

# Facilities Management

FM Key Performance Indicators

Northwestern

May 13, 2016

# Key Performance Indicators

Process/Function	KPI	Goal	Actual	Trend
Energy Conservation	Energy Usage Index (BTU/SF)	- 5%	- 5% YTD	At Goal
Waste Reduction	Waste to Landfill	- 3%	-1% YTD	Improving
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%	76%	Improving
Service Request Completion	Closed within 30 Days	>75%	72%	Improving
Technician Productivity	Wrench Time	60%	43%	Improving
Operating Budget Execution	Variance to Budget	+/- 1%	+4.5% YTD	Declining
Utility Budget Execution	Variance to Budget	+/- 5%	-3.5% YTD	At Goal
Local Resident Employment	Compliant Contracts	95%	78%	Declining

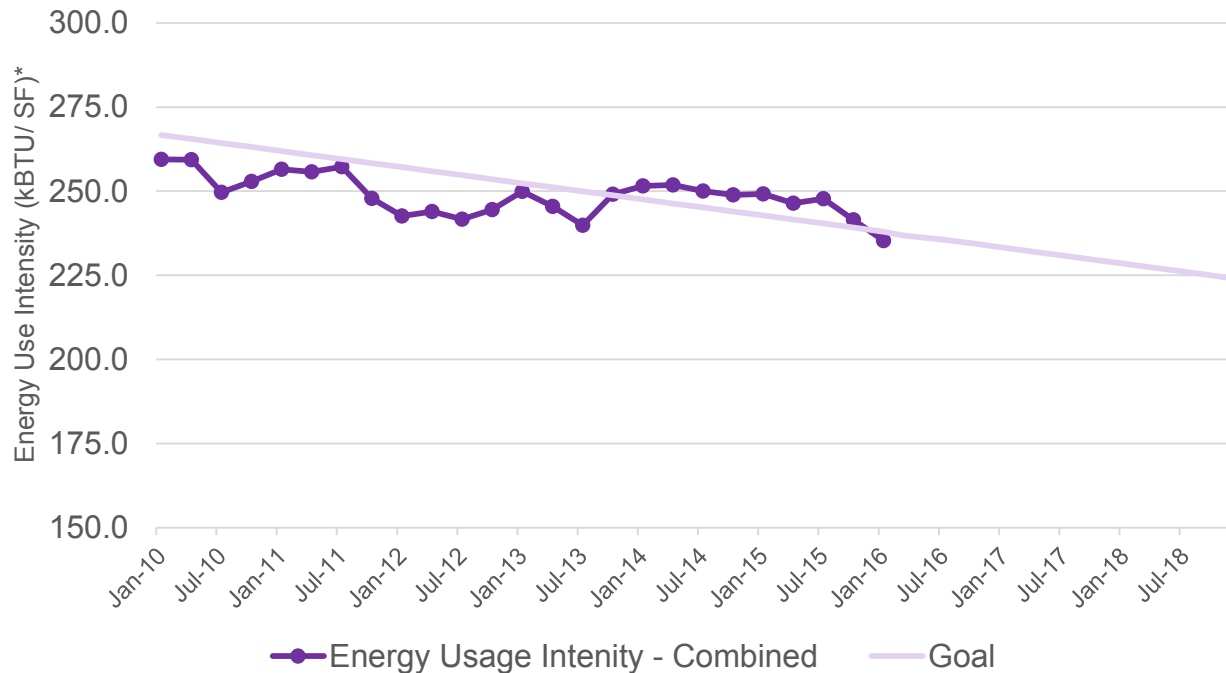
\*R&R is Renewal and Replacement, an annual capital allocation applied to buildings, grounds and installed equipment to extend the service life of Northwestern facilities.

Process/Function	KPI	Goal	Actual	Trend
MBE/FBE** Use	Compliant Contracts	95%	100%	At Goal
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	1,625	At Goal
Planning Data Access	Request Fulfillment Time	<1 Day	0.25 Days	At Goal
Planning Data Accuracy	Data Deficiencies	78,000 sf	97,645 SF	At Goal
Injury Management	Annual OSHA Injuries	<8/year	3 YTD	At Goal
Capital Plan Execution	Actual at or below Budget	>95%	95%	At Goal
Project Cash Flow	Actual to Plan	+/- 5%	- 13%	Declining
Design Quality	Receive Major Design Award	1/year	4 YTD	At Goal

\*\*MBE/FBE are Minority and Female Business Enterprises

# Energy Conservation

Energy Usage Intensity (kBTU/ SF)\*



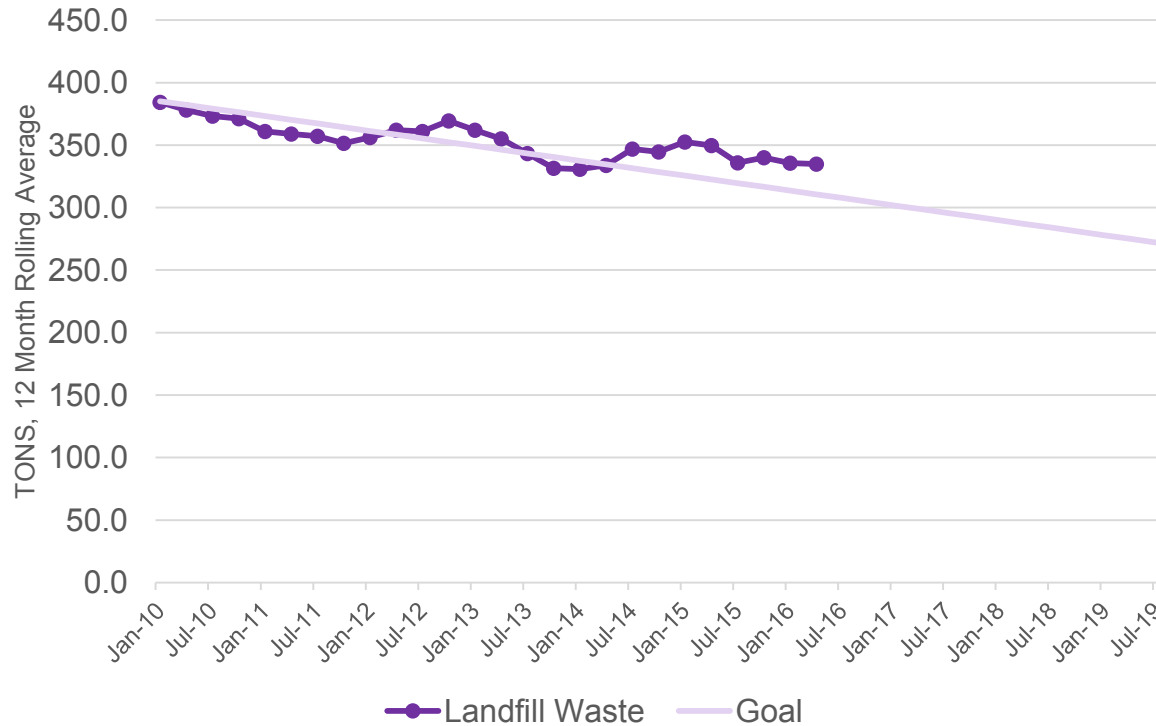
Campus	% Reduction (2010 Baseline)
Evanston	-9%
Chicago	-18%
<b>Combined</b>	<b>-13%</b>

- **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

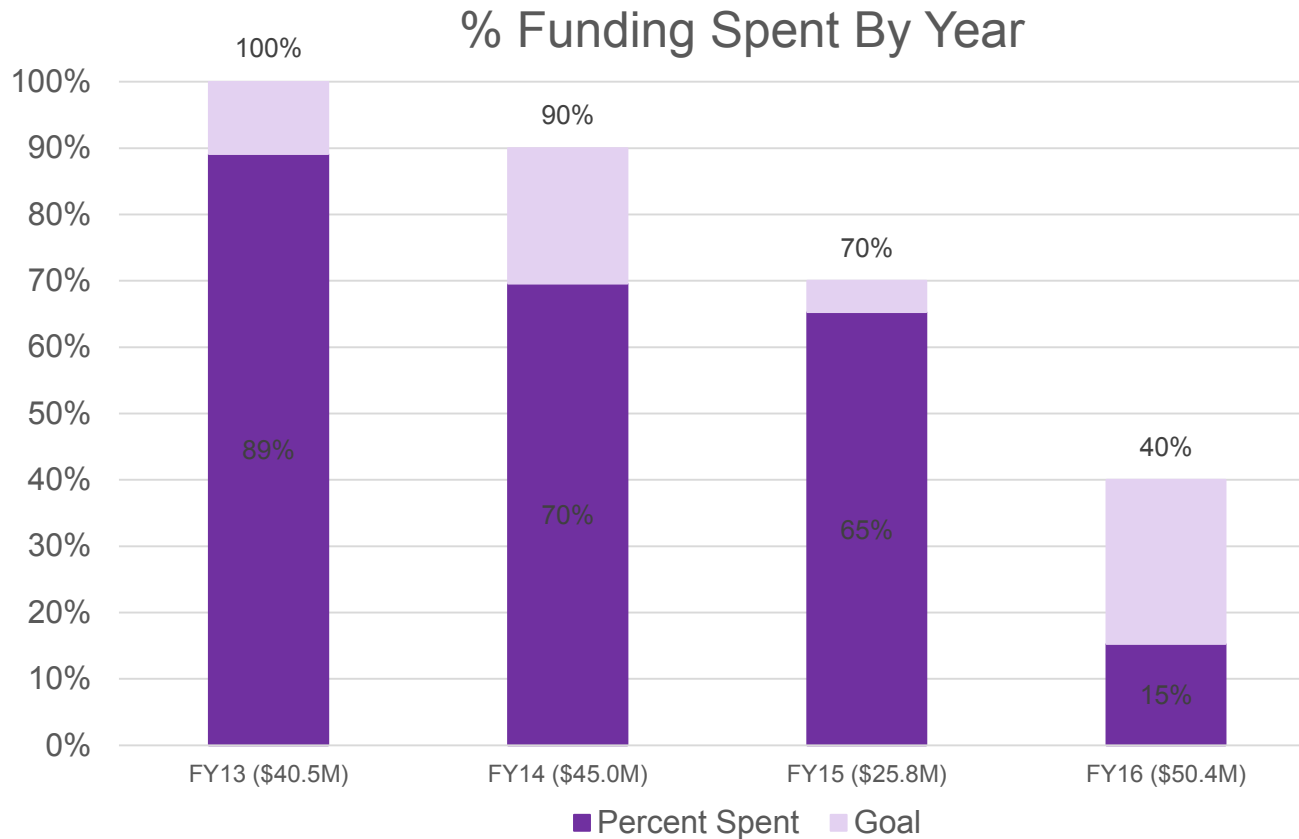


Campus	Trash % Reduction (2009 Baseline)
Evanston	-11%
Chicago	-18%
<b>Combined</b>	<b>-13%</b>

Campus	Recycling % Increase (2009 Baseline)
Evanston	21%
Chicago	4%
<b>Combined</b>	<b>17%</b>

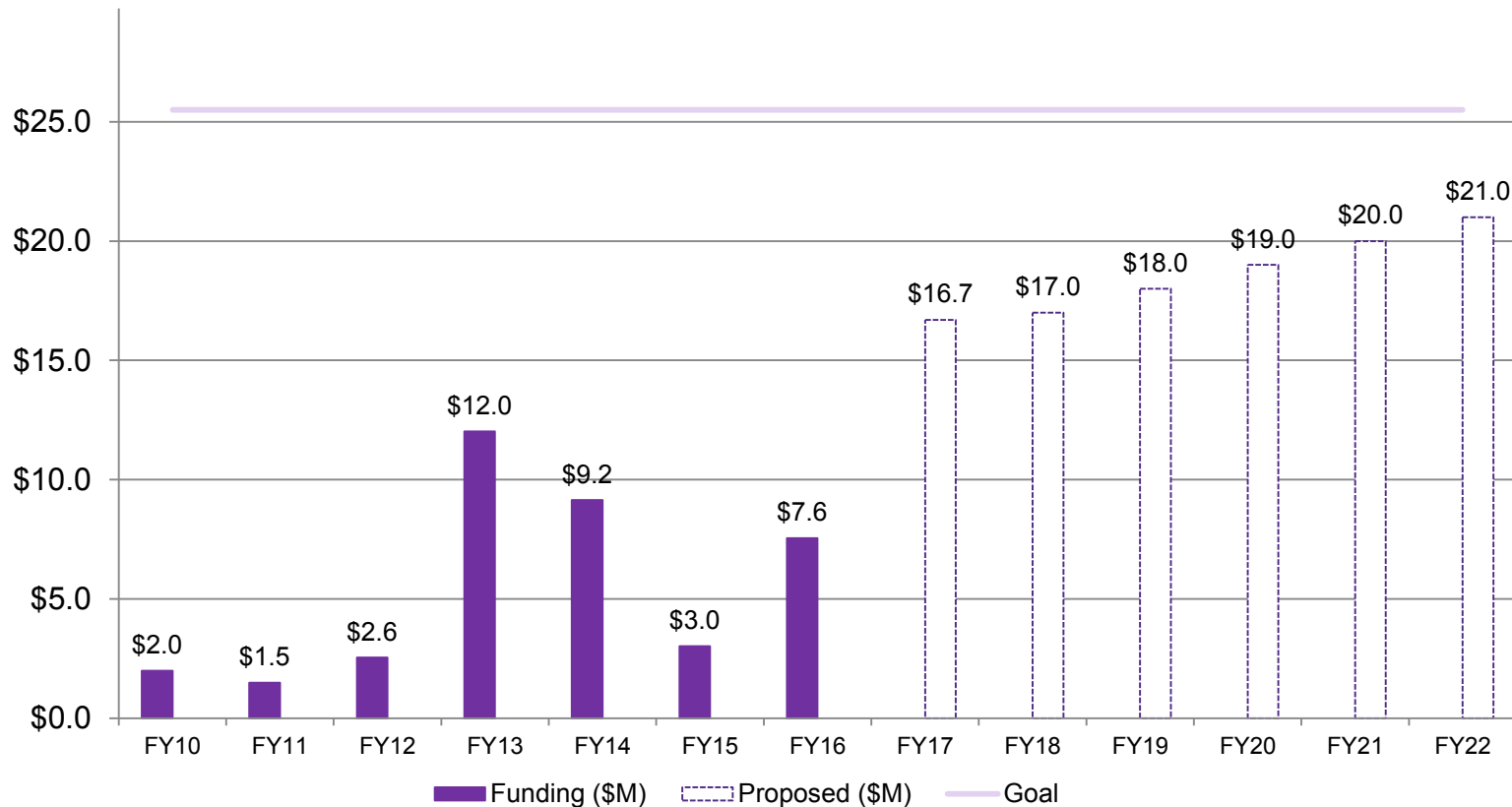
- f(purchasing, reuse, recycling, diversion, occupant behavior)
- **KPI goal is 30% reduction in waste to landfill by 2020 over 2009 baseline (3% reduction in 2016)**
- **Initiatives: Improve reuse programs; single-stream recycling; bin location; engagement and education**
- **FM Leader: Julie Cahillane**

# Recapitalization



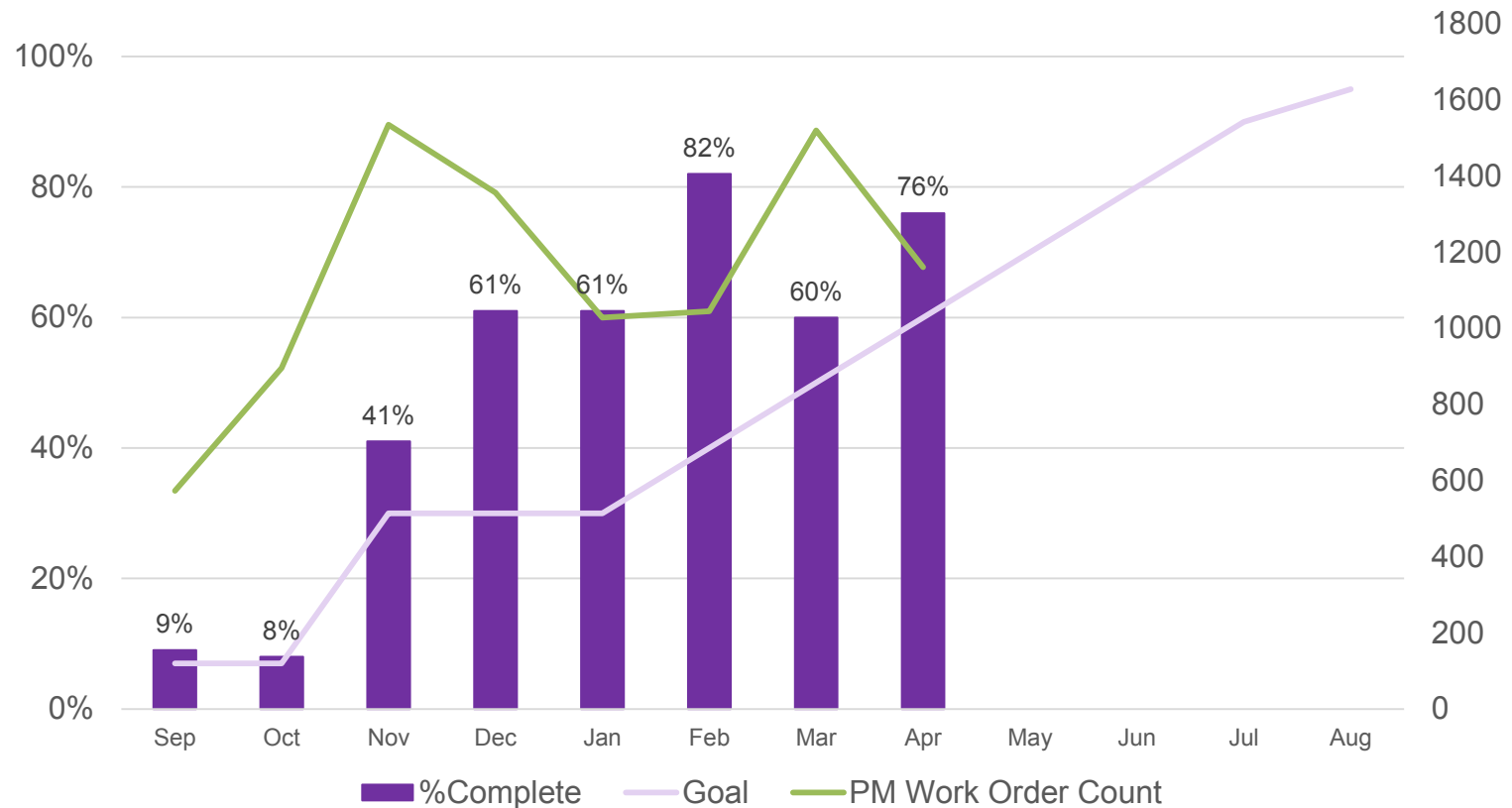
- **KPI goal is 100% of R&R funding spent within 4 Years of issue date**
- **f(staffing, contracting, space/system access, permitting)**
- **Initiatives: Early Design; Early Permitting; Indefinite Delivery, Indefinite Quantity (IDIQ) Contract Vehicles**
- **FM Leader: Gary Wojtowicz**

# 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 (PM) Completion

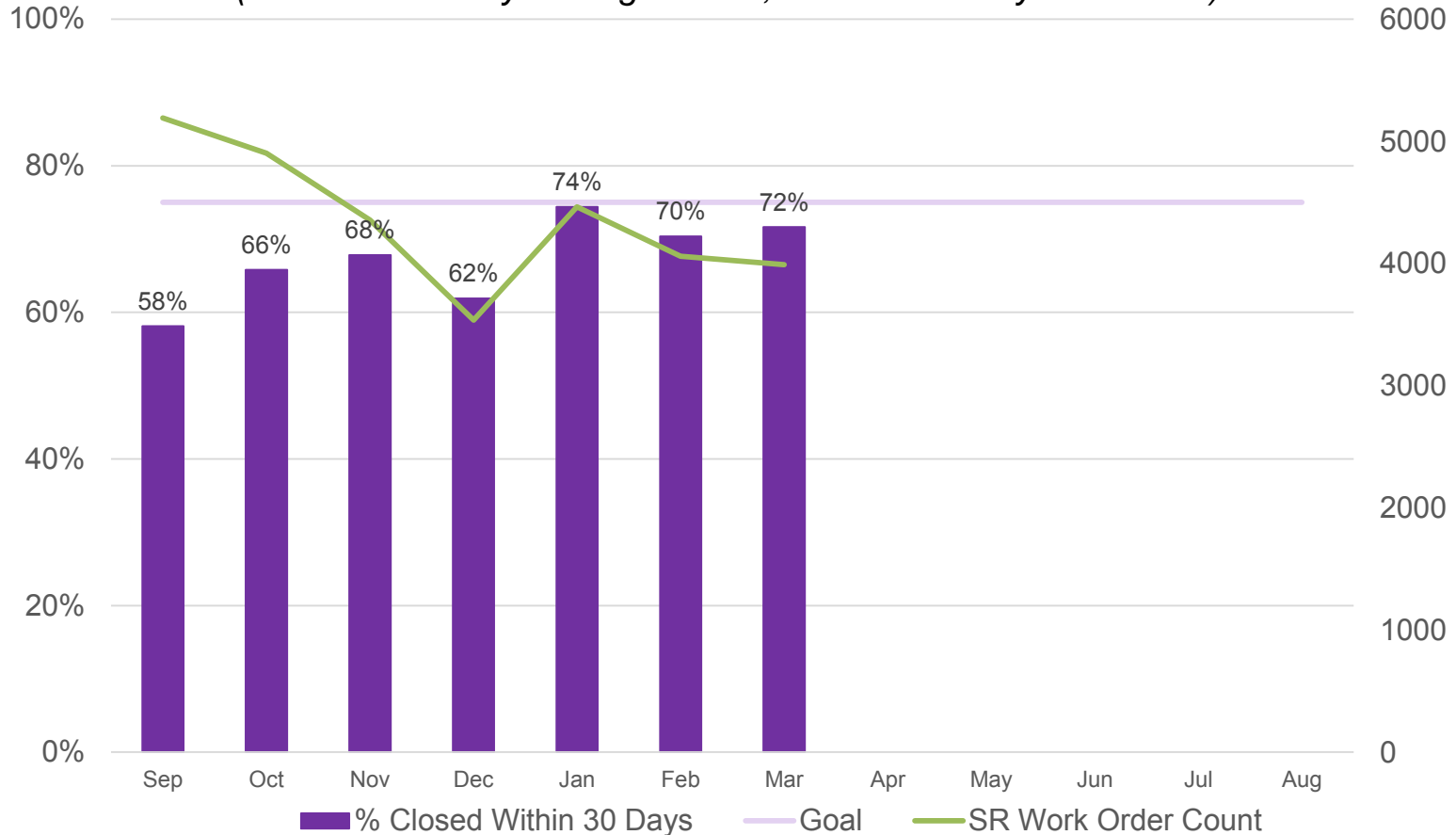


- **KPI goal is 95% completion of PM work orders within 30 days of scheduling**
- **f(staffing, funding, CMMS functionality, shut-down feasibility)**
- **Initiatives: Nov'15 EVENG PM restart, improve workflow with FAMIS mobile app, planning, scheduling, and real-time monitoring of work by RE, schedule adjustment**
- **FM Leader: Gary Wojtowicz**



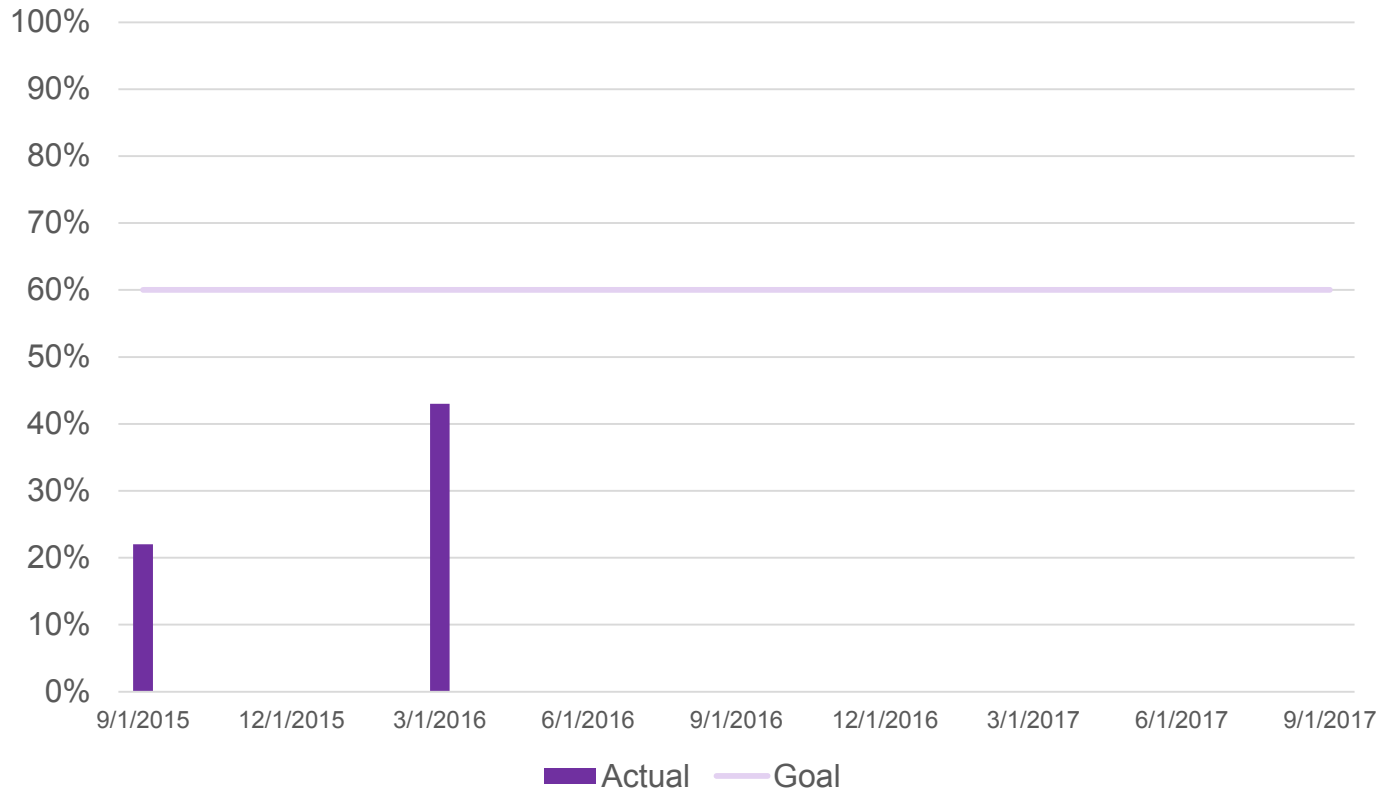
# Service Request (SR) Completion

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



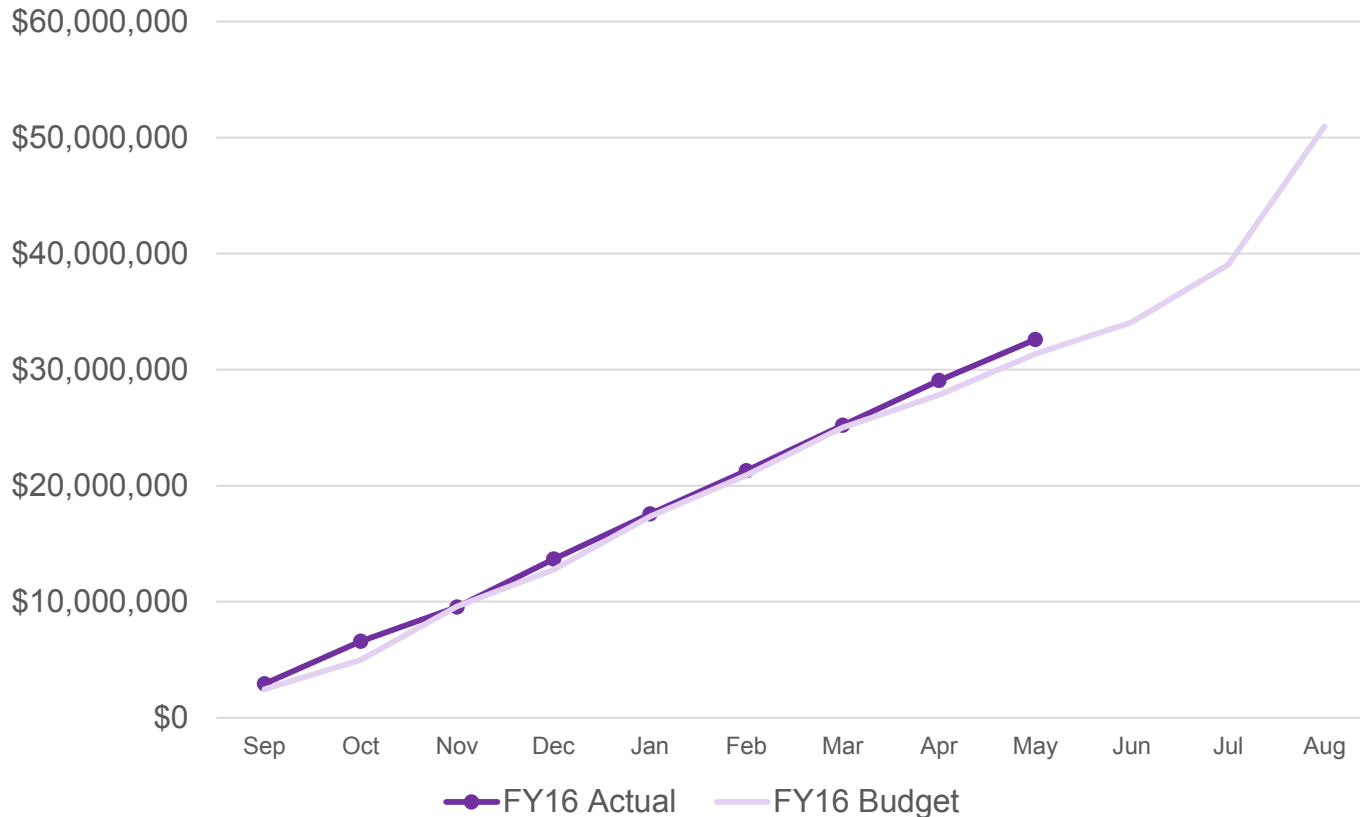
- **KPI goal is 75% closed within 30 days**
- **f(staffing, planning and scheduling, space/system access, close out procedures)**
- **Initiatives: FAMIS mobile app, revise close out procedures, real-time monitoring of closing rates**
- **FM Leader: Gary Wojtowicz**

# Technician Productivity



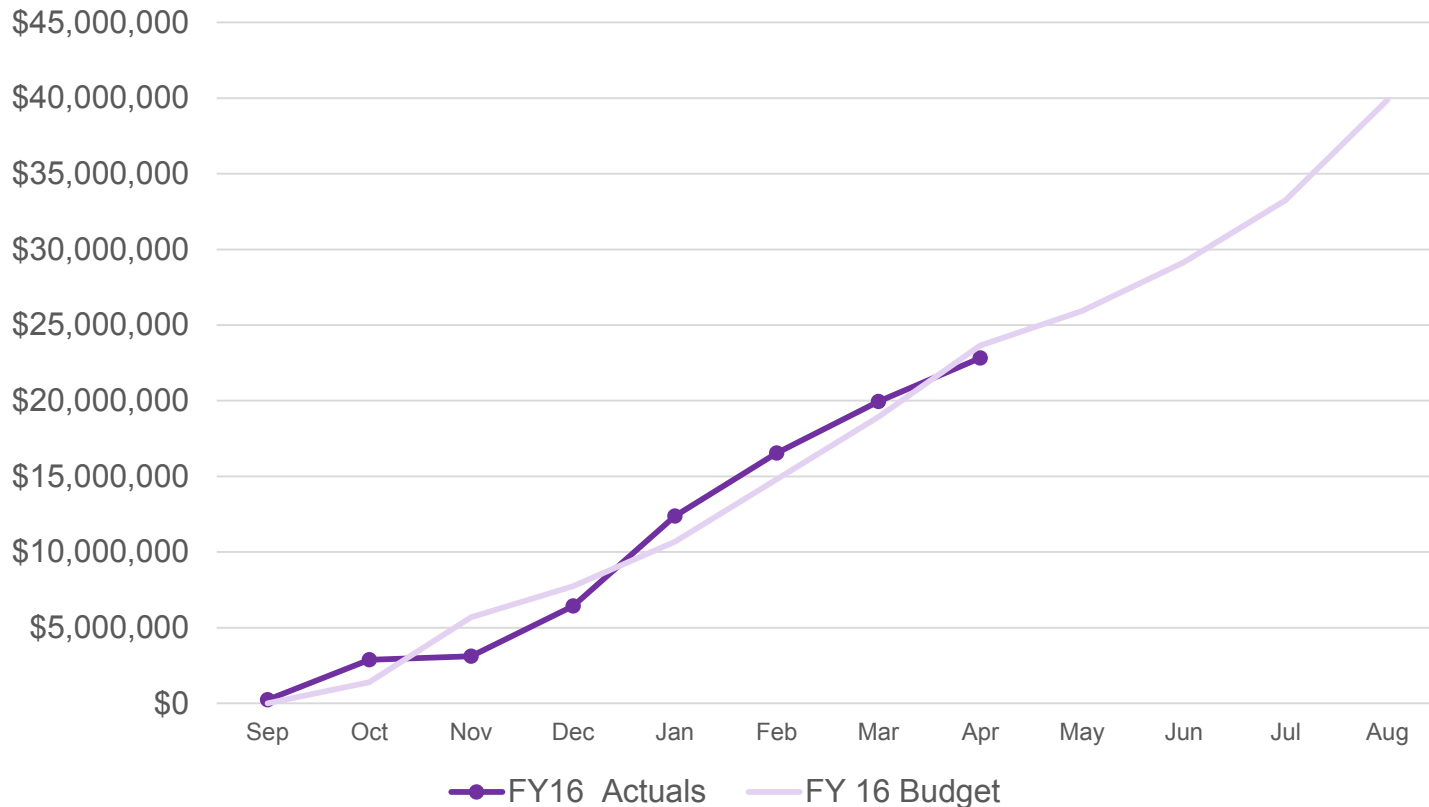
- **KPI goal is 60% labor efficiency in four years**
- **f(staffing, contracting, space/system access, funding, allowance to plan and schedule work)**
- **Initiatives: Improve work flow with FAMIS mobile app, quarterly time and productivity analyses, review zone maintenance practices**
- **FM Leader: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

# Monthly Operating Budget Execution



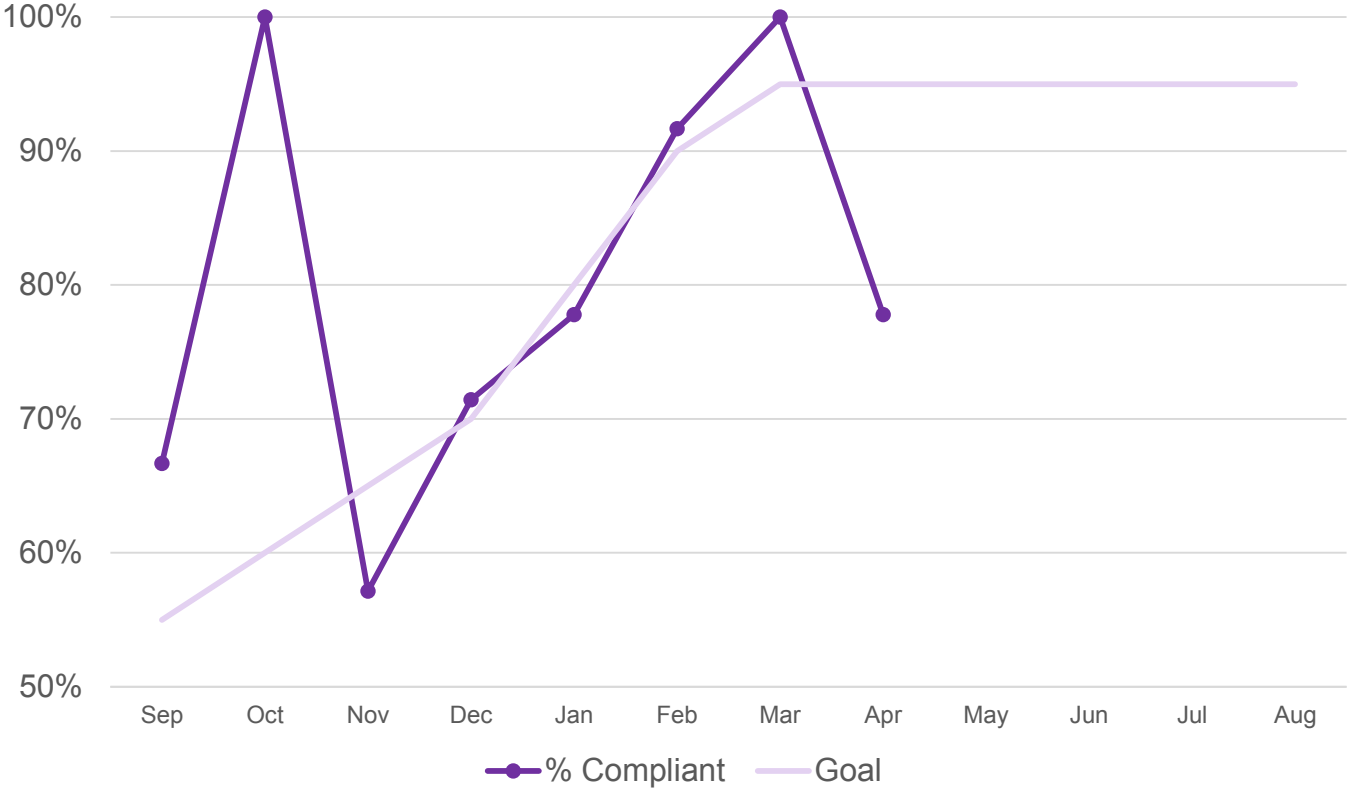
- **KPI goal is +/- 1% (historical annual trend is -4.3% to +10.9%)**
- **f(work orders, forecasting, labor, materials, sf, scheduling, planning, contractor, contracts)**
- **Initiatives: improve payment process; improve reporting; monthly variance justification**
- **FM Leader: Liz Schaps**

# 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



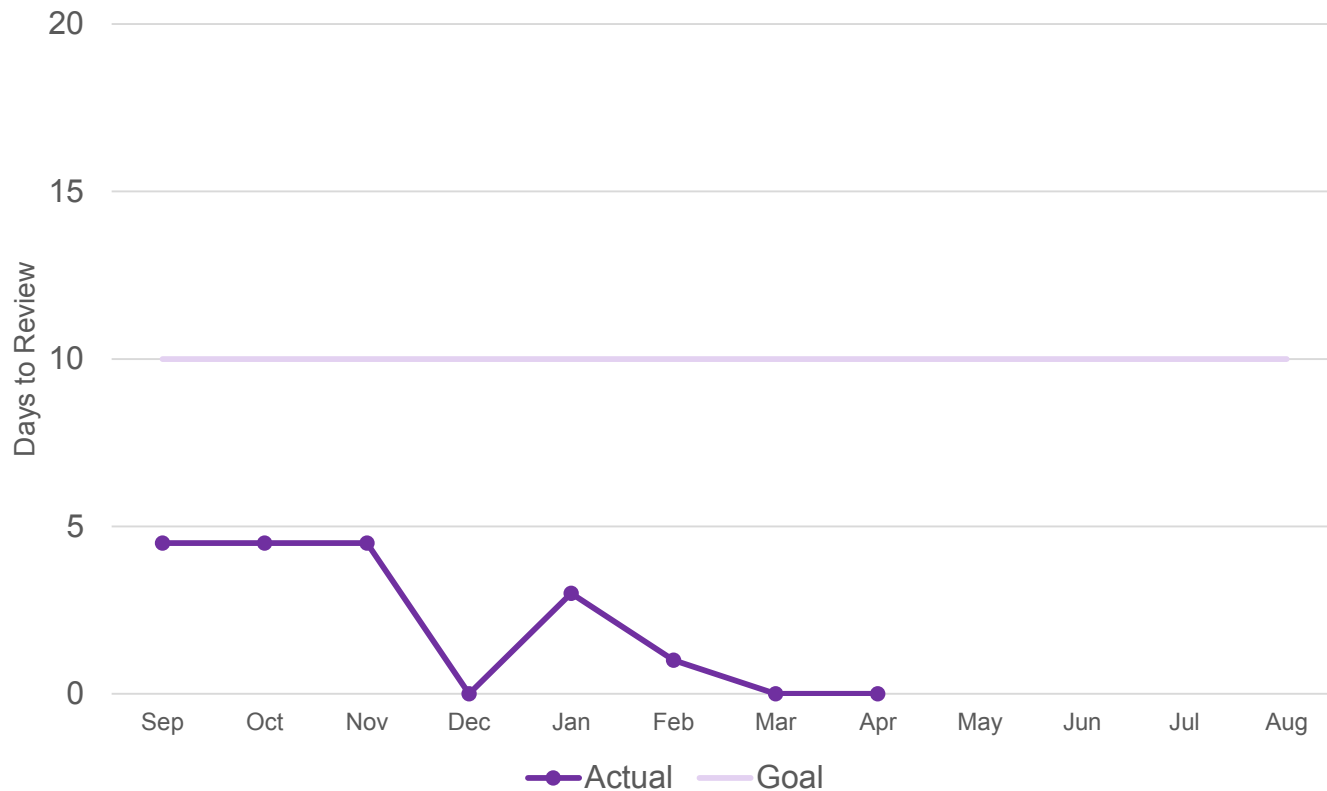
- **KPI goal is > 95% of Contracts Compliant with Policy**
- **f(contracts \$, labor market, labor hours, Evanston effort, NU/Contractor effort)**
- **Initiatives: Data collection in order to ensure improved compliance**
- **FM Leader: Liz Schaps**

# Monthly Minority and Female Business Enterprise Use



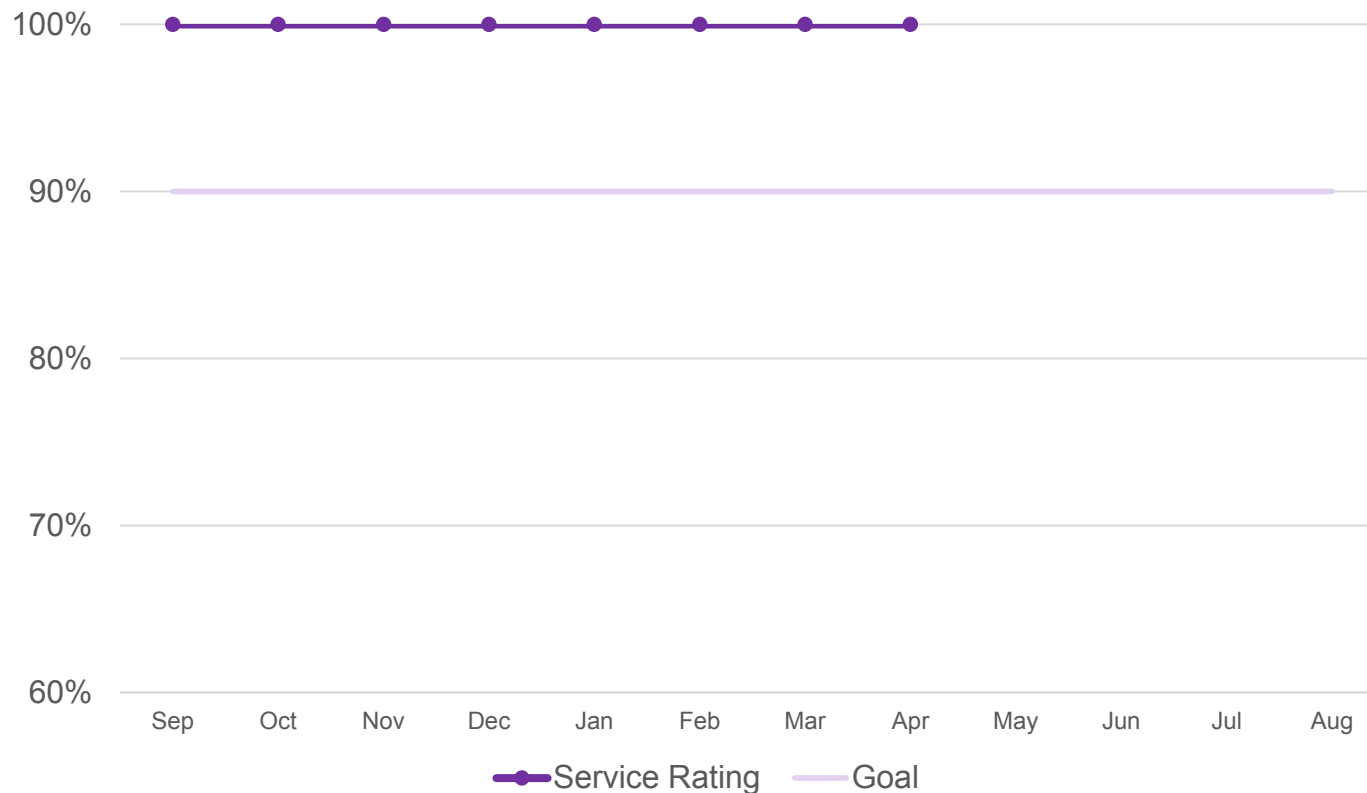
- **KPI goal is 95% of Contracts Compliant with Policy**
- **f(contracts, bids, labor market)**
- **Initiatives: TBD – new program**
- **FM Leader: Liz Schaps**

# 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: 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**

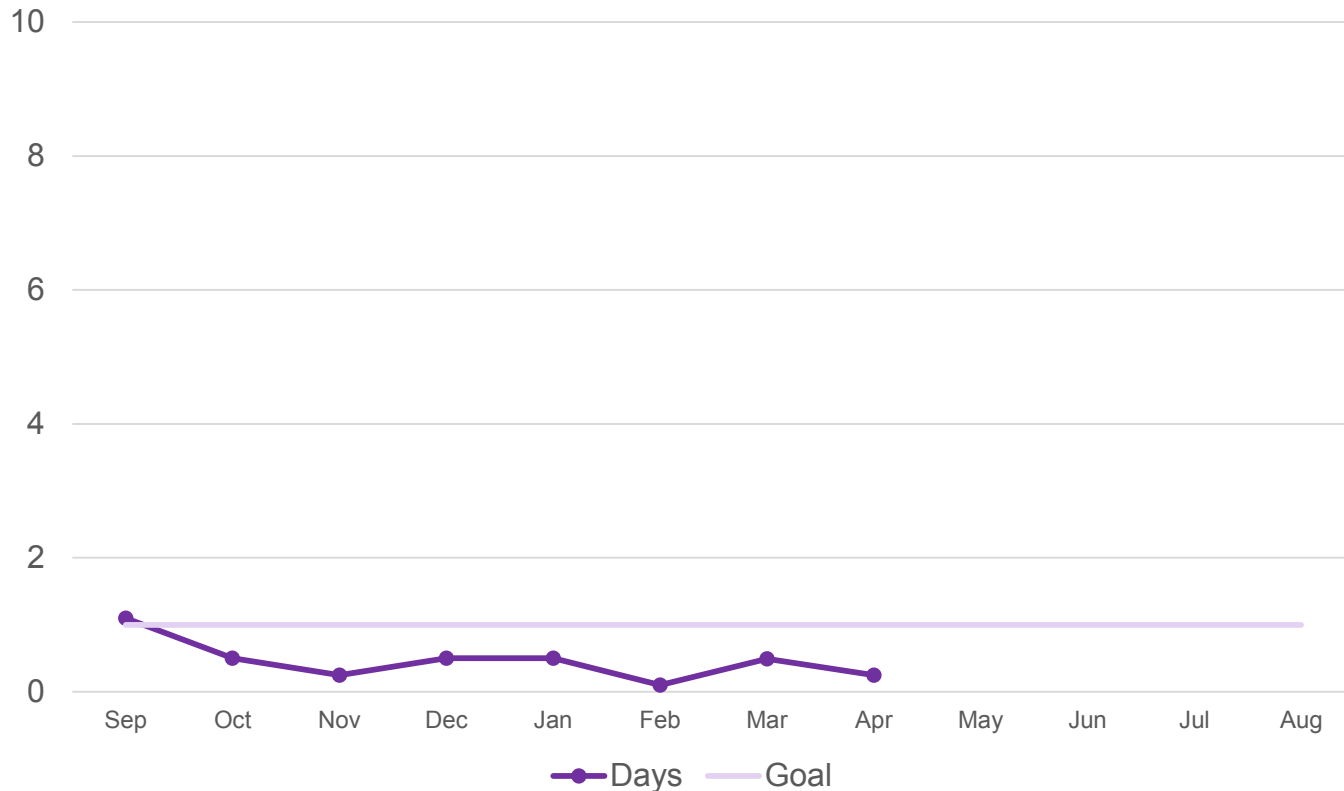


# Digitization – Number of Documents Scanned per Month



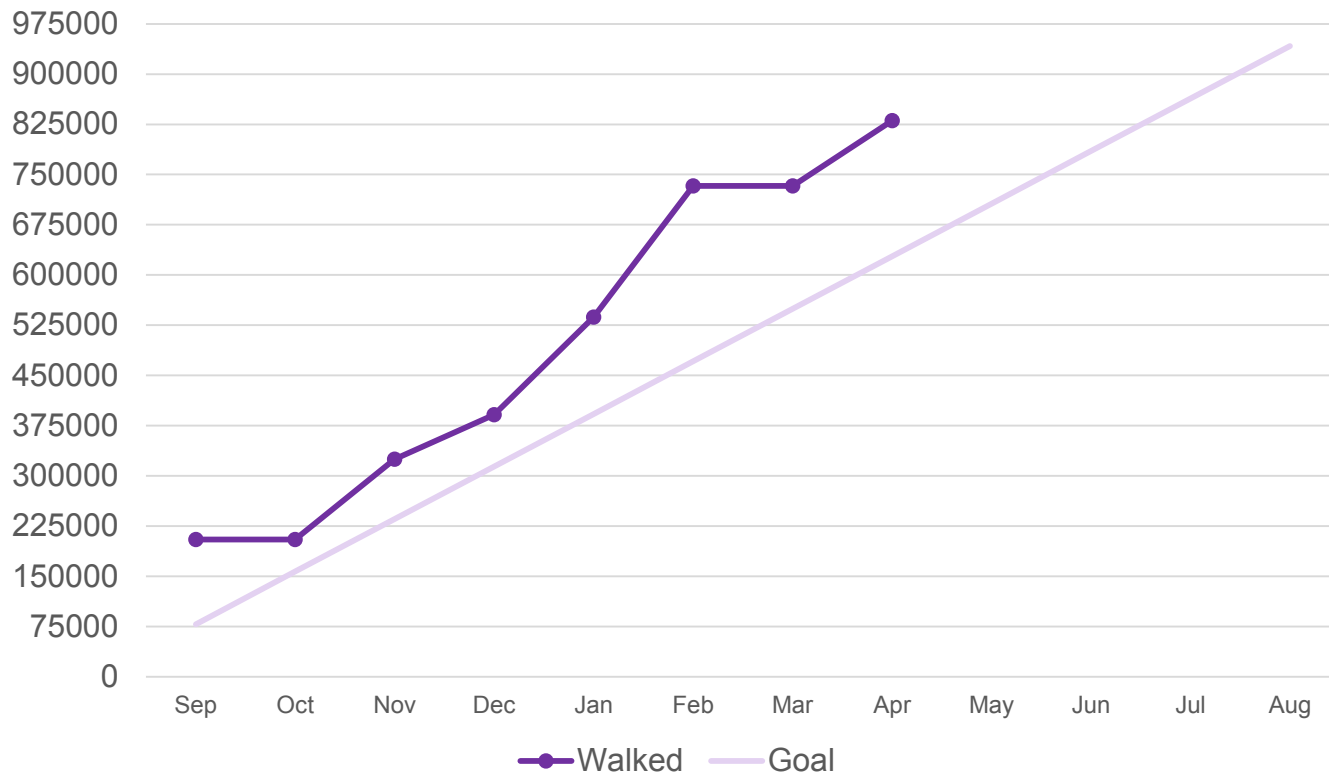
- **KPI goal is 800 documents per month.**
- **F(Number of documents scanned)**
- **Initiatives: Accessibility/Distribution of Space, Building & Campus Information**
- **FM Leader: Paul Weller**

# 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**

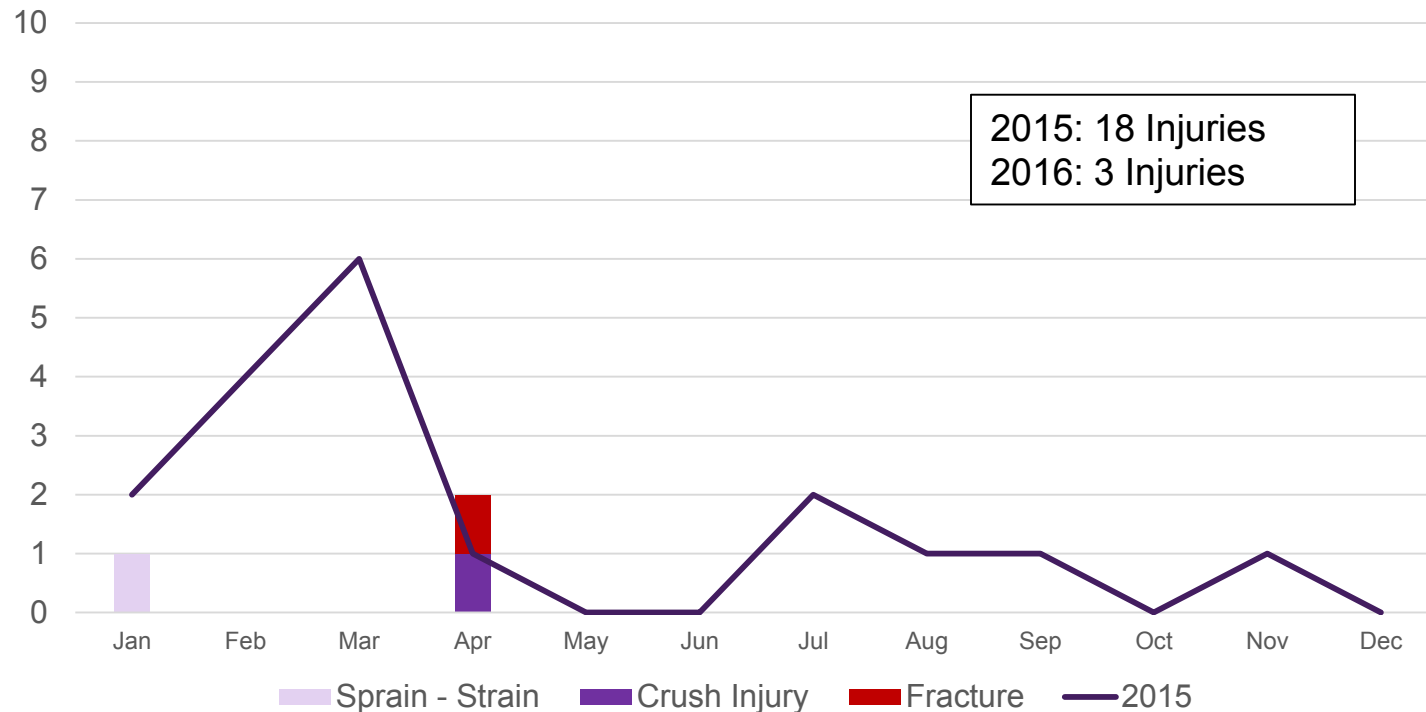
# Planning Data Accuracy – Square Footage Validated



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

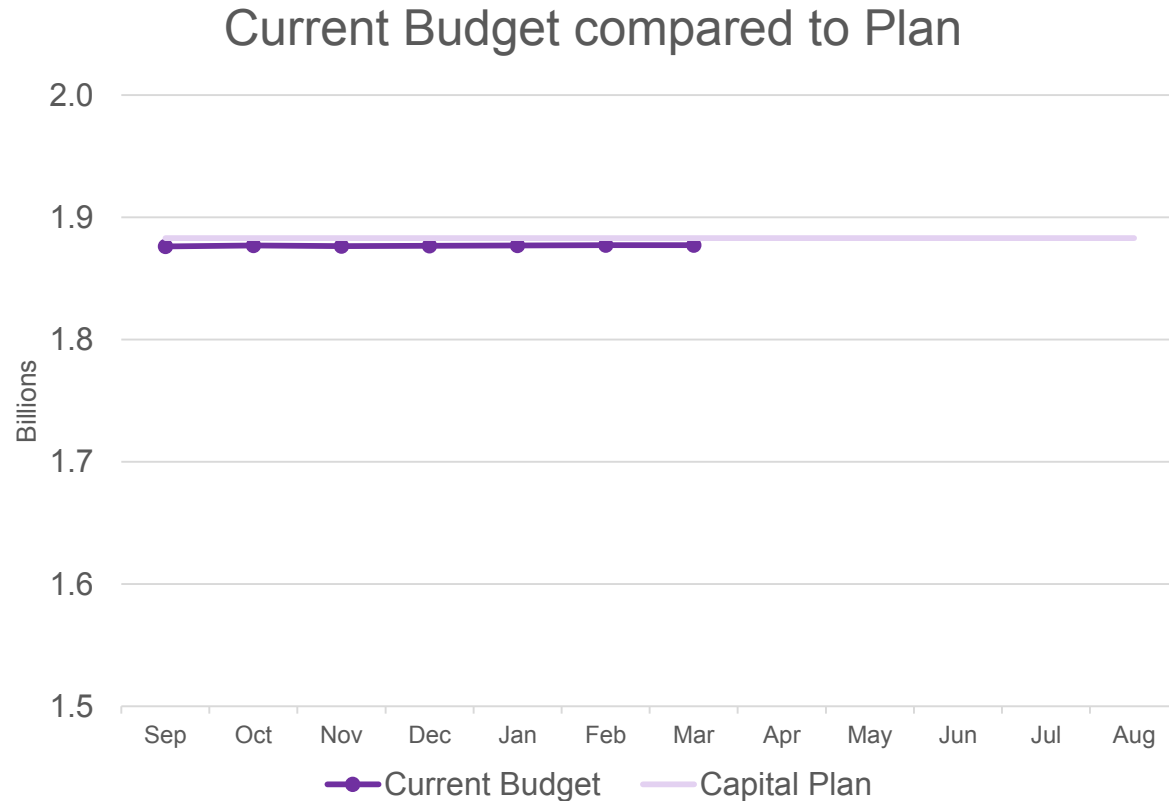
# Injury Reporting by Calendar Year

## 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**

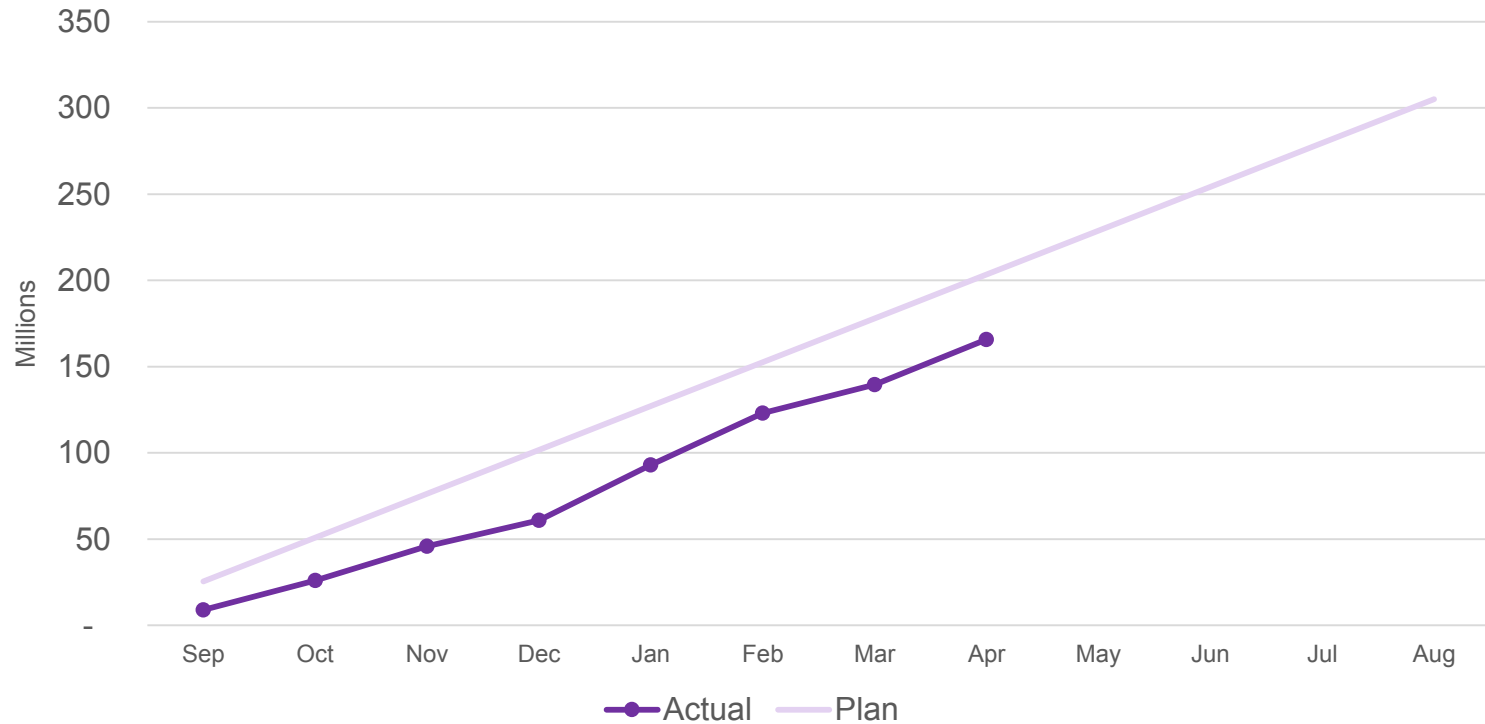
# Capital Plan Execution



- **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**

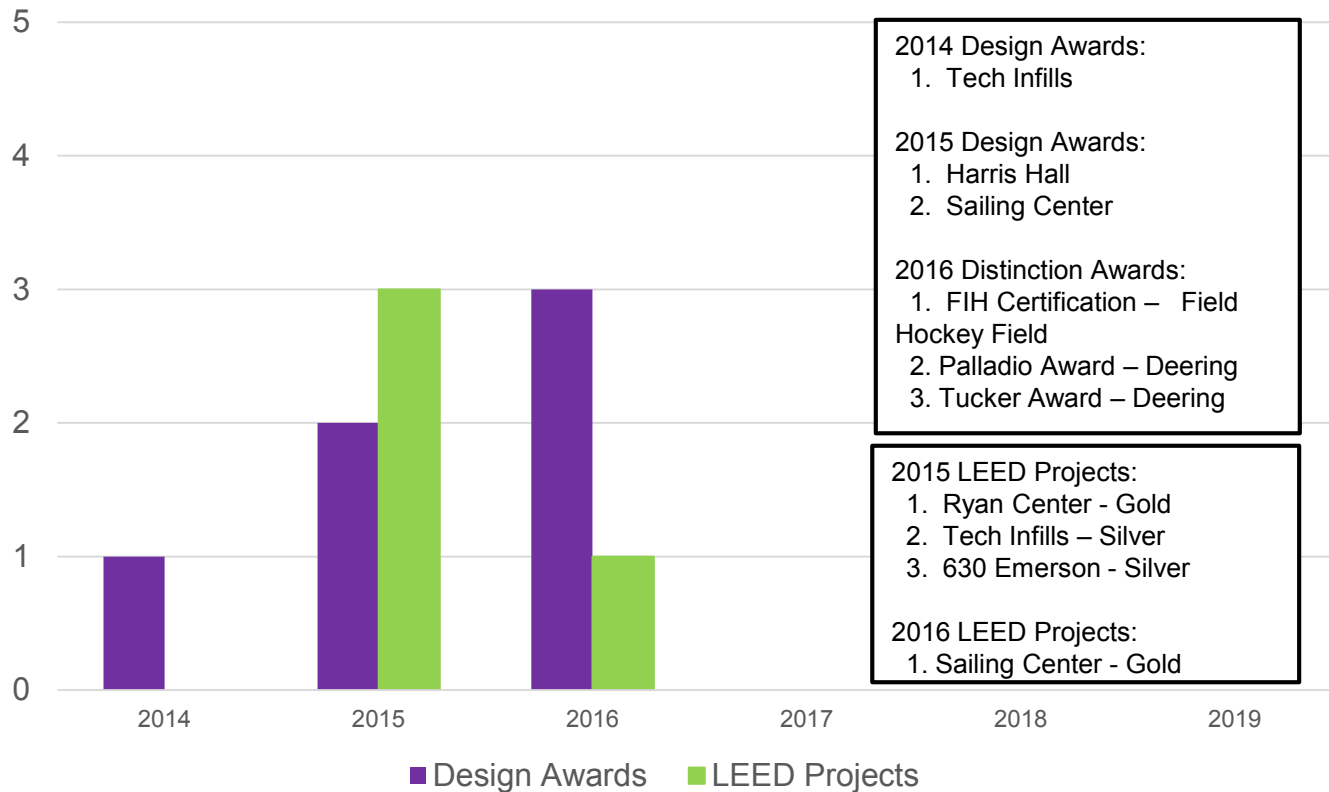
# Capital Project Cash Flow Management

## FMDC Program



- **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)