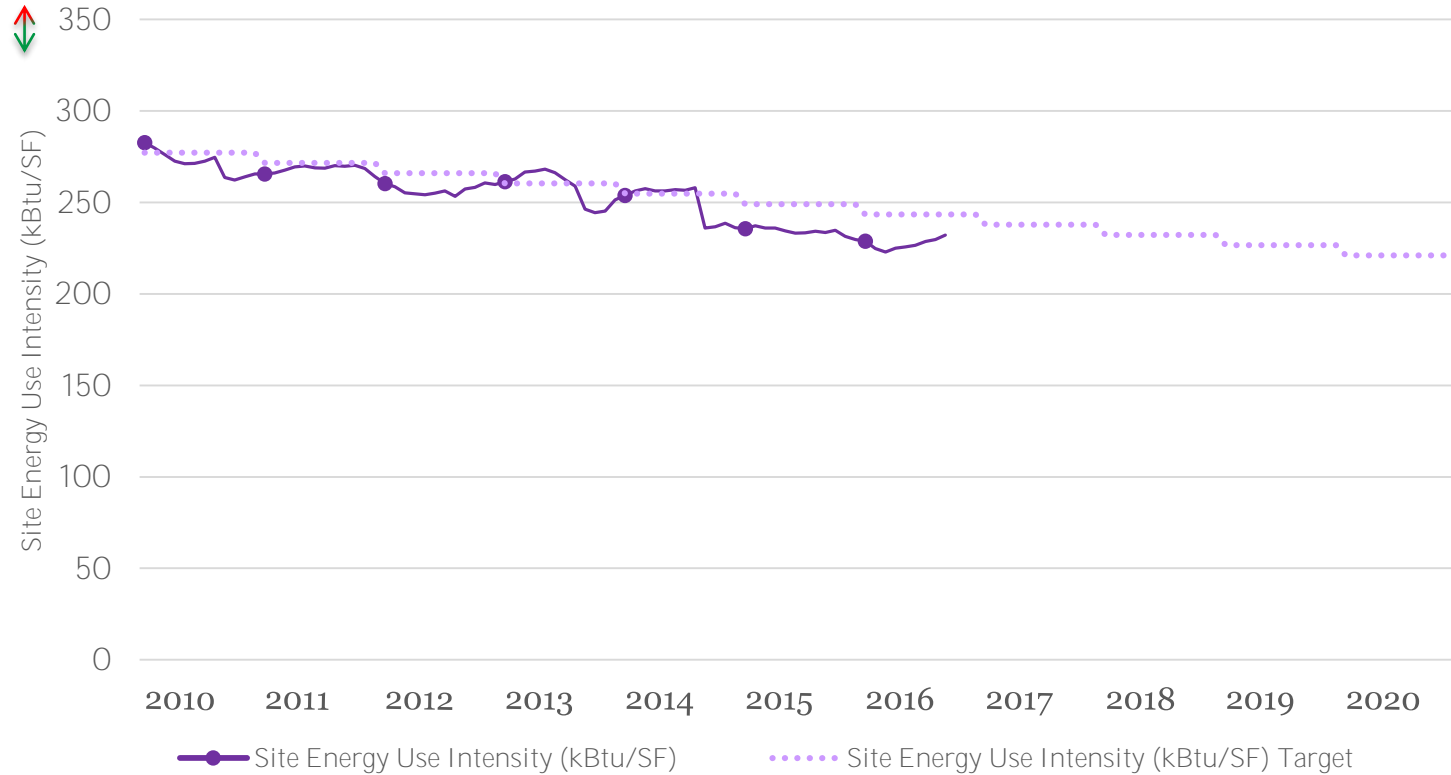
- KPI goal is to complete 100% of project milestones
- f(stakeholder engagement, staffing, business process, IT capabilities, communication, effective decision making)
- Initiatives: implement new integrated workplace management software; develop and implement process improvement; utilize effective project management methodology
- FM Leader: Liz Schaps

LO3. Engagement: Sustainability Outreach



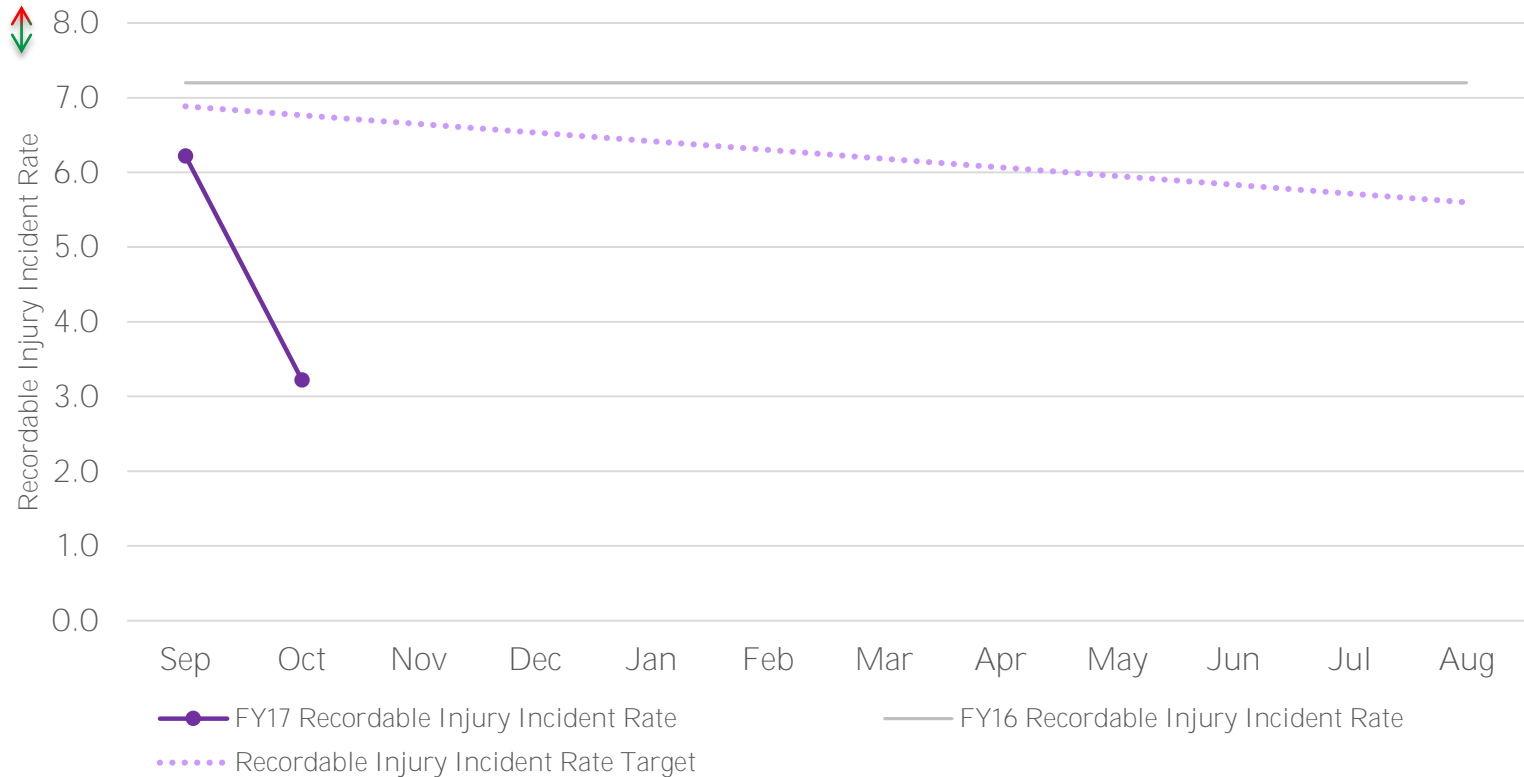
- KPI goal is to increase newsletter open rate by 12% annually (1% per month), as a measure of content quality
- f(perceived newsletter quality and value to subscribers, readers interest)
- Initiatives: actively promote newsletter; assess readers interest; increase relevance to readers
- FM Leader: Kathia Benitez

CE1. Energy Use Intensity



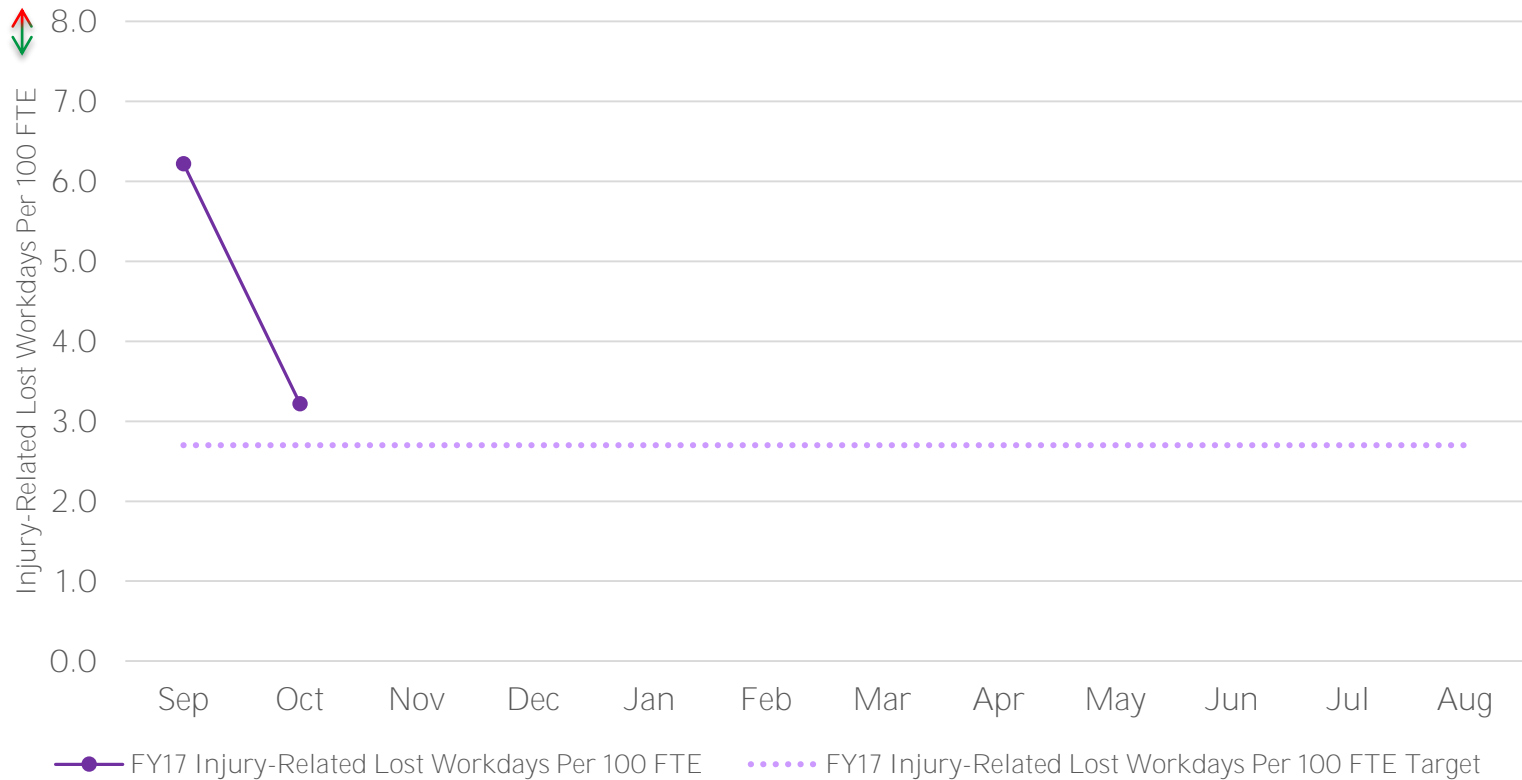
- KPI goal is to reduce the energy use intensity (EUI) by 20% by 2020
- f(occupant behavior, design, construction, technology, operations, weather)
- Initiatives: engage occupants; formalize design specifications; perform retro-commissioning; physically audit space for improvement
- FM Leader: Kathia Benitez

CE2. Recordable Injury Incident Rate



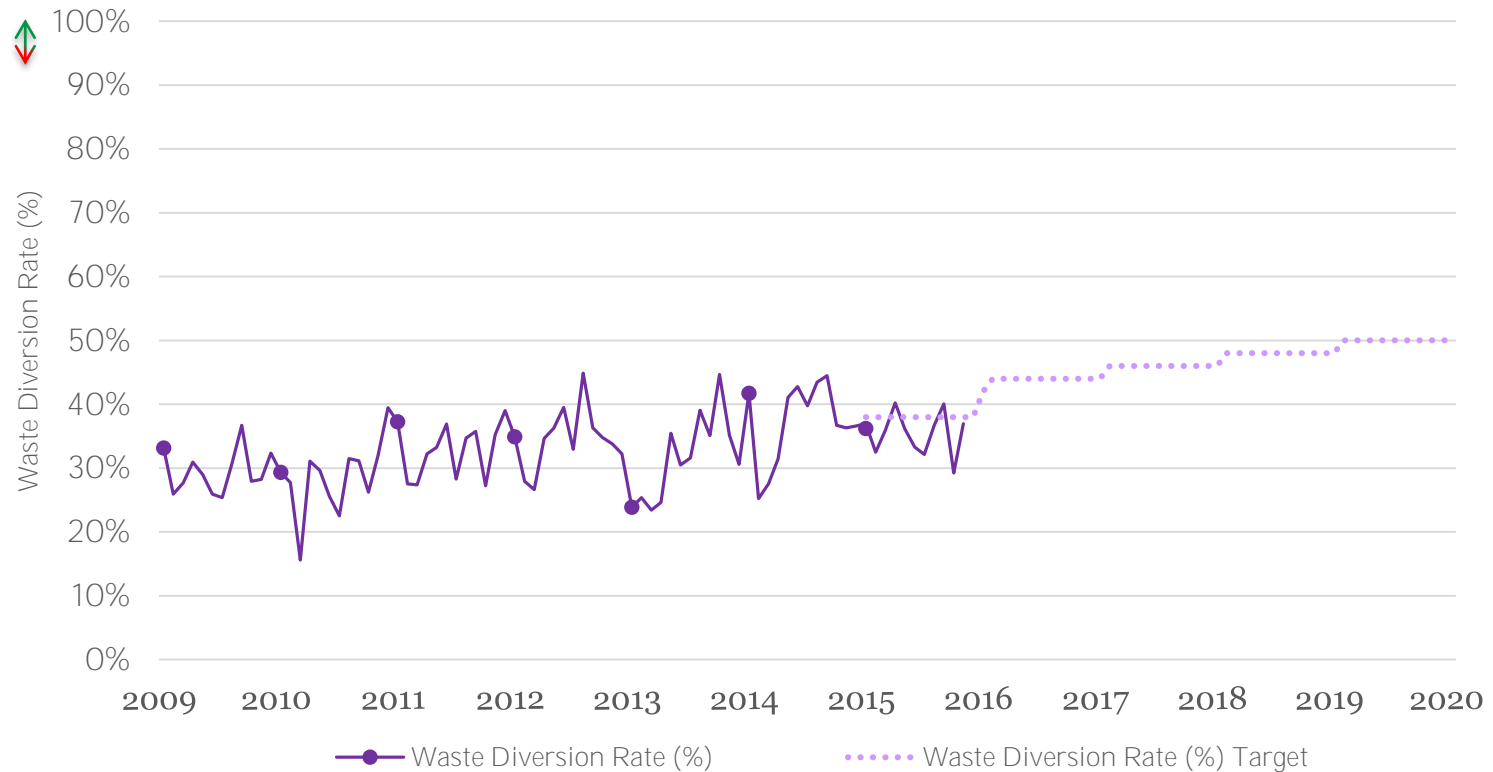
- KPI goal is to reduce OSHA Recordable Injury Incident Rate by 20% from prior year rate of 7.0 to 5.6
- f(equipment, training, behavior, personal protective equipment use)
- Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks
- FM Leader: Steve Kindrick

CE3. Injury-Related Lost Workday Rate



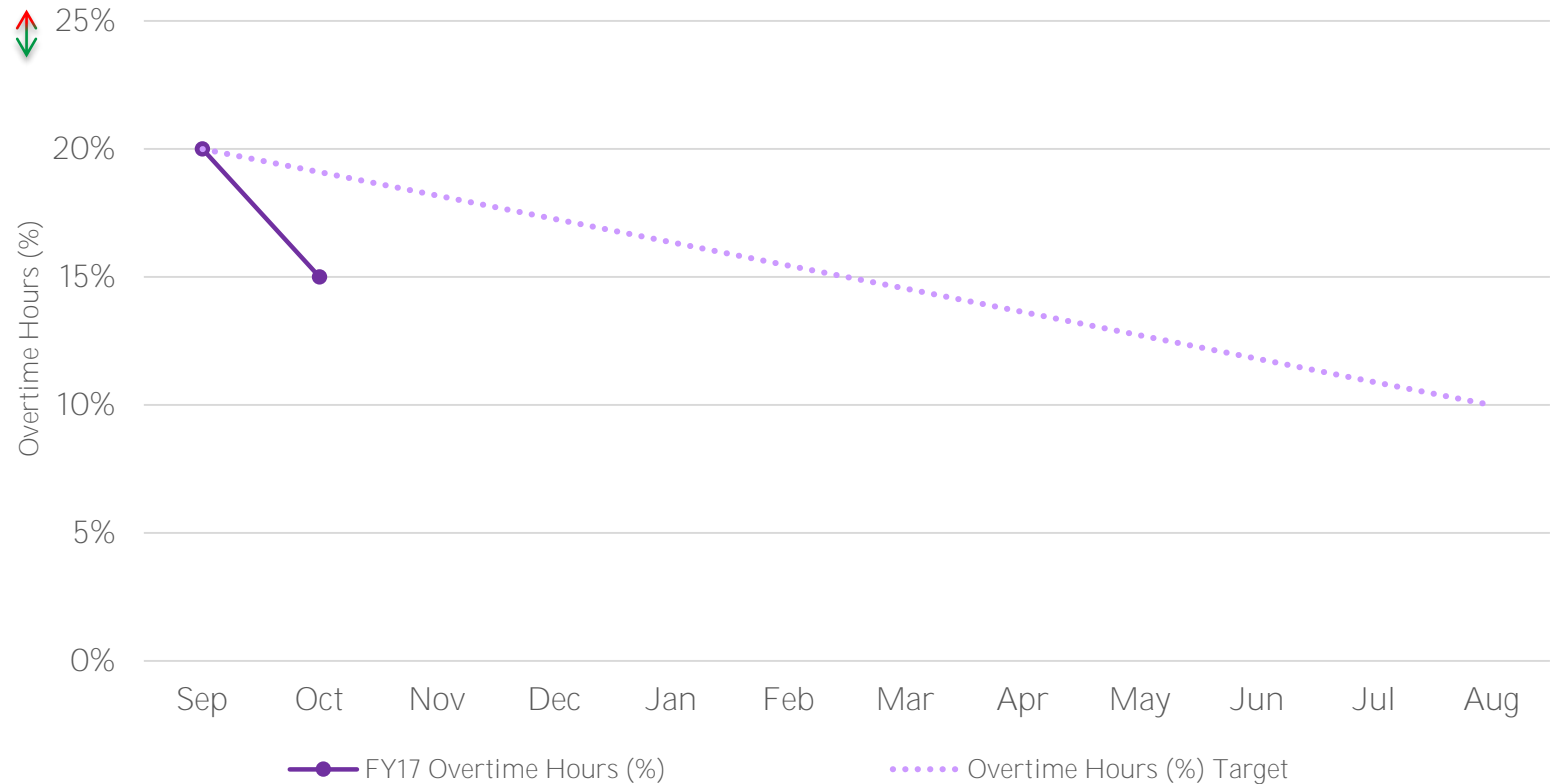
- KPI goal is to achieve an injury-related lost workday rate of less than 2.7 lost workdays (days away, restricted, or transferred) per 100 full time employees
- f(equipment, training, behavior, personal protective equipment use)
- Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks
- FM Leader: Steve Kindrick

CE4. Waste Diversion Rate



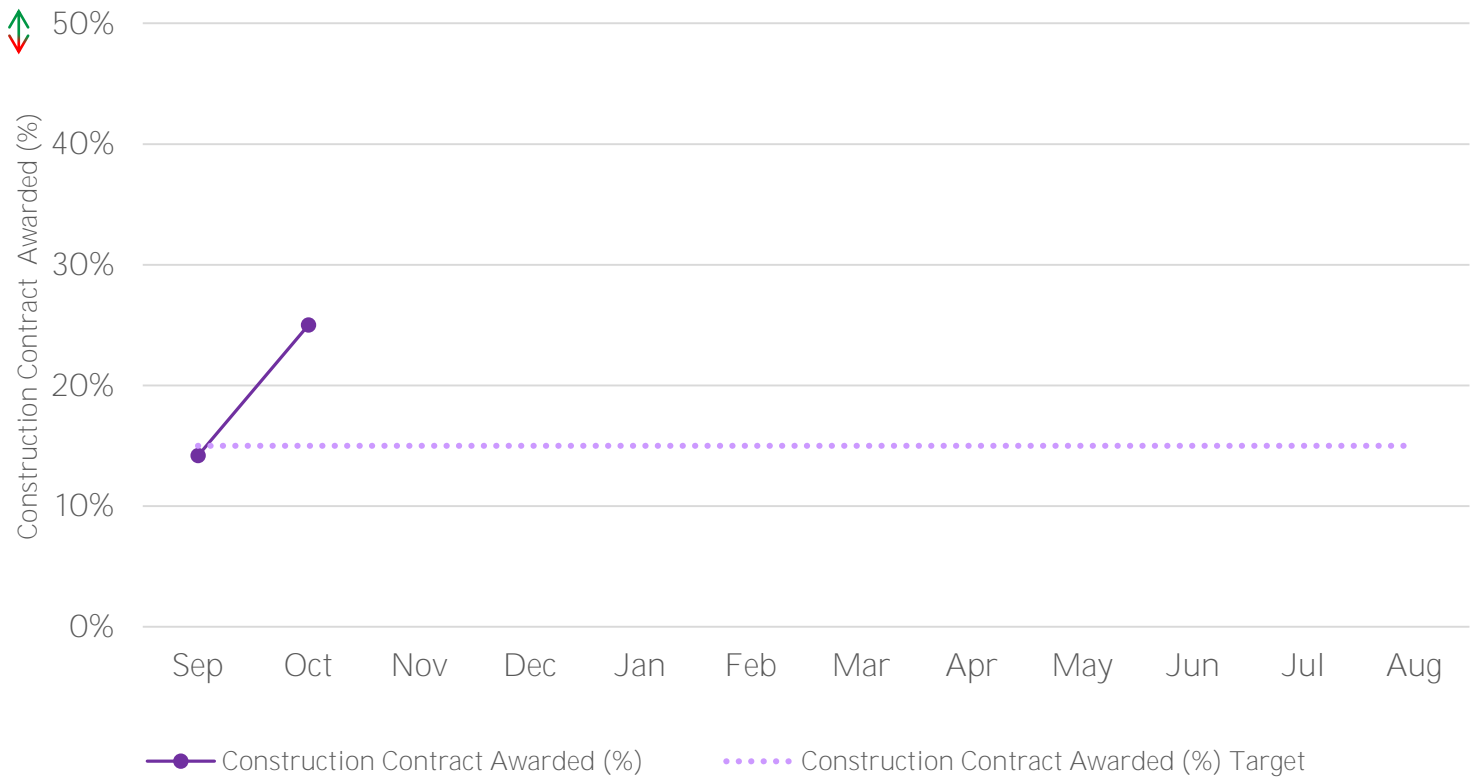
- KPI goal is a 50% diversion rate by 2020 over 2009 baseline (2% increase in 2017)
- f(occupant behavior purchasing, reuse, recycling, diversion, market availability of diversion services)
- Initiatives: audit waste; promote landfill diversion via new resource conversation working group, identify new landfill diversion opportunities; train occupants on recycling
- FM Leader: Kathia Benitez

CE5. Overtime



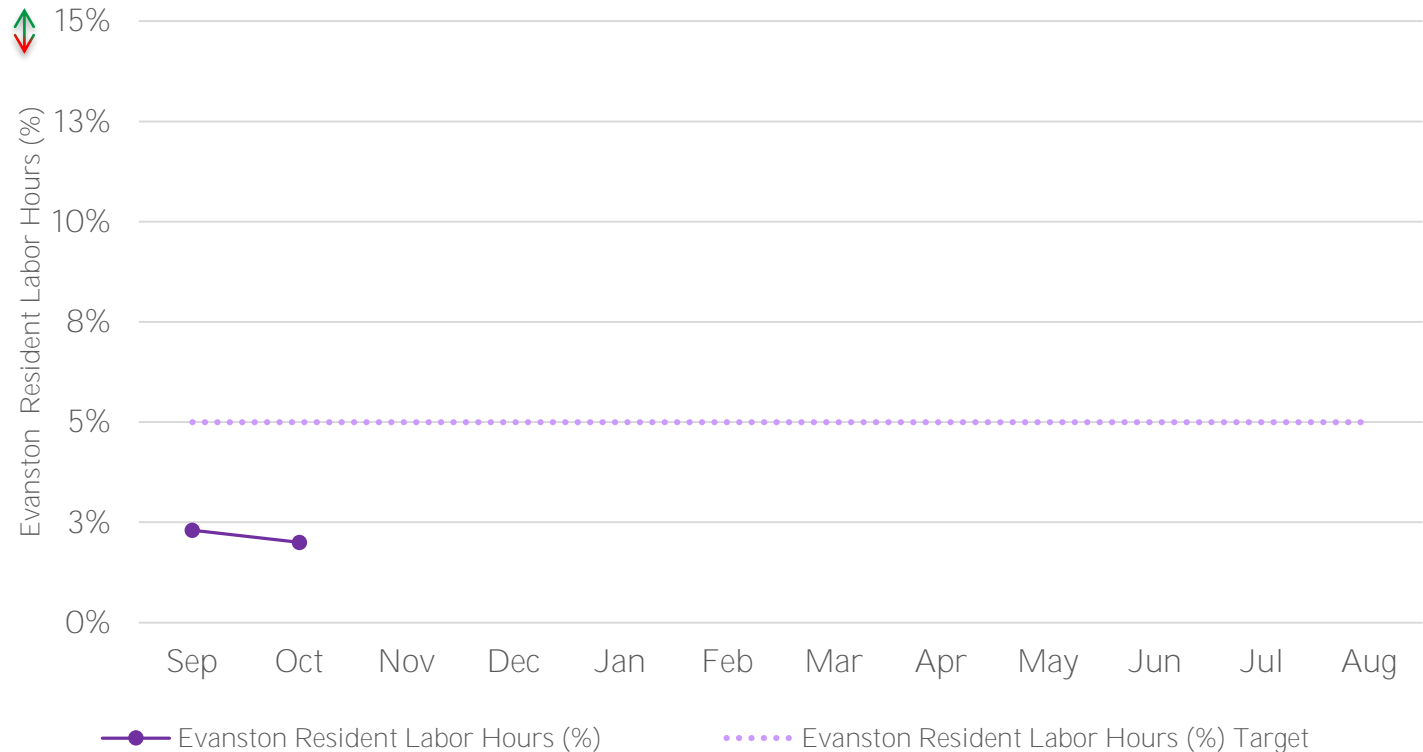
- KPI goal is to decrease service provider overtime rates to 10% of the total labor hours worked
- f(staffing, contracted services, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, off hours project and special event support)
- Initiatives: adjust staffing levels to reflect workload levels; supplement staff levels through temporary staff hires and contracted services; increase service provider productivity; plan and schedule work order assignments; adjust shift schedules to improve campus coverage
- FM Leader: Steve Kindrick

CE6. Minority, Female and Local Business Enterprise Use



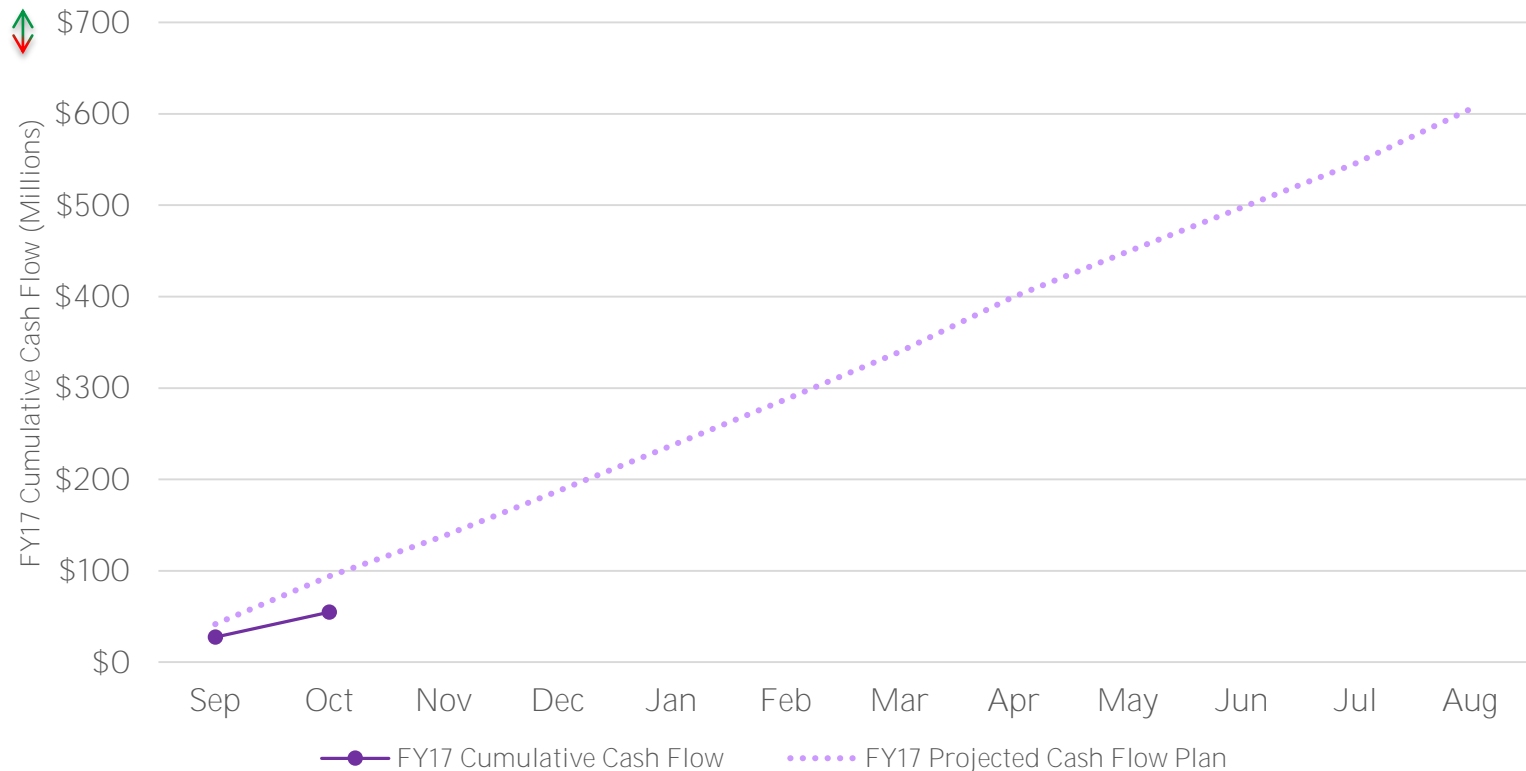
- KPI goal is to increase Minority, Female and Local Business Enterprise work on campus to 15% of contracts awarded on projects over \$25,000
- f(contract, bid, qualifying vendor availability in marketplace)
- Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity; explore marketplace for new vendors to engage
- FM Leader: Liz Schaps

CE7. Evanston Resident Employment



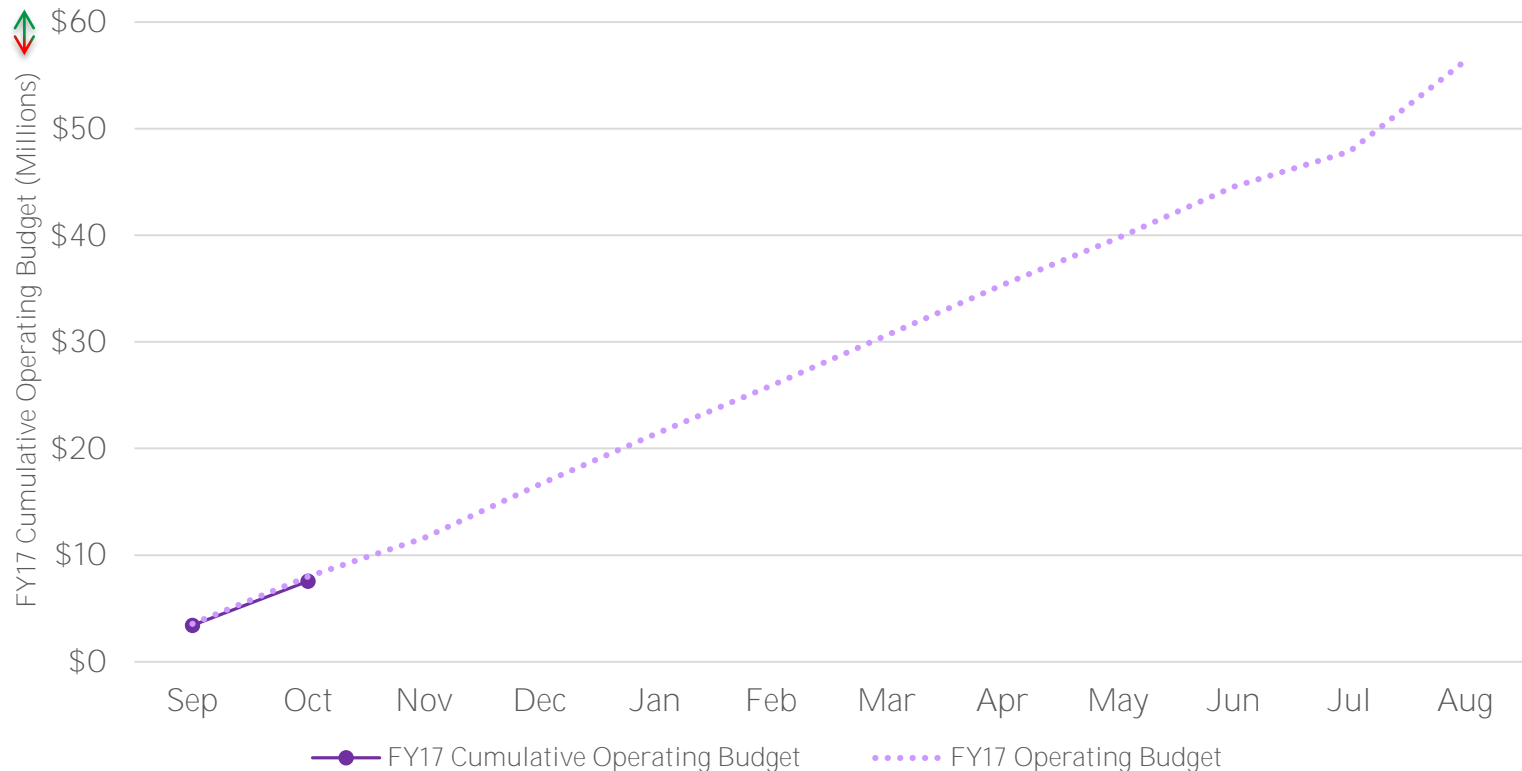
- KPI goal is 5% of total construction labor hours on qualifying campus projects greater than \$1,000,000
- f(project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation)
- Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity
- FM Leader: Liz Schaps

F1. Capital Project Cash Flow Execution



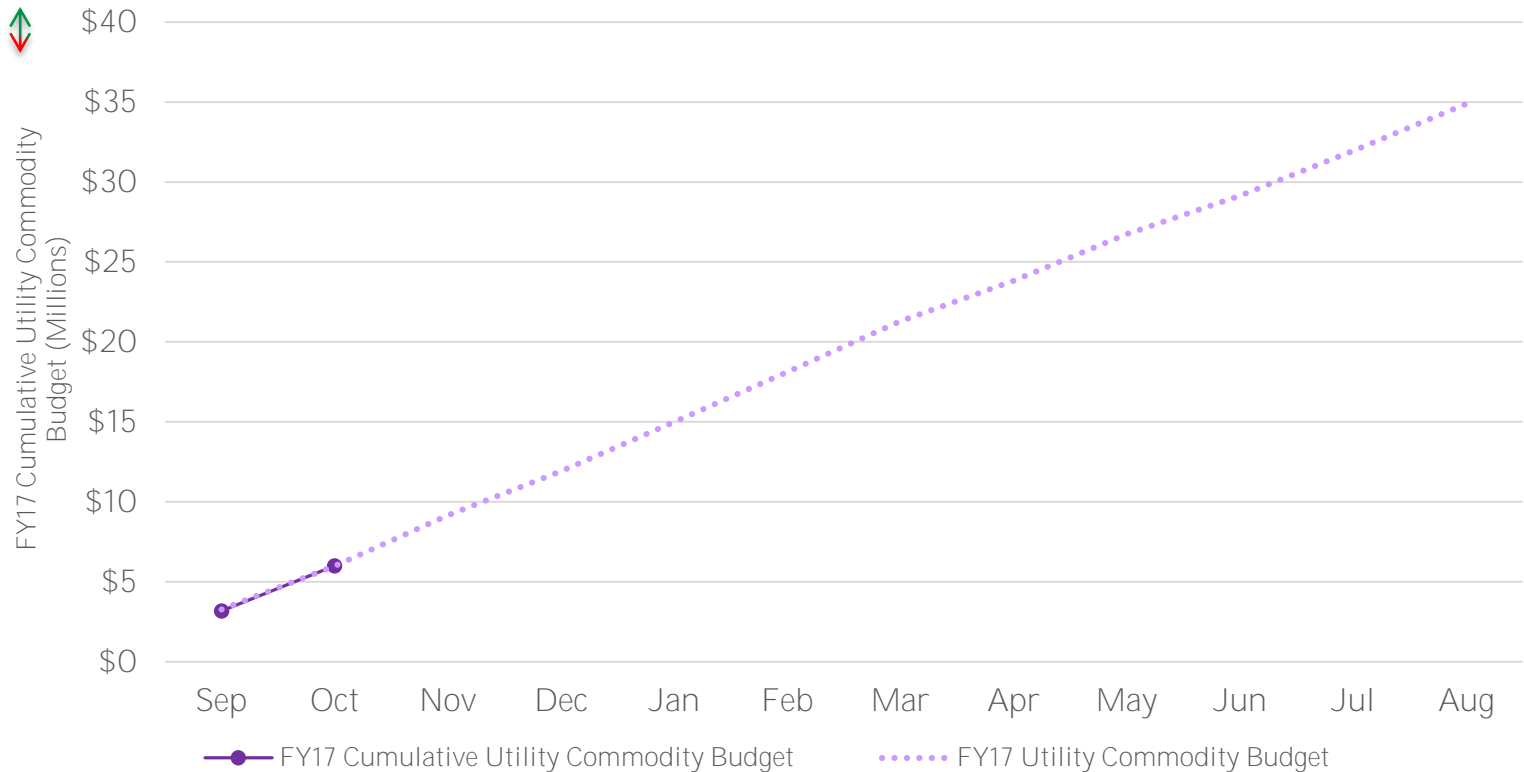
- KPI goal is to spend capital at a rate of +/-2% of committed capital cash flow plan
- f(timely contractor invoicing, unforeseen project conditions, accurate budgeting, scope changes, weather, institutional prioritization, accessibility to work areas/equipment)
- Initiatives: develop and implement process improvement; improve accuracy of cash flow plan; drive timely contractor invoicing; improve reporting; establish and execute project manager cash flow plan
- FM Leader: Liz Schaps

F2. Operating Budget Execution



- KPI goal is to spend operating expenses at a rate of +/- 1% of budget
- f(accurate budgeting, labor rates, material costs, campus growth, unanticipated repairs; accessibility to work areas/equipment)
- Initiatives: develop and implement process improvement; improve reporting; adhere to preventative maintenance plan; manage overtime expenses
- FM Leader: Liz Schaps

F3. Utility Commodity Budget Execution



- KPI goal is to manage utility commodity expenses at a rate of +/- 5% of budget
- f(accurate budgeting, utility commodity costs, campus growth, usage)
- Initiatives: adhere to sourcing strategy; improve reporting
- FM Leader: Liz Schaps