

Facilities Management

FM Key Performance Indicators

Northwestern

April 15, 2016

Key Performance Indicators

Process/Function	KPI	Goal	Actual	Trend
Energy Conservation	Energy Usage Index (BTU/SF)	- 5%	- 4% YTD	Improving
Waste Reduction	Waste to Landfill	- 3%	0% YTD	Flat
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%	60%	Improving
Service Request Completion	Open More Than 30 Days	<25%	70%	Improving
Technician Productivity	Wrench Time	60%	43%	Improving
Operating Budget Execution	Variance to Budget	+/- 1%	+ .8% YTD	At Goal
Utility Budget Execution	Variance to Budget	+/- 5%	+5.4% YTD	Improving
Local Resident Employment	Compliant Contracts	95%	100%	At Goal

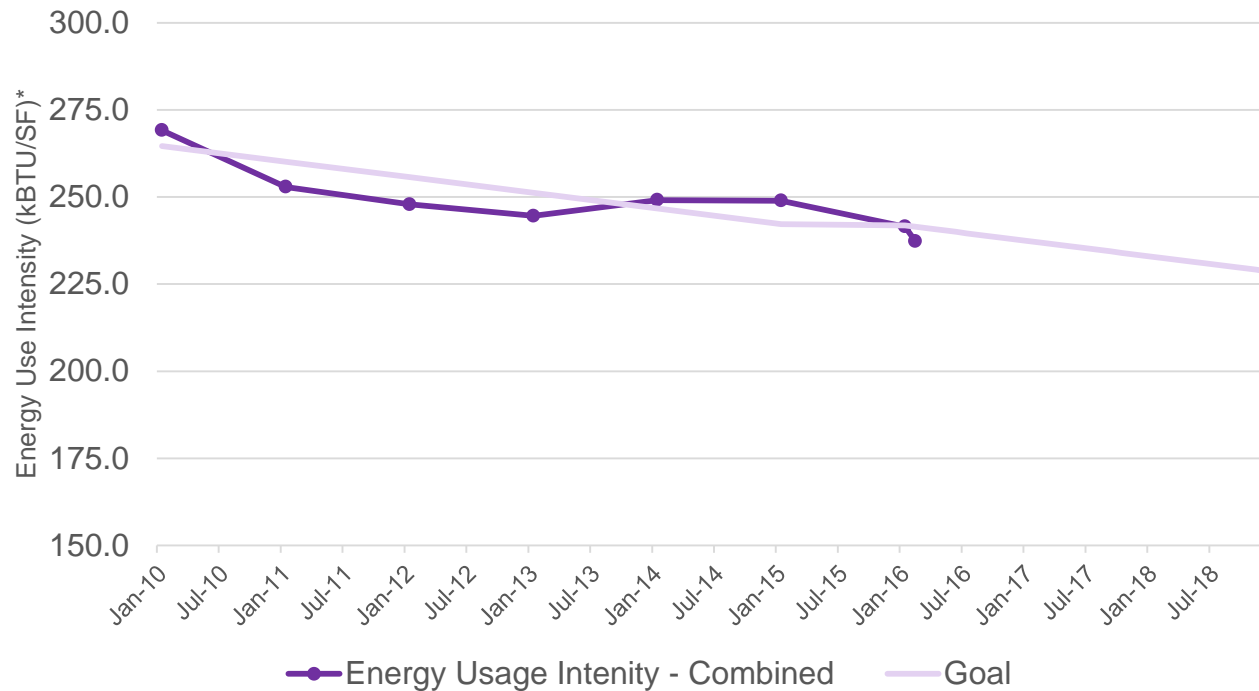
*R&R is Renewal and Replacement, an annual capital allocation applied to buildings, grounds and installed equipment to extend the service life of Northwestern facilities.

Process/Function	KPI	Goal	Actual	Trend
MBE/FBE** Use	Compliant Contracts	95%	81%	Improving
Inlease/Outlease Management	Review Time	<10 Days	0 Days	At Goal
Move Inspection Execution	Service Rating	>90%	100%	At Goal
Digitization	Scanned Documents per Month	>800	1,523	At Goal
Planning Data Access	Request Fulfillment Time	<1 Day	0.49 Days	At Goal
Planning Data Accuracy	Data Deficiencies	78,000 sf	0 sf	Declining
Injury Management	Annual OSHA Injuries	<8/year	1 YTD	At Goal
Capital Plan Execution	Actual at or below Budget	>95%	95%	At Goal
Project Cash Flow	Actual to Plan	+/- 5%	- 5%	At Goal
Design Quality	Receive Major Design Award	1/year	1 YTD	At Goal

**MBE/FBE are Minority and Female Business Enterprises

Energy Conservation

Energy Usage Intensity (kBTU/ SF)*



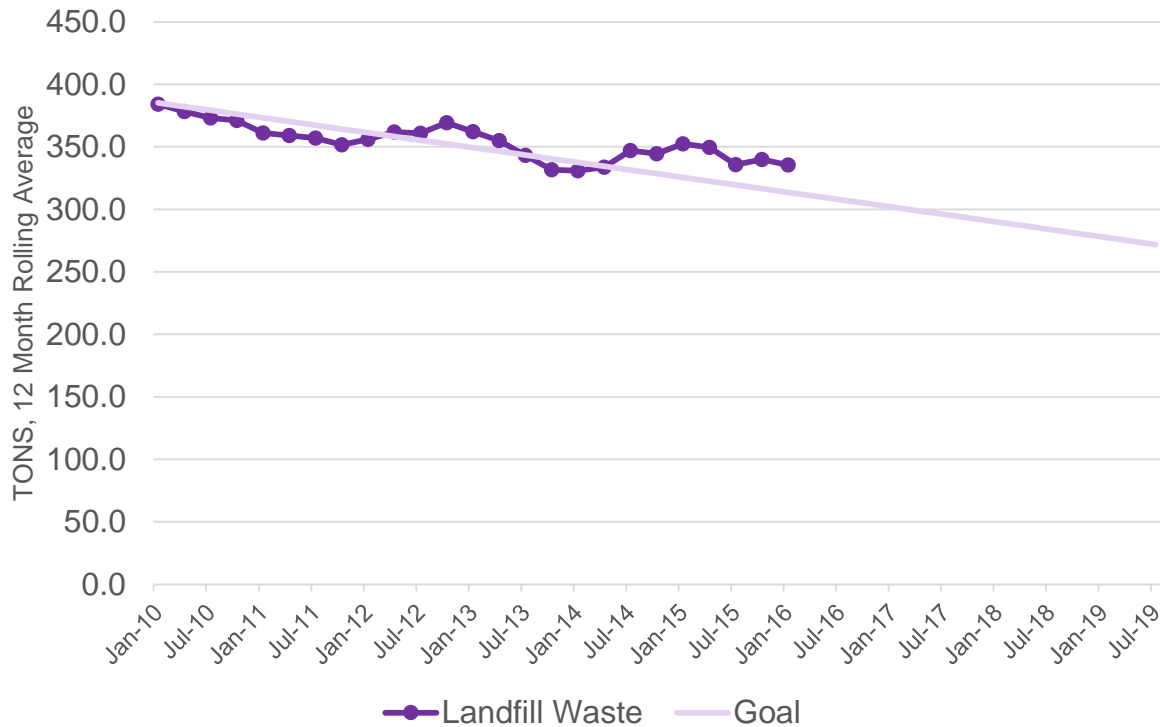
Campus	% Reduction (2010 Baseline)
Evanston	-9%
Chicago	-16%
Combined	-12%

- **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

Waste Reduction to Landfill



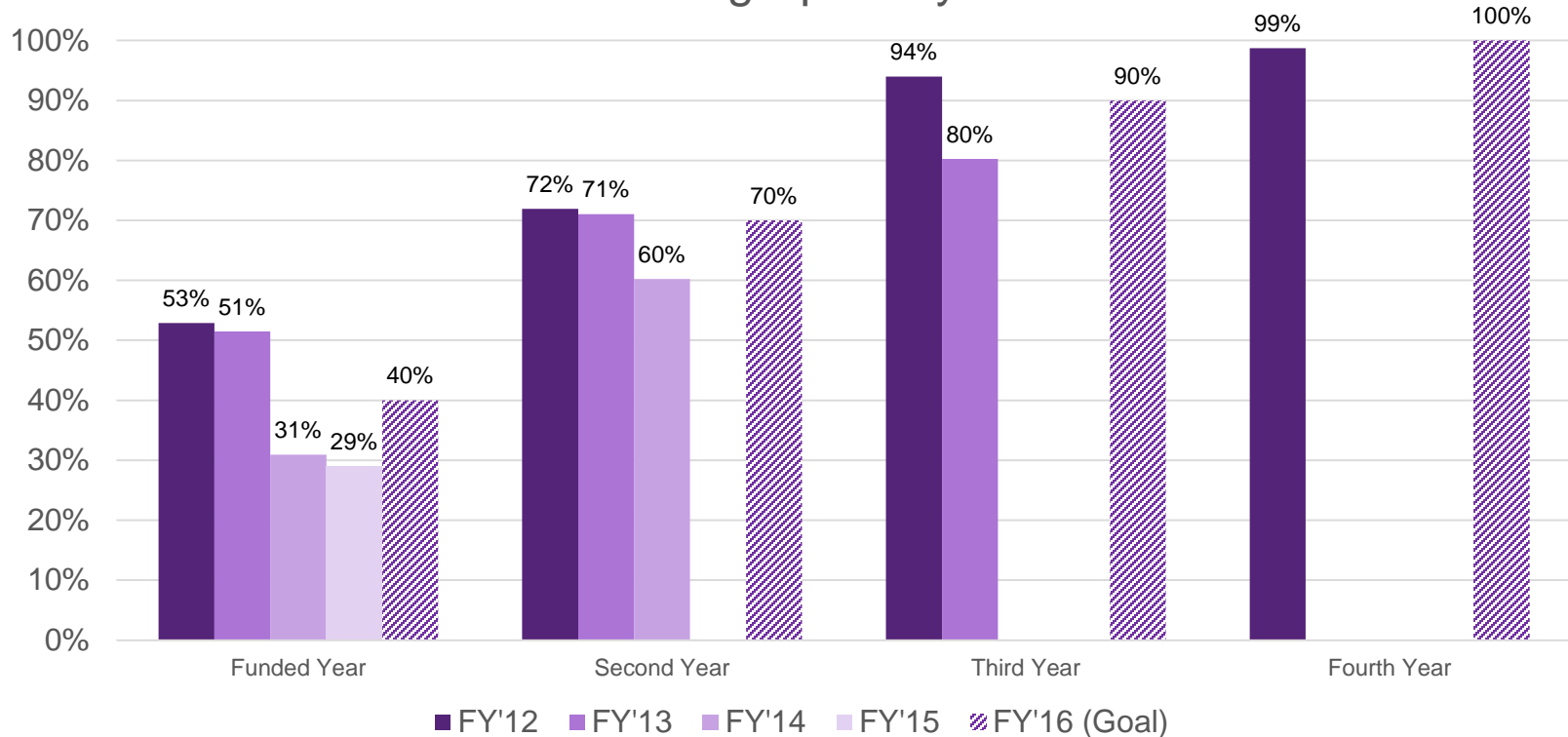
Campus	Trash % Reduction (2009 Baseline)
Evanston	-10%
Chicago	-18%
Combined	-12%

Campus	Recycling % Increase (2009 Baseline)
Evanston	23%
Chicago	6%
Combined	19%

- f(purchasing, reuse, recycling, diversion, occupant behavior)
- KPI goal is 30% reduction in waste to landfill by 2020 over 2009 baseline (3% reduction in 2016)
- Initiatives: Improve reuse programs; single-stream recycling; bin location; engagement and education
- FM Leader: Julie Cahillane

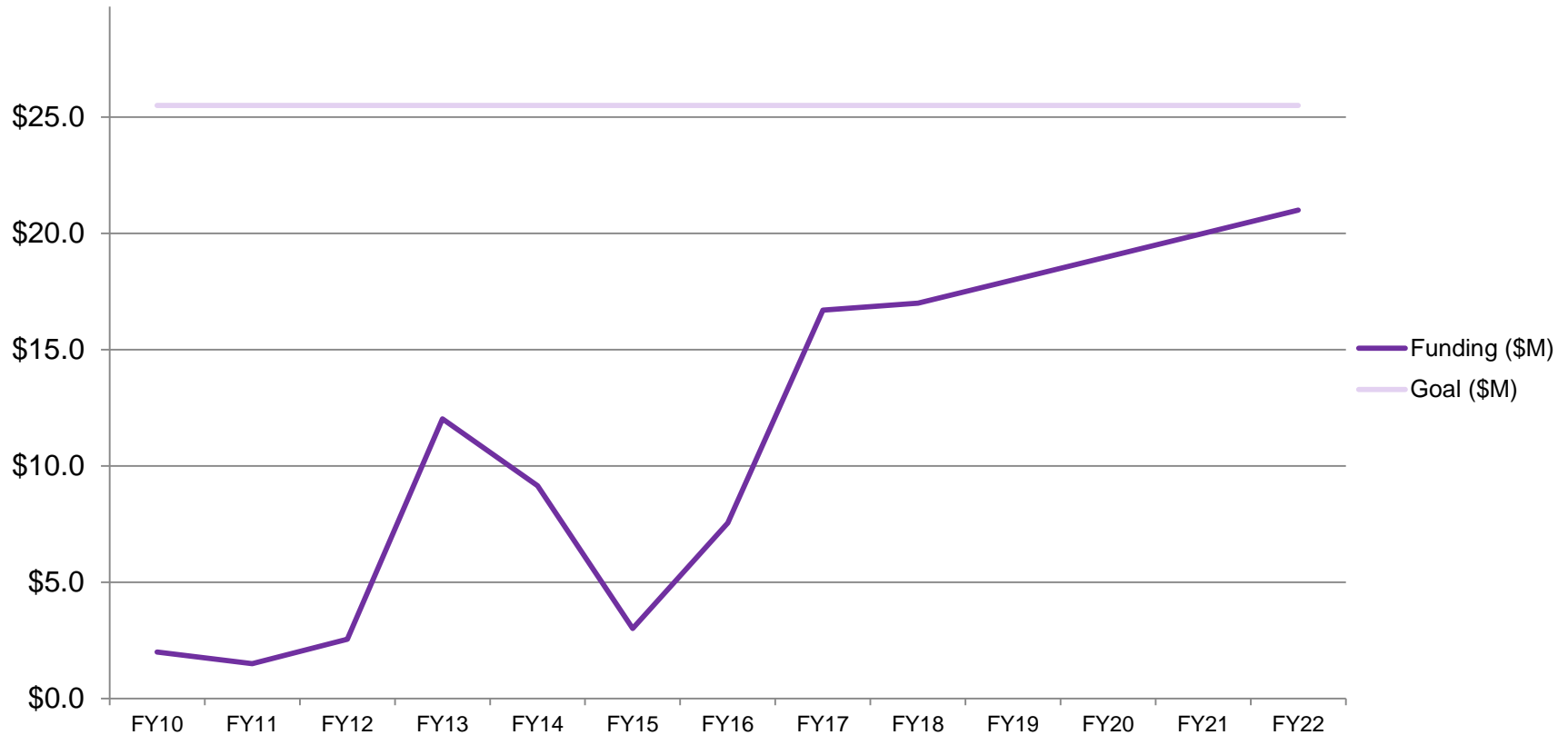
Recapitalization

% Funding Spent by Year



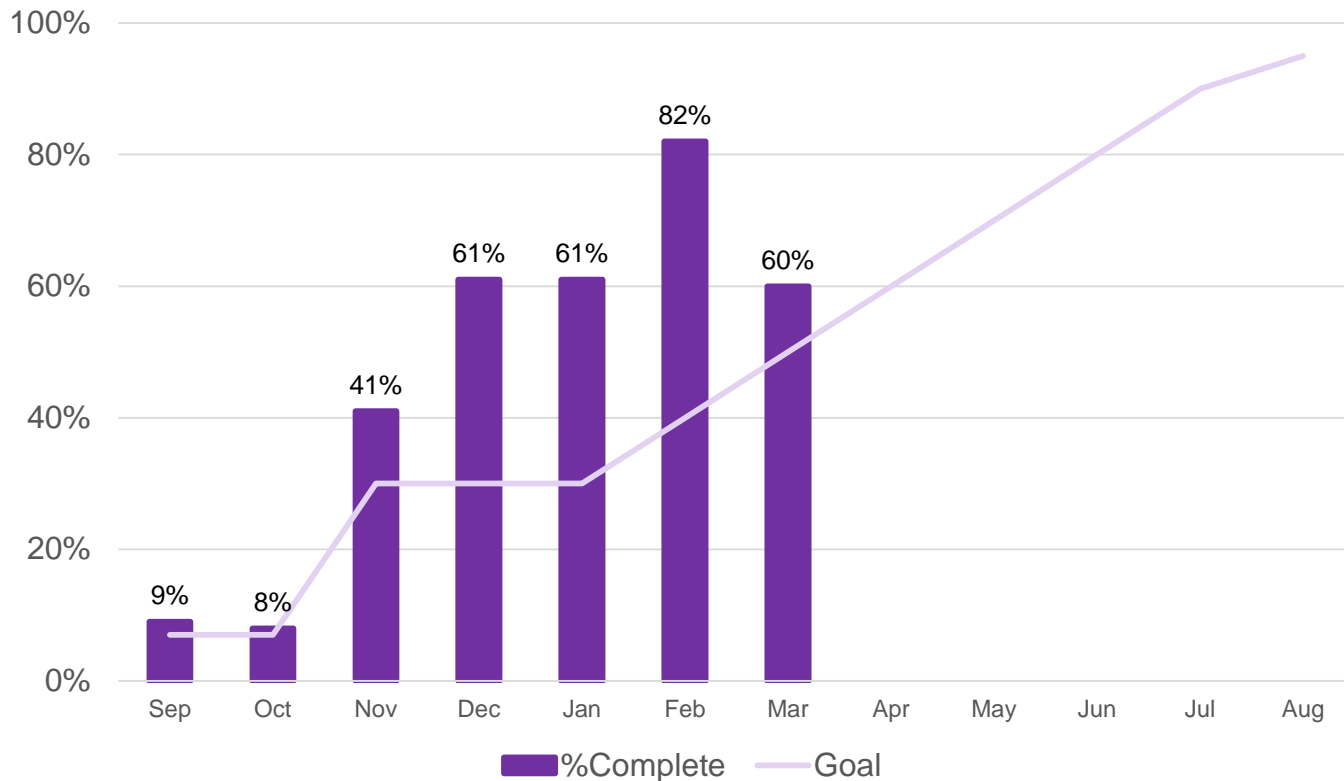
- **KPI goal is 100% of R&R funding spent within 4 Years of issue date**
- **f(staffing, contracting, space/system access, permitting)**
- **Initiatives: Early Design; Early Permitting; Indefinite Delivery, Indefinite Quantity (IDIQ) Contract Vehicles**
- **FM Leader: Gary Wojtowicz**

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**

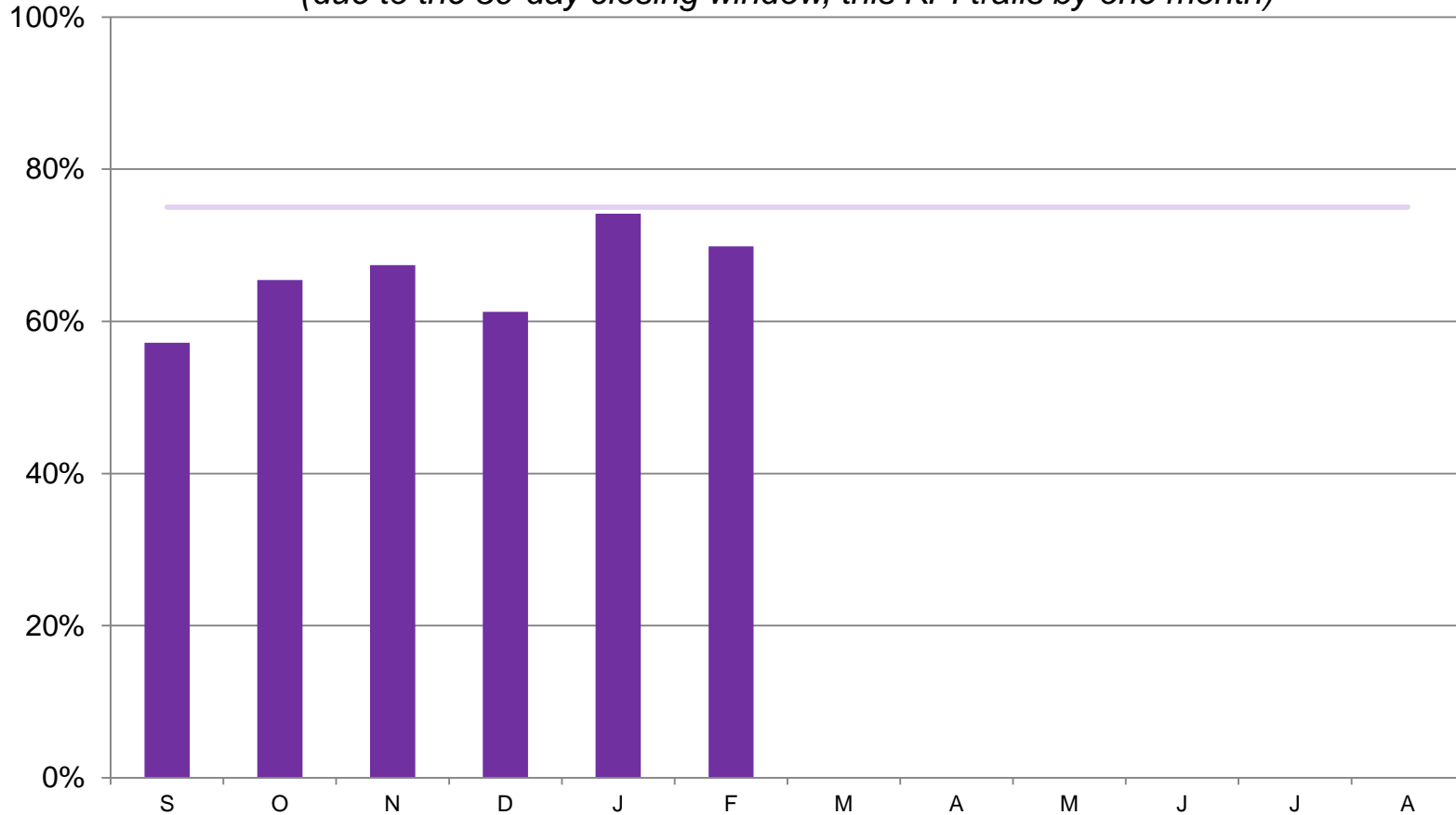
Preventive Maintenance Completion



- **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**

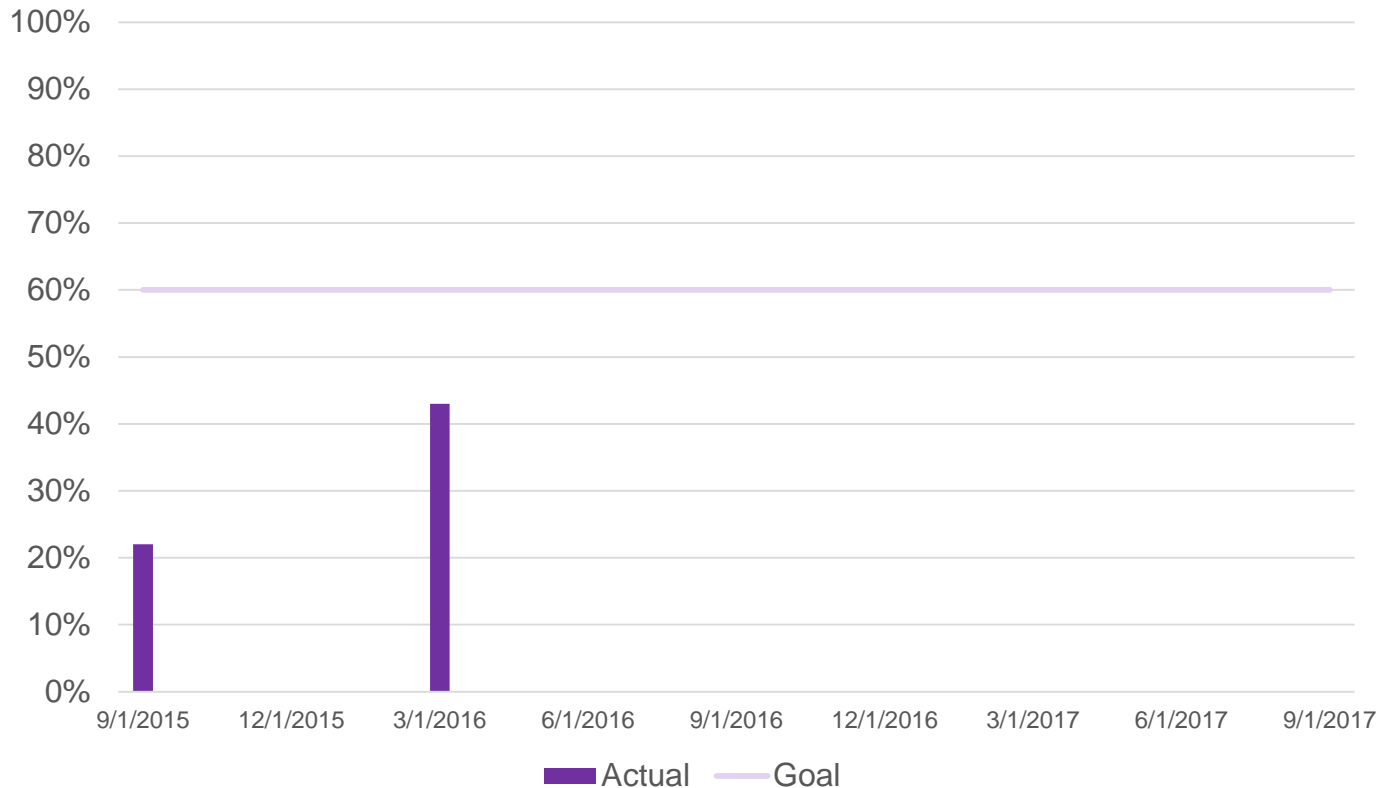
Monthly Service Request Tracking

(due to the 30-day closing window, this KPI trails by one month)



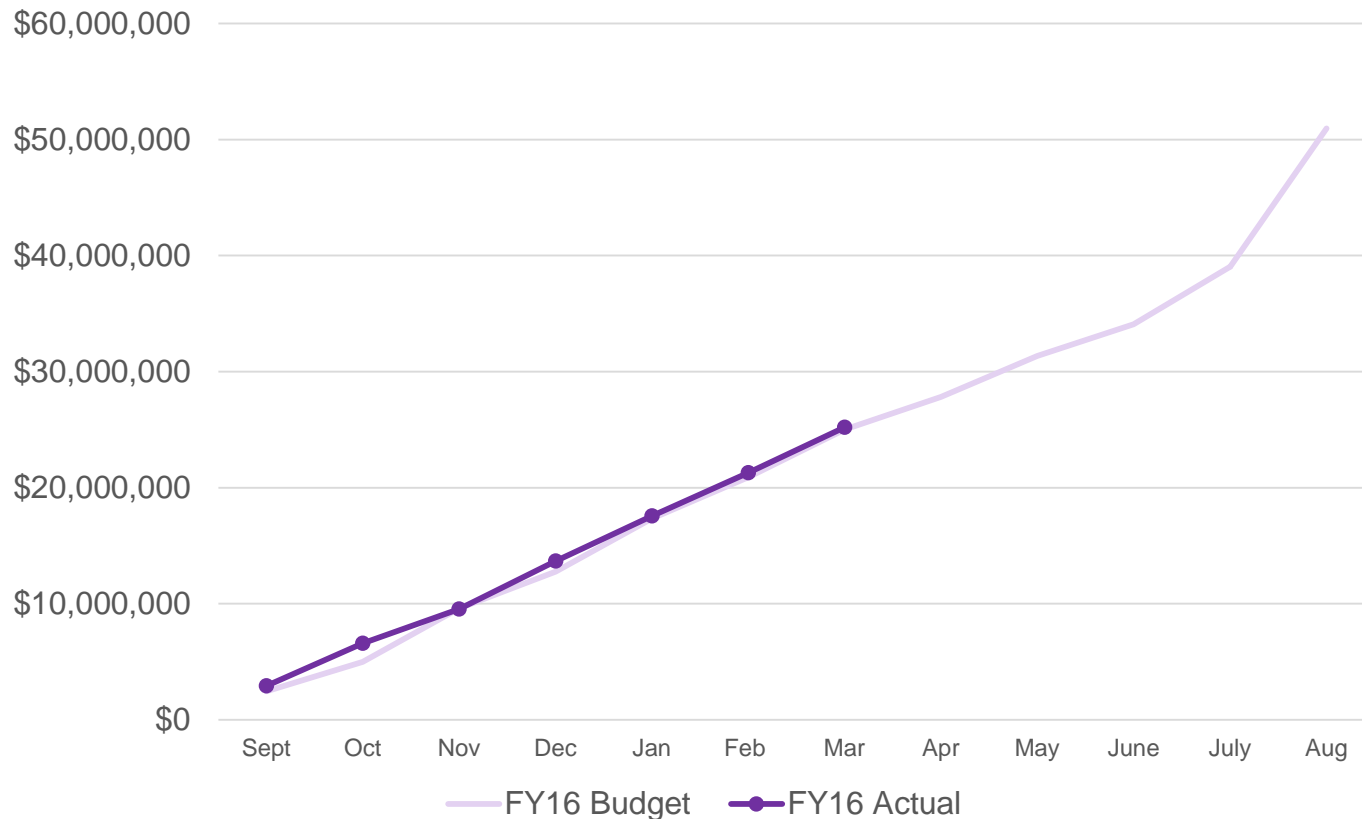
- **KPI goal is 75% closed within 30 days**
- **f(staffing, planning and scheduling, space/system access, close out procedures)**
- **Initiatives: FAMIS mobile app, revise close out procedures, real-time monitoring of closing rates**
- **FM Leader: Gary Wojtowicz**

Technician Productivity



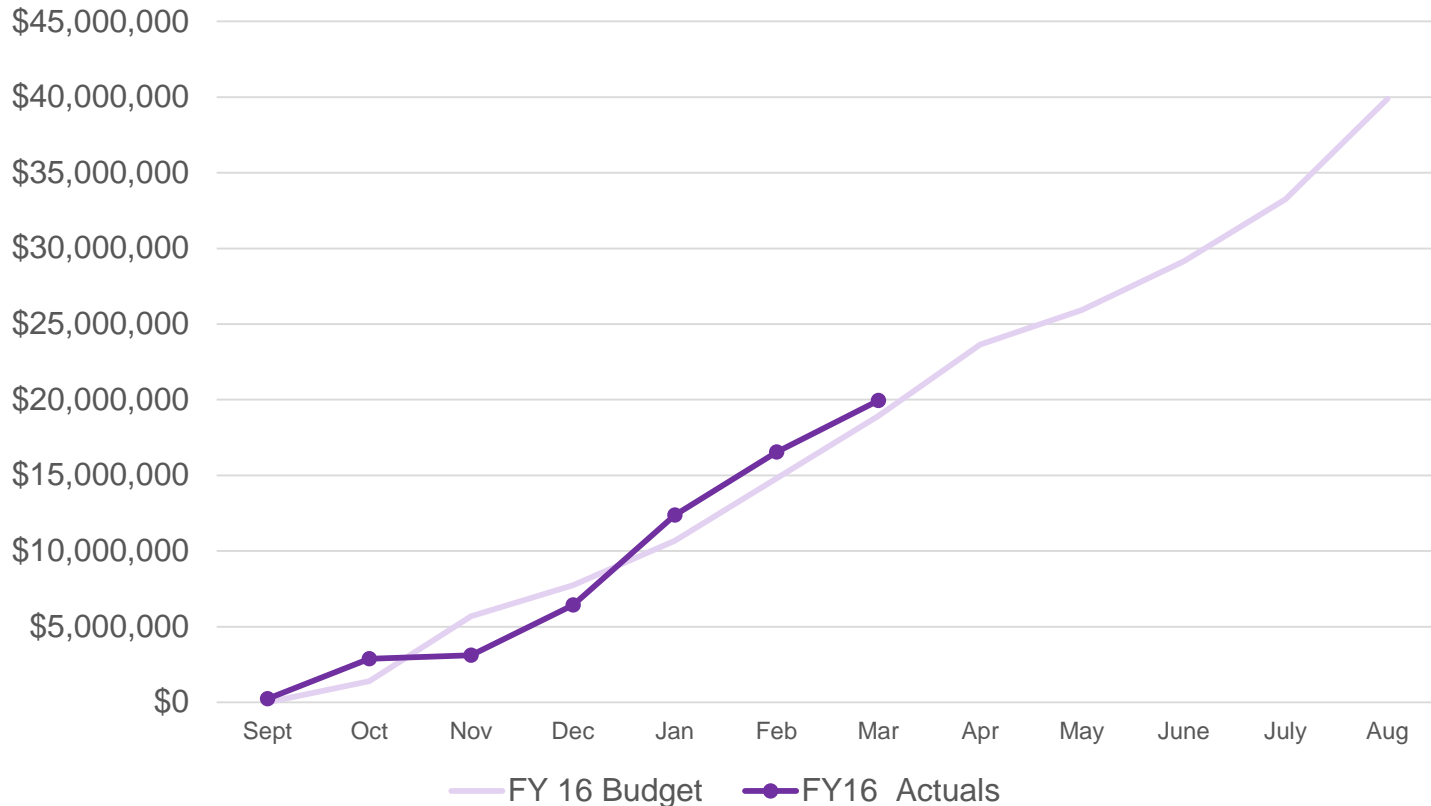
- **KPI goal is 60% labor efficiency in four years**
- **f(staffing, contracting, space/system access, funding, allowance to plan and schedule work)**
- **Initiatives: Improve work flow with FAMIS mobile app, quarterly time and productivity analyses, review zone maintenance practices**
- **FM Leader: 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**

Monthly Local Resident Employment



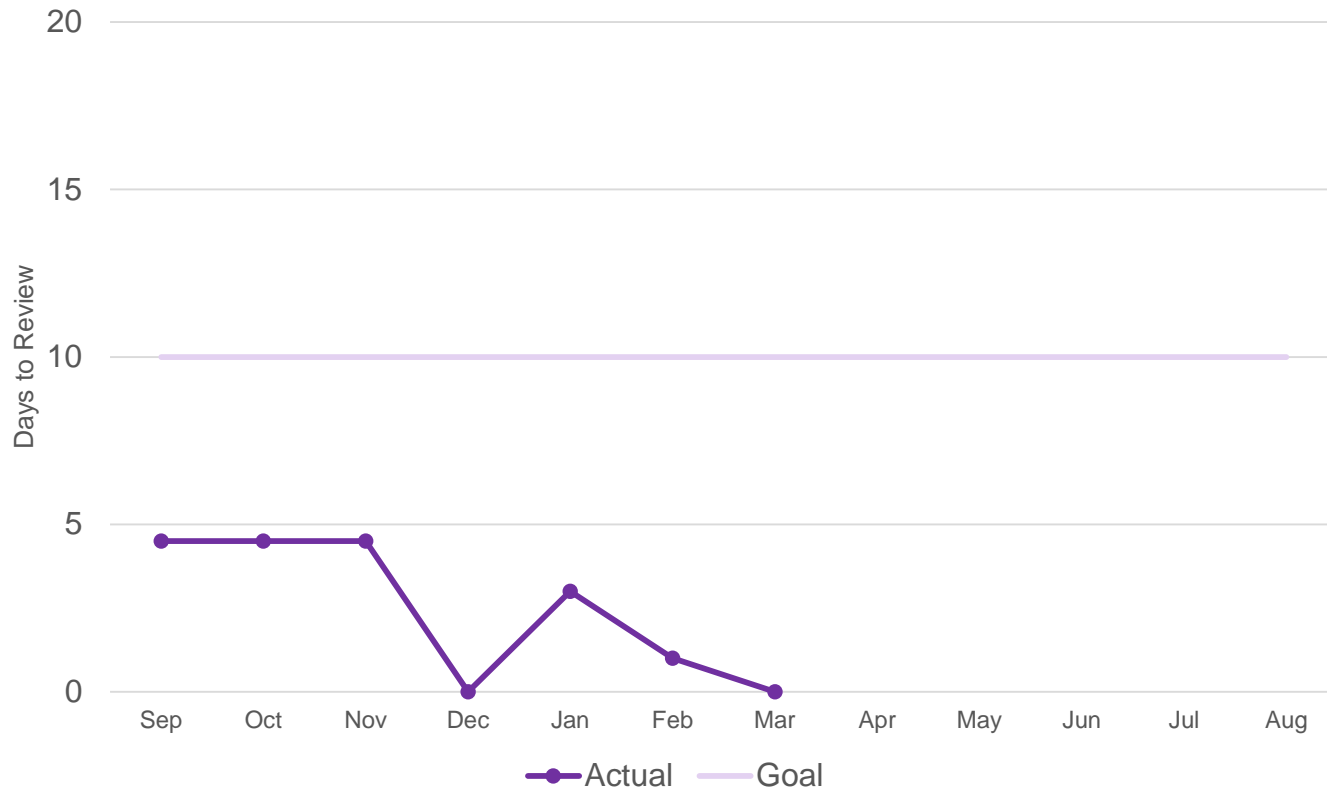
- **KPI goal is > 95% of Contracts Compliant with Policy**
- **f(contracts \$, labor market, labor hours, Evanston effort, NU/Contractor effort)**
- **Initiatives: Data collection in order to ensure improved compliance**
- **FM Leader: Liz Schaps**

Monthly Minority and Female Business Enterprise Use



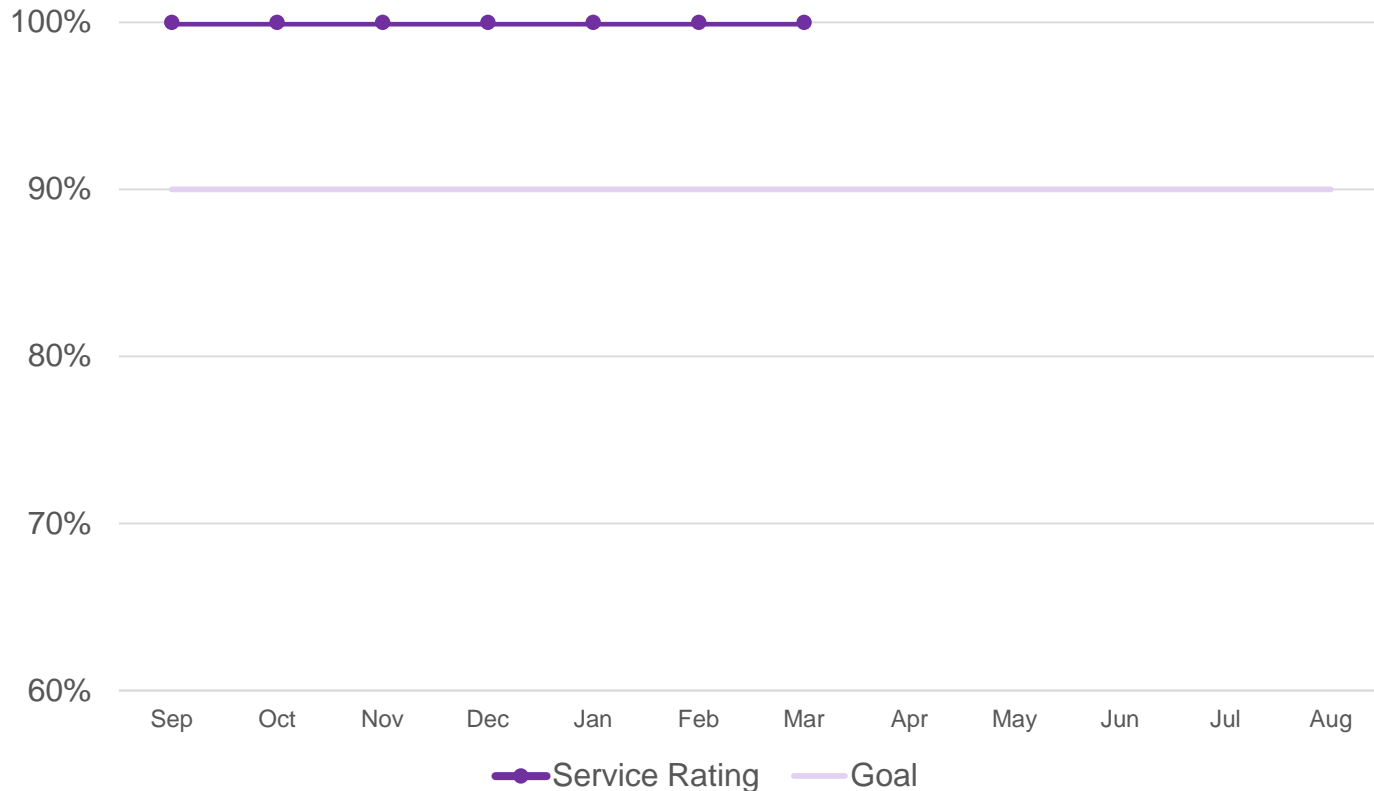
- **KPI goal is 95% of Contracts Compliant with Policy**
- **f(contracts, bids, labor market)**
- **Initiatives: TBD – new program**
- **FM Leader: Liz Schaps**

Inlease/Outlease Management – Contract Review Time



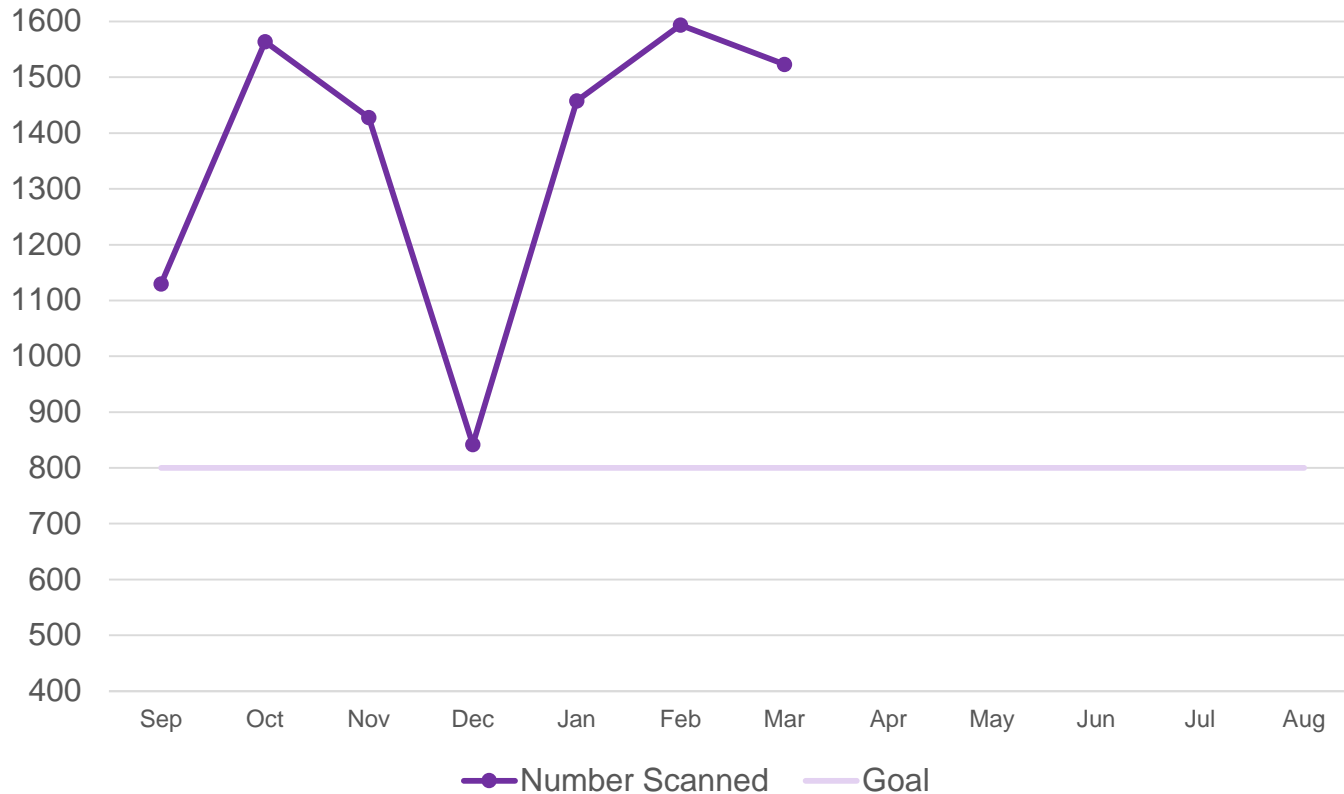
- **KPI goal is to complete contract reviews in 10 days or less**
- **f(schools requirements, landlords response, attorney response)**
- **Initiatives: Adding staff capacity, development of staff, lease management software**
- **FM Leader: Rane Berliant**

Move Inspection Execution – Property Readiness



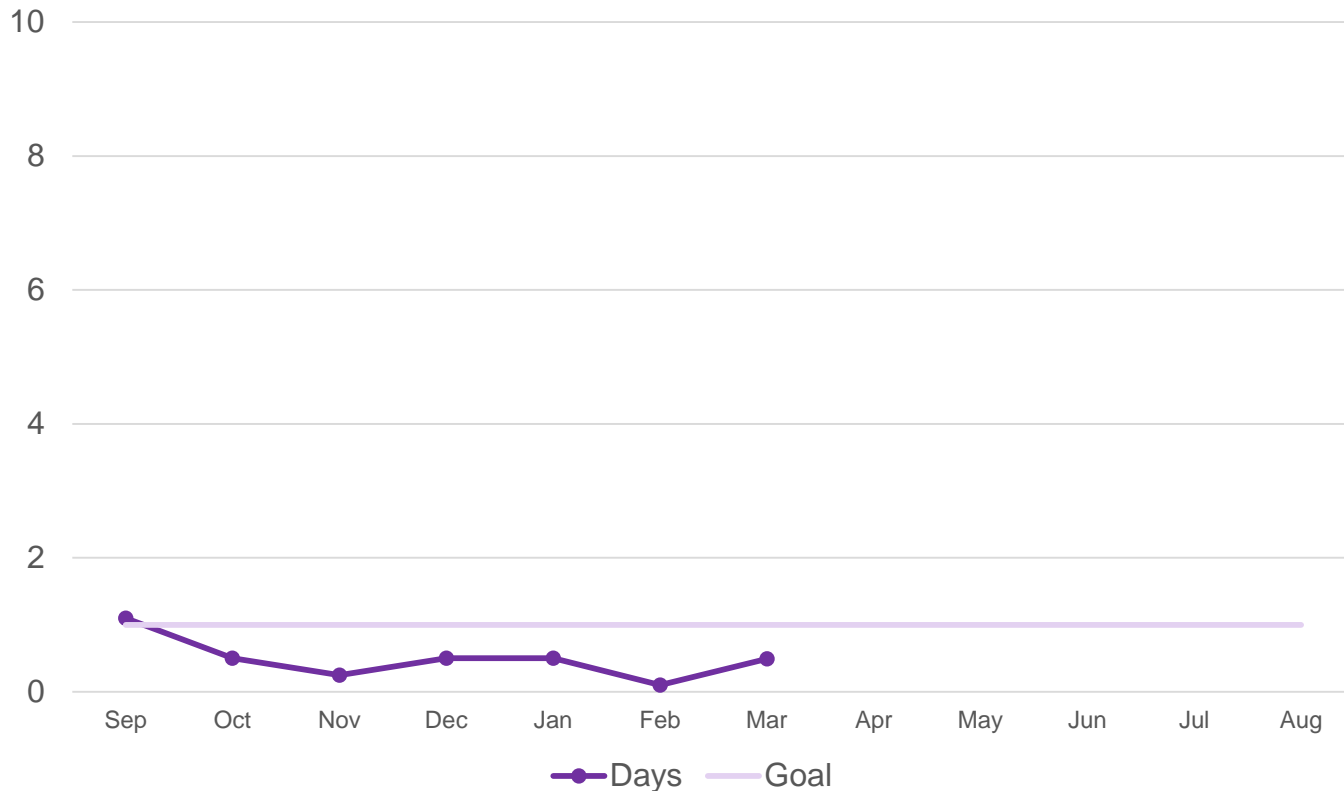
- KPI goal is service rating of “Good” or “Excellent” of 90% or higher as a percentage of total responses
- f(effective communication with tenant, capacity and capability of staff)
- Initiatives: Commitment of staff to execute and management to track
- FM Leader: Raneer Berliant

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**

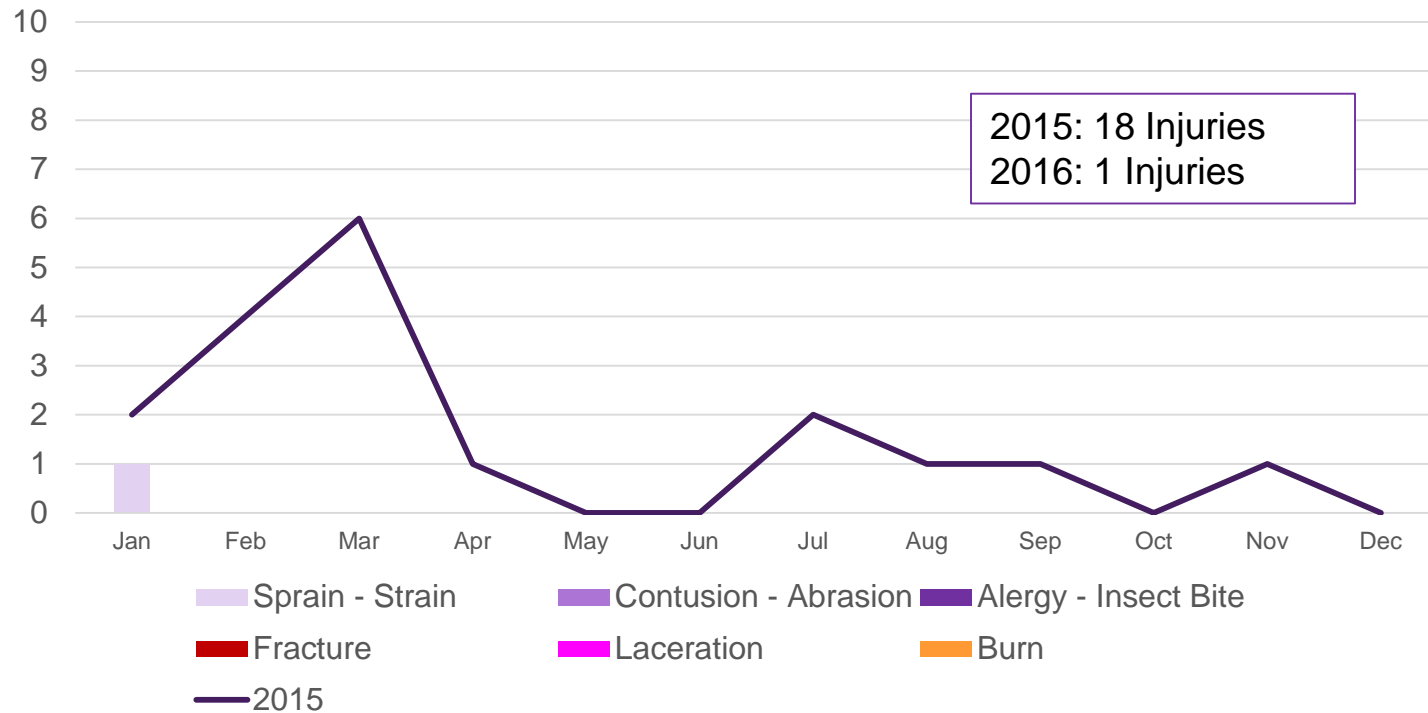
Planning Data Accuracy – Square Footage Walked



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

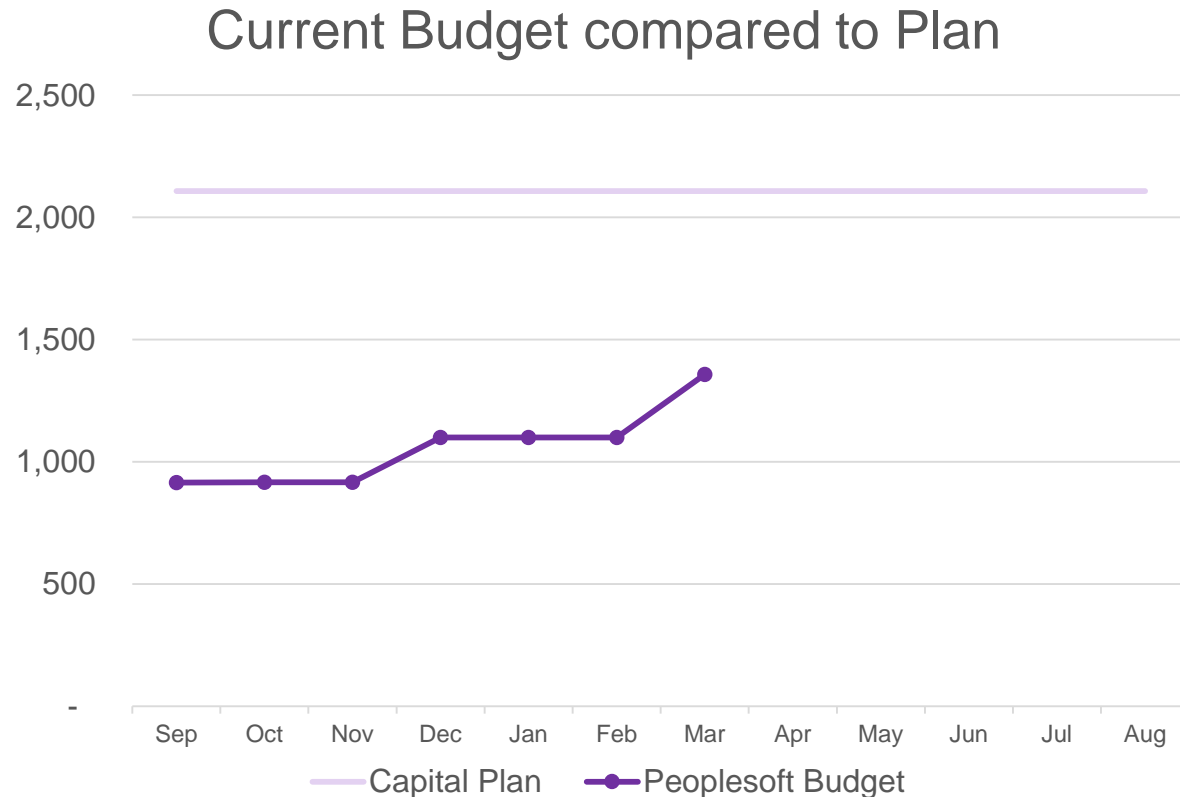
Injury Reporting by Calendar Year

Reported Injuries by Type and Month



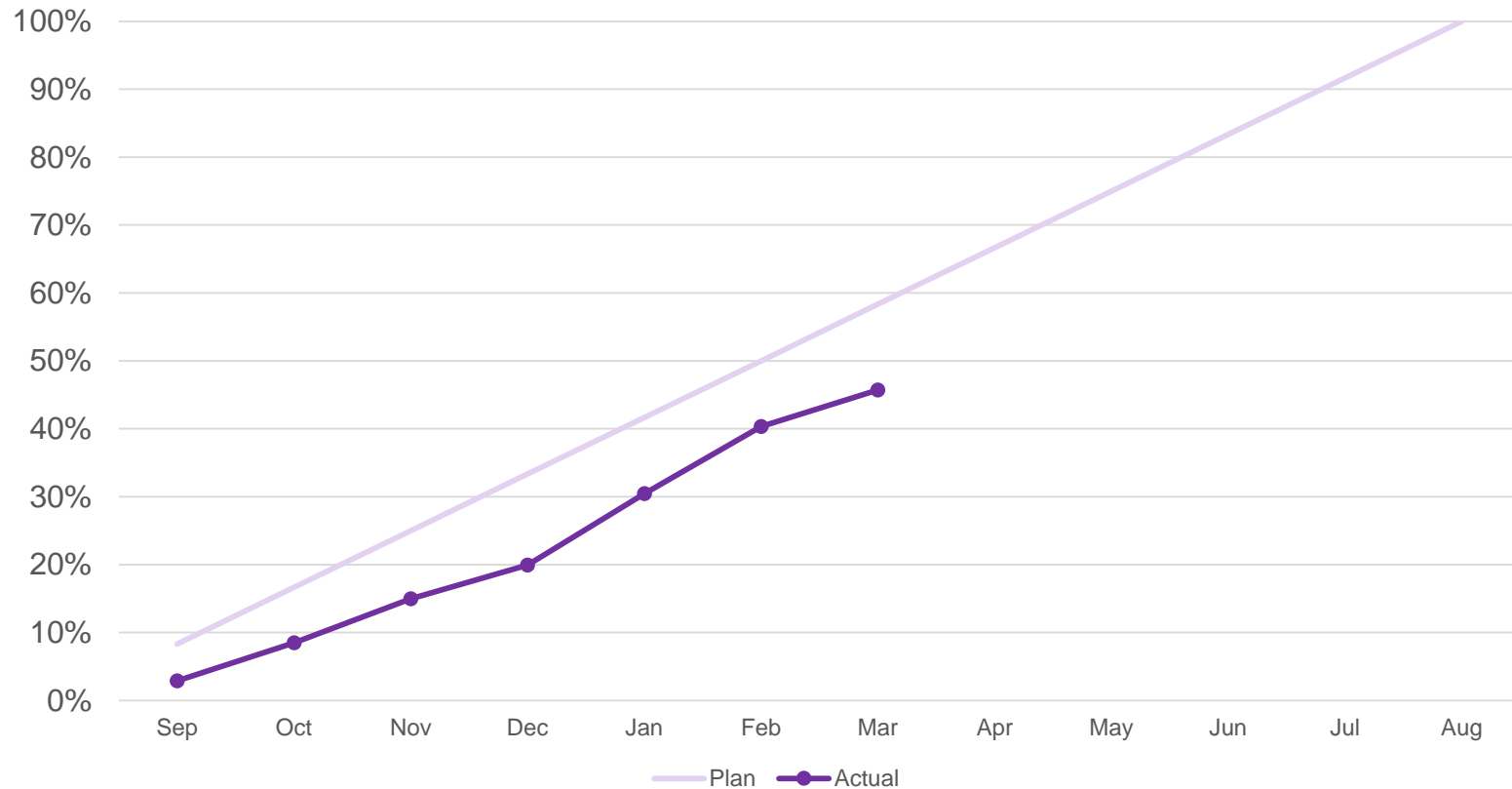
- **KPI goal is <4 Reportable Cases per 100 FTE (<8 injuries per year)**
- **f(Equipment, Behavior, PPE)**
- **Initiatives: Equipment - Environment Inspections, PPE Inventory - Usage Tracking, Training**
- **FM Leader: Steve Kindrick**

Capital Plan Execution



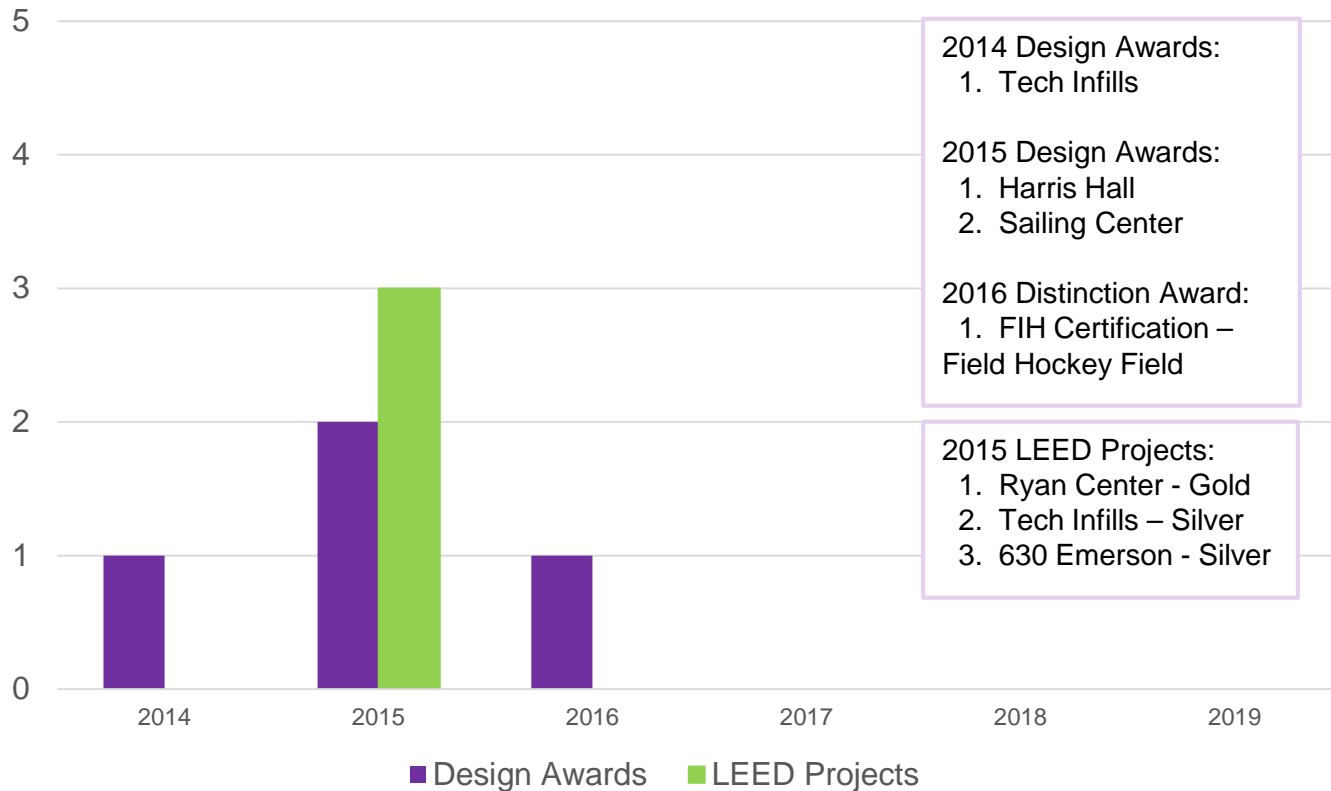
- **KPI goal is Completing 95% of all projects on or under original approved capital plan budget**
- **f(accurate scope, infrastructure requirements, initial estimating, manage scope creep)**
- **Initiatives: Improved budget approval tracking and fully loaded budgets into Peoplesoft**
- **FM Leader: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

Facilities Management Scale

- FM Team = 312 Full Time Equivalent
- Planning
 - 296 acres (281 Evanston, 15 Chicago)
 - 213 buildings (200 Evanston, 13 Chicago)
 - 12.4 million square feet (9.9 Evanston, 2.5 Chicago)
- Design and Construction
 - 105 open projects
 - 42 active projects – 19 design (\$1B) and 23 construction (\$0.6B)
- Operations
 - 60,000 work orders per year (76% Evanston, 24% Chicago)
 - \$55M Operations and Maintenance (78% educational buildings)