

Facilities Management

FM Key Performance Indicators

Northwestern

May 15, 2017

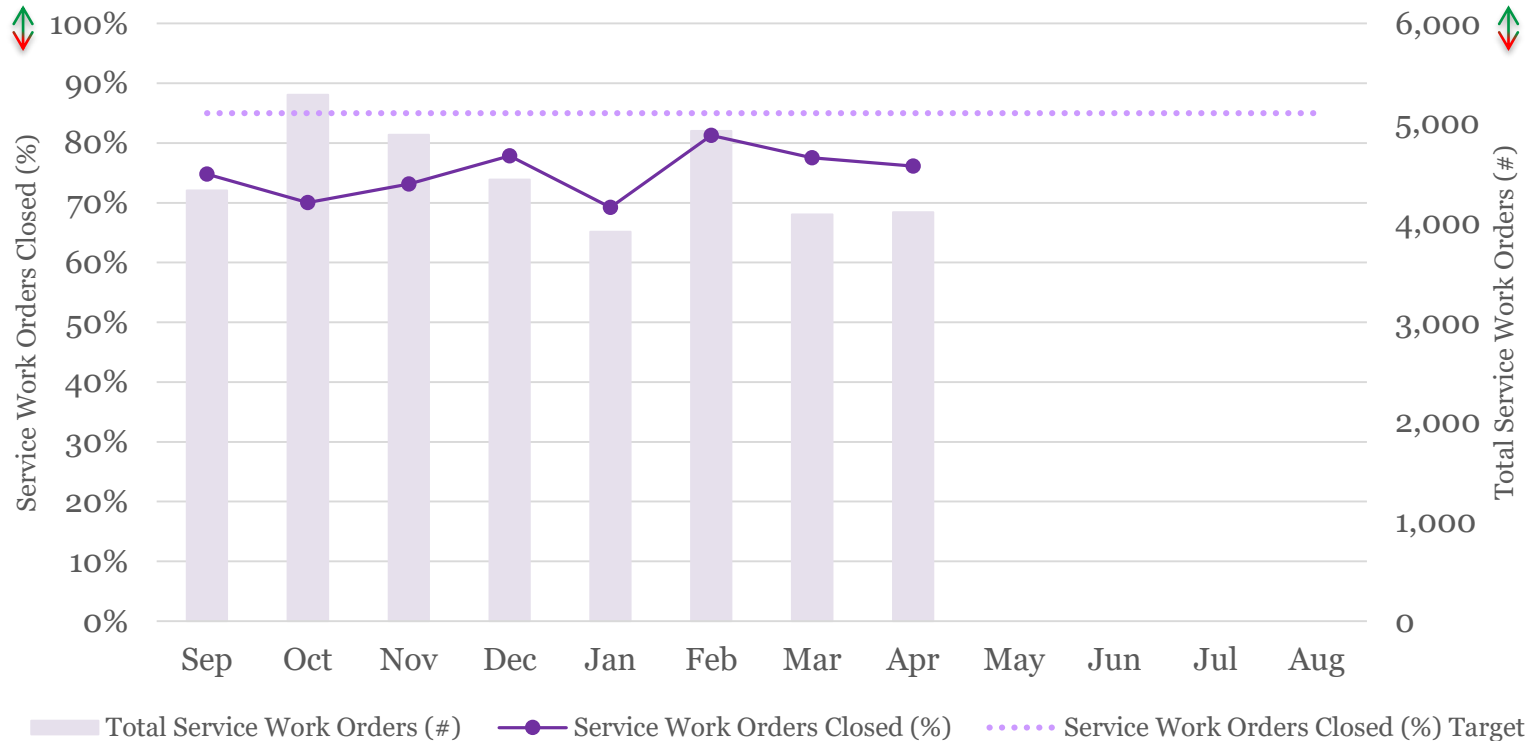
Facilities Management Key Volume Indicators

Key Volume	FM	Change	Evanston	Chicago
Full Time Equivalent (FTE)	346	+2	283	63
Acres	296	0	281	15
Buildings	222	+9	206	16
Square Feet	14.7M	+2.3M	10.5M	4.2M
Number of Open Projects	80	-1	61	19
Design	27	+1	18	9
Construction	21	-2	17	4
Punchlist	8	+3	8	0
Closeout	24	-3	18	6
Value of Open Projects	\$2.4B	+\$0.3B	\$1.8B	\$0.6B
Design	\$0.6B	+\$0.1B	\$0.5B	\$0.1B
Construction	\$1.2B	+\$0.1B	\$0.7B	\$0.5B
Punchlist	\$0.4B	+\$0.1B	\$369.8M	\$0.0M
Closeout	\$0.2B	-\$0.1B	\$190.4M	\$29.9M
Work Orders Per Reporting Month	5,706	-7.2%	4,233	1,473
Work Orders Per Rolling 12 Months	73,179	+0.3%	55,241	17,938
Operations and Maintenance	\$57M	0	\$41M	\$16M

Key Performance Indicators

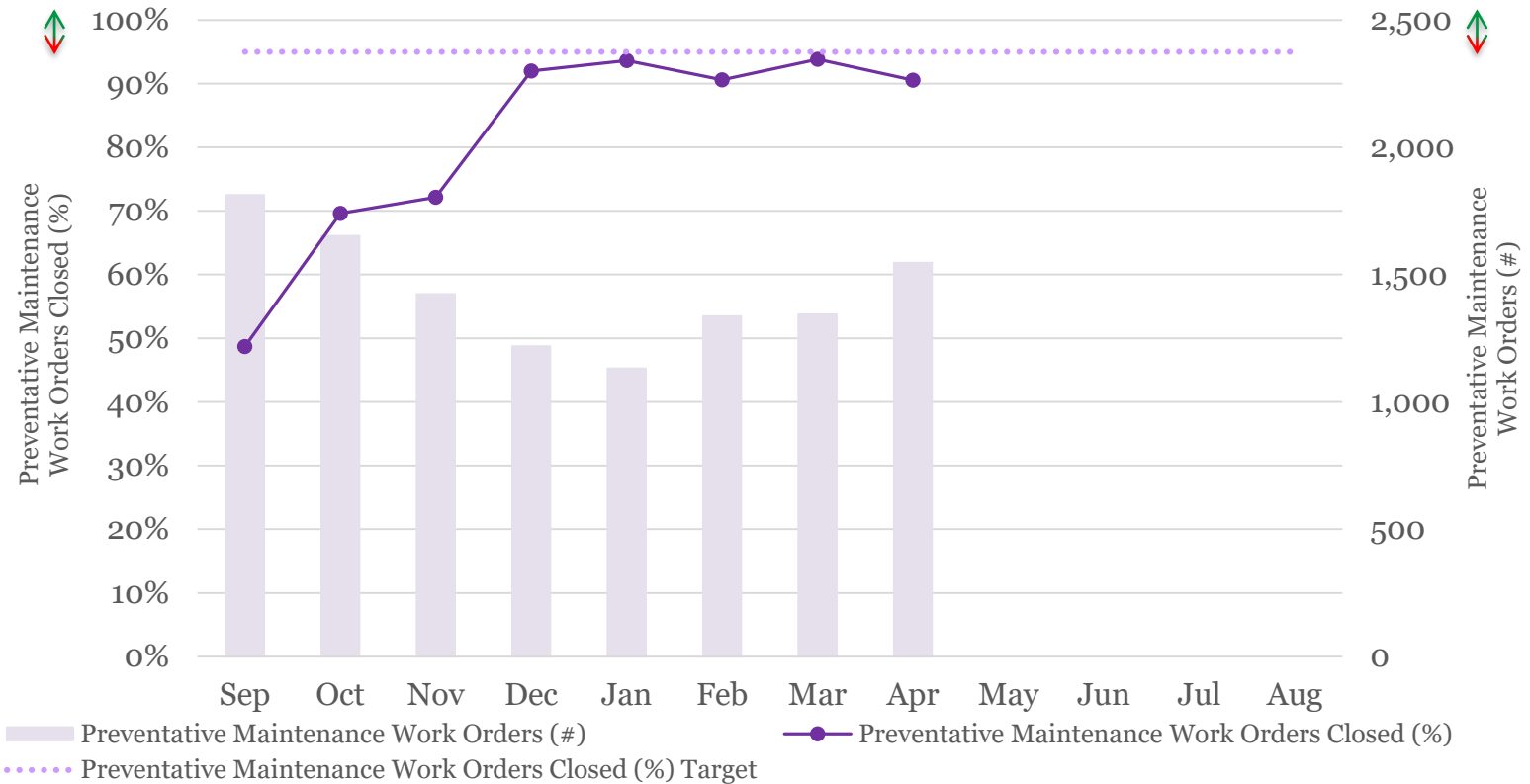
Slide #	KPI Description	Annual Goal	Apr-17 Goal	Actual	Trend
3	SD1. Service Request Closure	85%	85%	✘ 76%	✘ -2%
4	SD2. Preventative Maintenance Closure	95%	95%	✘ 91%	✘ -3%
5	SD3. Rework	<10%	<10%	⚠ 11%	✘ 5%
6	SD4. Proactivity: FM-Identified Work Orders	25%	25%	✔ 30%	✘ -2%
7	LO1. Common Space Program	5%	1.9%	⚠ 1.3%	⚠ 0.0%
8	LO2. Facilities Connect Implementation	100%	27%	⚠ 22%	✔ 9%
9	LO3. Engagement: Sustainability Outreach	12%	1%	✘ -6%	✘ -4%
10	CE1. Energy Use Intensity (kBtu/SF)	-5%	-5%	✔ -1.0%	⚠ 0%
11	CE2. Recordable Injury Incident Rate	5.60	6.07	✔ 3.49	✔ -0.49
12	CE3. Injury-Related Lost Workday Rate	2.70	2.70	✔ 1.74	✔ -0.25
13	CE4. Waste Diversion Rate	38%	38%	✔ 43%	✔ 4%
14	CE5. Overtime	10%	14%	✔ 12%	⚠ 0%
15	CE6. Minority, Female and Local Business Enterprise Use	15%	15%	✔ 25%	✔ 25%
16	CE7. Evanston Resident Employment	5%	5%	✘ 2%	⚠ 0%
17	F1. Capital Project Cash Flow Execution	+/-2%	+/-2%	✘ -6%	✔ 1%
18	F2. Operating Budget Execution	+/-1%	+/-1%	✔ -1%	⚠ 0%
19	F3. Utility Commodity Budget Execution	+/-5%	+/-5%	✔ 1%	✔ 2%

SD1. Service Request Closure



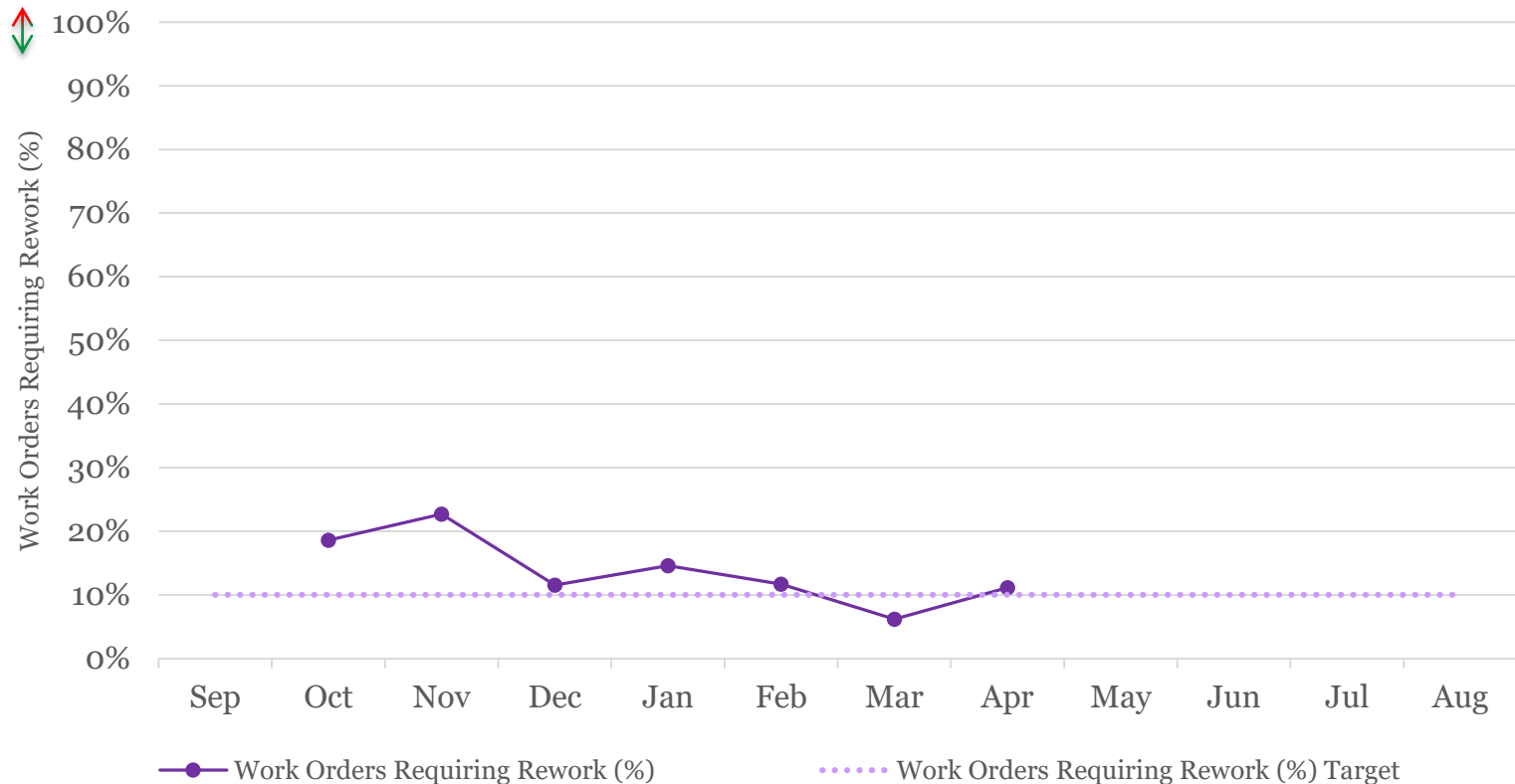
- **KPI goal is to close 85% of service work orders within 30 days (excluding project-related work orders)**
- **f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity, parts/material availability, accessibility of work areas/equipment)**
- **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: James McKinney and Nadia Jackson**

SD2. Preventative Maintenance Closure



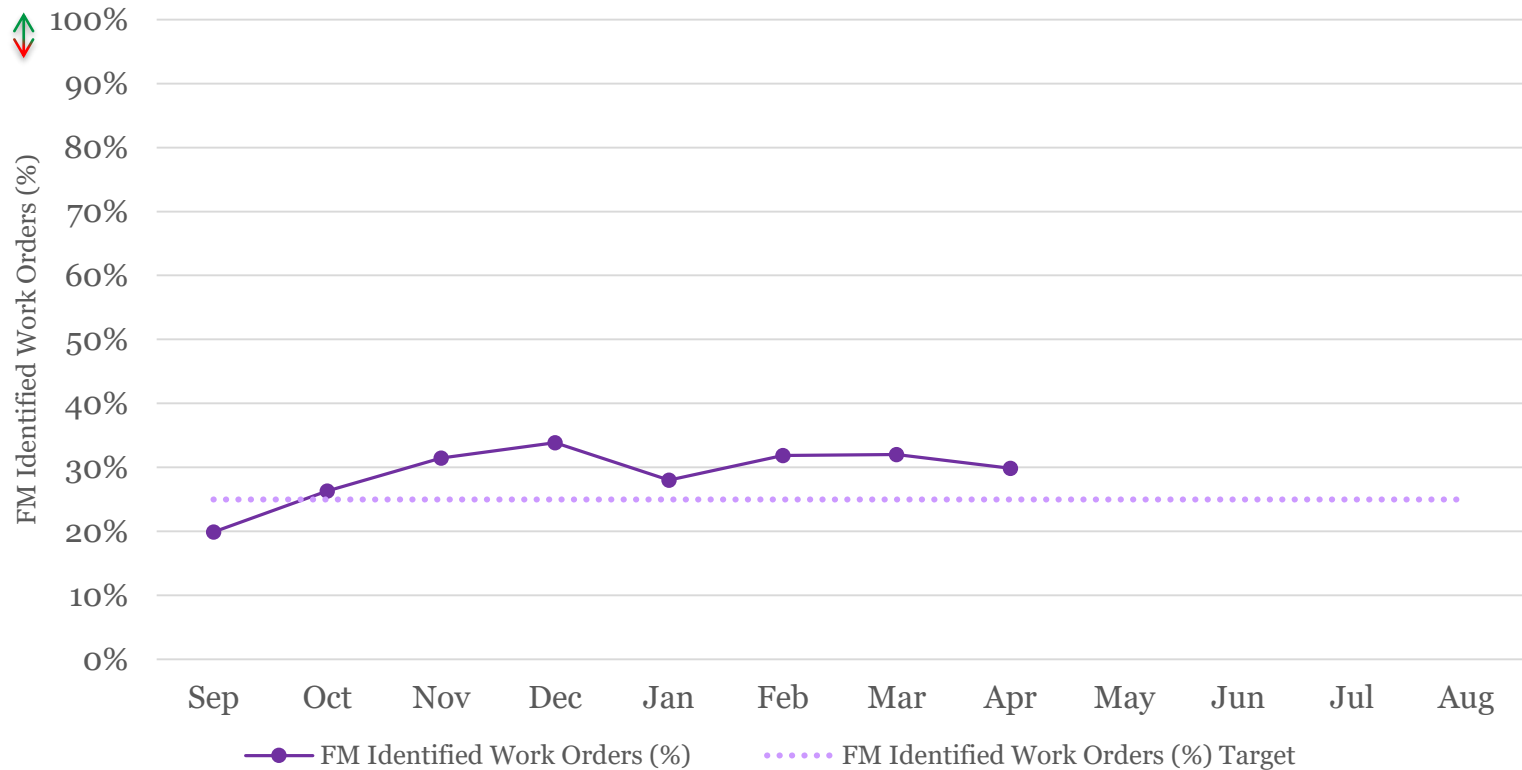
- **KPI goal is to close 95% of Preventative Maintenance work orders within 30 days**
- **f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity)**
- **Initiatives: plan and schedule preventative maintenance work assignments; revise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

SD3. Rework



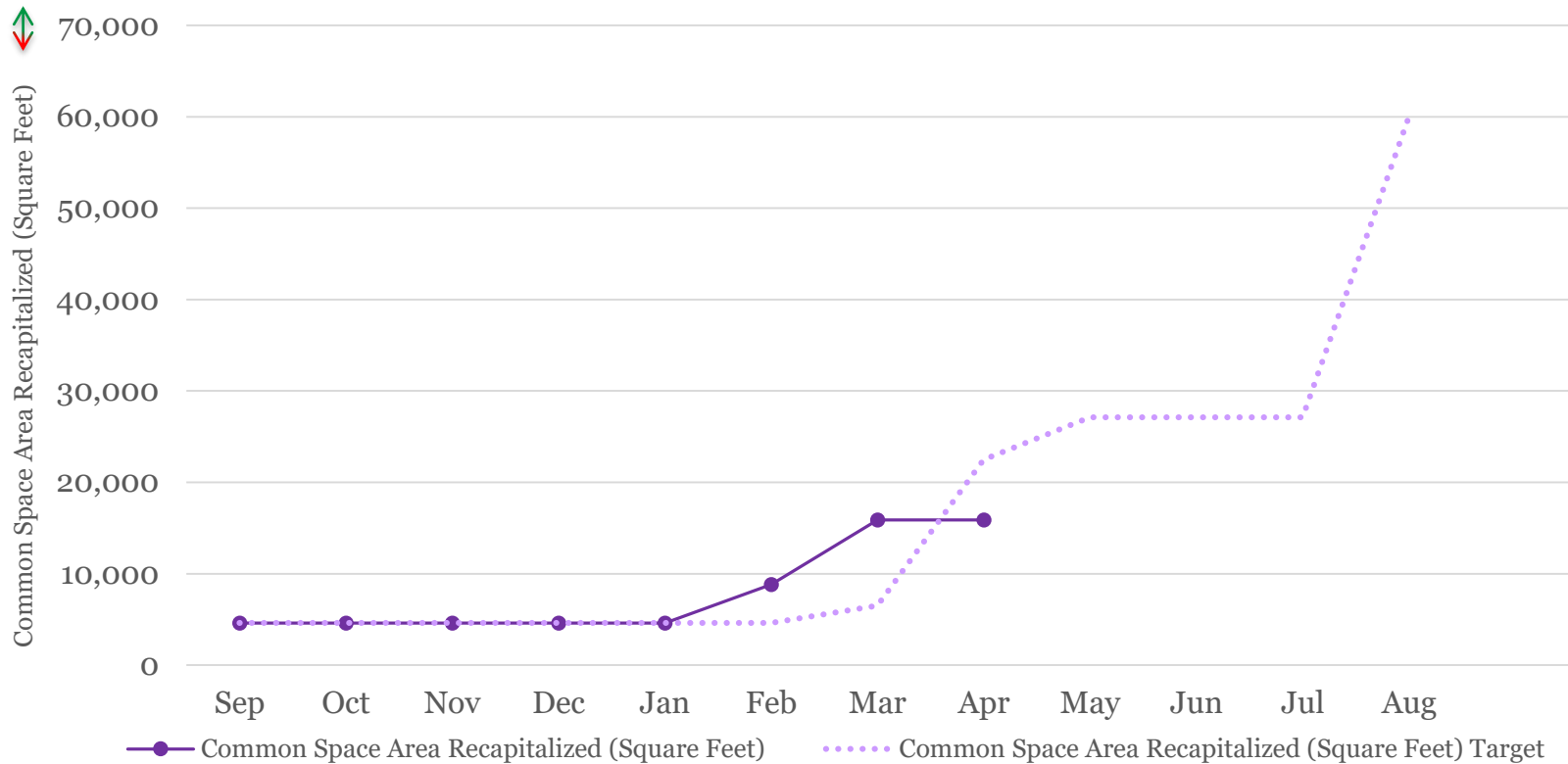
- **KPI goal is to have fewer than 10% of inspected Preventative Maintenance, Corrective Maintenance and Service Call work orders require corrective rework**
- **f(staffing, quality of work performed, clarity of task instructions)**
- **Initiatives: decrease volume of contracted services; revise task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

SD4. Proactivity: FM-Identified Work Orders



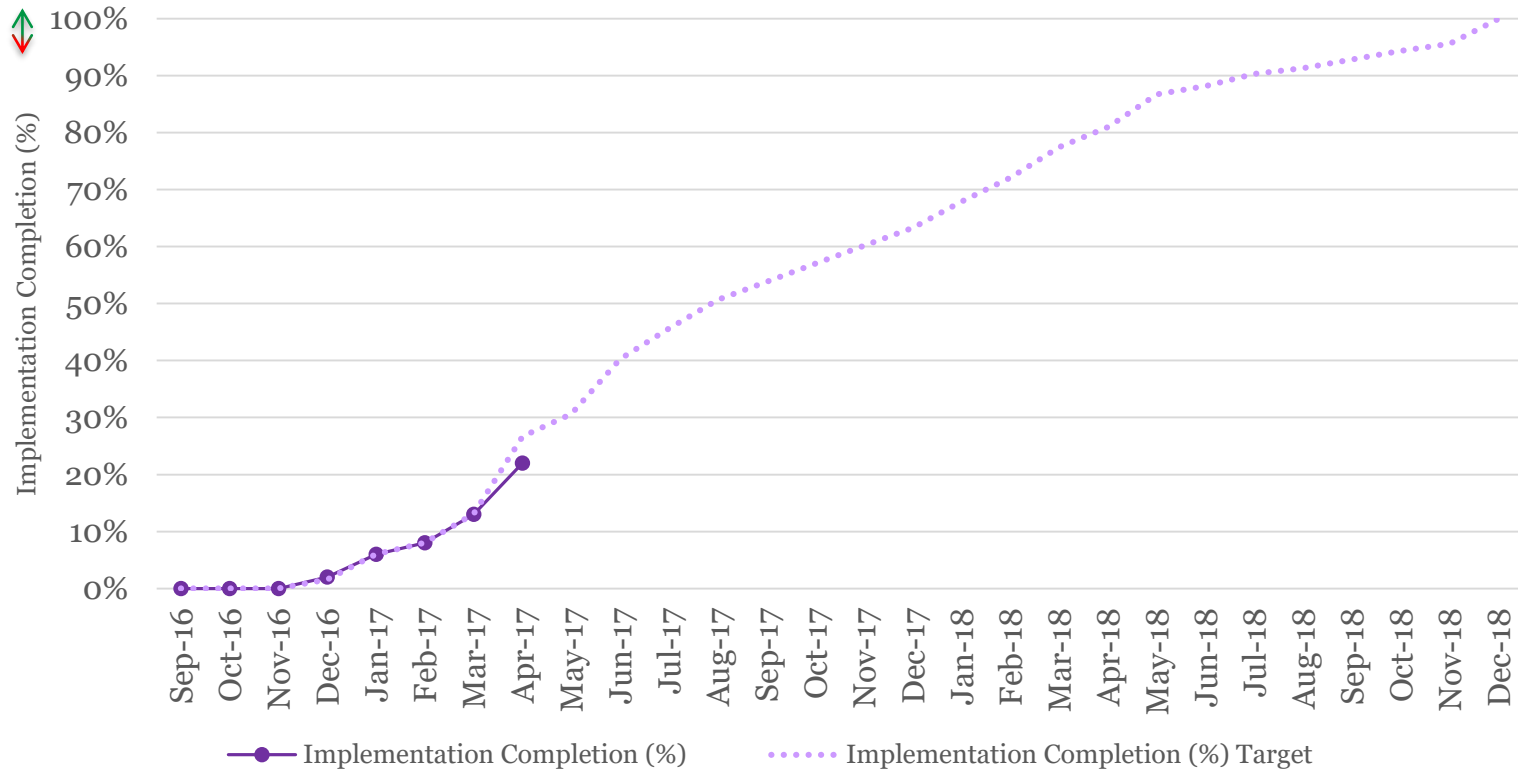
- **KPI goal is that at least 25% of corrective work orders are identified by Facilities Management Staff, as a measure of proactivity**
- **f(staffing, functionality of mobile technology, training)**
- **Initiatives: expand commissioning and preventative maintenance programs; institute quality assurance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

LO1. Common Space Program



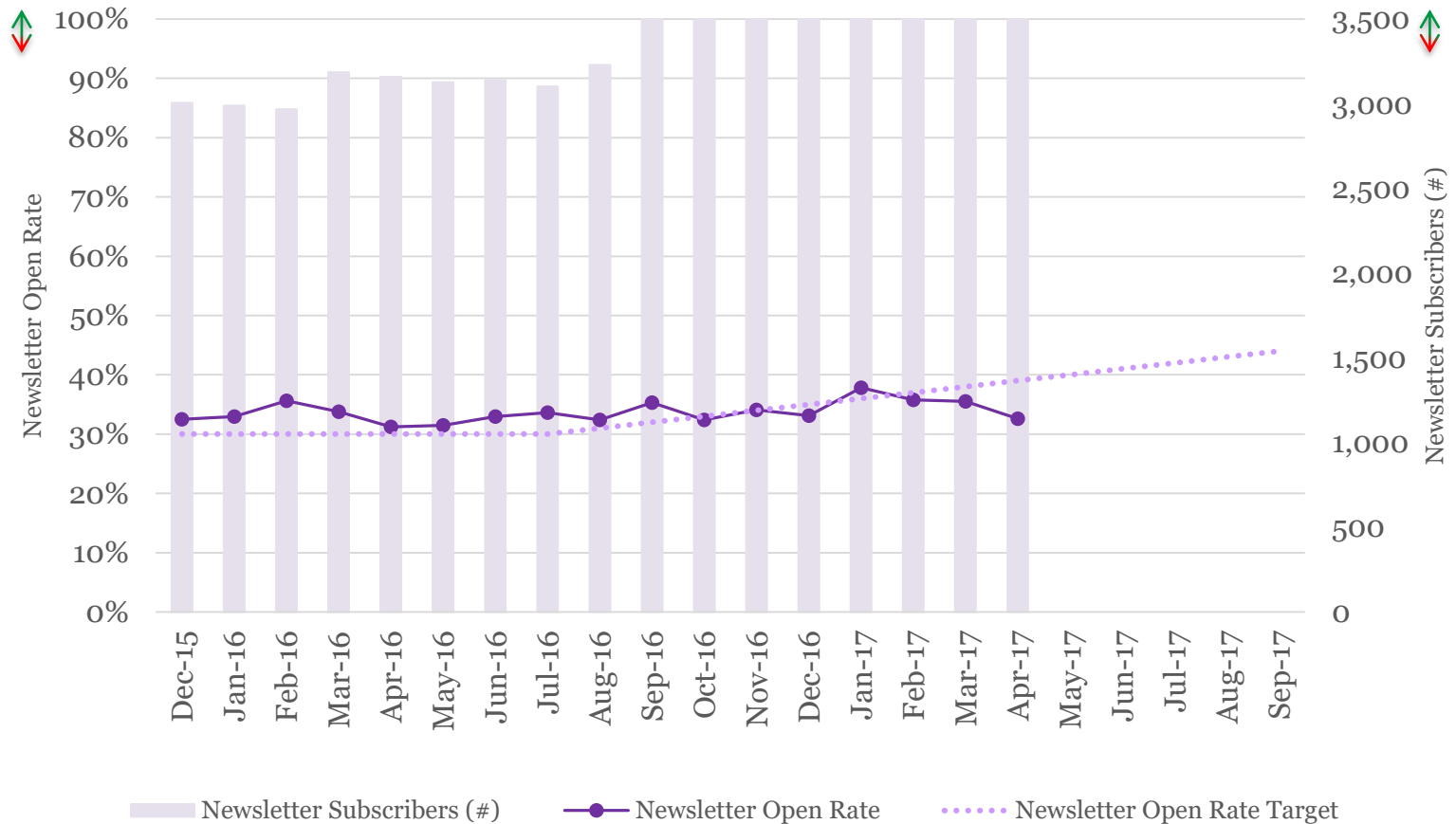
- **KPI goal is to recapitalize 5% of common spaces per year, which represents 55,000 square feet in FY17**
- **f(funding availability, project staffing, efficient decision making, accessibility to work areas)**
- **Initiatives: recapitalization of campus spaces**
- **FM Leader: Carrie West**

LO2. Facilities Connect Implementation



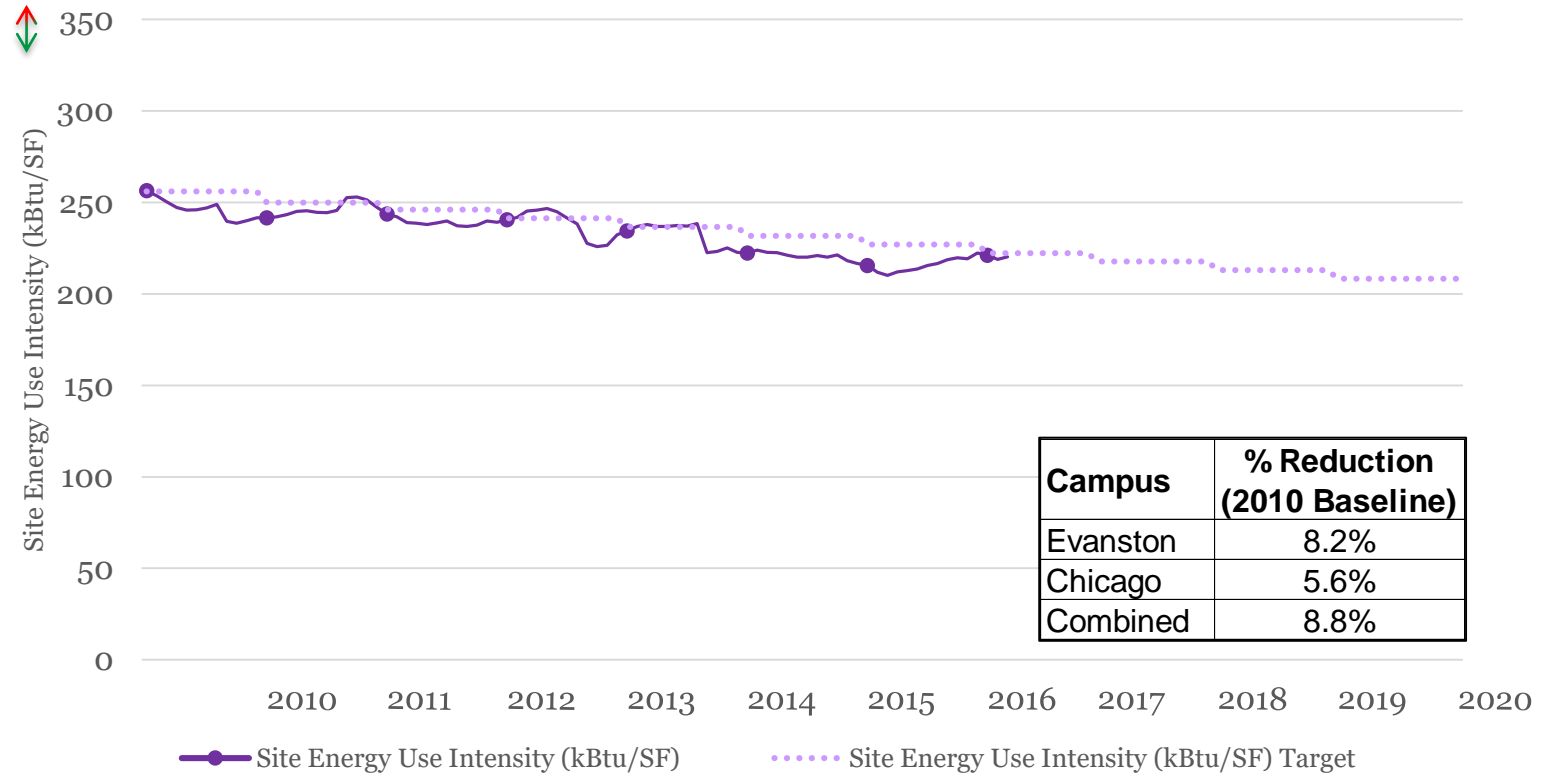
- **KPI goal is to complete 100% of project milestones**
- **f(stakeholder engagement, staffing, business process, IT capabilities, communication, effective decision making)**
- **Initiatives: implement new integrated workplace management software; develop and implement process improvement; utilize effective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

LO3. Engagement: Sustainability Outreach



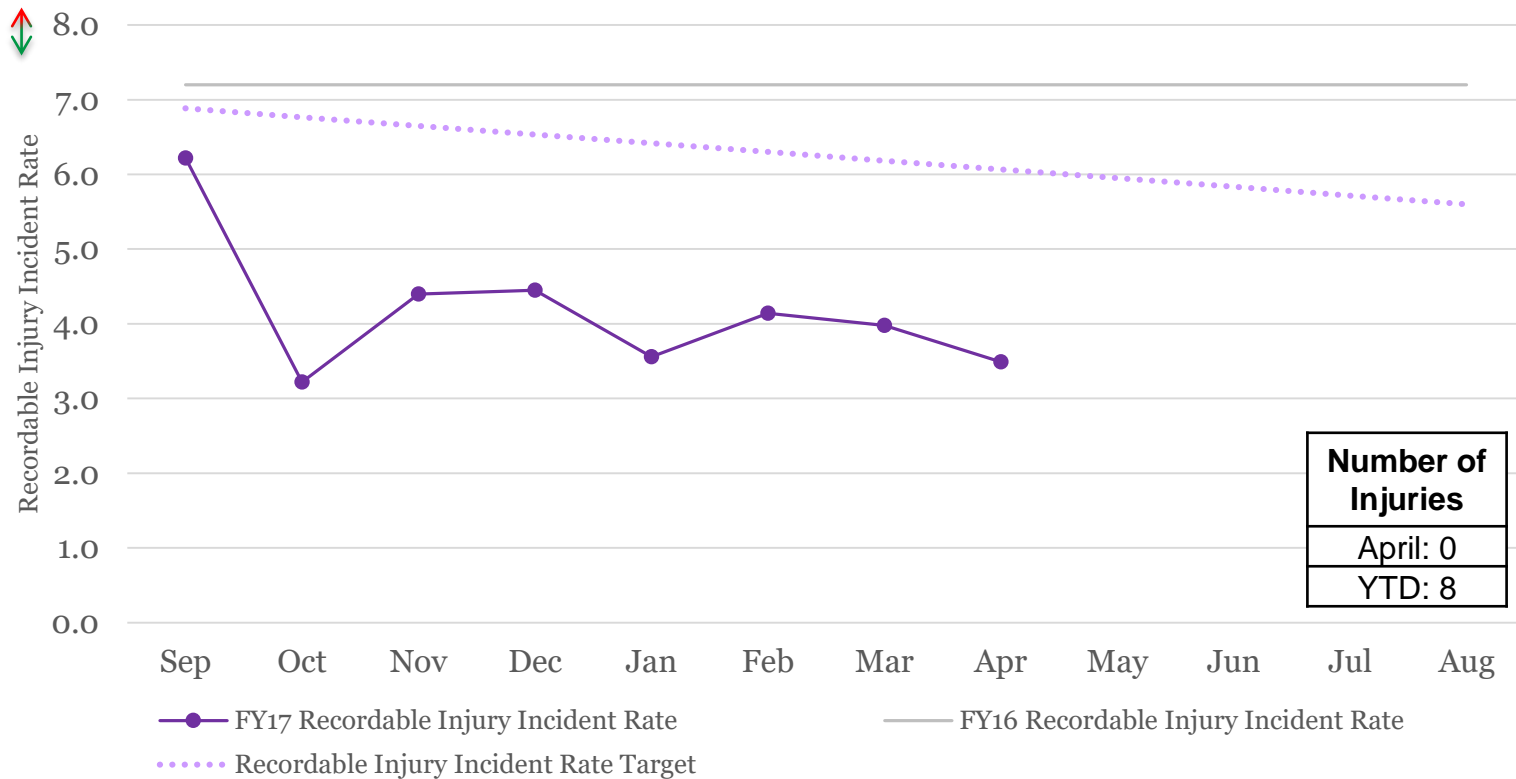
- **KPI goal is to increase newsletter open rate by 12% annually (1% per month), as a measure of content quality (perceived newsletter quality and value to subscribers, readers interest)**
- **Initiatives: actively promote newsletter; assess readers interest; increase relevance to readers**
- **FM Leader: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

CE1. Energy Use Intensity



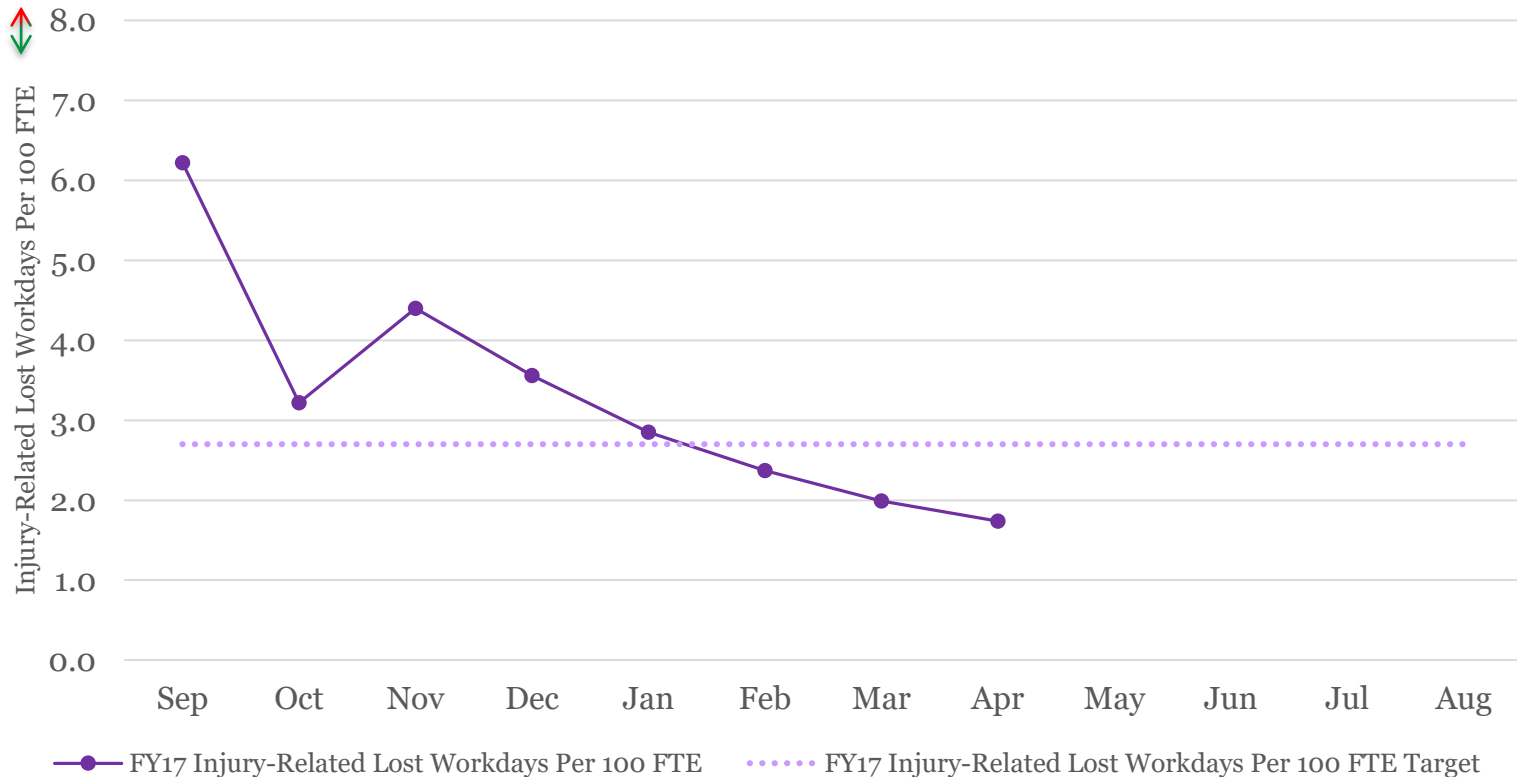
- **KPI goal is to reduce the energy use intensity (EUI) by 20% by 2020**
- **f(occupant behavior, design, construction, technology, operations, weather)**
- **Initiatives: engage occupants; formalize design specifications; perform retro-commissioning; physically audit space for improvement**
- **FM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

CE2. Recordable Injury Incident Rate



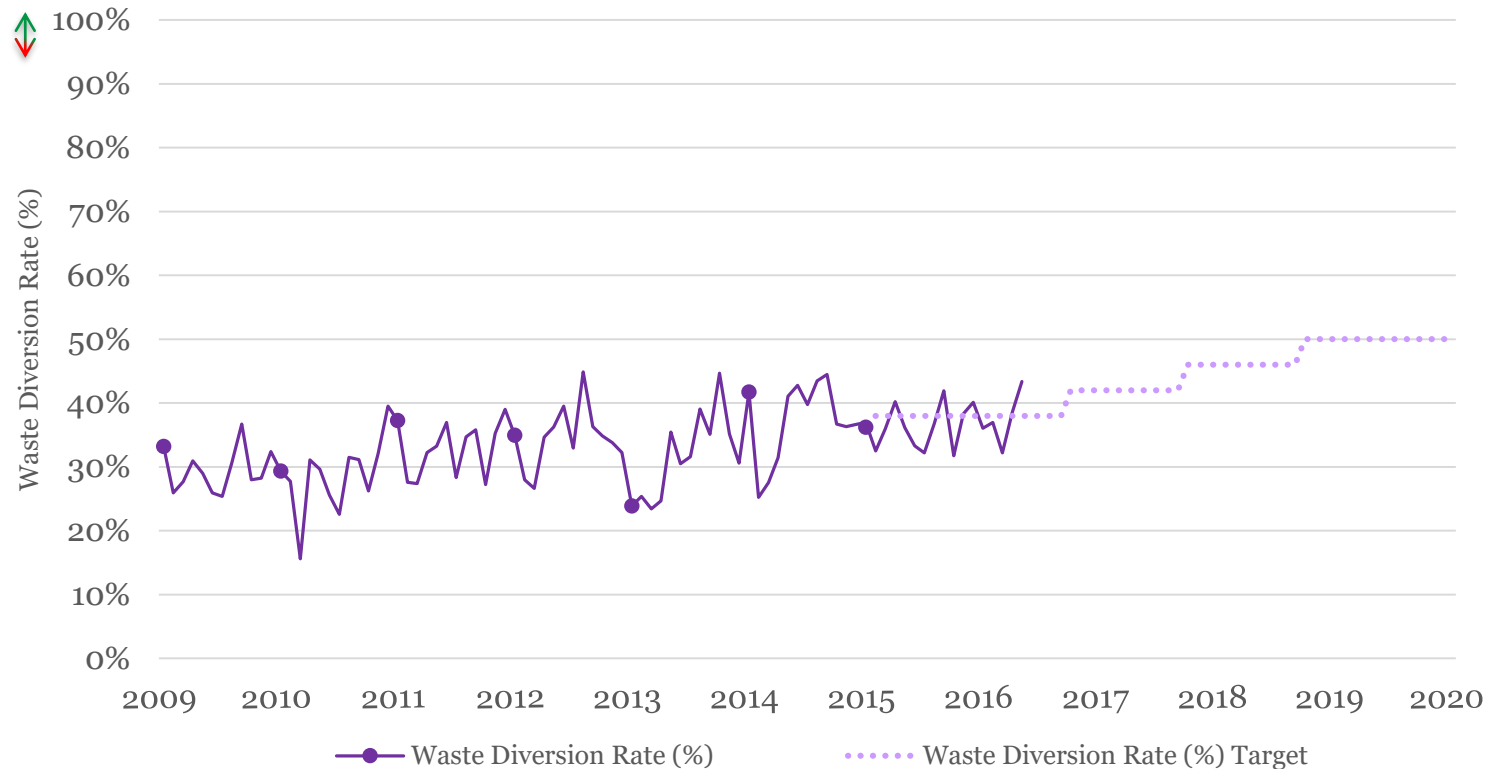
- **KPI goal is to reduce OSHA Recordable Injury Incident Rate by 20% from prior year rate of 7.0 to 5.6**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective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

CE3. Injury-Related Lost Workday Rate



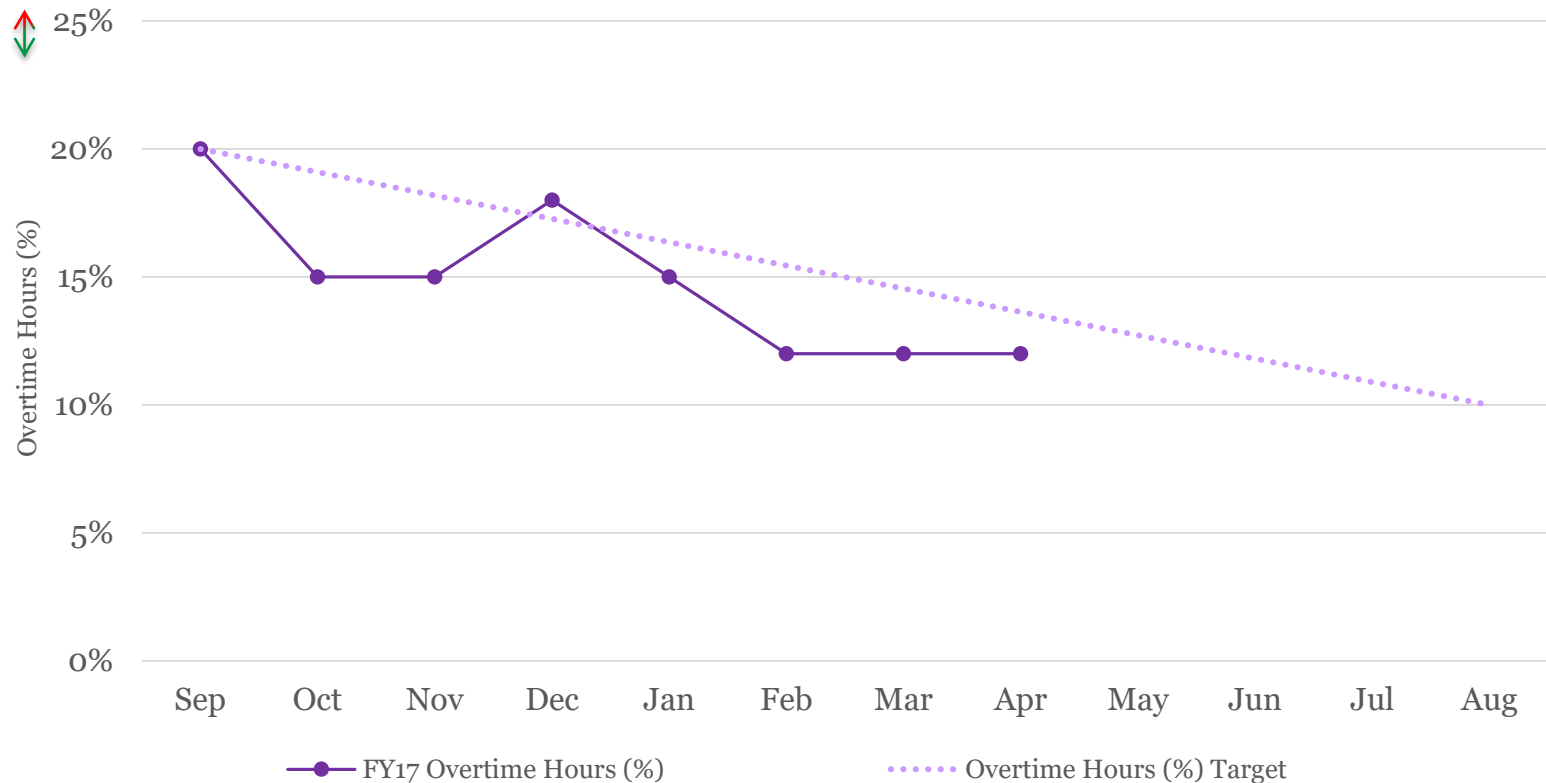
- **KPI goal is to achieve an injury-related lost workday rate of less than 2.7 lost workdays (days away, restricted, or transferred) per 100 full time employees**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal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

CE4. Waste Diversion Rate



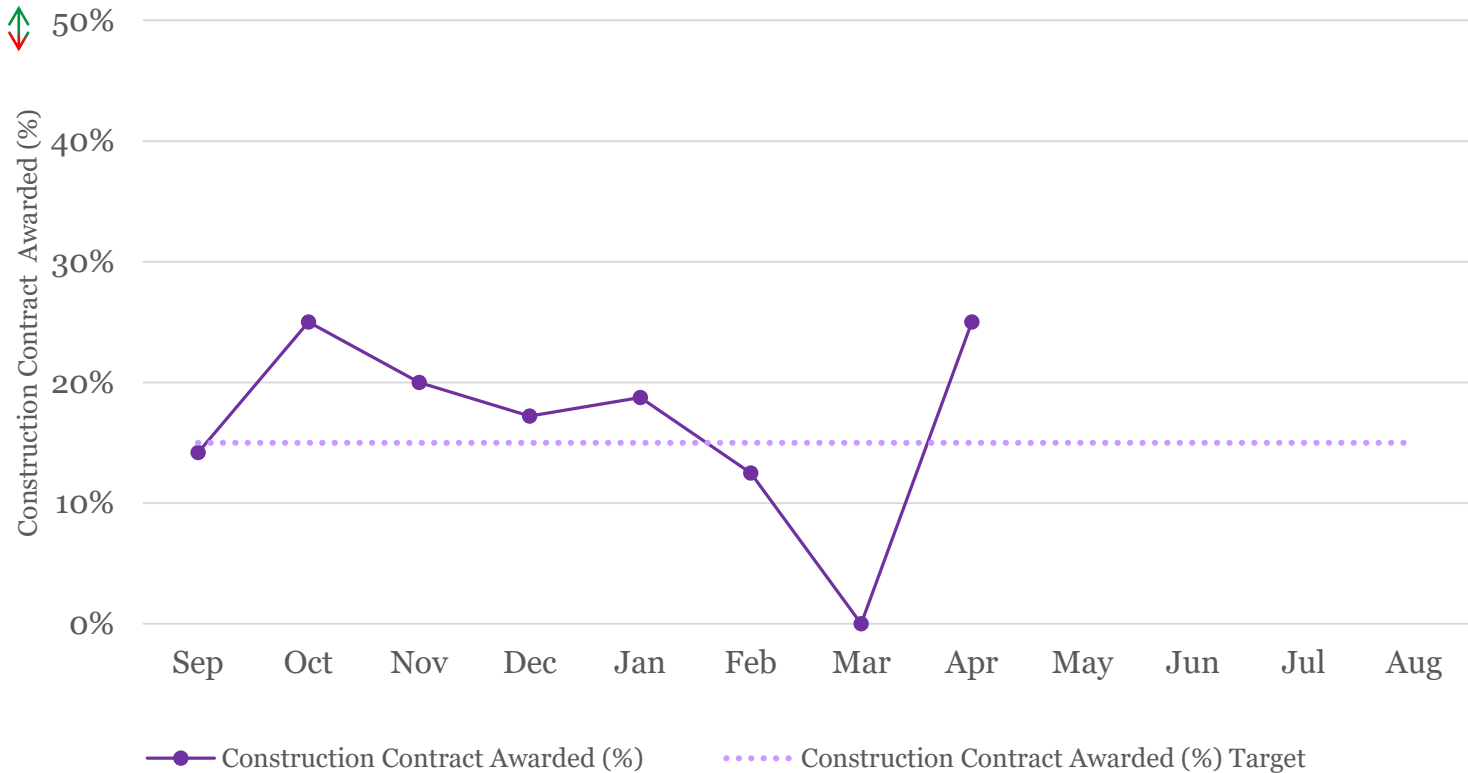
- **KPI goal is a 50% diversion rate by 2020 over 2009 baseline (2% increase in 2017)**
- **f(occupant behavior purchasing, reuse, recycling, diversion, market availability of diversion services)**
- **Initiatives: audit waste; promote landfill diversion via new resource conversation working group, identify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

CE5. Overtime



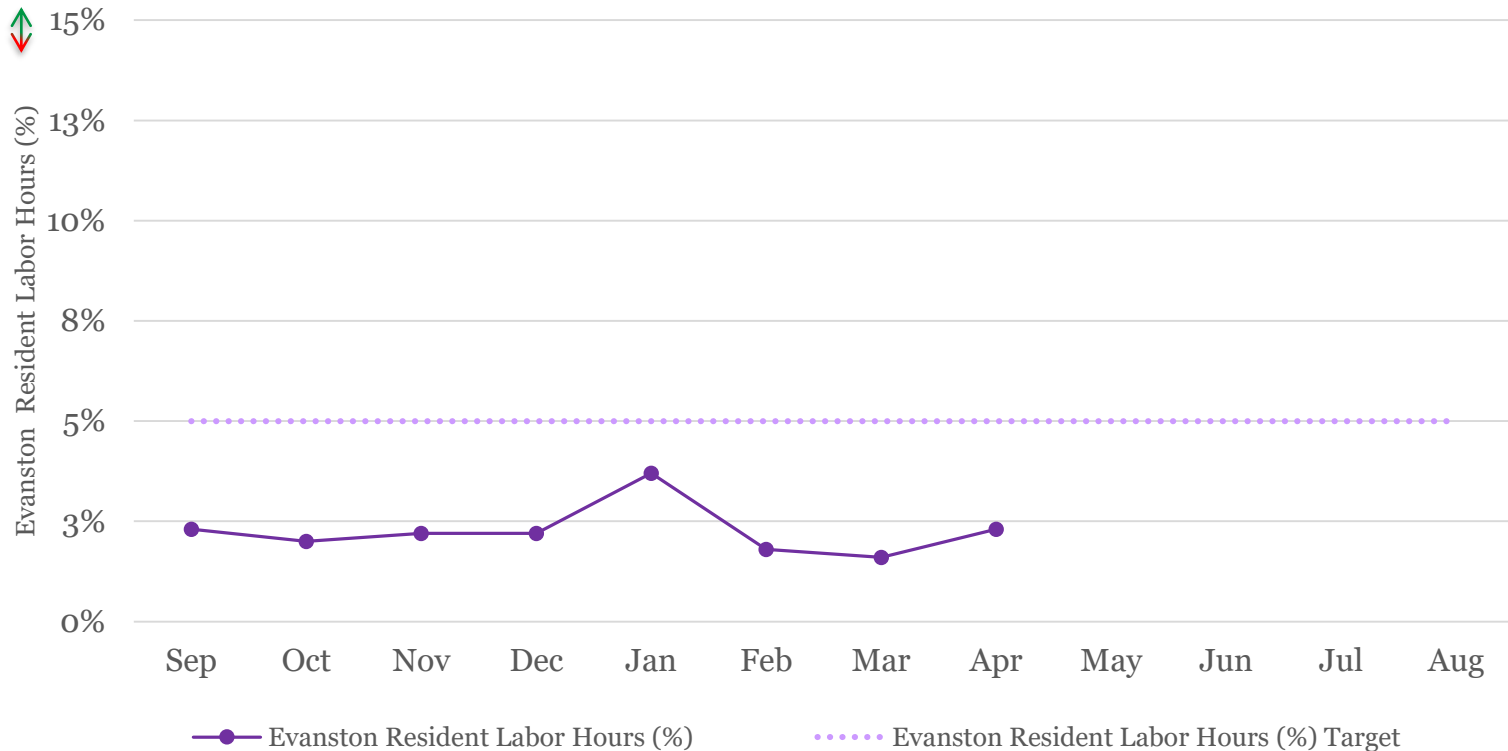
- **KPI goal is to decrease service provider overtime rates to 10% of the total labor hours worked**
- **f(staffing, contracted services, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, off hours project and special event support)**
- **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



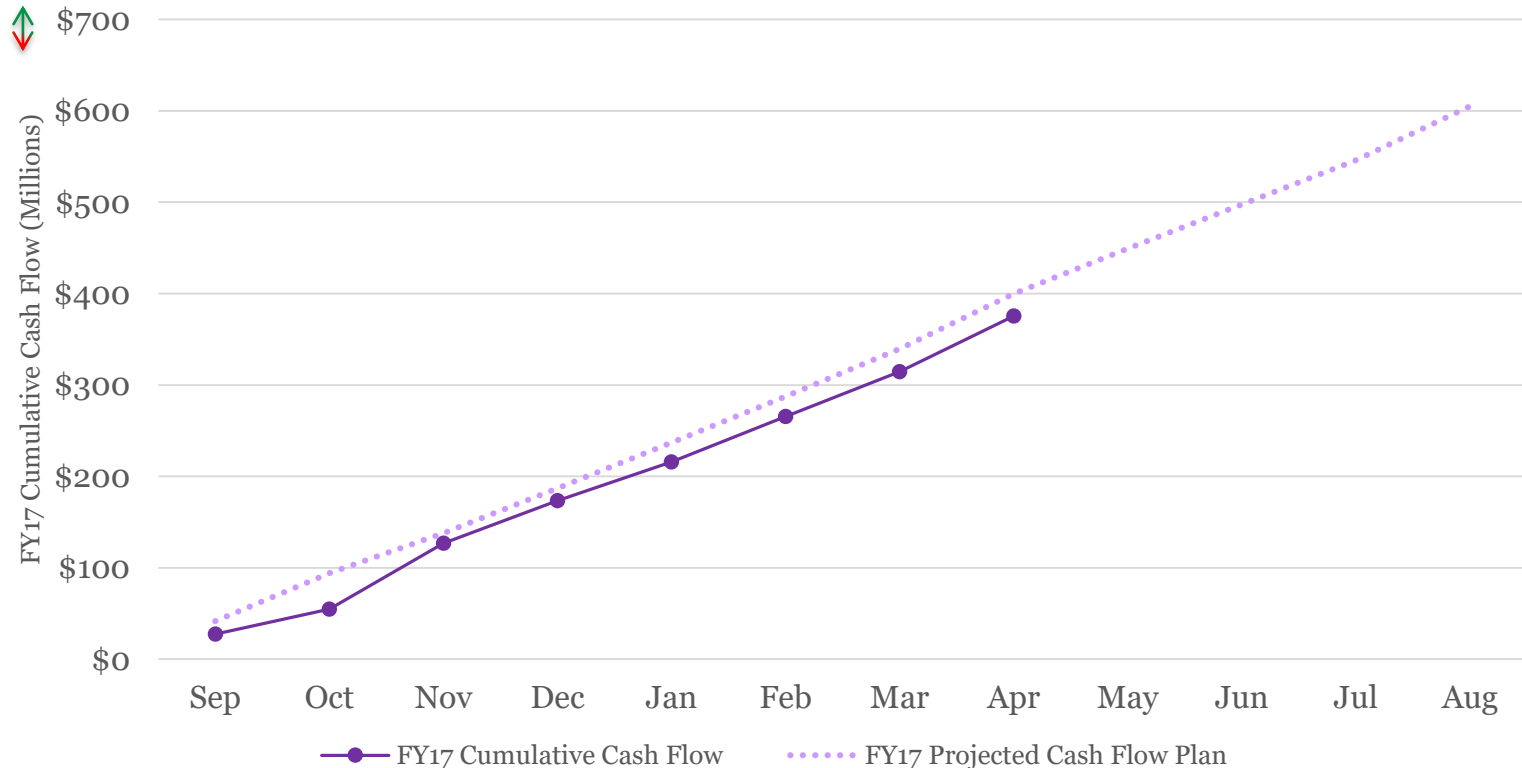
- **KPI goal is to increase Minority, Female and Local Business Enterprise work on campus to 15% of contracts awarded on projects over \$25,000**
- **f(contract, bid, qualifying vendor availability in marketplace)**
- **Initiatives: implement new software system; train and educate Project Managers &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

CE7. Evanston Resident Employment



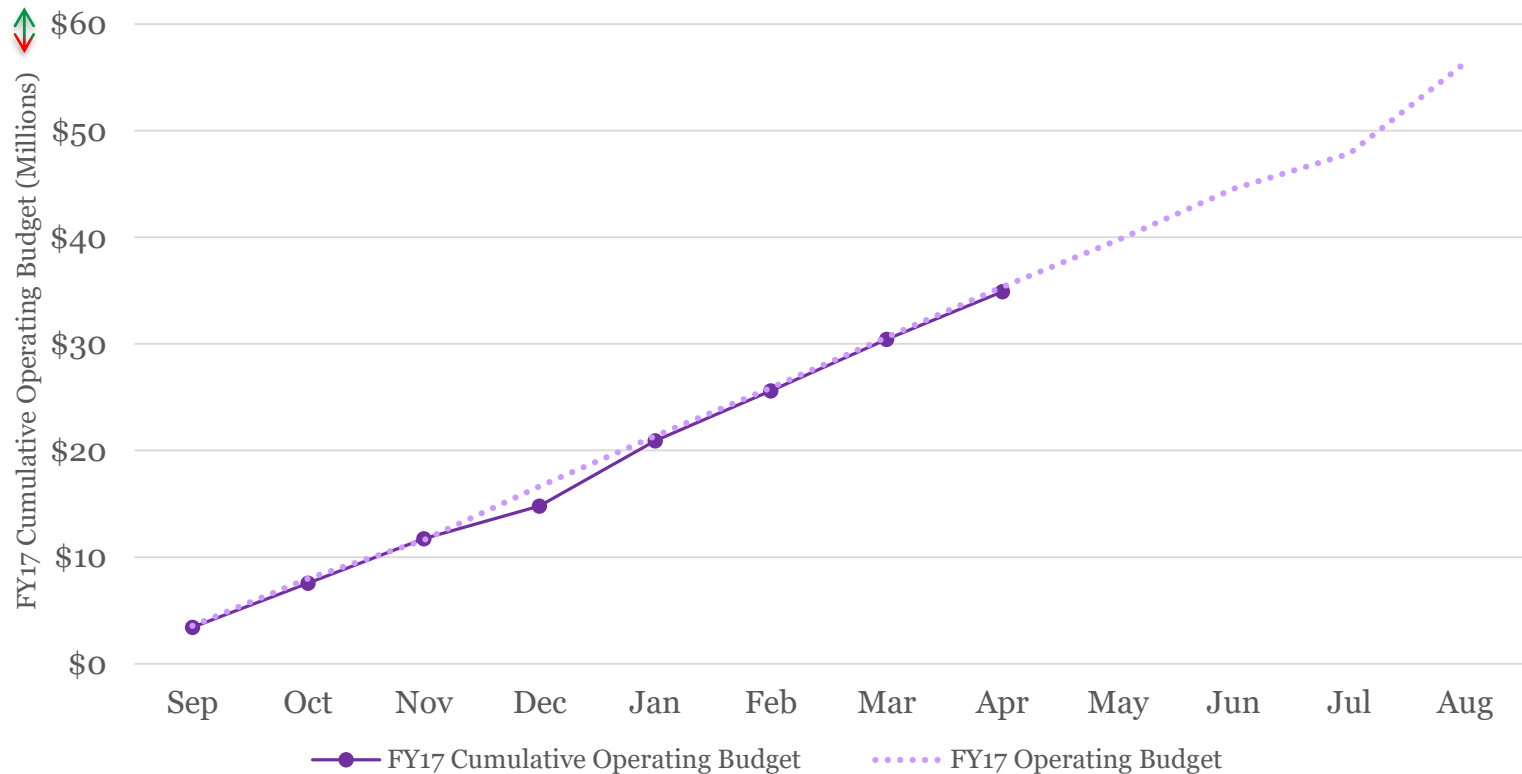
- **KPI goal is 5% of total construction labor hours on qualifying campus projects greater than \$1,000,000**
- **f(project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation)**
- **Initiatives: implement new software system; train and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

F1. Capital Project Cash Flow Execution



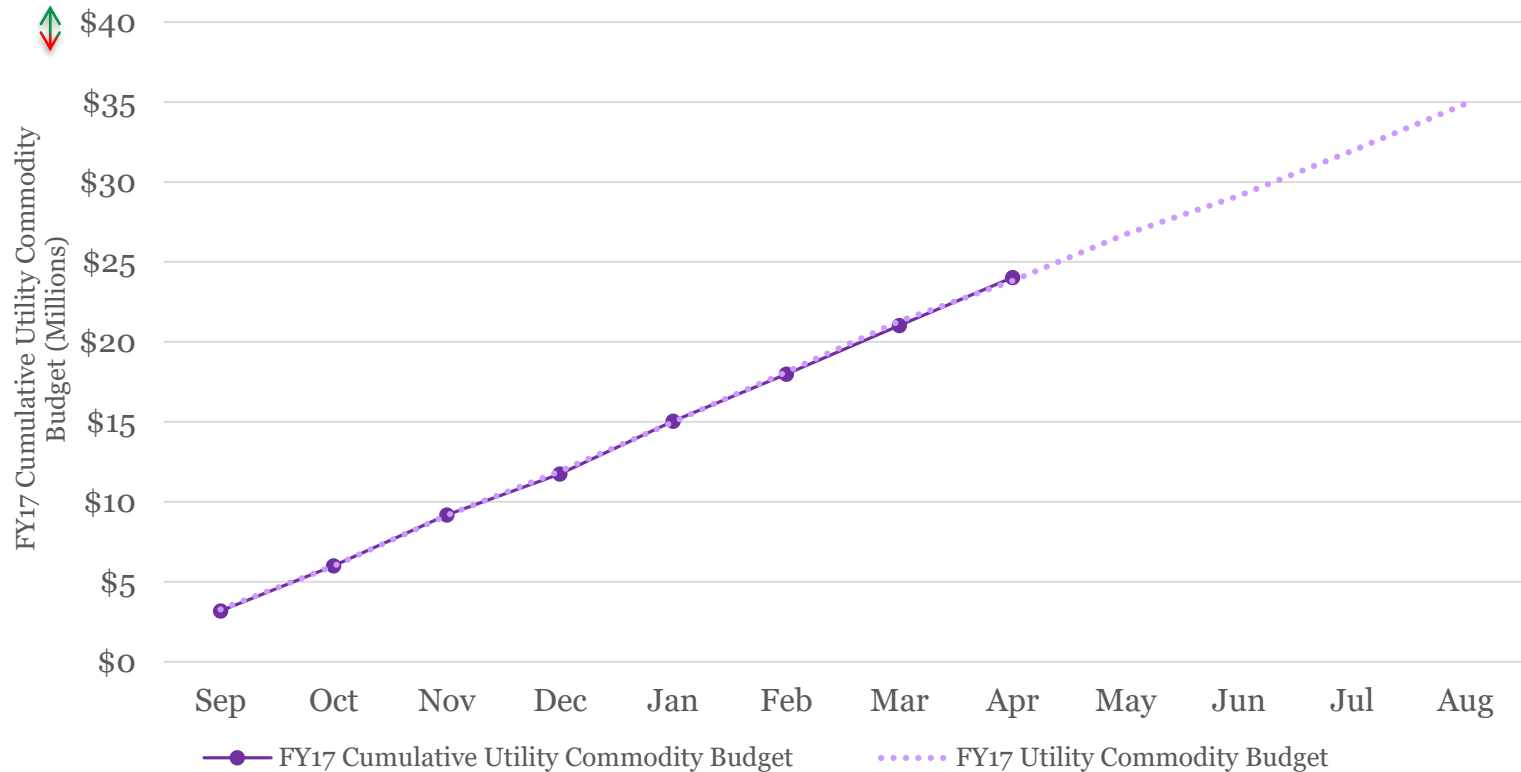
- **KPI goal is to spend capital at a rate of +/-2% of committed capital cash flow plan**
- **f(timely contractor invoicing, unforeseen project conditions, accurate budgeting, scope changes, weather, institutional prioritization, accessibility to work areas/equipment)**
- **Initiatives: develop and implement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