Facilities Management

FM Key Performance Indicators

Northwestern
March 15, 2017
## Facilities Management Key Volume Indicators

<table>
<thead>
<tr>
<th>Key Volume</th>
<th>FM</th>
<th>Change</th>
<th>Evanston</th>
<th>Chicago</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time Equivalent (FTE)</td>
<td>339</td>
<td>+2</td>
<td>277</td>
<td>62</td>
</tr>
<tr>
<td>Acres</td>
<td>296</td>
<td>0</td>
<td>281</td>
<td>15</td>
</tr>
<tr>
<td>Buildings</td>
<td>213</td>
<td>0</td>
<td>200</td>
<td>13</td>
</tr>
<tr>
<td>Square Feet</td>
<td>12.4M</td>
<td>0</td>
<td>9.9M</td>
<td>2.5M</td>
</tr>
<tr>
<td>Number of Open Projects</td>
<td>79</td>
<td>-3</td>
<td>69</td>
<td>10</td>
</tr>
<tr>
<td>Design</td>
<td>23</td>
<td>+1</td>
<td>19</td>
<td>4</td>
</tr>
<tr>
<td>Construction</td>
<td>24</td>
<td>+1</td>
<td>22</td>
<td>2</td>
</tr>
<tr>
<td>Punchlist</td>
<td>5</td>
<td>-2</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Closeout</td>
<td>27</td>
<td>-3</td>
<td>22</td>
<td>5</td>
</tr>
<tr>
<td>Value of Open Projects</td>
<td>$2.1B</td>
<td>-$0.1B</td>
<td>$1.6B</td>
<td>$0.5B</td>
</tr>
<tr>
<td>Design</td>
<td>$0.5B</td>
<td>$0.0B</td>
<td>$0.4B</td>
<td>$0.1B</td>
</tr>
<tr>
<td>Construction</td>
<td>$1.1B</td>
<td>$0.0B</td>
<td>$0.6B</td>
<td>$0.5B</td>
</tr>
<tr>
<td>Punchlist</td>
<td>$0.3B</td>
<td>$0.0B</td>
<td>$301.3M</td>
<td>$13.5M</td>
</tr>
<tr>
<td>Closeout</td>
<td>$0.3B</td>
<td>-$0.1B</td>
<td>$309.9M</td>
<td>$7.8M</td>
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<tr>
<td>Work Orders Per Reporting Month</td>
<td>6,031</td>
<td>+1.6%</td>
<td>4,556</td>
<td>1,475</td>
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<tr>
<td>Work Orders Per Rolling 12 Months</td>
<td>72,376</td>
<td>+1.6%</td>
<td>54,669</td>
<td>17,707</td>
</tr>
<tr>
<td>Operations and Maintenance</td>
<td>$57M</td>
<td>0</td>
<td>$41M</td>
<td>$16M</td>
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</tbody>
</table>
## Key Performance Indicators

<table>
<thead>
<tr>
<th>Slide #</th>
<th>KPI Description</th>
<th>Annual Goal</th>
<th>Feb-17 Goal</th>
<th>Actual</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>SD1. Service Request Closure</td>
<td>85%</td>
<td>85%</td>
<td>× 81%</td>
<td>12%</td>
</tr>
<tr>
<td>4</td>
<td>SD2. Preventative Maintenance Closure</td>
<td>95%</td>
<td>95%</td>
<td>× 91%</td>
<td>-3%</td>
</tr>
<tr>
<td>5</td>
<td>SD3. Rework</td>
<td>&lt;10%</td>
<td>&lt;10%</td>
<td>× 12%</td>
<td>-3%</td>
</tr>
<tr>
<td>6</td>
<td>SD4. Proactivity: FM-Identified Work Orders</td>
<td>25%</td>
<td>25%</td>
<td>32%</td>
<td>4%</td>
</tr>
<tr>
<td>7</td>
<td>LO1. Common Space Program</td>
<td>5%</td>
<td>0.4%</td>
<td>0.7%</td>
<td>0.3%</td>
</tr>
<tr>
<td>8</td>
<td>LO2. Facilities Connect Implementation</td>
<td>100%</td>
<td>8%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>9</td>
<td>LO3. Engagement: Sustainability Outreach</td>
<td>12%</td>
<td>1%</td>
<td>-1%</td>
<td>-3%</td>
</tr>
<tr>
<td>10</td>
<td>CE1. Energy Use Intensity (kBtu/SF)</td>
<td>-5%</td>
<td>-5%</td>
<td>-5.0%</td>
<td>-6%</td>
</tr>
<tr>
<td>11</td>
<td>CE2. Recordable Injury Incident Rate</td>
<td>5.60</td>
<td>6.30</td>
<td>4.14</td>
<td>0.58</td>
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<tr>
<td>12</td>
<td>CE3. Injury-Related Lost Workday Rate</td>
<td>2.70</td>
<td>2.70</td>
<td>2.37</td>
<td>-0.48</td>
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<tr>
<td>13</td>
<td>CE4. Waste Diversion Rate</td>
<td>38%</td>
<td>38%</td>
<td>32%</td>
<td>-6%</td>
</tr>
<tr>
<td>14</td>
<td>CE5. Overtime</td>
<td>10%</td>
<td>15%</td>
<td>12%</td>
<td>-3%</td>
</tr>
<tr>
<td>15</td>
<td>CE6. Minority, Female and Local Business Enterprise Use</td>
<td>15%</td>
<td>15%</td>
<td>13%</td>
<td>-5%</td>
</tr>
<tr>
<td>16</td>
<td>CE7. Evanston Resident Employment</td>
<td>5%</td>
<td>5%</td>
<td>-2%</td>
<td>-2%</td>
</tr>
<tr>
<td>17</td>
<td>F1. Capital Project Cash Flow Execution</td>
<td>+/-2%</td>
<td>+/-2%</td>
<td>-8%</td>
<td>1%</td>
</tr>
<tr>
<td>18</td>
<td>F2. Operating Budget Execution</td>
<td>+/-1%</td>
<td>+/-1%</td>
<td>-1%</td>
<td>1%</td>
</tr>
<tr>
<td>19</td>
<td>F3. Utility Commodity Budget Execution</td>
<td>+/-5%</td>
<td>+/-5%</td>
<td>-1%</td>
<td>-1%</td>
</tr>
</tbody>
</table>
SD1. Service Request Closure

- KPI goal is to close 85% of service work orders within 30 days (excluding project-related work orders)
- Factors: 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
• 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
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
- f(perceived newsletter quality and value to subscribers, readers interest)
- Initiatives: actively promote newsletter; assess readers interest; increase relevance to readers
- FM Leader: Kathia Benitez
• 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

Number of Injuries

- February: 2
- YTD: 7
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
- KPI means: 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
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
- **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

![Construction Contract Awarded (%)](chart)

- **Construction Contract Awarded (%)**
- **Construction Contract Awarded (%) Target**
CE7. Evanston Resident Employment

- KPI goal is 5% of total construction labor hours on qualifying campus projects greater than $1,000,000
- \( f(\text{project qualification, labor market, demand for labor hours, City of Evanston partnership, qualifying Contractor participation}) \)
- 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
- (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