Facilities Management

FM Key Performance Indicators

Northwestern
May 13, 2016
# Key Performance Indicators

<table>
<thead>
<tr>
<th>Process/Function</th>
<th>KPI</th>
<th>Goal</th>
<th>Actual</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Conservation</td>
<td>Energy Usage Index (BTU/SF)</td>
<td>- 5%</td>
<td>- 5% YTD</td>
<td>At Goal</td>
</tr>
<tr>
<td>Waste Reduction</td>
<td>Waste to Landfill</td>
<td>- 3%</td>
<td>-1% YTD</td>
<td>Improving</td>
</tr>
<tr>
<td>Recapitalization</td>
<td>R&amp;R* Capital Encumber Rate</td>
<td>3 Years</td>
<td>4 Years</td>
<td>Improving</td>
</tr>
<tr>
<td>Utilities Management</td>
<td>Recapitalization Rate</td>
<td>33 Years</td>
<td>112 Years</td>
<td>Improving</td>
</tr>
<tr>
<td>Preventive Maintenance</td>
<td>Percent on time completion</td>
<td>100%</td>
<td>76%</td>
<td>Improving</td>
</tr>
<tr>
<td>Service Request Completion</td>
<td>Closed within 30 Days</td>
<td>&gt;75%</td>
<td>72%</td>
<td>Improving</td>
</tr>
<tr>
<td>Technician Productivity</td>
<td>Wrench Time</td>
<td>60%</td>
<td>43%</td>
<td>Improving</td>
</tr>
<tr>
<td>Operating Budget Execution</td>
<td>Variance to Budget</td>
<td>+/- 1%</td>
<td>+4.5% YTD</td>
<td>Declining</td>
</tr>
<tr>
<td>Utility Budget Execution</td>
<td>Variance to Budget</td>
<td>+/- 5%</td>
<td>-3.5% YTD</td>
<td>At Goal</td>
</tr>
<tr>
<td>Local Resident Employment</td>
<td>Compliant Contracts</td>
<td>95%</td>
<td>78%</td>
<td>Declining</td>
</tr>
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*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.*
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<tbody>
<tr>
<td>MBE/FBE** Use</td>
<td>Compliant Contracts</td>
<td>95%</td>
<td>100%</td>
<td>At Goal</td>
</tr>
<tr>
<td>Inlease/Outlease Management</td>
<td>Review Time</td>
<td>&lt;10 Days</td>
<td>0 Days</td>
<td>At Goal</td>
</tr>
<tr>
<td>Move Inspection Execution</td>
<td>Service Rating</td>
<td>&gt;90%</td>
<td>100%</td>
<td>At Goal</td>
</tr>
<tr>
<td>Digitization</td>
<td>Scanned Documents per Month</td>
<td>&gt;800</td>
<td>1,625</td>
<td>At Goal</td>
</tr>
<tr>
<td>Planning Data Access</td>
<td>Request Fulfillment Time</td>
<td>&lt;1 Day</td>
<td>0.25 Days</td>
<td>At Goal</td>
</tr>
<tr>
<td>Planning Data Accuracy</td>
<td>Data Deficiencies</td>
<td>78,000 sf</td>
<td>97,645 SF</td>
<td>At Goal</td>
</tr>
<tr>
<td>Injury Management</td>
<td>Annual OSHA Injuries</td>
<td>&lt;8/year</td>
<td>3 YTD</td>
<td>At Goal</td>
</tr>
<tr>
<td>Capital Plan Execution</td>
<td>Actual at or below Budget</td>
<td>&gt;95%</td>
<td>95%</td>
<td>At Goal</td>
</tr>
<tr>
<td>Project Cash Flow</td>
<td>Actual to Plan</td>
<td>+/- 5%</td>
<td>- 13%</td>
<td>Declining</td>
</tr>
<tr>
<td>Design Quality</td>
<td>Receive Major Design Award</td>
<td>1/year</td>
<td>4 YTD</td>
<td>At Goal</td>
</tr>
</tbody>
</table>

**MBE/FBE are Minority and Female Business Enterprises**
Energy Conservation

Energy Usage Intensity (kBTU/ SF)*

- 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

- 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

- 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

% Funding Spent By Year

- FY13 ($40.5M): 100% goal
- FY14 ($45.0M): 90% percent spent
- FY15 ($25.8M): 70% percent spent
- FY16 ($50.4M): 40% percent spent
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 (PM) 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
Service Request (SR) Completion

*(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: Ranee 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:** Ranee 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
• 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
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

- **2015**: 18 Injuries
- **2016**: 3 Injuries

- 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 = 310 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)