Facilities Management

FM Key Performance Indicators

Northwestern

October 20, 2017

Facilities Management Key Volume Indicators

| Key Volume	FM	Change	Evanston	Chicago
Full Time Equivalent (FTE)	370	+1	301	69
Acres	296	0	281	15
Buildings	222	0	204	18
Square Feet	15.1M	+0.4M	10.1M	5.0M
Number of Open Projects	78	+3	66	12
Design	29	+2	20	9
Construction	15	-5	12	3
Punchlist	19	+5	19	0
Closeout	15	+1	15	0
Value of Open Projects	$2.5B	$0.0B	$1.9B	$0.6B
Design	$0.6B	$0.0B	$0.5B	$0.1B
Construction	$1.2B	-$0.1B	$0.7B	$0.5B
Punchlist	$0.5B	+$0.1B	$498.4M	$0.0M
Closeout	$0.2B	$0.0B	$234.9M	$0.0M
Work Orders Per Reporting Month	7,227	+6.6%	5,618	1,609
Work Orders Per Rolling 12 Months	72,917	+0.1%	54,855	18,062
Operations and Maintenance	$59.6M	+$2.6M	$40.9M	$18.7M

Key Performance Indicators

| KPI Description	Annual Goal	Sep-17 Goal	Actual	Trend
SD1. Service Request Closure	90%	78%	TBD	TBD
SD2. Preventative Maintenance Closure	75%	76%	✅ 76%	⚠️ 0%
SD3. Proactivity: FM-Identified Work Orders	30%	30%	❌ 26%	❌ -5%
LO1. Common Space Program	10%	5%	✅ 5%	⚠️ 0.0%
LO2. Facilities Connect Implementation	90%	54%	❌ 43%	✅ 7%
LO3. Engagement: Sustainability Outreach	15%	1%	✅ 9%	⚠️ 0%
CE1. Energy Use Intensity (kBtu/SF)	-5%	-5%	TBD	TBD
CE2. Recordable Injury Incident Rate	2.90	2.90	❌ 3.94	⚠️ 0.29
CE3. Injury-Related Lost Workday Rate	1.34	1.34	✅ 1.13	⚠️ -0.83
CE4. Waste Diversion Rate	42%	42%	✅ 45%	✅ 4%
CE5. Overtime	<5%	<5%	❌ 18%	⚠️ 0%
CE6. Minority and Female Enterprise Use	15%	15%	TBD	TBD
CE6. Local Business Enterprise Use	15%	15%	TBD	TBD
CE7. Evanston Resident Employment	5%	5%	❌ 2%	✅ 1%
F1. Capital Project Cash Flow Execution	+/-2%	+/-2%	❌ 34%	⚠️ 0%
F2. FM Operating Budget Execution	+/-1%	+/-1%	TBD	TBD
F3. Utility Commodity Budget Execution	+/-5%	+/-5%	TBD	TBD
F4. Invoices: Number of Days to Pay	90%	90%	❌ 77%	⚠️ 0%

SD1. Service Request Closure
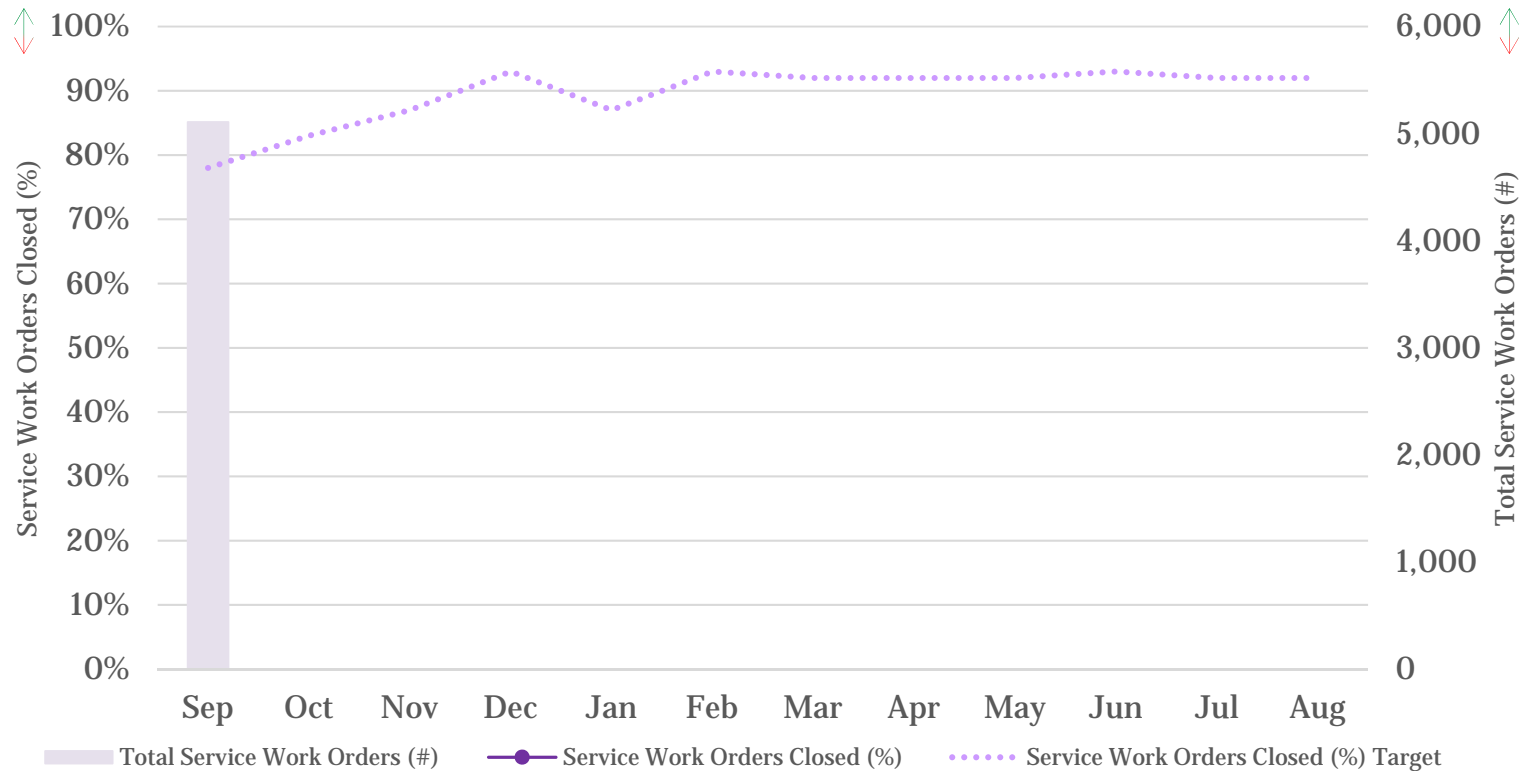
- **KPI goal is to have a yearly average of 90% of service work orders within 30 days (excluding project-related work orders)**
- **f(staffing, contracted services, seasonal work order volume variations, closeout procedures, service provider productivity, parts/material availability, accessibility of 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**

Northwestern

SD2. Preventative Maintenance Closure
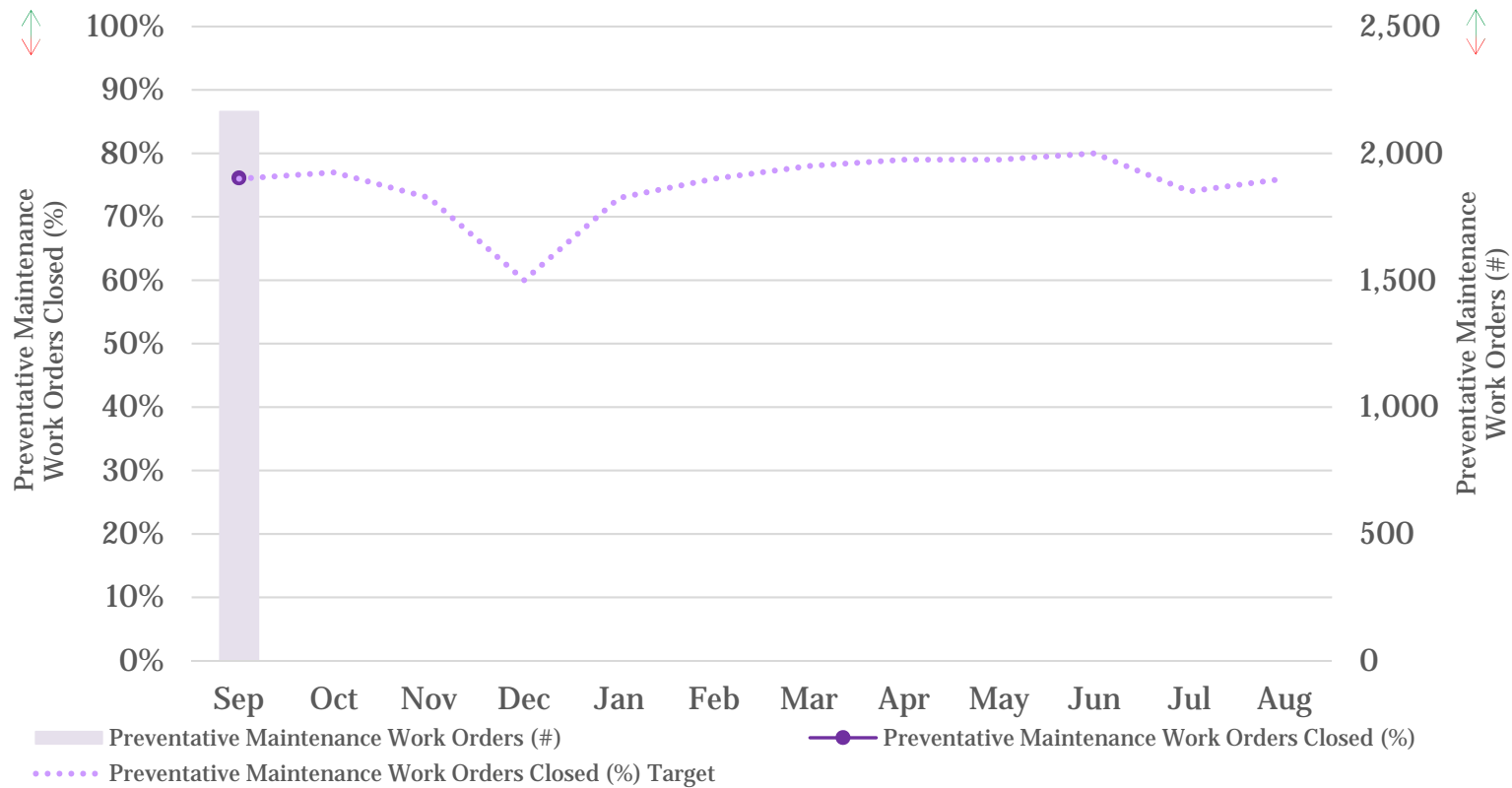
- **KPI goal is to have yearly average of 75% of preventative maintenance tickets closed within 30 days**
- **f(staffing, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, project and special event support)**
- **Initiatives: plan and 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
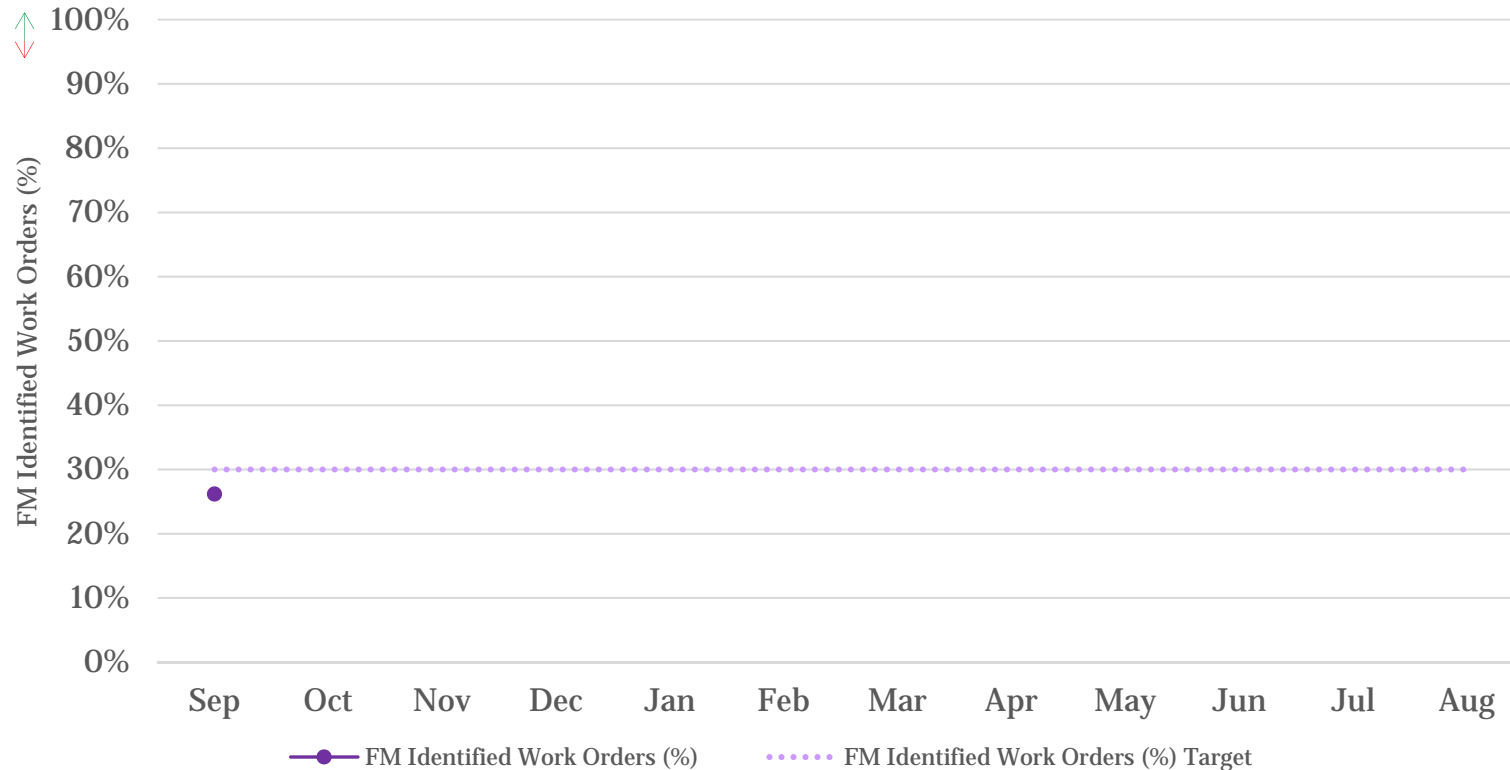
- **KPI goal is that at least 30% of corrective work orders are identified by Facilities Management Staff, as a measure of proactivity**
- **f(staffing, functionality of mobile technology, training)**
- **Initiatives: expand commissioning and preventative maintenance programs; institute quality assurance 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
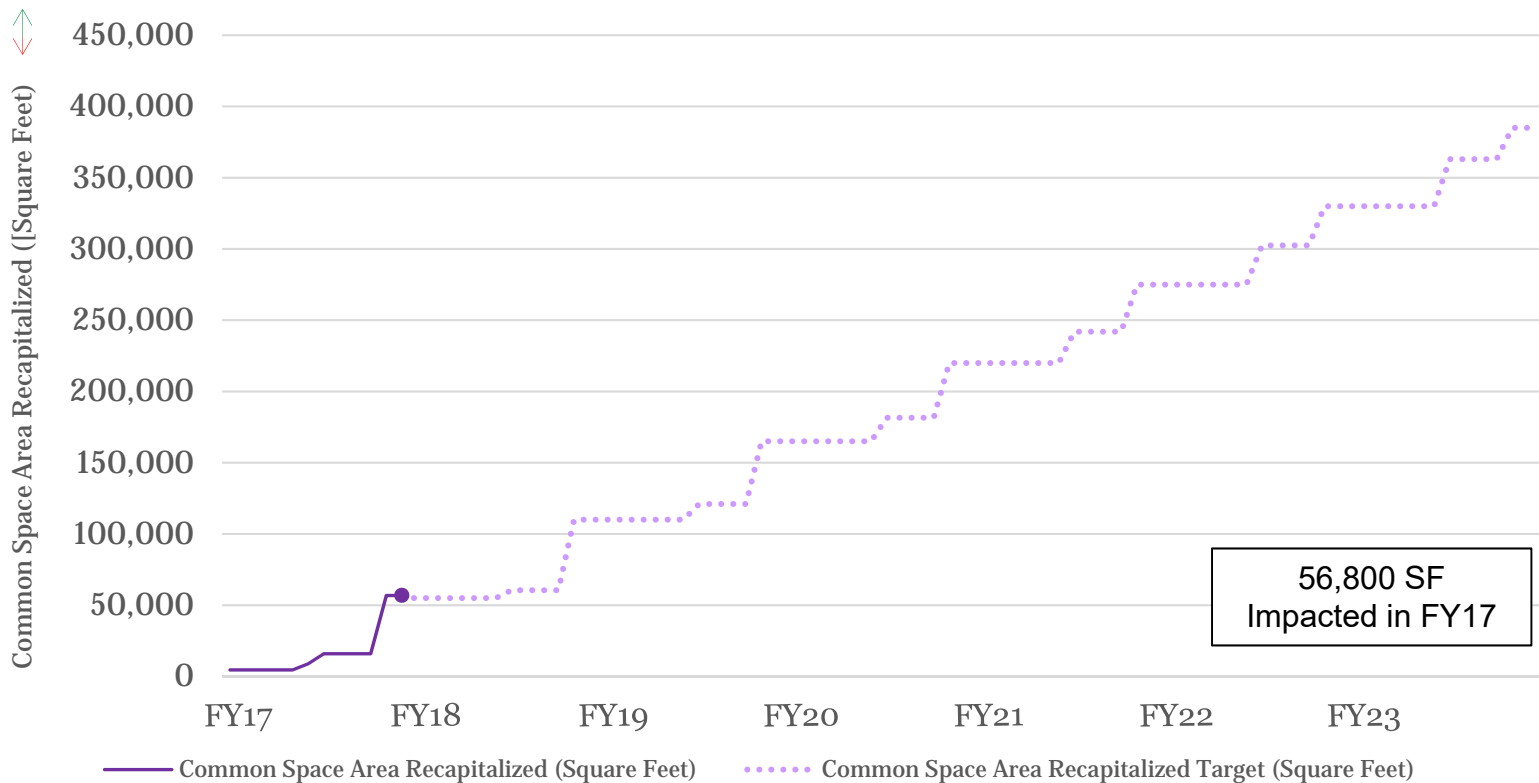
- KPI goal is to recapitalize 55,000 square feet of common spaces per year.
- f(funding availability, project staffing, efficient decision making, accessibility to work areas)
- Initiatives: recapitalization of campus spaces
- FM Leader: Carrie West

# LO2. Facilities Connect Implementation
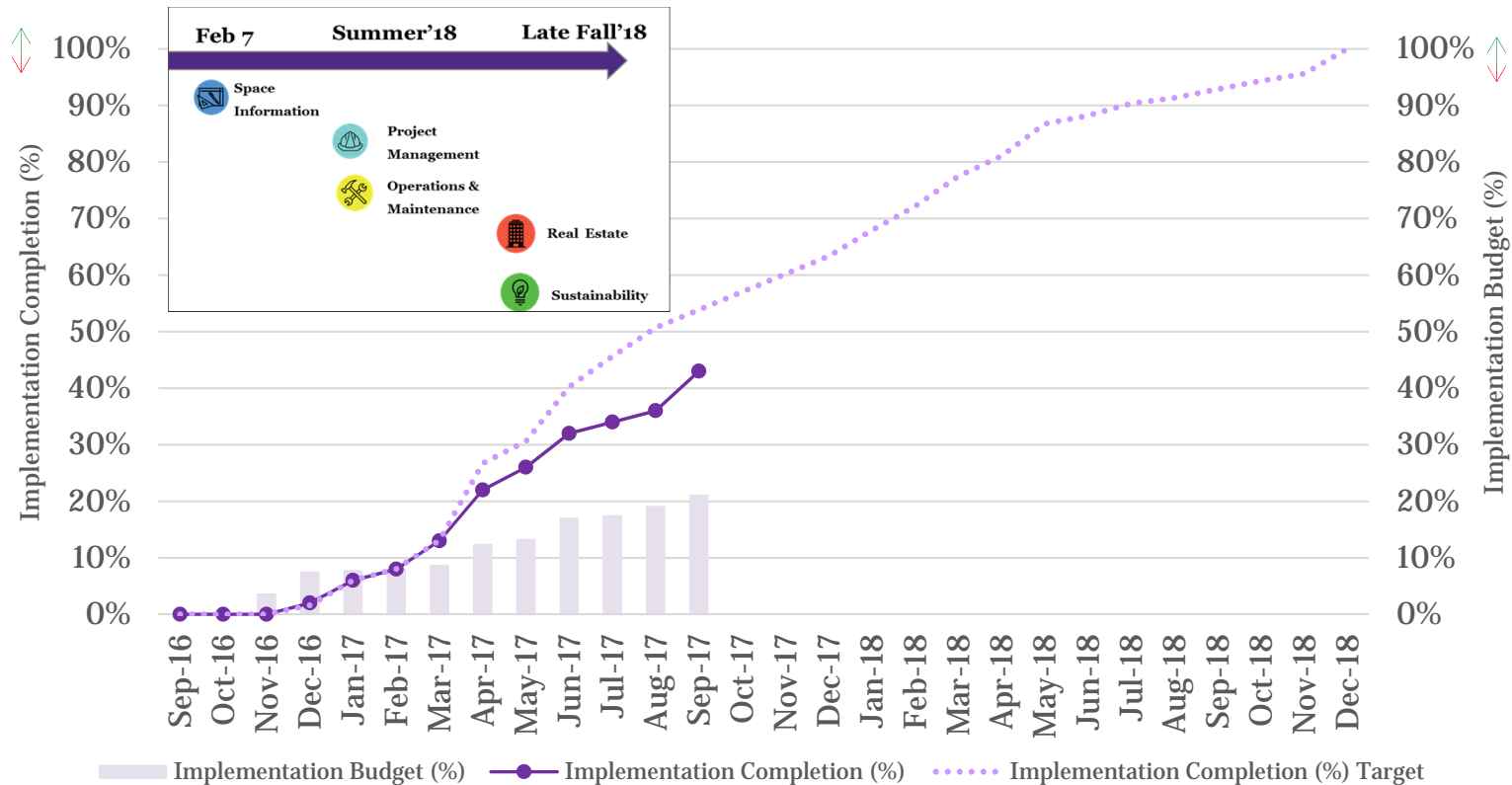
- KPI goal is to complete 90% of project milestones by fiscal year 2018
- f(stakeholder engagement, staffing, business process, IT capabilities, communication, effective decision making)
- Initiatives: implement new integrated workplace management software; develop and implement process improvement; utilize effective project management methodology
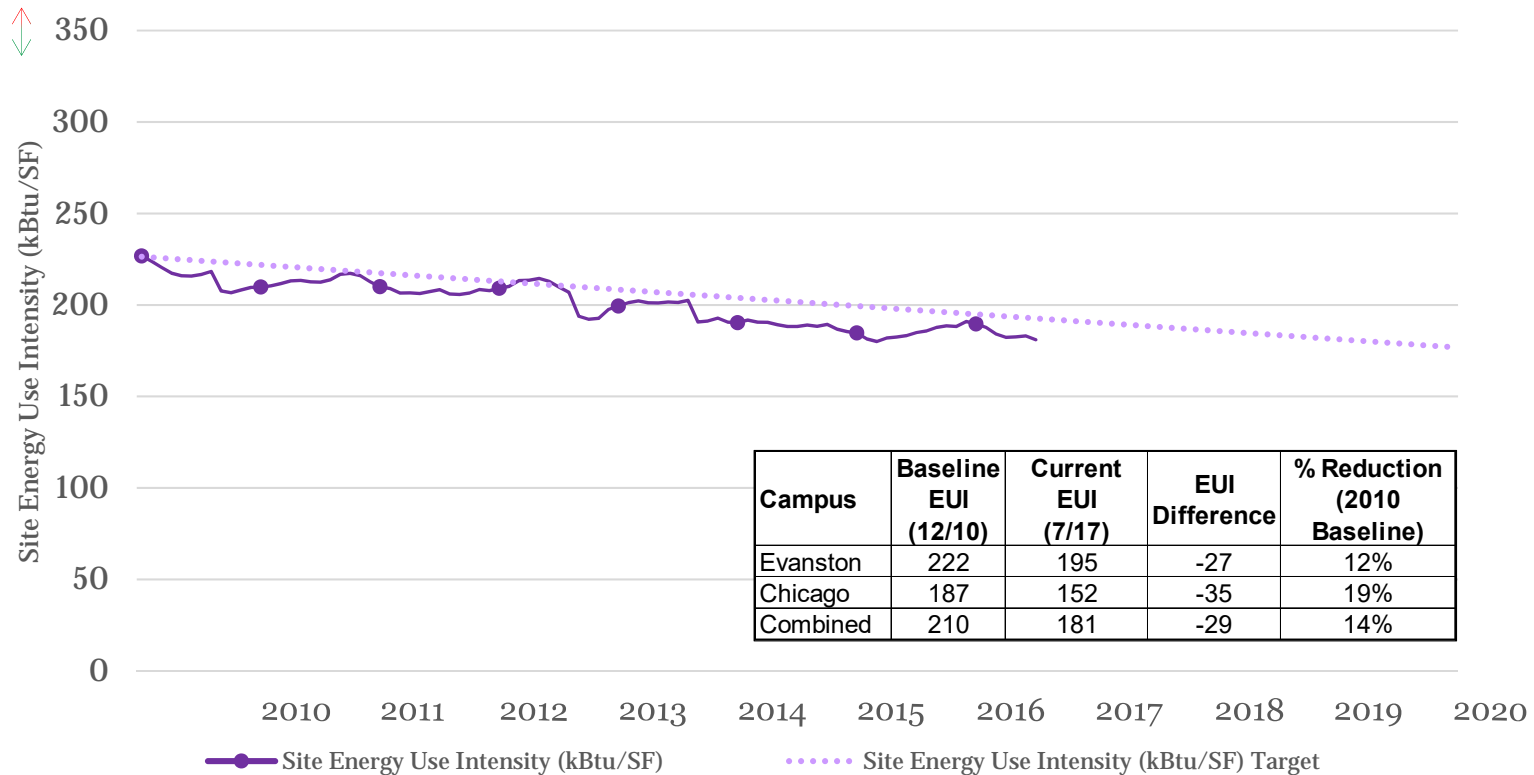- FM Leader: Liz Schaps

# LO3. Engagement: Sustainability Outreach
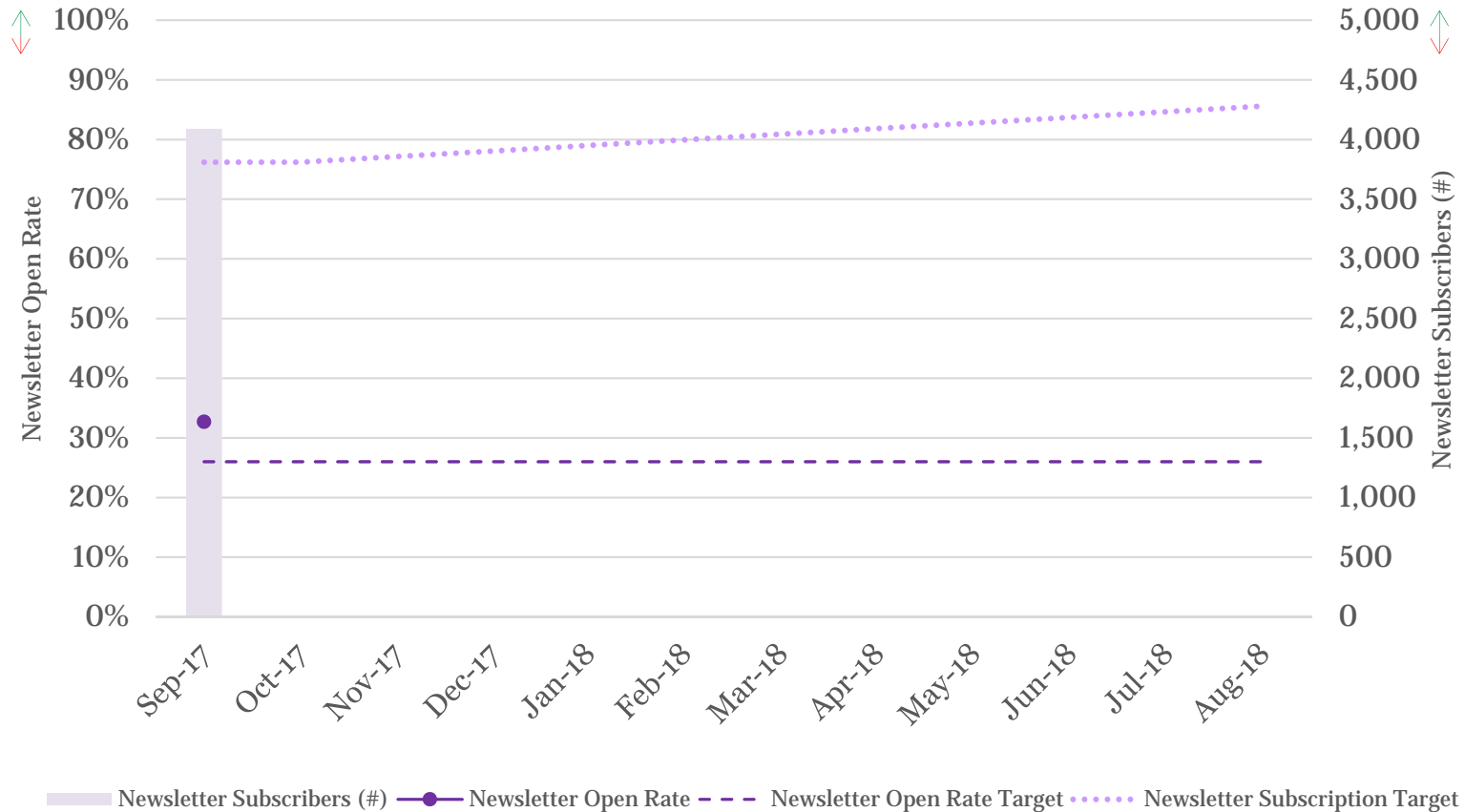
- **KPI goal is to increase newsletter subscription by 15% annually (1.25% per month); maintain open rate 10% above industry average**
- **Initiatives: actively promote newsletter across University communication;**
- **FM Leader: Kathia Benitez**

CE1. Energy Use Intensity

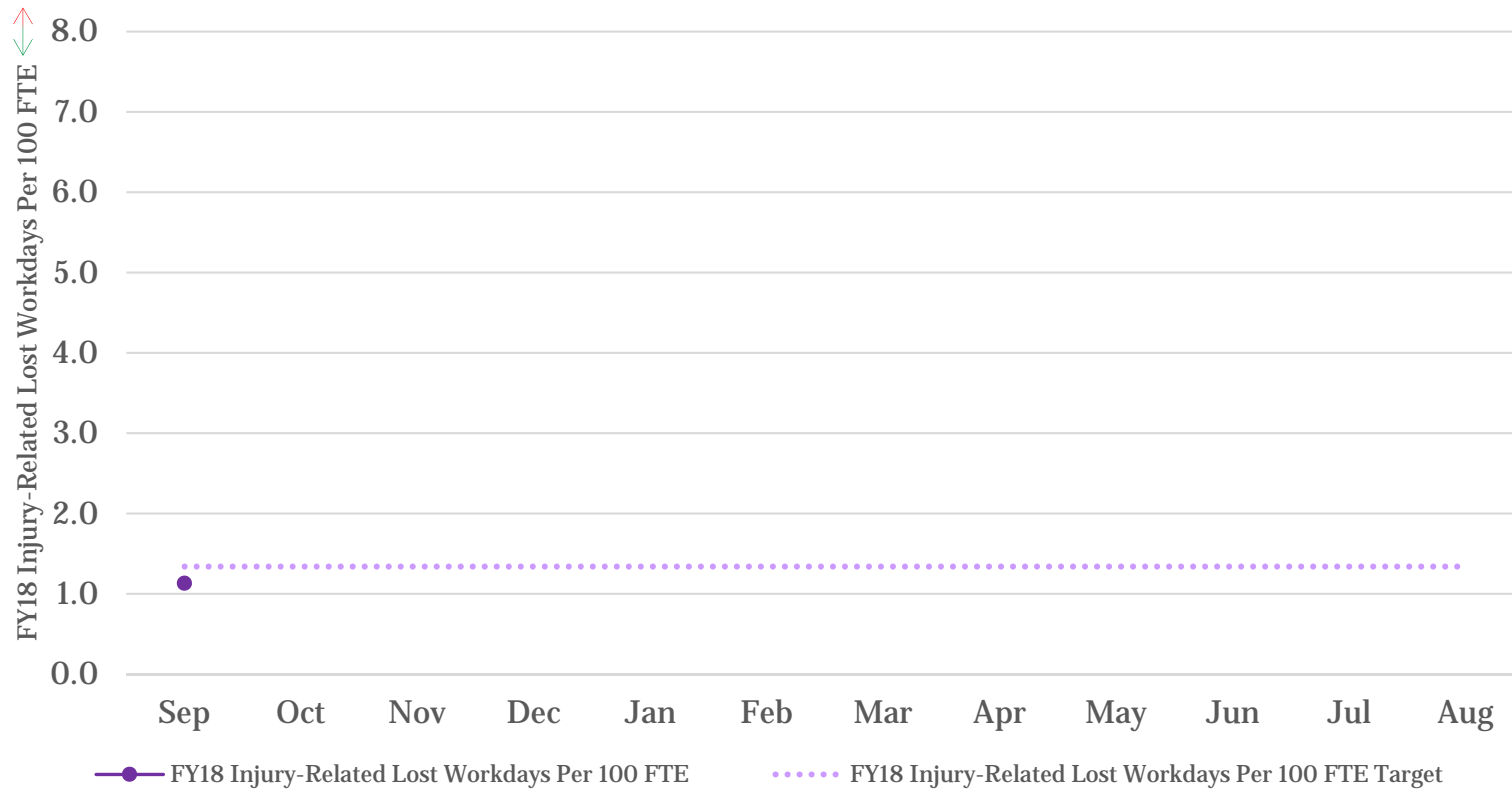| Campus	Baseline EUI (12/10)	Current EUI (7/17)	EUI Difference	% Reduction (2010 Baseline)
Evanston	222	195	-27	12%
Chicago	187	152	-35	19%
Combined	210	181	-29	14%

- **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

| Number of Injuries |
|---|
| Sep: 3 |
| YTD: 3 |
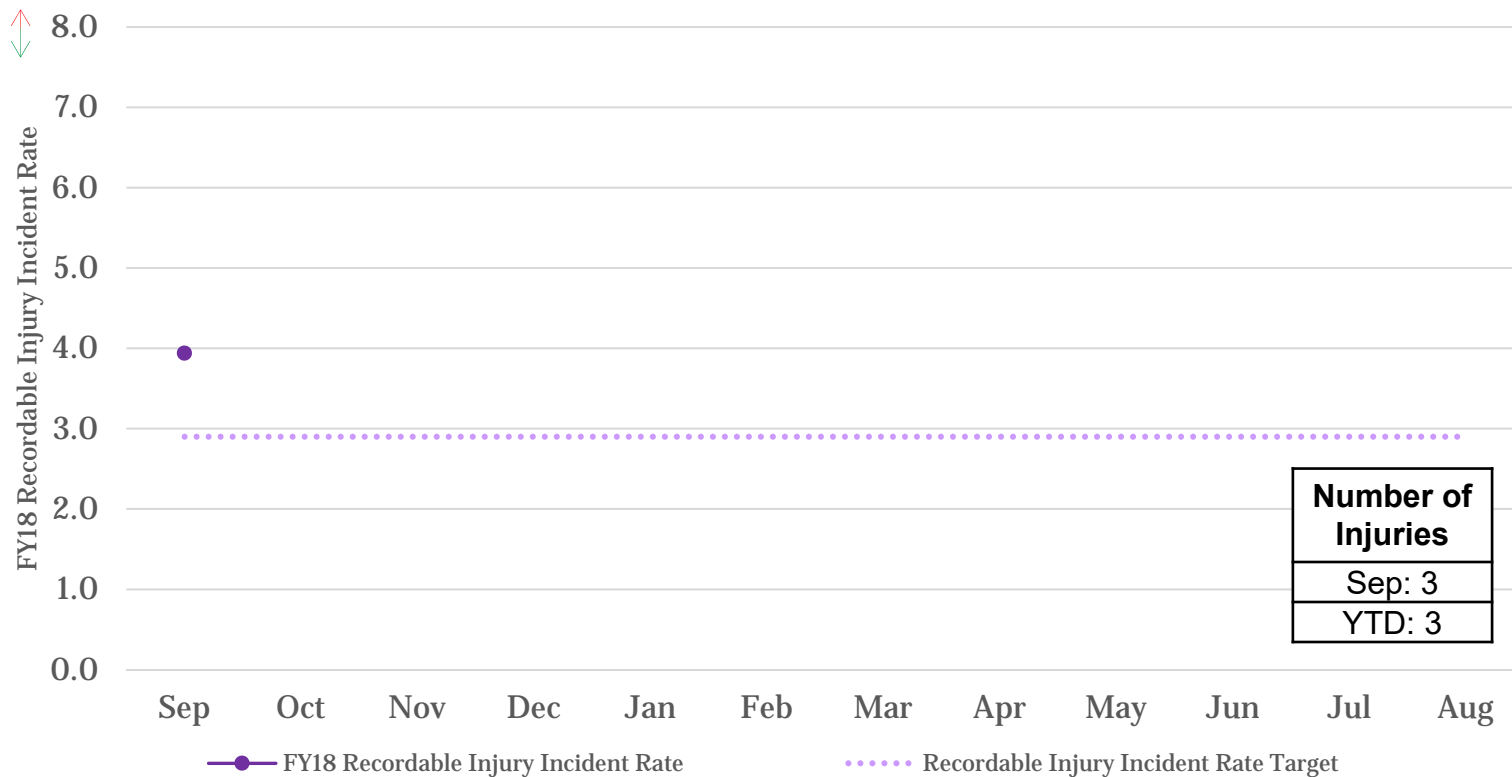
- **KPI goal is to reduce OSHA Recordable Injury Incident Rate by 20% from prior year rate of 3.65 to 2.90**
- **f(equipment, training, behavior, personal protective equipment use)**
- **Initiatives: inspect equipment and environment; manage personal protective equipment inventory; track personal protective 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

Chart: FY18 Injury-Related Lost Workdays Per 100 FTE. Y-axis ranges 0.0 to 8.0. X-axis months Sep through Aug. A single data point near Sep at approximately 1.1. Dotted target line at approximately 1.34 across all months.

Legend:
- FY18 Injury-Related Lost Workdays Per 100 FTE
- FY18 Injury-Related Lost Workdays Per 100 FTE Target

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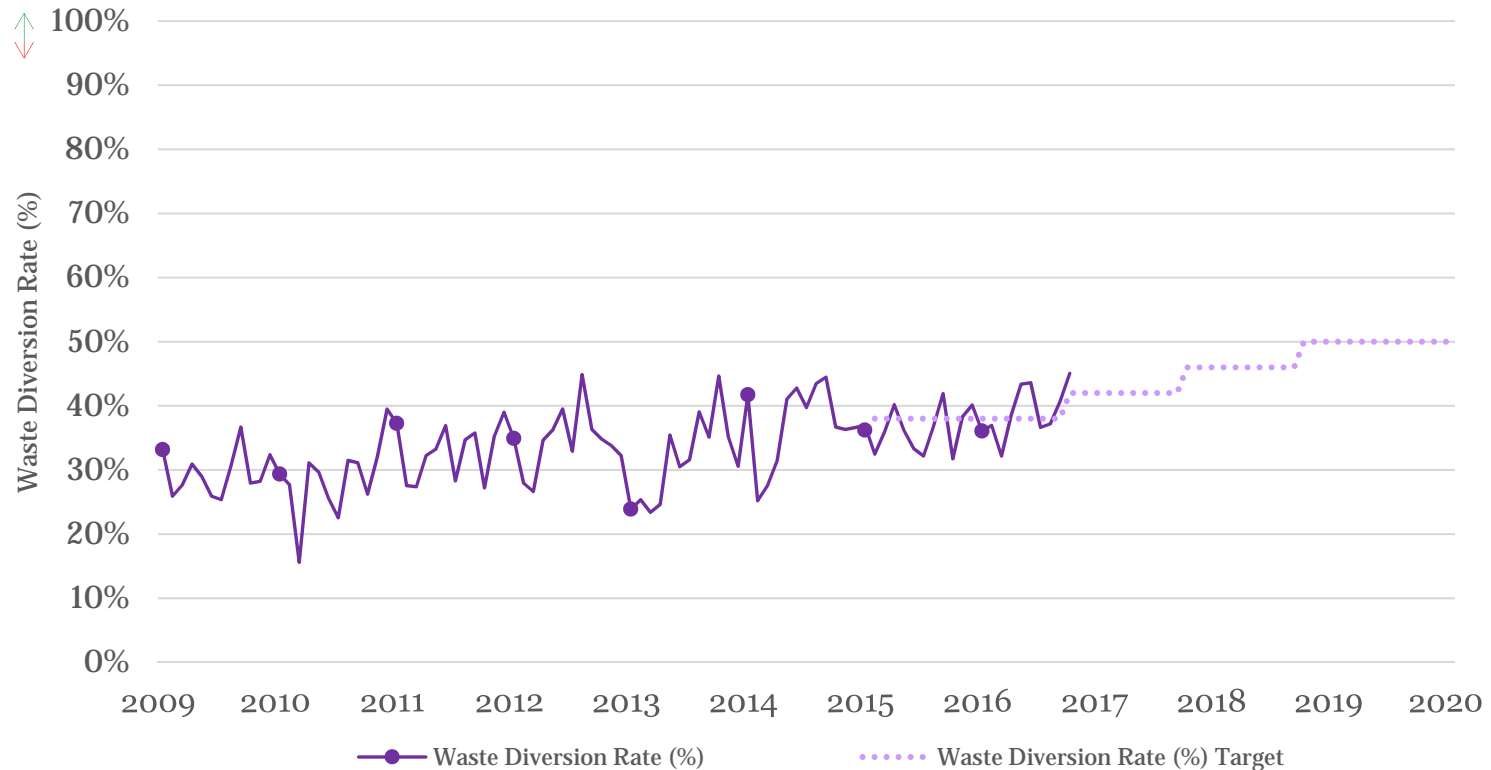
- **KPI goal is a 50% diversion rate by 2020 over 2009 baseline (4% increase in FY 2018 over FY 2017)**
- **f(occupant behavior purchasing, reuse, recycling, diversion, market availability of diversion services)**
- **Initiatives: audit waste; promote landfill diversion via new resource conversation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

CE5. Overtime
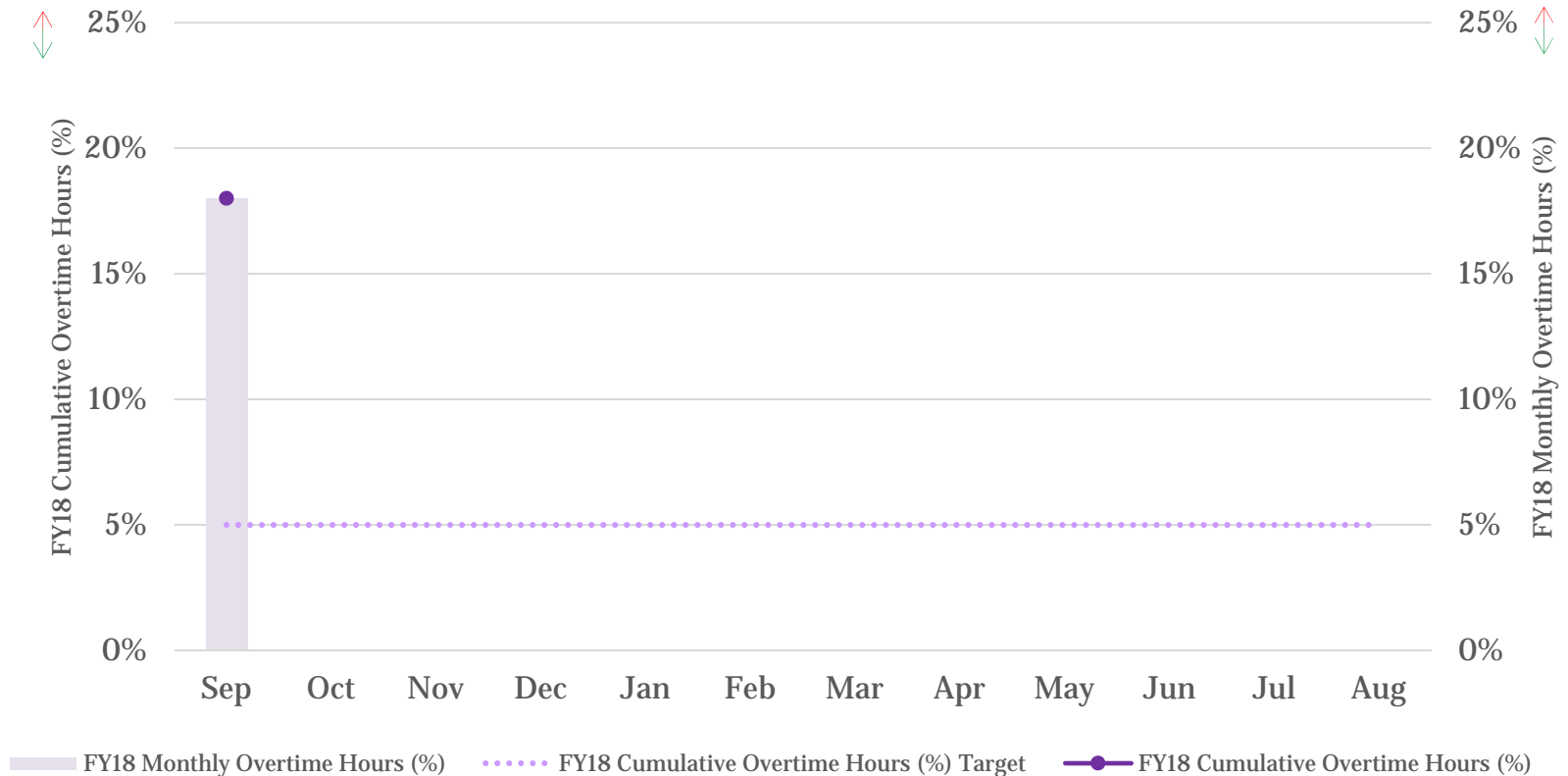
- **KPI goal is to decrease overtime from 15% of total labor hours in FY17 to 5% of total hours.**
- **f(staffing, contracted services, service provider productivity, planning and scheduling of work, accessibility of work areas/equipment, emergency work, off hours project and special event support)**
- **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
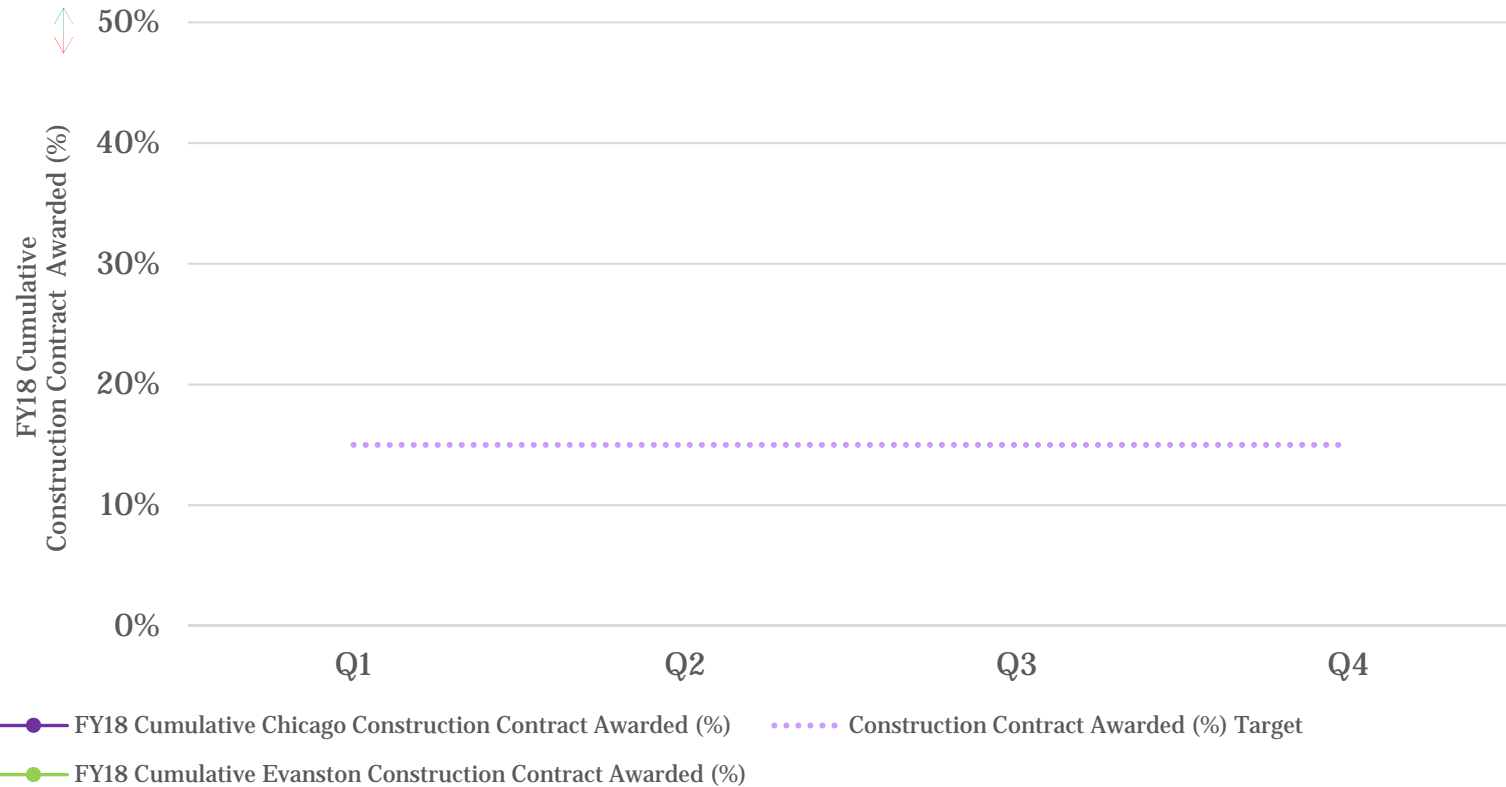
- **KPI goal is to increase Minority and Female Enterprise work on campus to 15% of contracts awarded on projects over $25,000**
- **f(contract, bid, qualifying vendor availability in marketplace)**
- **Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity; explore marketplace for new vendors to engage**
- **FM Leader: Liz Schaps**

CE7. Local Business Enterprise Use
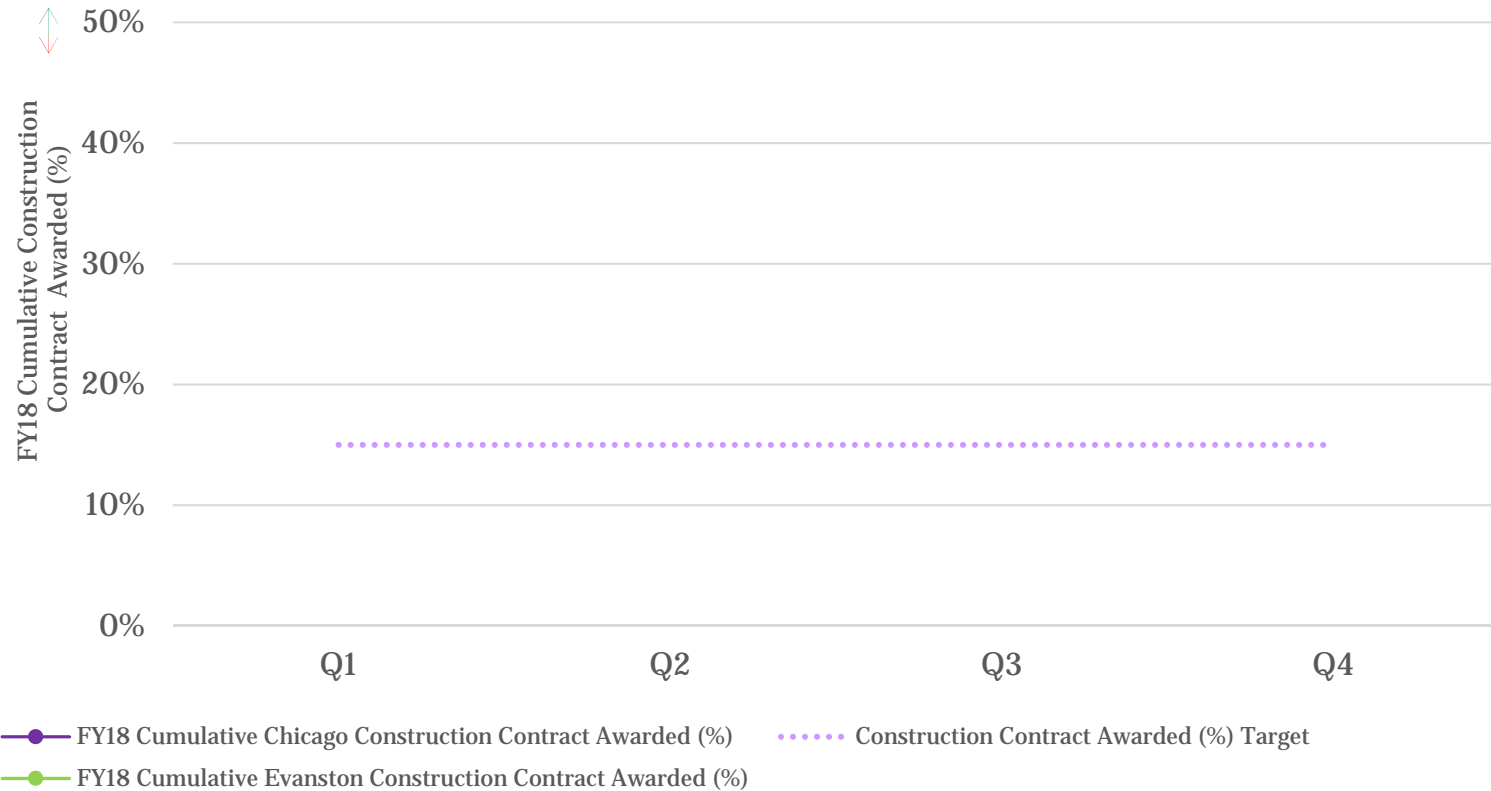
- **KPI goal is to increase Local Business Enterprise work on campus to 15% of contracts awarded on projects over $25,000**
- **f(contract, bid, qualifying vendor availability in marketplace)**
- **Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity; explore marketplace for new vendors to engage**
- **FM Leader: Liz Schaps**

CE8. Evanston Resident Employment
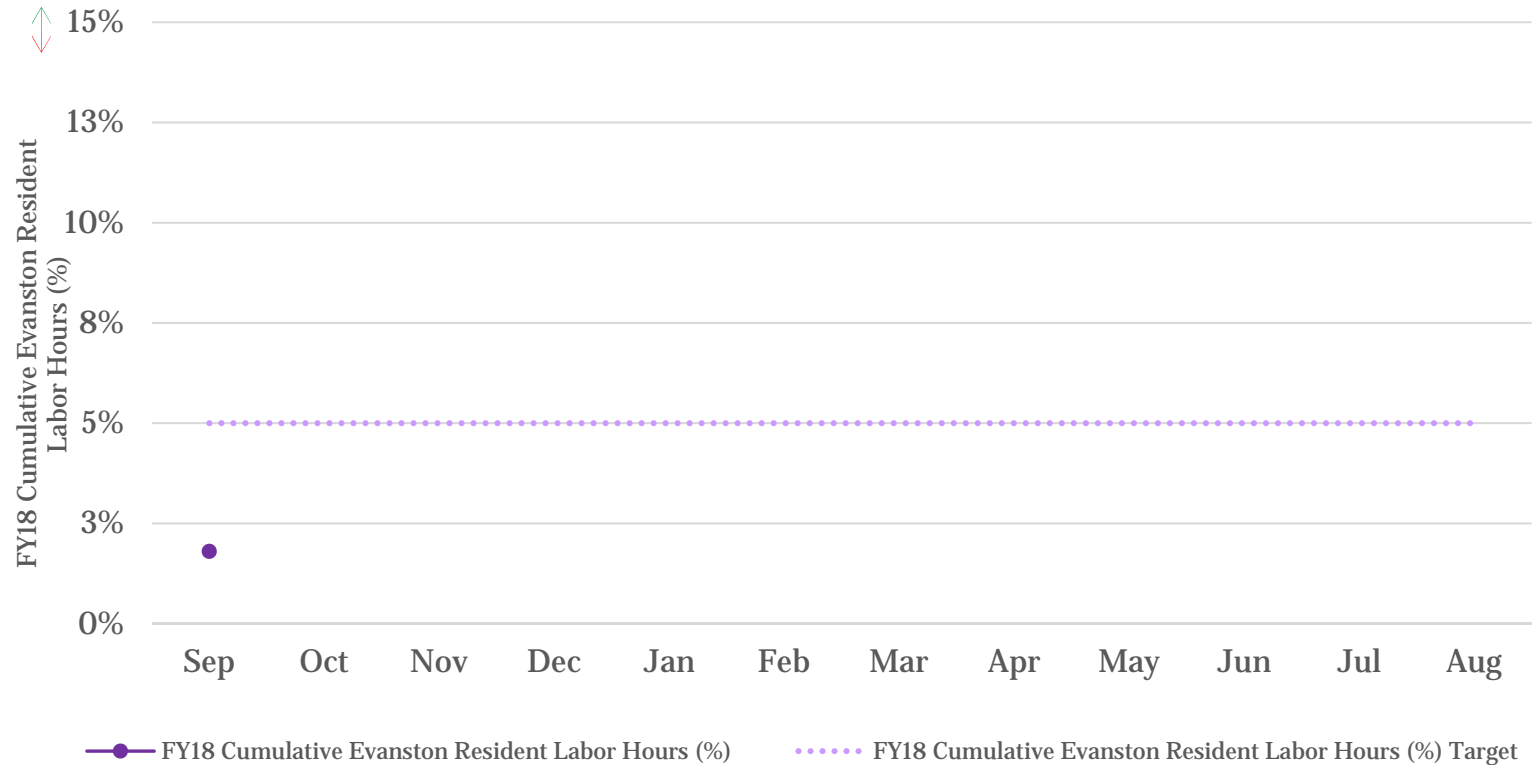
- **KPI goal is 5% of total construction labor hours on qualifying campus projects greater than $1,000,000**
- **f(project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation)**
- **Initiatives: implement new software system; train and educate Project Managers & Contractors; collaborate with Director of Diversity**
- **FM Leader: Liz Schaps**

F1. Capital Project Cash Flow Execution
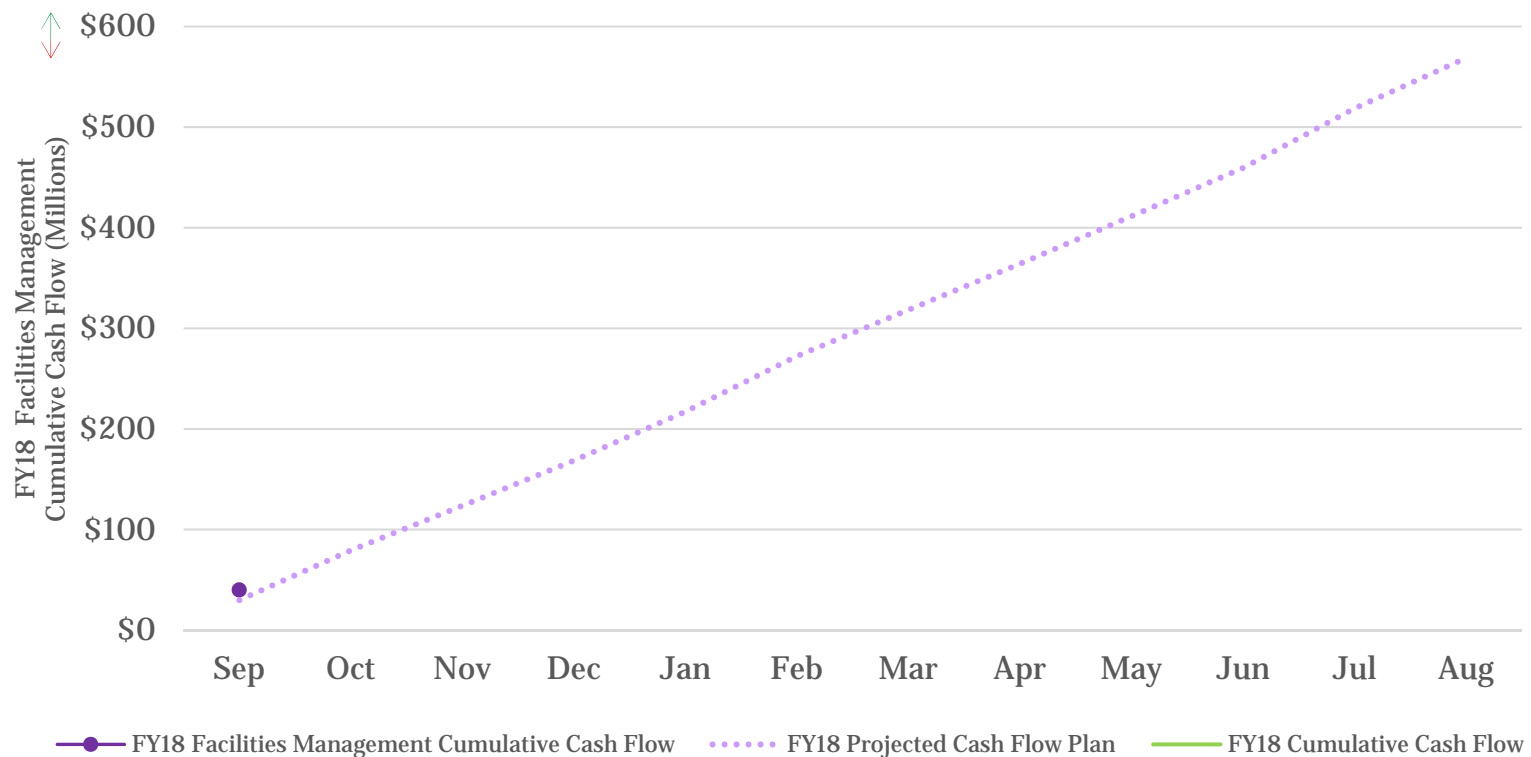
- **KPI goal is to spend capital at a rate of +/-2% of committed capital cash flow plan**
- **f(timely contractor invoicing, unforeseen project conditions, accurate budgeting, scope changes, weather, institutional prioritization, accessibility to work areas/equipment)**
- **Initiatives: develop and implement 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
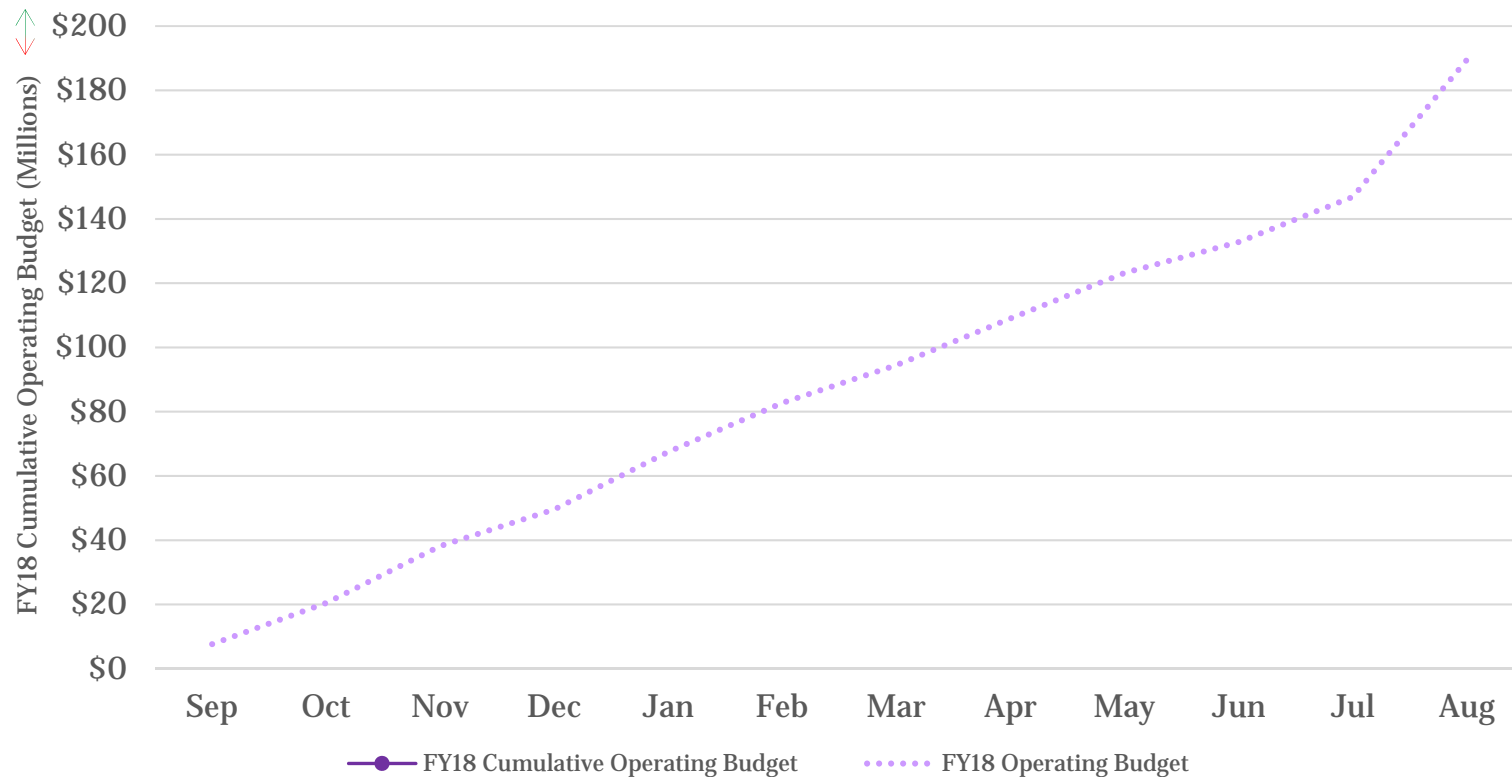
- **KPI goal is to spend Facilities Management division operating expenses at a rate of +/- 1% of budget**
- **f(accurate budgeting of FM Operations and Maintenance, FM Administration, FM Planning, FM Design and Construction, FM Sustainability, FM HR, campus growth, unanticipated factors)**
- **Initiatives: develop and implement process improvement; improve reporting; adhere to preventative maintenance plan; manage overtime expenses**
- **FM Leader: Liz Schaps**

F3. Utility Commodity Budget Execution
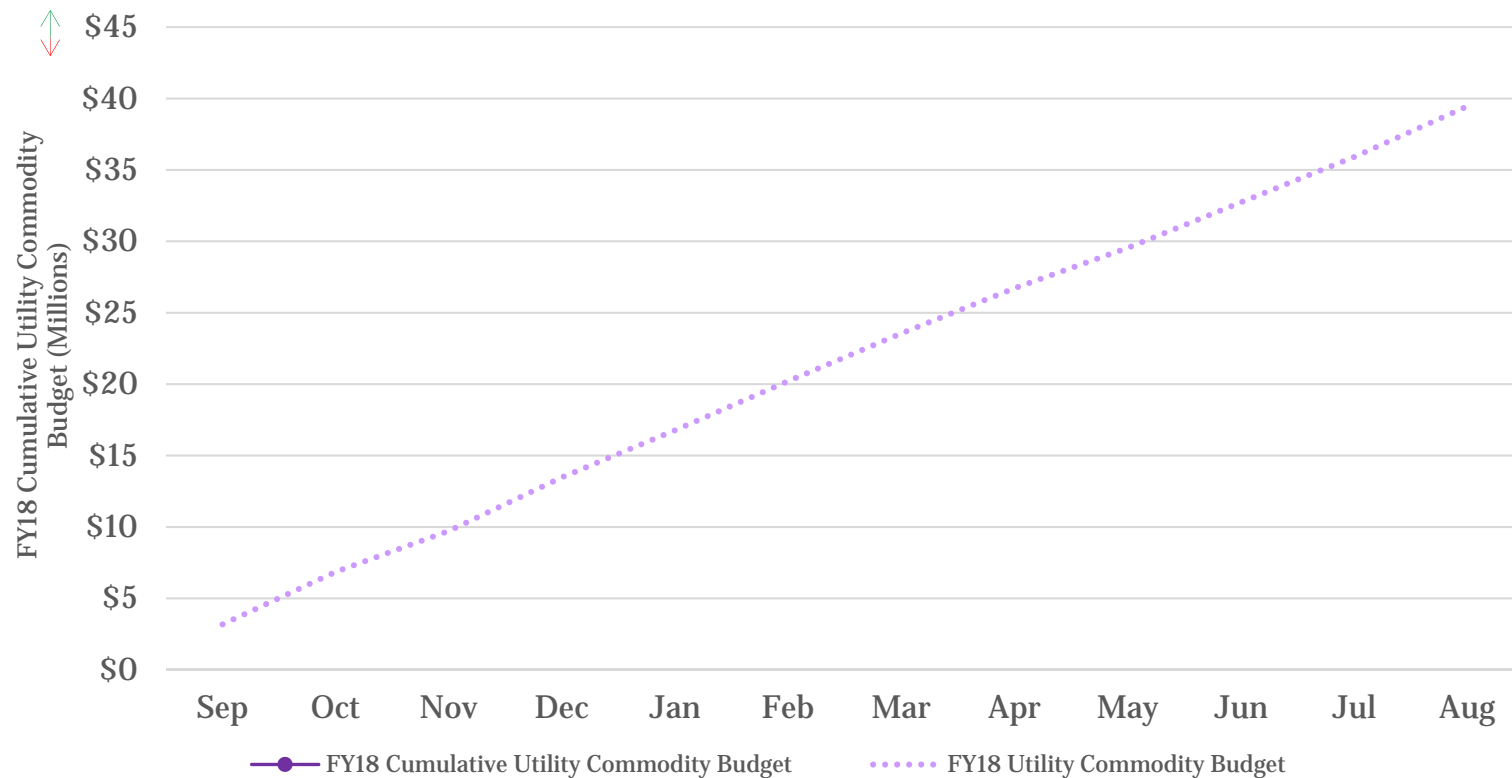
- **KPI goal is to manage utility commodity expenses at a rate of +/- 5% of budget**
- **f(accurate budgeting, utility commodity costs, campus growth, usage)**
- **Initiatives: adhere to sourcing strategy; improve reporting**
- **FM Leader: Liz Schaps**

Northwestern

F4. Invoices: Number of Days to Pay
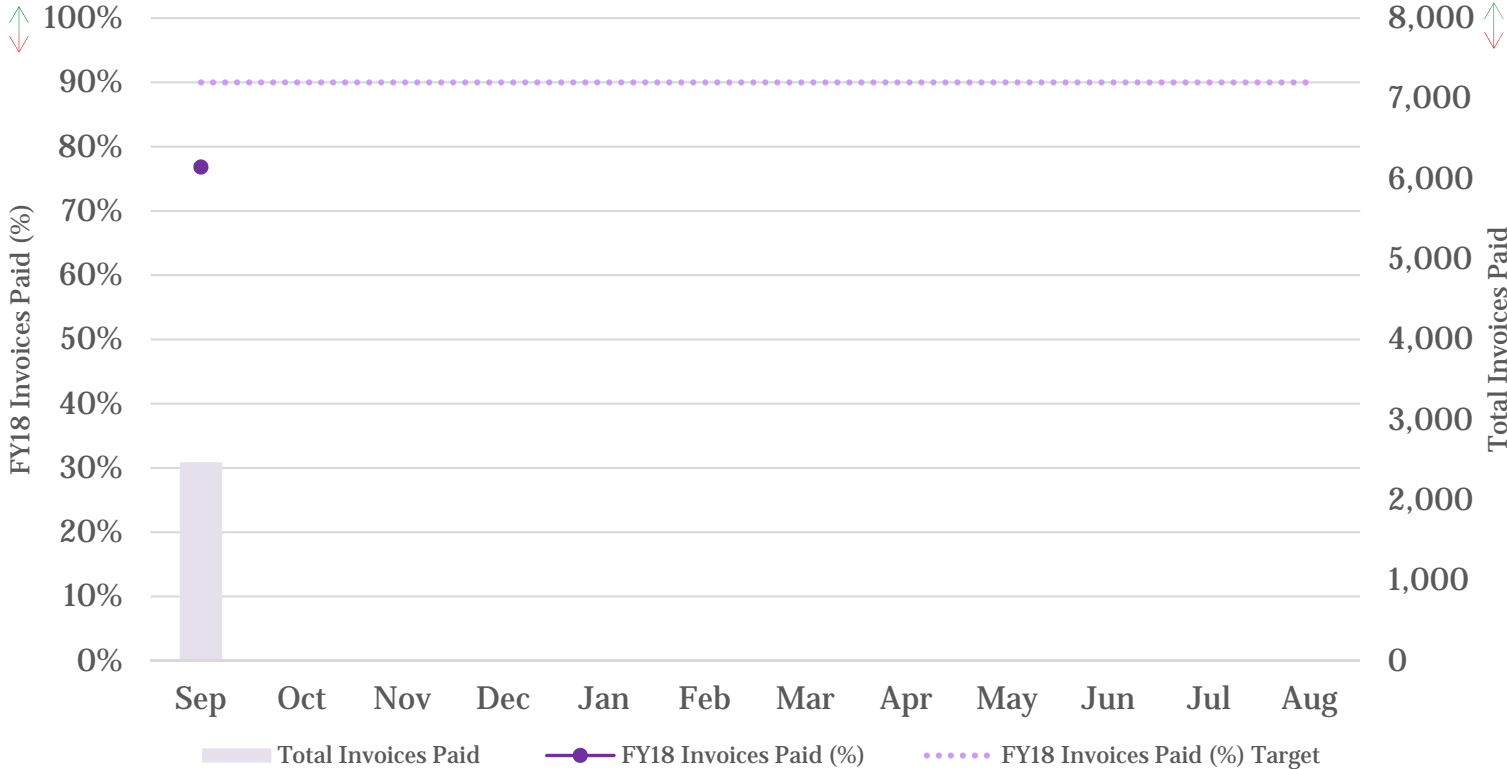
- KPI goal is to process 90% of invoices from receipt to voucher/ACH within 30 days
- f(accurate invoicing, FM timely invoice processing, accounts payable, staffing)
- Initiatives: develop and implement process improvement; improve reporting
- FM Leader: Liz Schaps

Northwestern