

# Facilities Management

FM Key Performance Indicators

Northwestern

**December 15, 2017**

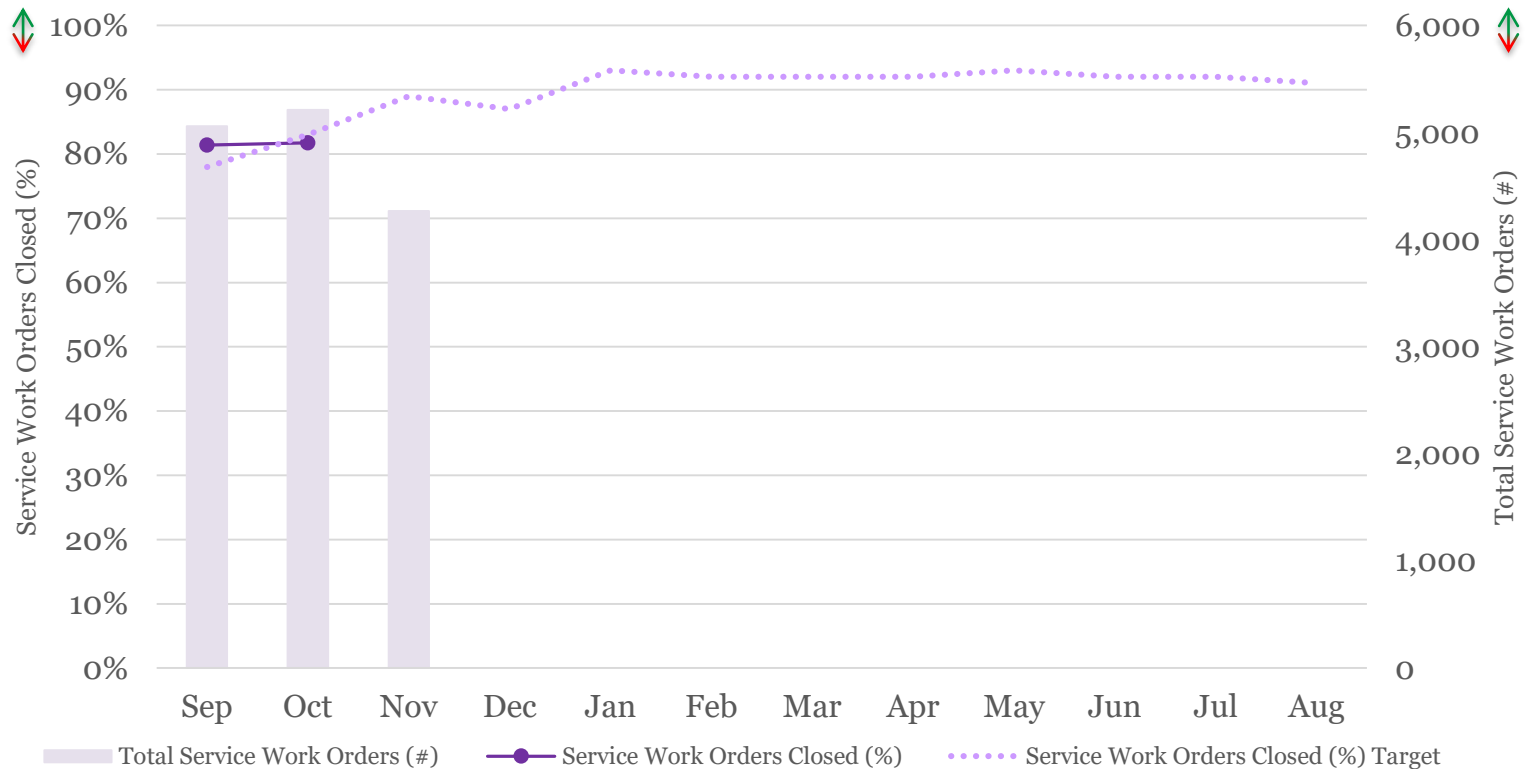
# Facilities Management Key Volume Indicators

Key Volume	FM	Change	Evanston	Chicago
Full Time Equivalent (FTE)	370	-1	302	68
Acres	296	0	281	15
Buildings	222	0	204	18
Square Feet	15.6M	+0.5M	10.6M	5.0M
Number of Open Projects	85	+7	66	19
Design	35	+6	22	13
Construction	19	+4	15	4
Punchlist	11	-8	10	1
Closeout	20	+5	19	1
Value of Open Projects	\$2.5B	\$0.0B	\$1.9B	\$0.6B
Design	\$0.6B	\$0.0B	\$0.4B	\$0.2B
Construction	\$1.2B	\$0.0B	\$0.7B	\$0.5B
Punchlist	\$0.5B	\$0.0B	\$474.3M	\$0.0M
Closeout	\$0.2B	\$0.0B	\$234.9M	\$0.1M
Work Orders Per Reporting Month	6,394	-22.2%	4,928	1,466
Work Orders Per Rolling 12 Months	74,653	+0.6%	56,448	18,205
Operations and Maintenance	\$59.6M	\$0.0M	\$40.9M	\$18.7M

# Key Performance Indicators

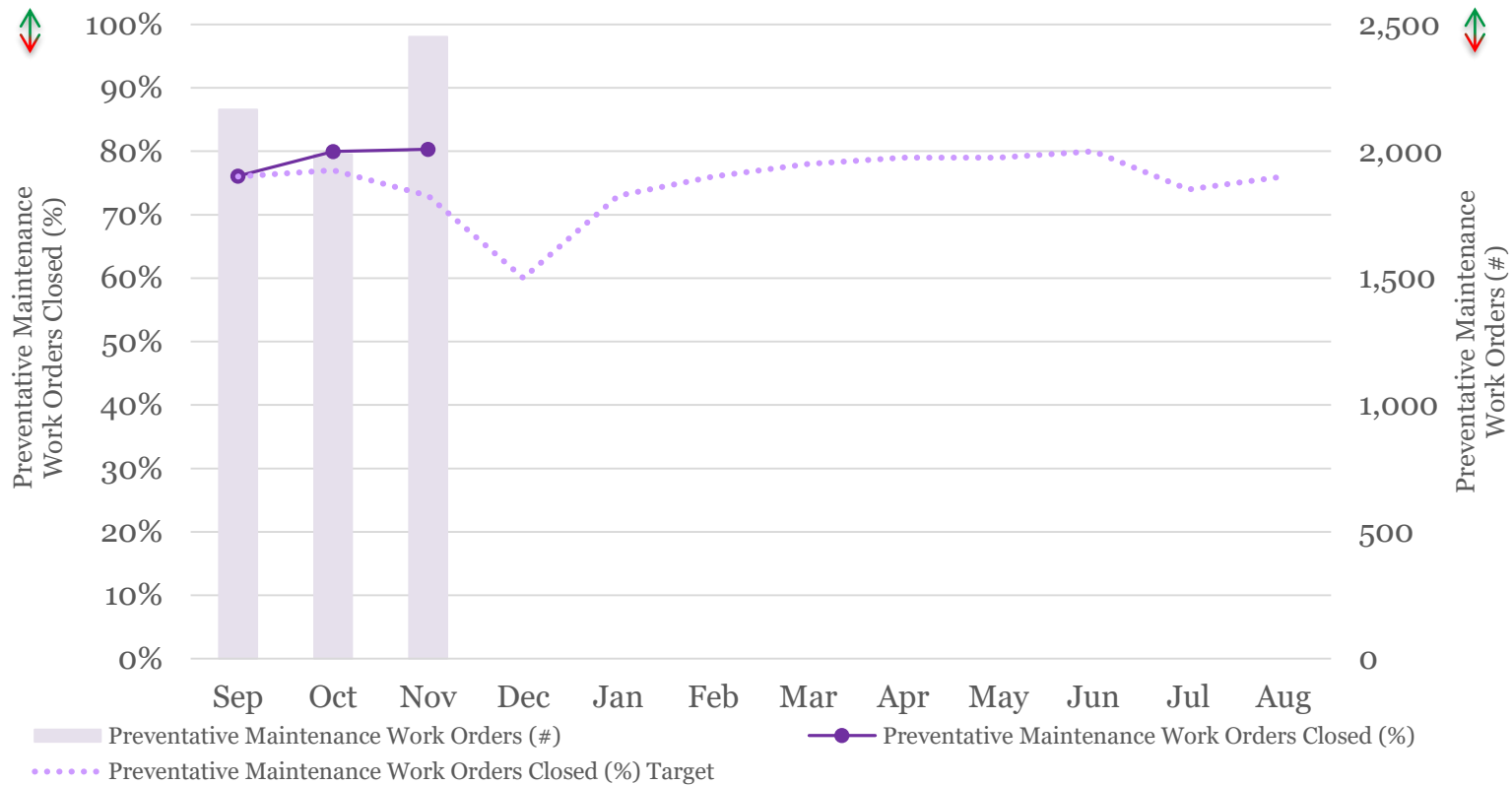
KPI Description	Annual Goal	Nov-17 Goal	Actual	Trend
SD1. Service Request Closure	90%	83%	🟡 82%	🟢 1%
SD2. Preventative Maintenance Closure	75%	72%	🟢 80%	🟡 0%
SD3. Proactivity: FM-Identified Work Orders	30%	30%	🟡 28%	🔴 -1%
LO1. Common Space Program	10%	5%	🟢 5%	🟡 0%
LO2. Facilities Connect Implementation	90%	60%	🔴 50%	🟢 3%
LO3. Engagement: Sustainability Outreach	15%	4%	🟢 10%	🟢 2%
CE1. Energy Use Intensity (kBtu/SF)	-5%	-5%	🟢 -5%	🟢 -1%
CE2. Recordable Injury Incident Rate	2.90	2.90	🔴 3.65	🟡 -0.05
CE3. Injury-Related Lost Workday Rate	1.34	1.34	🟢 0.56	🟡 -0.06
CE4. Waste Diversion Rate	42%	42%	🔴 39%	🔴 -3%
CE5. Overtime	<5%	<5%	🔴 11%	🟢 -3%
CE6. Minority and Female Enterprise Use	15%	15%	TBD	TBD
CE7. Local Business Enterprise Use	15%	15%	TBD	TBD
CE8. Evanston Resident Employment	5%	5%	🔴 2%	🟡 0%
F1. Capital Project Cash Flow Execution	+/-2%	+/-2%	🟢 2%	🟢 -14%
F2. FM Operating Budget Execution	+/-1%	+/-1%	🔴 9%	🟢 -8%
F3. Utility Commodity Budget Execution	+/-5%	+/-5%	🔴 -18%	🟢 1%
F4. Invoices: Number of Days to Pay	90%	90%	🔴 77%	🔴 -3%

# SD1. Service Request Closure



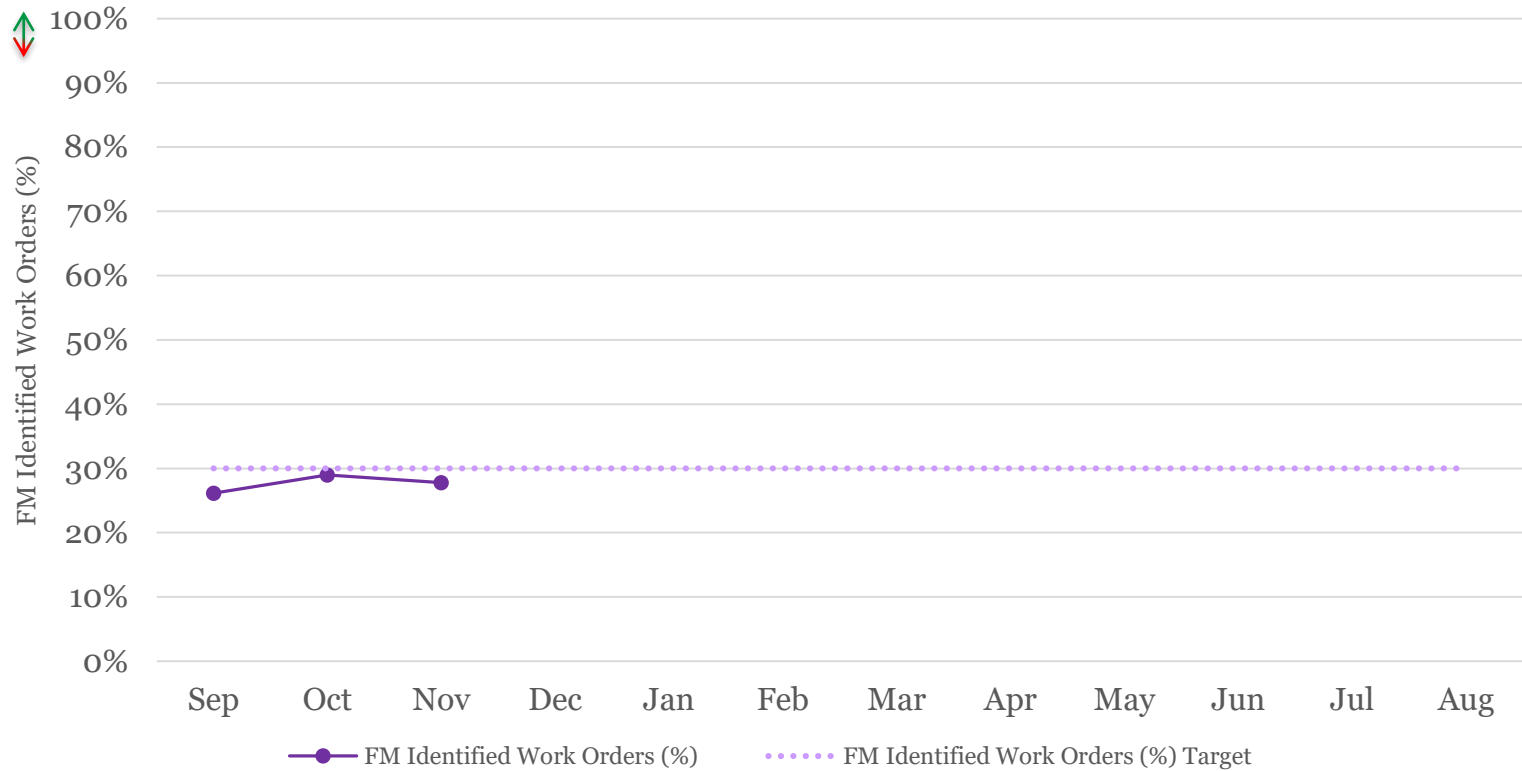
- **KPI goal is to have a yearly average of 90% of service work orders within 30 days (excluding project-related work orders)**
- **f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity, parts/material availability, accessibility of 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: James McKinney and Nadia Jackson**

# SD2. Preventative Maintenance Closure



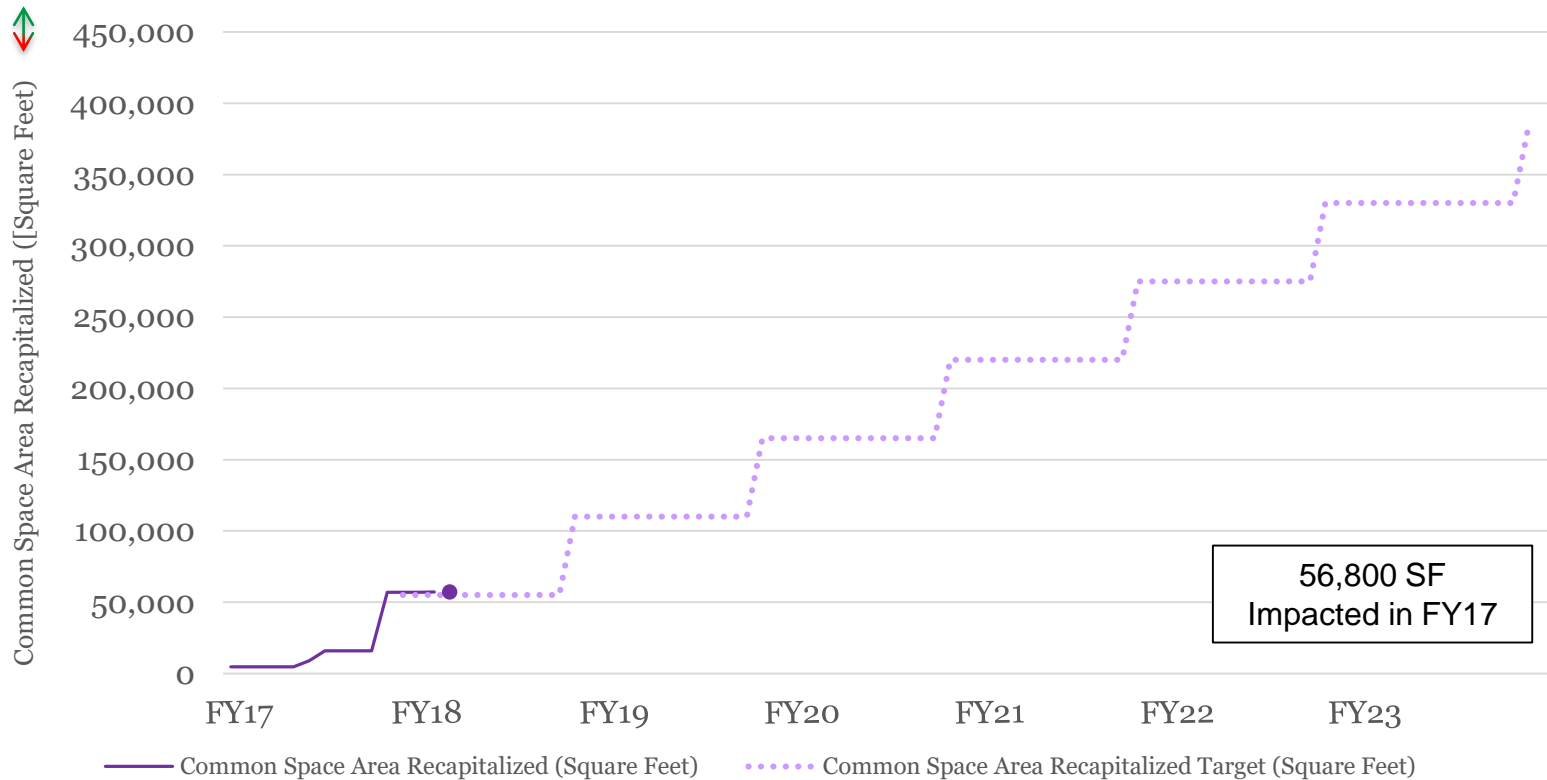
- **KPI goal is to have yearly average of 75% of preventative maintenance tickets closed within 30 days**
- **f(staffing, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, project and special event support)**
- **Initiatives: plan and schedule preventative maintenance work assignments; revise task instructions; optimize recurring task frequencies; adjust staffing levels to reflect workload**
- **FM Leader: James McKinney and Nadia Jackson**

# SD3. Proactivity: FM-Identified Work Orders



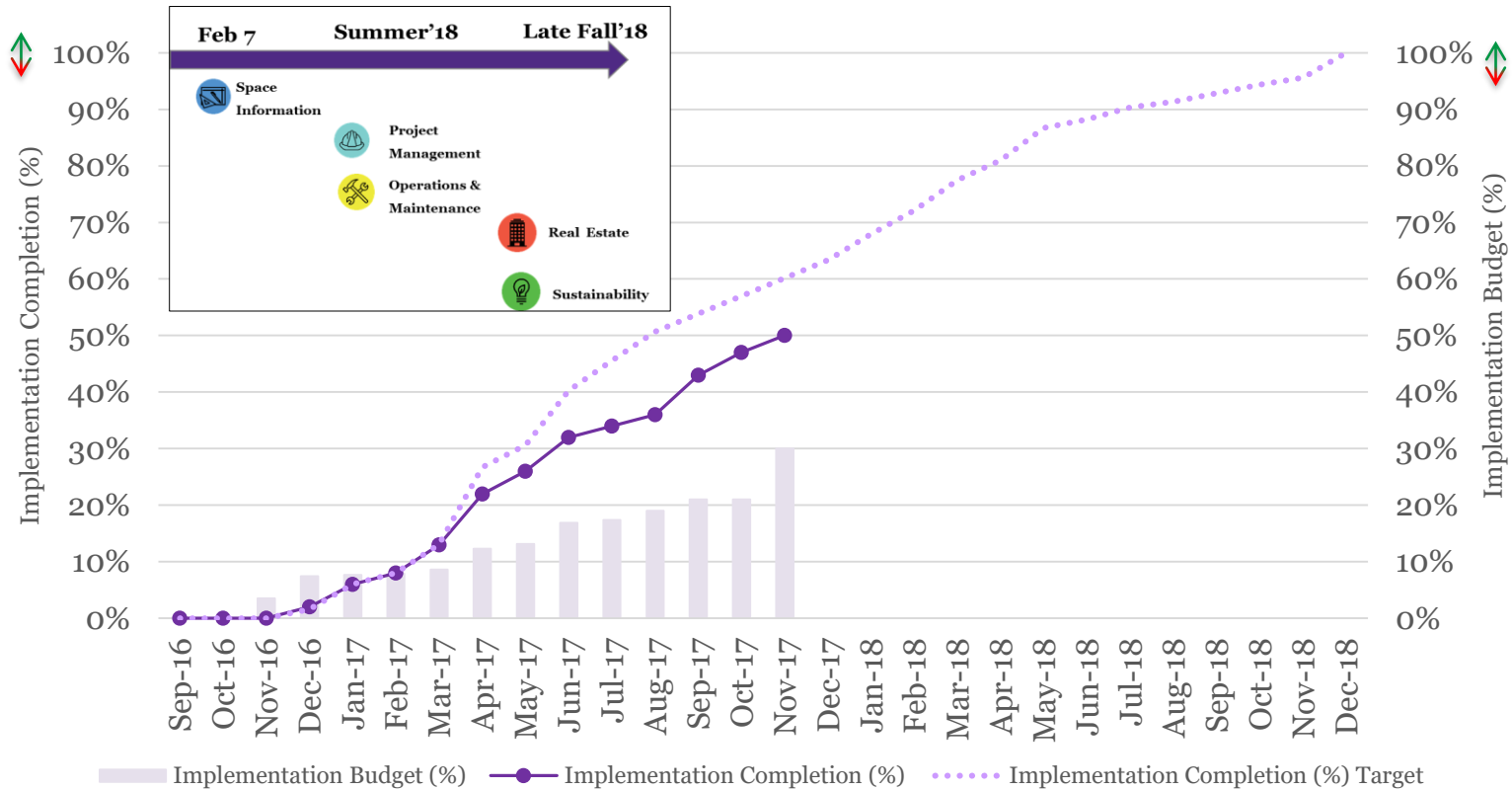
- **KPI goal is that at least 30% of corrective work orders are identified by Facilities Management Staff, as a measure of proactivity**
- **f(staffing, functionality of mobile technology, training)**
- **Initiatives: expand commissioning and preventative maintenance programs; institute quality assurance and quality control programs; increase functionality of mobile technology; implement a zone service model**
- **FM Leader: James McKinney and Nadia Jackson**

# LO1. Common Space Program



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

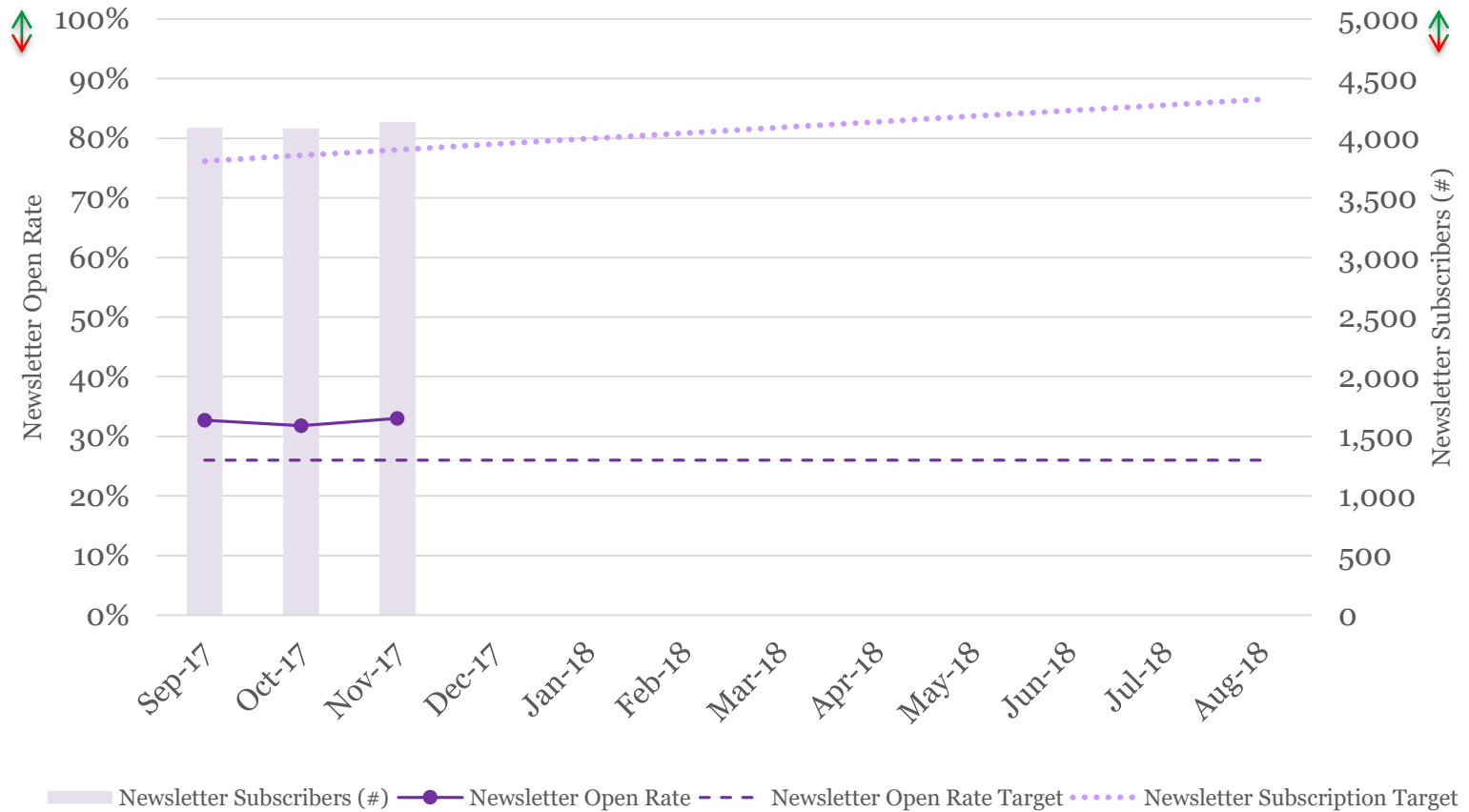
# LO2. Facilities Connect Implementation



- **KPI goal is to complete 90% of project milestones by fiscal year 2018**
- **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**

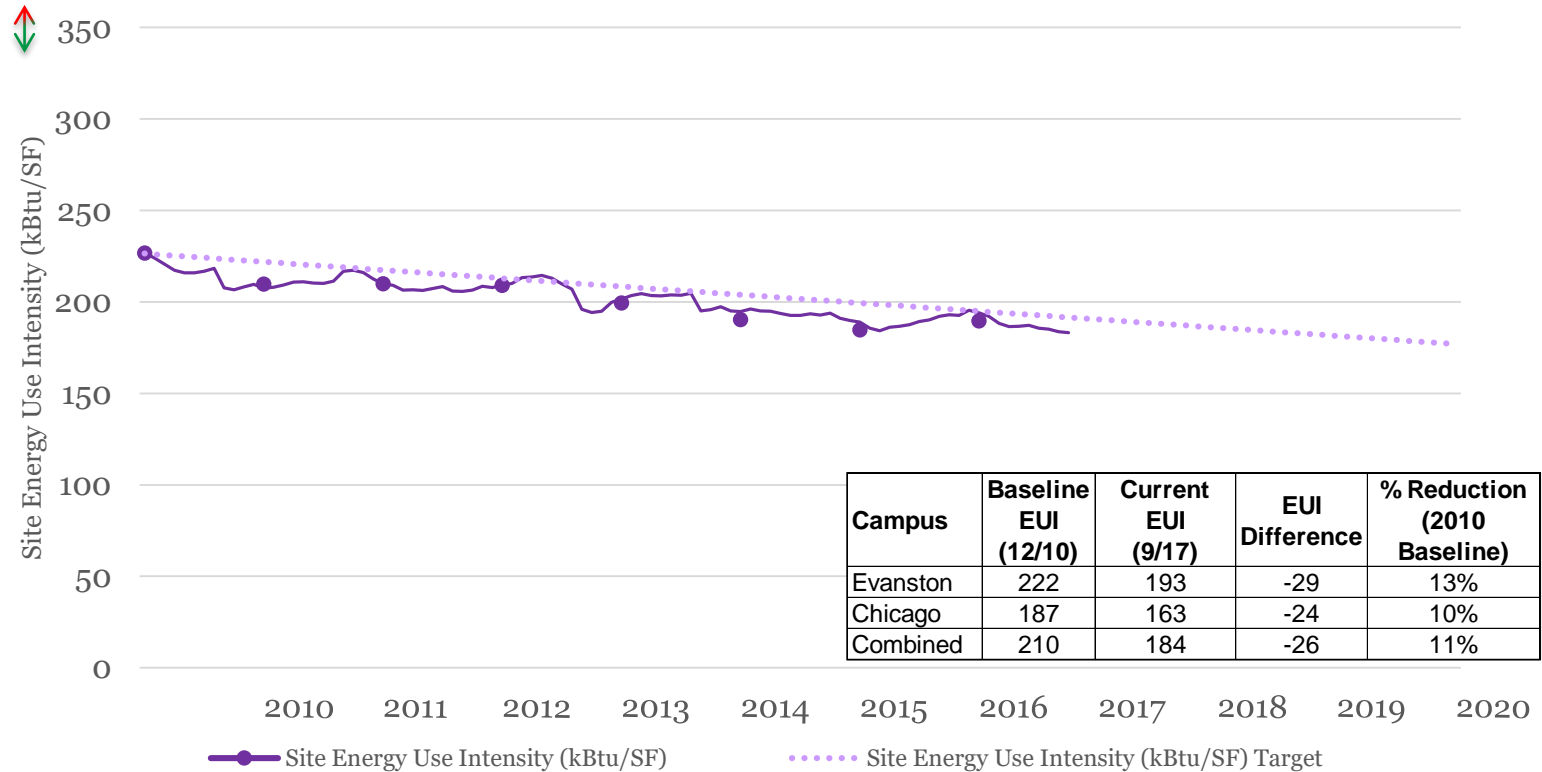


# LO3. Engagement: Sustainability Outreach



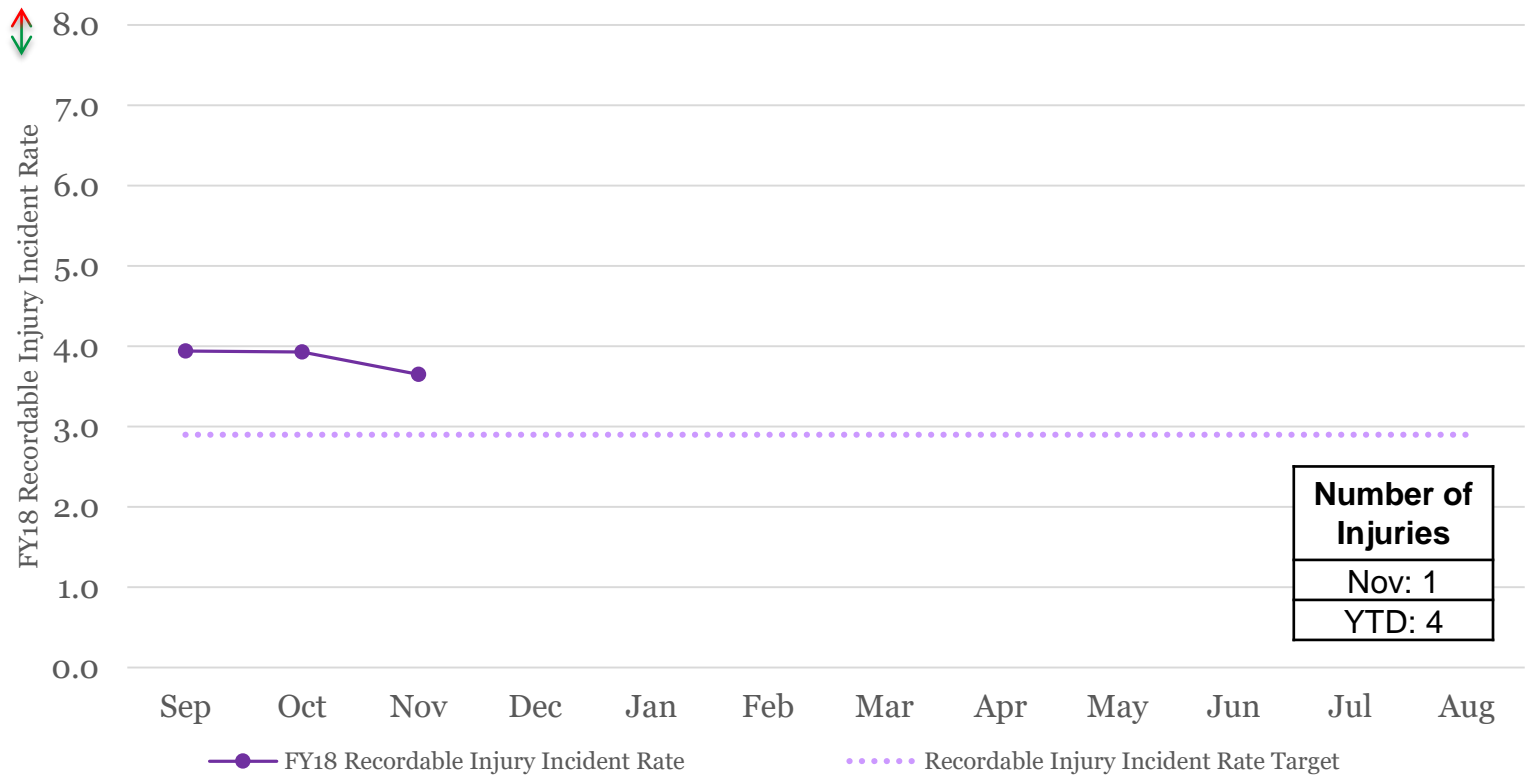
- **KPI goal is to increase newsletter subscription by 15% annually (1.25% per month); maintain open rate 10% above industry average**
- **Initiatives: actively promote newsletter across University communication;**
- **FM Leader: Kathia Benitez**

# CE1. Energy Use Intensity



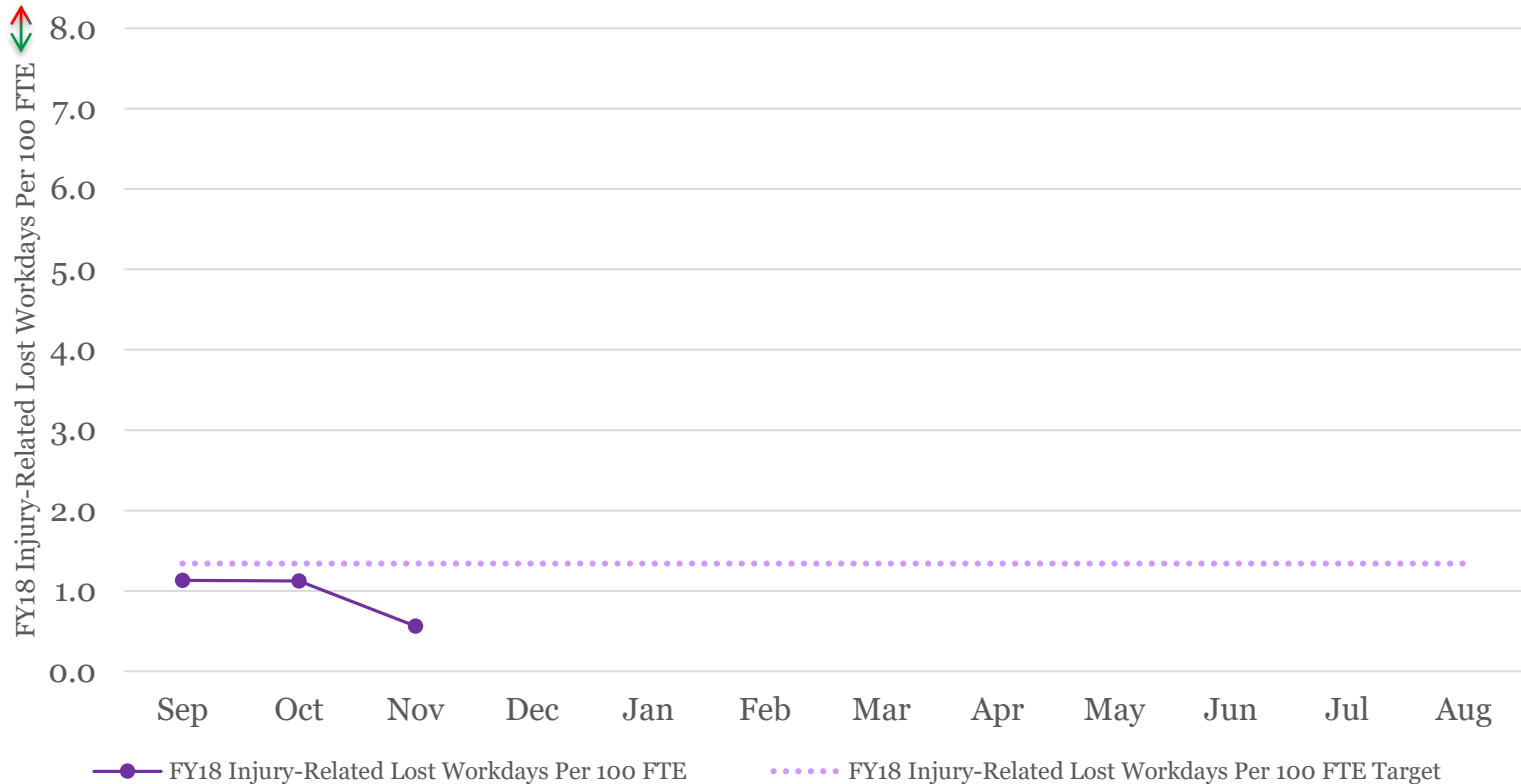
- **KPI goal is to reduce the energy use intensity (EUI) by 20% by 2020**
- **f(occupant behavior, design, construction, technology, operations, weather)**
- **Initiatives: engage occupants; formalize design specifications; perform retro-commissioning; physically audit space for improvement**
- **FM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

# CE2. Recordable Injury Incident Rate



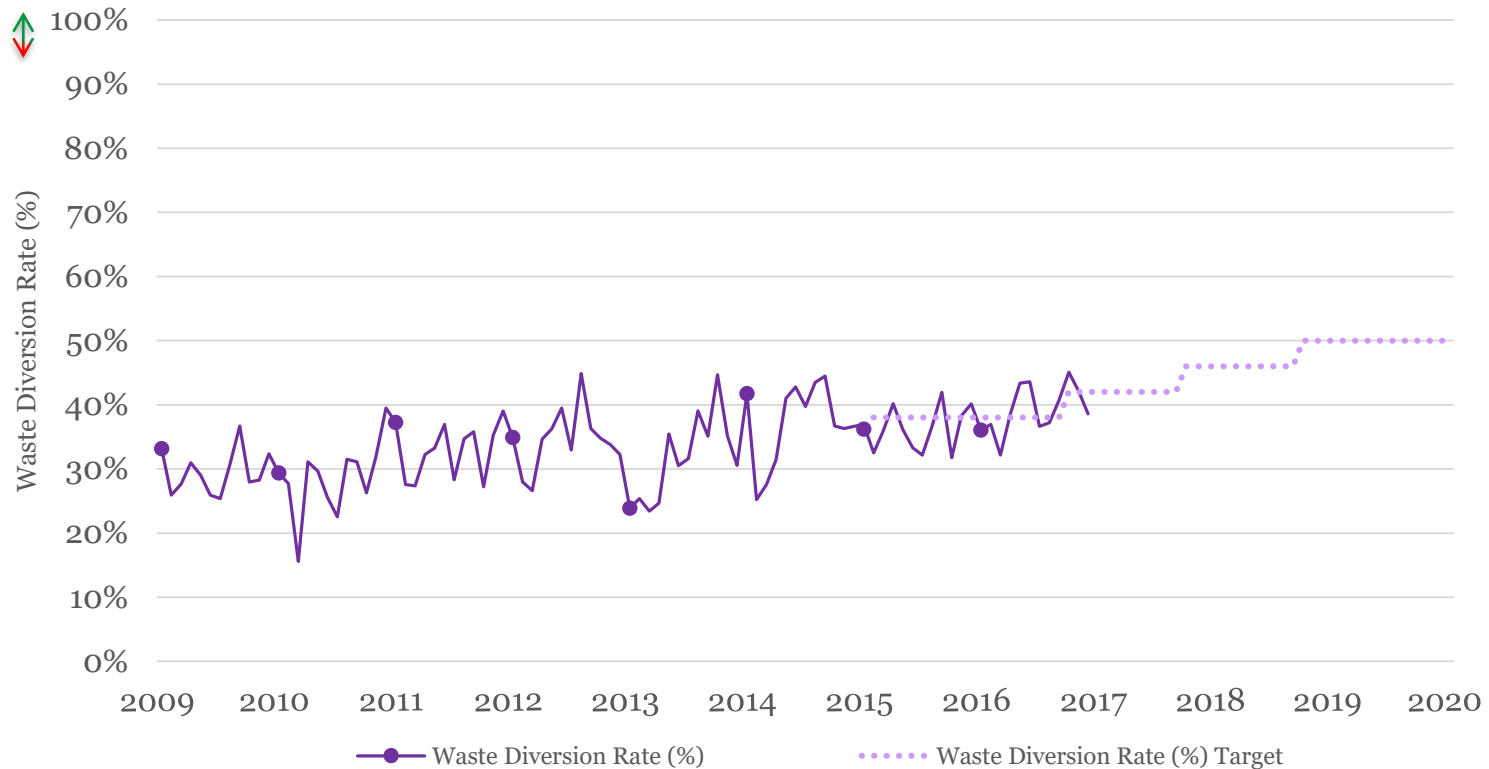
- **KPI goal is to reduce OSHA Recordable Injury Incident Rate by 20% from prior year rate of 3.65 to 2.90**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks, near miss incident program, hearing conservation program**
- **FM Leader: Rachel Gunn**

# CE3. Injury-Related Lost Workday Rate



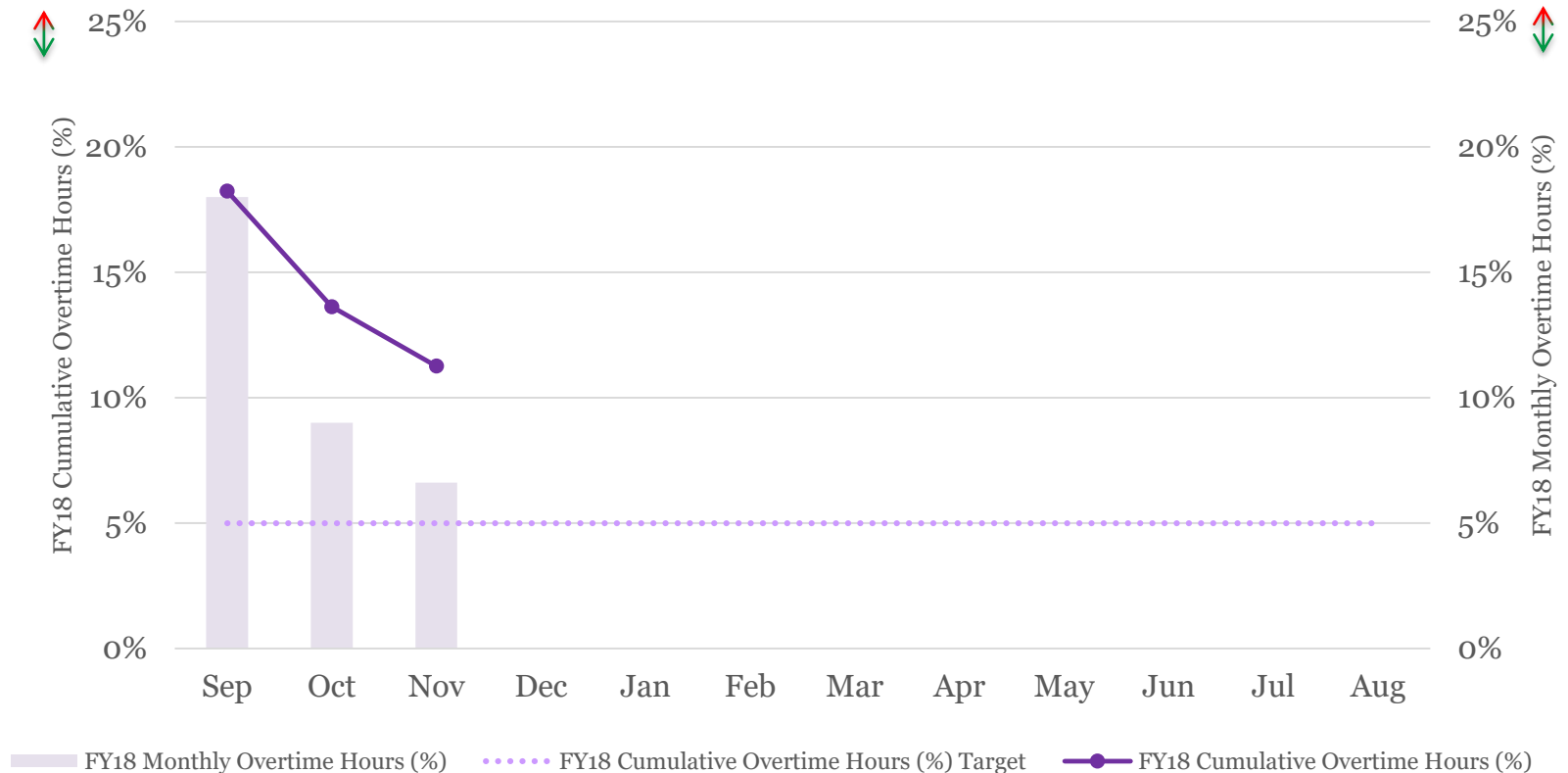
- **KPI goal is to achieve an injury-related lost workday rate of less than 1.34 lost workdays (days away, restricted, or transferred) per 100 full time employees**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective equipment use; train staff; enact monthly safety talks**
- **FM Leader: Rachel Gunn**

# CE4. Waste Diversion Rate



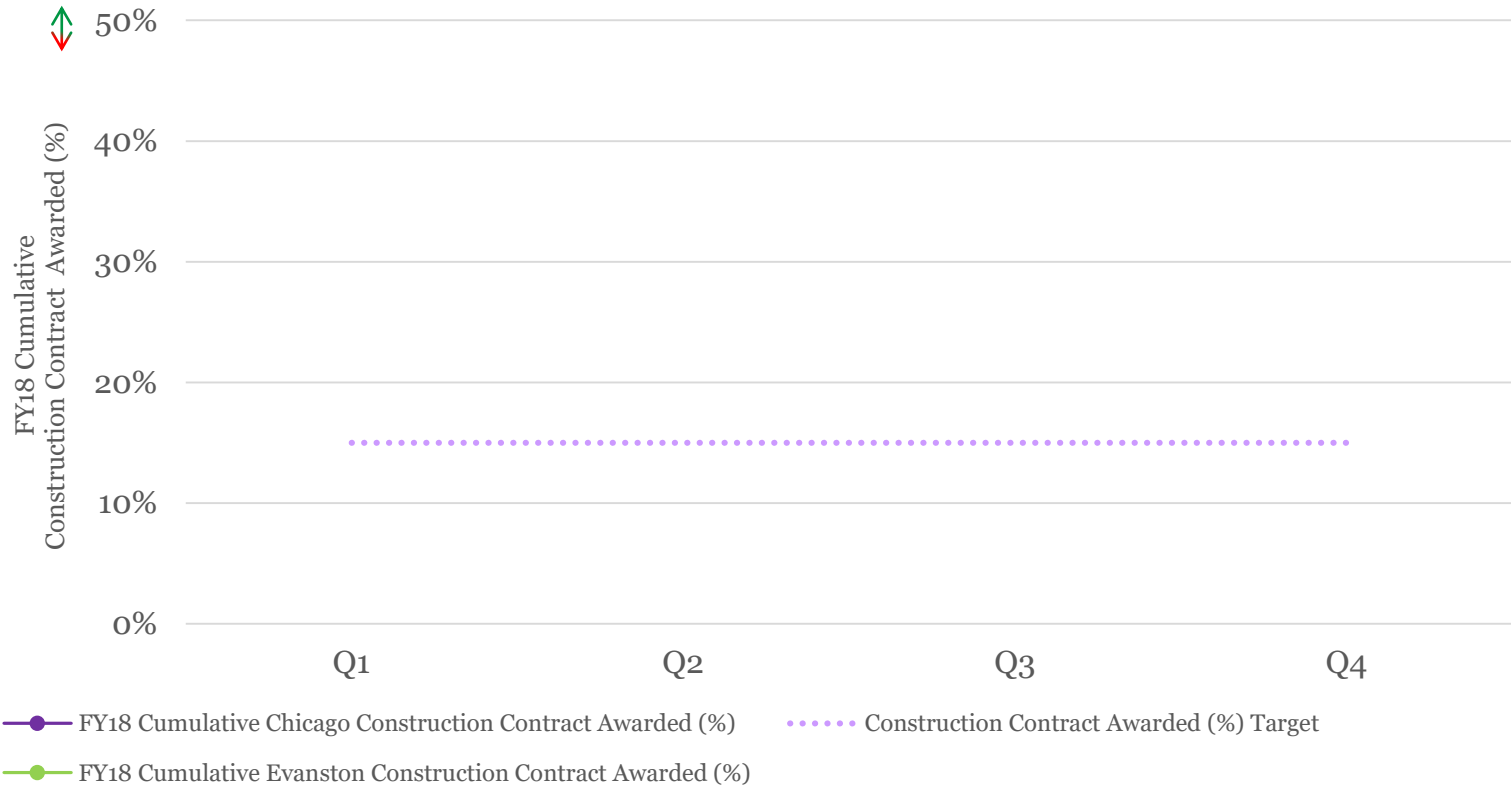
- **KPI goal is a 50% diversion rate by 2020 over 2009 baseline (4% increase in FY 2018 over FY 2017)**
- **f(occupant behavior purchasing, reuse, recycling, diversion, market availability of diversion services)**
- **Initiatives: audit waste; promote landfill diversion via new resource conversation working group, identify new landfill diversion opportunities; train occupants on recycling**
- **FM Leader: Kathia Benitez**

# CE5. Overtime



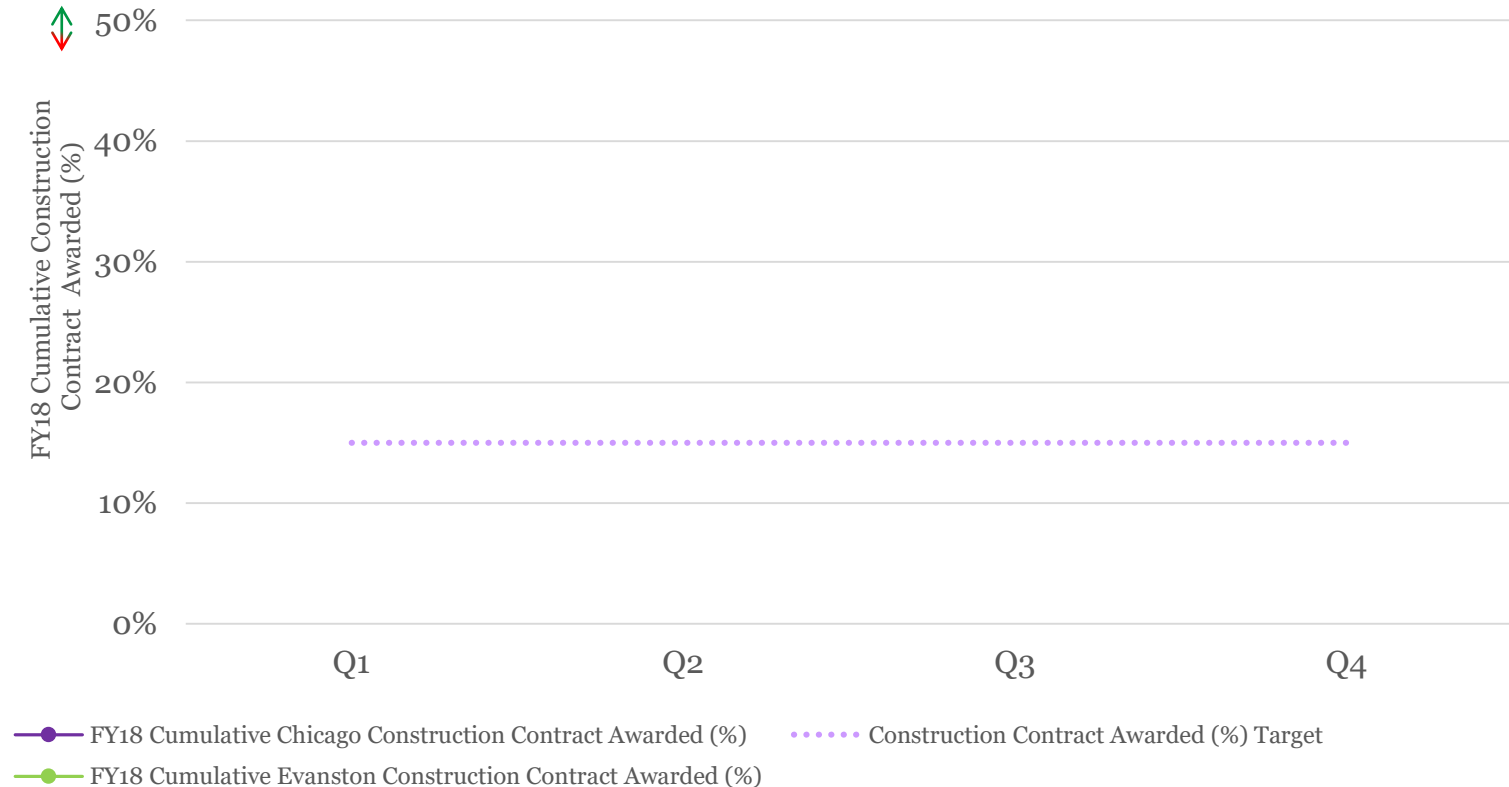
- **KPI goal is to decrease overtime from 15% of total labor hours in FY17 to 5% of total hours.**
- **f(staffing, contracted services, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, off hours project and special event support)**
- **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: Rachel Gunn**

# CE6. Minority and Female Enterprise Use



- **KPI goal is to increase Minority and Female 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**

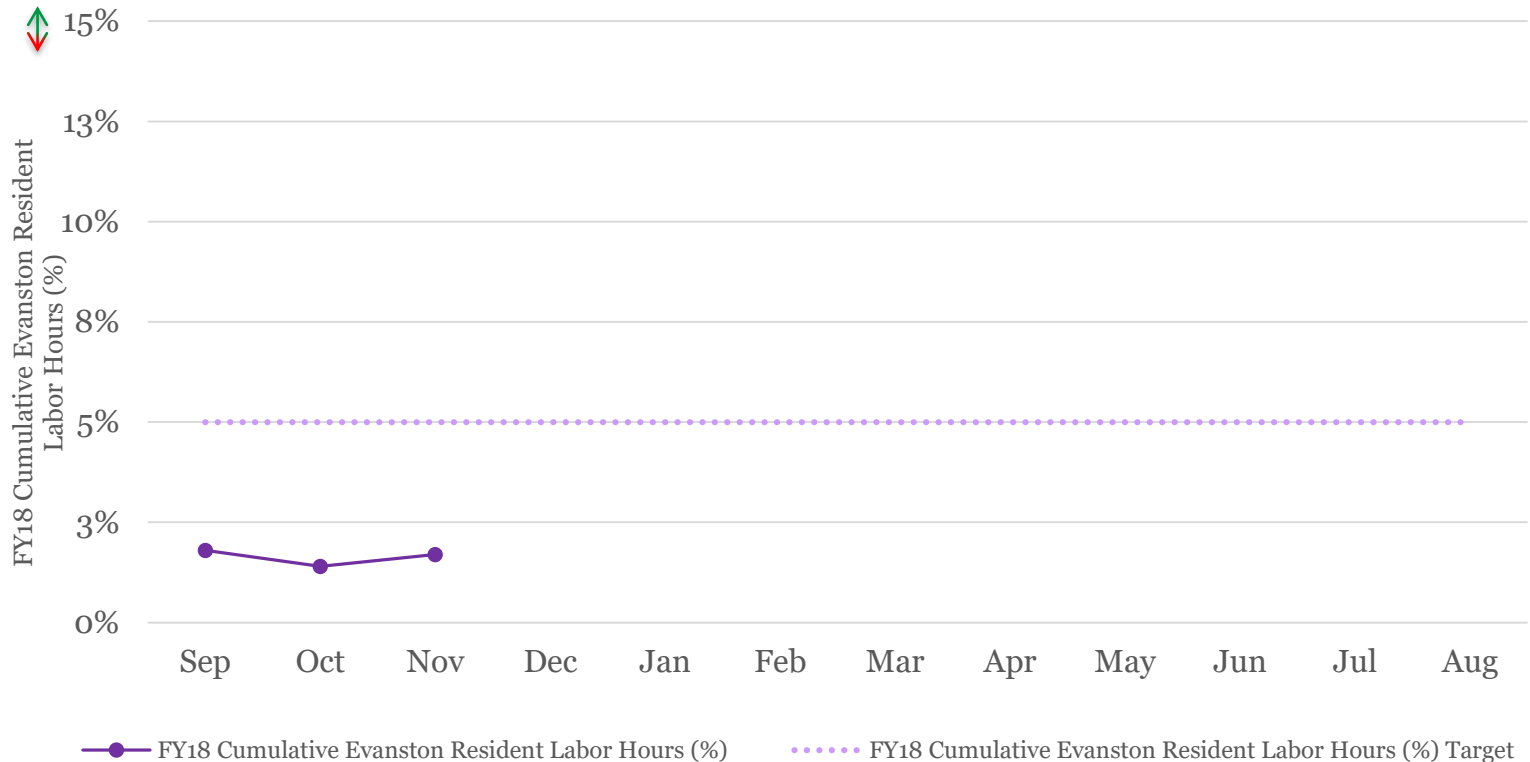
# CE7. Local Business Enterprise Use



- **KPI goal is to increase 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**

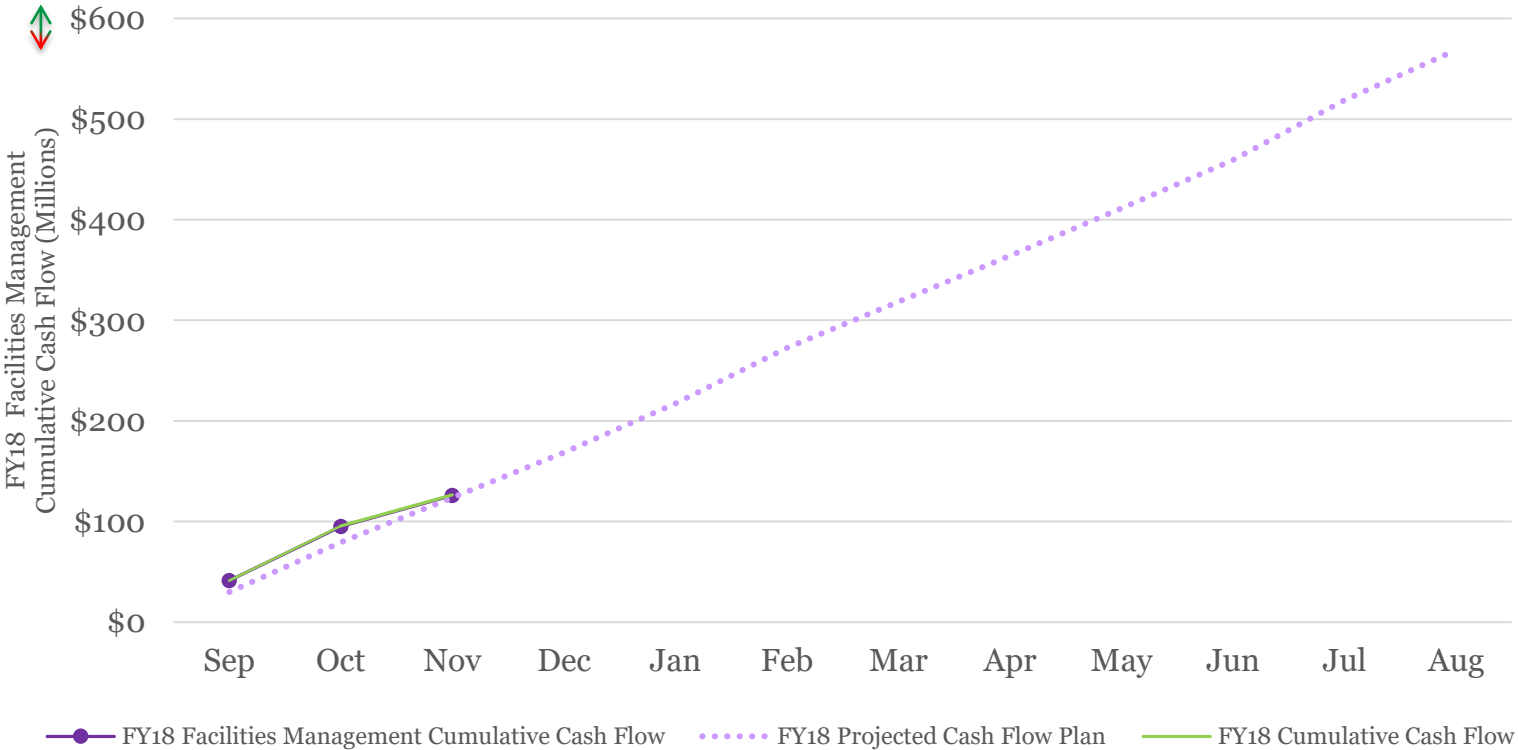


# CE8. Evanston Resident Employment



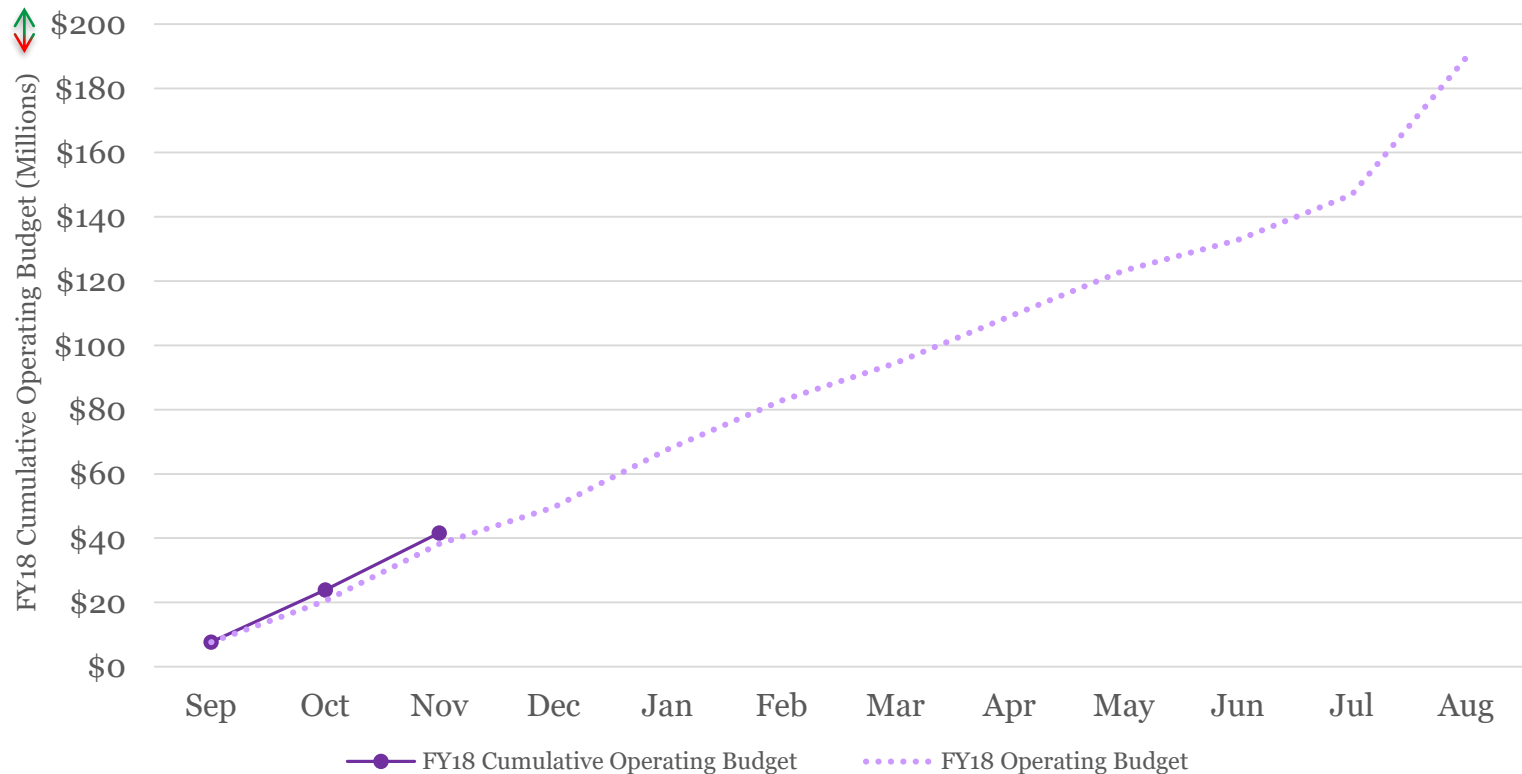
- **KPI goal is 5% of total construction labor hours on qualifying campus projects greater than \$1,000,000**
- **f(project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation)**
- **Initiatives: implement new software system; train and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

# F1. Capital Project Cash Flow Execution



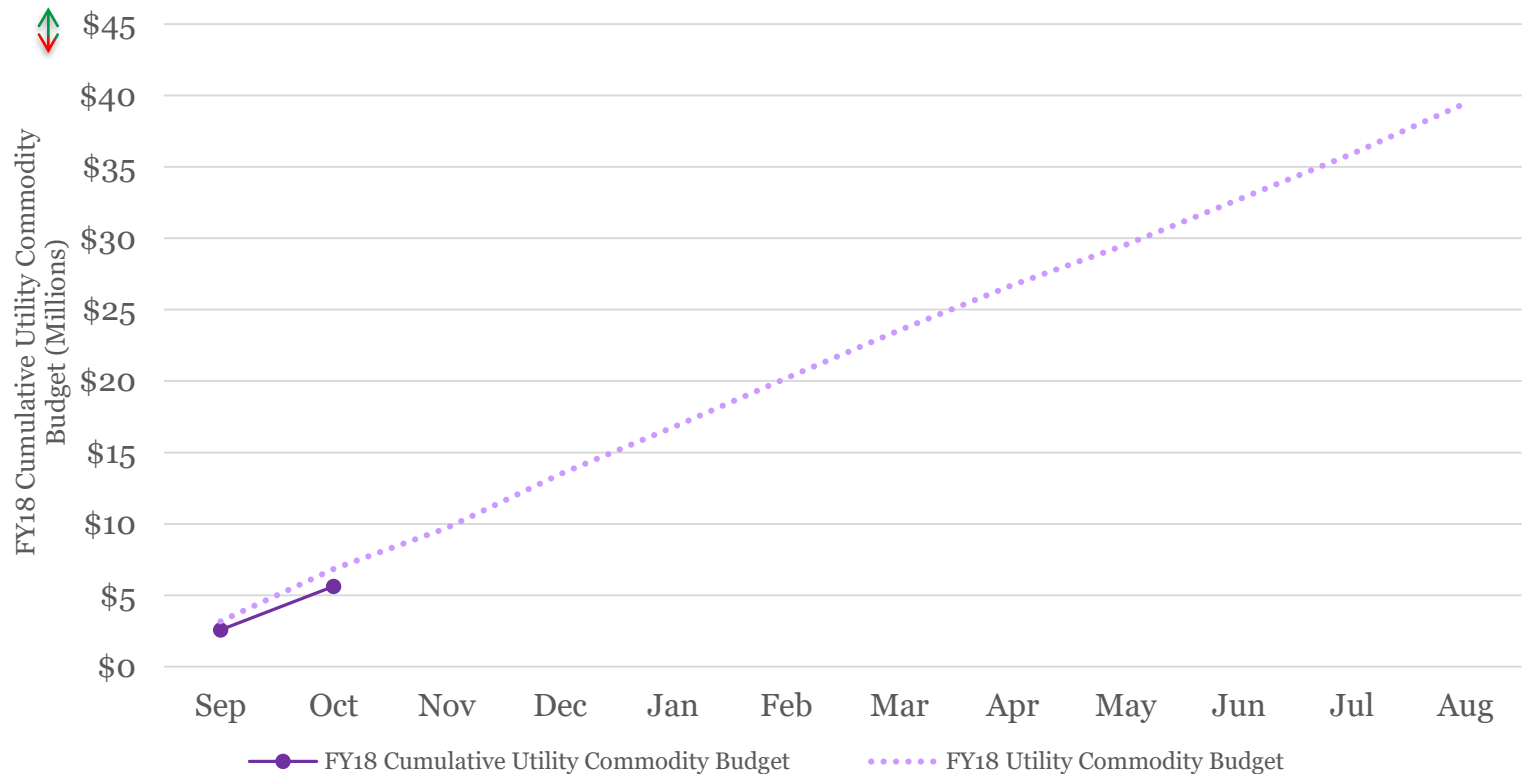
- **KPI goal is to spend capital at a rate of +/-2% of committed capital cash flow plan**
- **f(timely contractor invoicing, unforeseen project conditions, accurate budgeting, scope changes, weather, institutional prioritization, accessibility to work areas/equipment)**
- **Initiatives: develop and implement 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. FM Operating Budget Execution



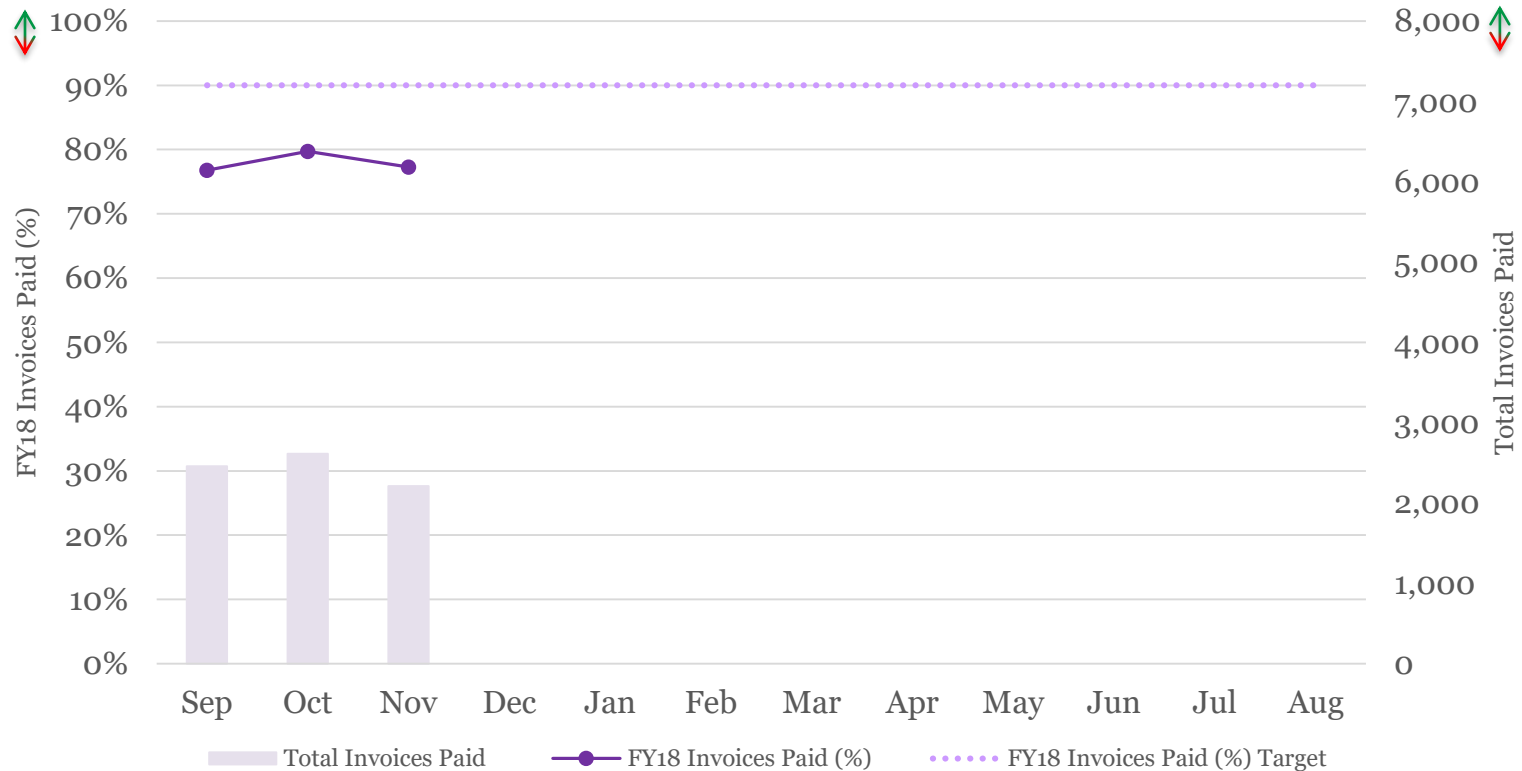
- **KPI goal is to spend Facilities Management division operating expenses at a rate of +/- 1% of budget**
- **f(accurate budgeting of FM Operations and Maintenance, FM Administration, FM Planning, FM Design and Construction, FM Sustainability, FM HR, campus growth, unanticipated factors)**
- **Initiatives: 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**

# F4. Invoices: Number of Days to Pay



- **KPI goal is to process 90% of invoices from receipt to voucher/ACH within 30 days**
- **f(accurate invoicing, FM timely invoice processing, accounts payable, staffing )**
- **Initiatives: develop and implement process improvement; improve reporting**
- **FM Leader: Liz Schaps**