Metrics, Informatics & Performance

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AIA Continuing Education Provider

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Course Description

558: Metrics, Informatics & Performance

Modern facilities organizations are awash in a sea of data – from financial to work management, geospatial to building controls, organizations are collecting vast amounts of data. Too often, however, organizations simply use that data as a record of past outcomes rather than as a tool that supports forward-looking organizational decision making. This session will discuss how organizations can address this issue and begin to effectively use their data. Topics will include data, metrics, KPIs, benchmarking (including APPA's Facilities Performance Indicators) and APPA's newly launched initiative on Facilities Informatics.

Faculty Member: Chris Smeds

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Learning Objectives

1. Learn how to address the sea of data being collected.
2. Discuss data, metrics, KPIs, and benchmarking.
3. Discuss using the metrics collected in APPA's Facilities Performance Indicators and facilities informatics.
4. Discuss how to effectively use the data collected.

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Today we will cover

Becoming data-based decision makers

1. Transforming data into wisdom
2. Metrics & KPIs
3. Benchmarking
4. Reports, dashboards & visualizations
5. Data analytics, modeling & predictive analytics
6. Facilities informatics

Have a question or comment?

Feel free to ask or share during the presentation

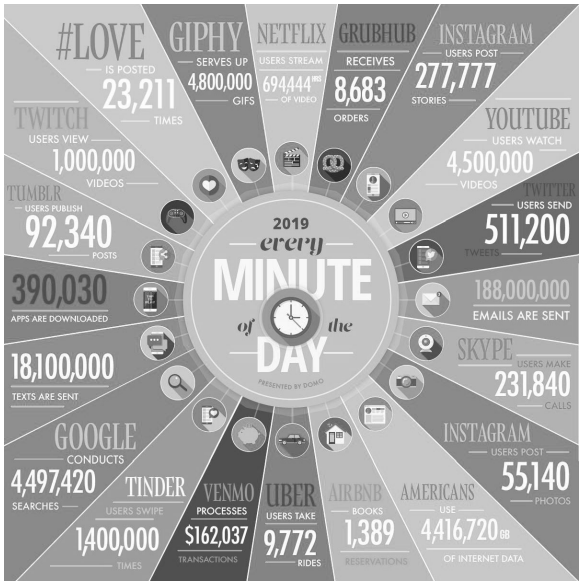
Open discussion format

1

Transforming data into wisdom

3 common data mistakes organizations make


MONEYBALL
{LESSONS FROM MONEYBALL}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OF INTERNET DATA
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PHOTOS

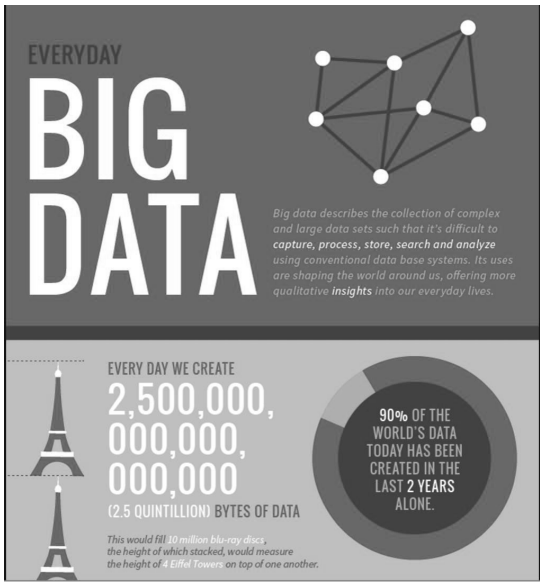

2019
BOARD
BASICS
BOARD OF VISITORS OFFICE
UNIVERSITY of VIRGINIA

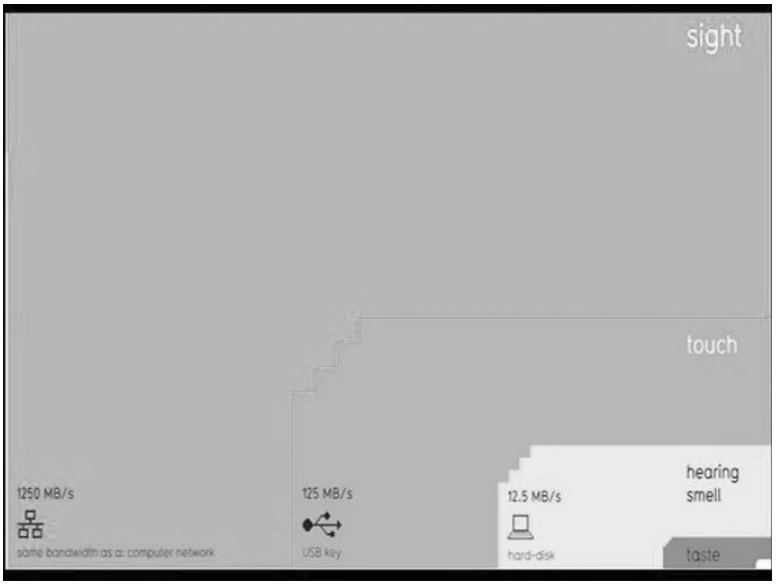
1,000,000,000 unique emails processed in 2018.

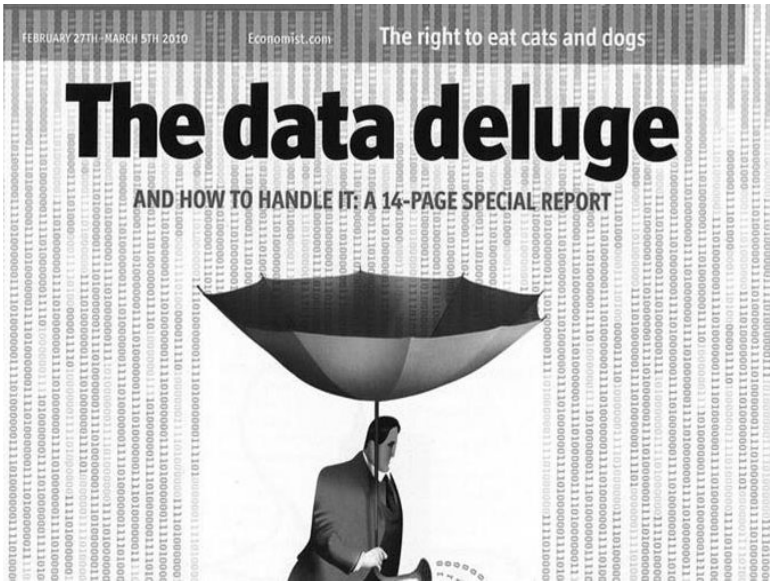
2,422,000 email messages received daily (2018 average).

1,545,000 incoming emails detected daily as spam (2018 average). (63%!!!)

12,950,900 daily attacks blocked by our intrusion protection system/ firewalls in 2018.



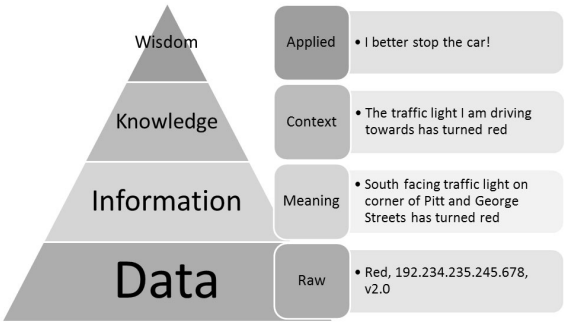




3 common data issues organizations face

- Using the wrong data/having the wrong goal (Moneyball)
- Overwhelmed by amount of data (trying to find a needle in a haystack)
- Not using the data (the ostrich)

Our goal should be to become **data-based** decision makers



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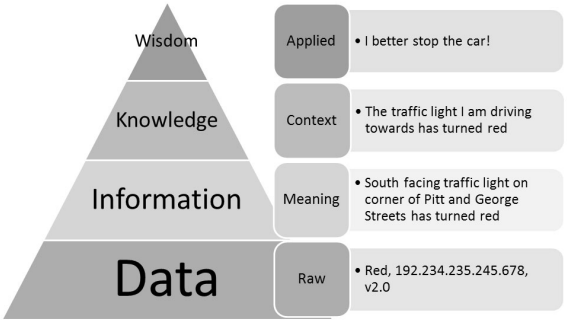
Our goal should be to become **data-informed** decision makers



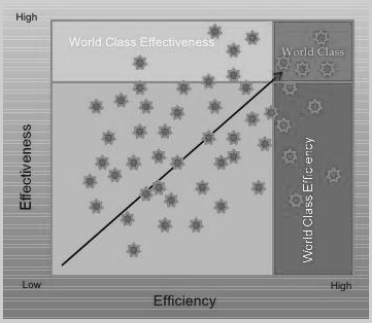
Your data foundation has to be solid

1. Sources of data
2. Completeness of data
3. Accuracy
4. Cleanliness of data (garbage in, garbage out)
5. Structure of data (e.g. work classification)
6. Granularity of data
7. Timeliness of data
8. Efficiently collecting data
9. Governance

Information & Knowledge: Focus on what matters to your organization

Organizational values set the context for how we use our data

- Know the business
- Know the goals of the organization
- Know the constraints on the organization



Understanding the context of our organizations

- Regulatory
- Industry best practices
  - APPA (www.appa.org)
  - SMRP (www.smrp.org)
  - DOE Building Performance Database (http://energy.gov/eere/buildings/analysis-tools)
  - Many others…
- Books, magazines, web content
  - APPA publications
  - Whittaker & Shouse: Achieving Excellence in Facilities Management
- Consultants
- Tribal knowledge
- Customers!

APPA's Levels of Service

Level	Maintenance	Custodial	Grounds
1	Showpiece Facility	Orderly Spotlessness	State-of-the-Art
2	Comprehensive Stewardship	Orderly Tidiness	High Level
3	Managed Care	Casual Inattention	Moderate Level
4	Reactive Management	Moderate Dinginess	Moderately Low- Level
5	Crisis Response	Unkempt Neglect	Minimum Level

APPA's Maintenance Level of Service

Level	1	2	3	4	5
Description	Showpiece Facility	Comprehensive Stewardship	Managed Care	Reactive Management	Crisis Response
Customer Service & Response Time	Able to respond to virtually any type of service, immediate response.	Response to most service needs, including non-maintenance activities, is typically in a week or less.	Services available only by reducing maintenance, with response times of one month or less.	Services available only by reducing maintenance, with response times of one year or less.	Services not available unless directed from top administration, none provided except emergencies
Customer Satisfaction	Proud of facilities, have a high level of trust for the facilities organization.	Satisfied with facilities related services, usually complimentary of facilities staff.	Accustomed to basic level of facilities care. Generally able to perform mission duties. Lack of pride in physical environment.	Generally critical of cost, responsiveness, and quality of facilities services.	Consistent customer ridicule, mistrust of facilities services.
vs. Corrective Maintenance	100%	75-100%	50-75%	25-50%	<25%
Maintenance Mix	All recommend preventive maintenance (PM) is scheduled and performed on time. Emergencies (e.g. storms or power outages) are very infrequent and are handled efficiently.	A well-developed PM program: most required PM is done at a frequency slightly less than per defined schedule. Occasional emergencies caused by pump failures, cooling system failures etc.	Reactive maintenance predominates due to systems failing to perform, especially during harsh seasonal peaks. The high number of emergencies causes reports to upper administration.	Worn-out systems require staff to be scheduled to react to systems that are performing poorly or not at all. PM work possible consists of simple tasks and is done inconsistently.	No PM performed due to more pressing problems. Reactive maintenance is a necessity due to worn-out systems. Good emergency response because of skills gained in reacting to frequent system failures.
Aesthetics, Interior	Like-new finishes.	Clean/crisp finishes.	Average finishes.	Dingy finishes.	Neglected finishes.
Aesthetics, Exterior	Windows, doors, trim, exterior walls are like new.	Watertight, good appearance of exterior cleaners.	Minor leaks and blemishes, average exterior appearance.	Somewhat drafty and leaky, rough-looking exterior, extra painting necessary.	Inoperable windows, leaky windows, unpainted, cracked panes, significant air and water penetration, poor appearance overall.
Aesthetics, Lighting	Bright and clean, attractive lighting.	Bright and clean, attractive lighting.	Small percentage of lights out, generally well lit and clean.	Numerous lights out, some missing diffusers, secondary areas dark.	Dark, lots of shadows, bulbs and diffusers missing, cave-like, damaged, hardware missing.
Service Efficiency	Maintenance activities appear highly organized and focused. Service and maintenance calls are responded to immediately.	Maintenance activities appear organized with direction. Service and maintenance calls are responded to in a timely manner.	Maintenance activities appear to be somewhat organized, but remain people-dependant. Service and maintenance calls are variable and sporadic, without apparent cause.	Maintenance activities appear somewhat chaotic and are people-dependant. Service and maintenance call are typically not responded to in a timely manner.	Maintenance activities appear chaotic and without direction. Equipment and building components are routinely broken and inoperable. Service and maintenance calls are never responded to in a timely manner.
Building Systems' Reliability	Breakdown maintenance is rare and limited to vandalism and abuse repairs.	Breakdown maintenance is limited to system components short of mean time between failures (MTBF).	Building and systems components periodically or often fail.	Many systems are unreliable. Constant need for repair. Backlog of repair needs exceeds resources.	Many systems are non-functional. Repair instituted only for life safety issues.
Facility Maintenance Operating Budget as % of CRV	>4.0	3.5-4.0	3.0-3.5	2.5-3.0	<2.5
Campus Average FCI	<0.05	0.05-0.15	0.15-0.29	0.30-0.49	>0.50

APPA's Grounds Level of Attention

Level	1	2	3	4	5
Description	State-of-the-Art Maintenance	High-Level Maintenance	Moderate Level Maintenance	Moderately Low-Level Maintenance	Minimum-Level Maintenance
Turf Care	Grass height maintained. Mowed at least once every five days and as often as once every three days.	Grass cut once every five days.	Grass cut once every ten working days.	Low-frequency mowing scheduled based on species.	Low-frequency mowing scheduled based on species.
Fertilizer	Adequate fertilization applied to plant species according to their optimum requirements.	Adaquate fertilizer level to ensure that all plant materials are healthy and growing vigorously.	Applied only when turf vigor seems to be low.	Not fertilized	Not fertilized
Irrigation	automatic commonly used. Frequency of use follows rainfall.	automatic commonly used. Frequency of use follows rainfall.	Dependent on climate.	No irrigation.	No irrigation.
Litter Control	Minimum of once per day, seven days per week.	Minimum of once per day, five days per week.	Minimum service of two to three times per week.	Once per week or less.	On demand or complaint basis.
Pruning	Frequency dictated primarily by species and variety of trees and shrubs.	Usually done at least once per season unless species planted dictate more frequent attention.	When required for health or reasonable appearance.	No regular trimming.	No pruning unless safety is involved.
Disease and Insect Control	Controlling objective to is avoid public awareness of any problems.	Usually done when disease or insects are inflicting noticeable damage, are reducing vigor or plant material, or could be considered a both to the public.	Done only to address epidemics or serious compliants.	None except where the problem is epidemic and the epidemic condition threatens resources or the public.	No control except in epidemic or safety situations.
Snow Removal	Snow removal starts the same day that accumulations of .5 inch are present.	Snow removed by noon the day following snowfall.	Done based on local law requirements but generally accomplished by the day following snowfall.	Done based on local law requirements but generally accomplished by the day following snowfall.	Done based on local law requirements but generally accomplished by the day following snowfall.
Surfaces	Sweeping, cleaning, and washing of surfaces should be done so that at no time does an accumulation of sand, dirt, or leaves distract from the looks or safety of the area.	Should be cleaned, repaired, repainted, or replaced when their appearances have noticeably deteriorated.	Cleaned on compliant basis. Repaired or replaced as budget allows.	Replaced or repaired when safety is a concern and when budget is available.	Serviced only when safety is a consideration.
Repairs	Repairs to all elements of the design should be done immediately.	Should be done whenever safety, functions, or appearance is in question.	Should be done whenever safety or function is in question.	Should be done whenever safety or function is in question.	Should be done whenever safety or function is in question.
Inspections	A staff member should conduct inspection daily.	A staff member should conduct inspection daily.	Inspections are conducted once per week.	Inspections are conducted once per month.	Inspections are conducted once per month.
Floral Plantings	Maximum care, including watering, fertilizing, disease control, disbudding, and weeding, is necessary. Weeding is done a minimum once per week.	Care cycle is usually at least once per week, but watering may be more frequent. Bed essentially kept weed free.	Only perennials or flowing trees or shrubs.	None.	None.

APPA's Custodial Levels of Appearance

Level	1	2	3	4	5
Description	Orderly Spotlessness	Ordinary Tidiness	Casual Inattention	Moderate Dinginess	Unkempt Neglect
Floors & Base Moldings	Shine and/or are bright and clean; colors are fresh	Shine and/or are bright and clean; no build-up in corners or along walls; up to two days worth of dust, dirt, stains, or streaks	Floors are swept or vacuumed clean, but upon close observation there can be stains. A build-up of dirt and/or floor finish in corners and along walls can be seen. There are dull/spots and/or matted carpet in walking lanes. There are streaks or splashes on base moldings.	Floors are swept or vacuumed clean, but are dull, dingy, and stained. There is a noticeable build-up of dirt and/or floor finish in corners and along walls. There is a dull path and/or floor obviously matted carpet in the walking lanes. Base molding is dull and dingy with streaks or splashes.	Floors and carpets are dull, dingy, scuffed, and/or matted. There is a conspicuous buildup of old dirt and/or floor finish in the corners and along walls. Base molding is dirty, stained, and streaked. Gum, stains, dirt, dust balls, and trash are broadcast.
Vertical & Horizontal Surfaces	Freshly cleaned or polished appearance and have no accumulation of dust, dirt, marks, streaks, smudges, or fingerprints. Lights all work and fixtures are clean.	Surfaces are clean, but marks, dust, smudges, and fingerprints are noticeable upon close observation. Lights work and fixtures are clean.	All vertical and horizontal surfaces have obvious dust, dirt, marks, smudges, and fingerprints. Lamps all work and fixtures are clean	All vertical and horizontal surfaces have conspicuous dust, dirt, marks, smudges, and fingerprints. Lamp fixtures are dirty and some lamps (up to 5%) are burned out.\	Major accumulation of dust, dirt, smudges, and fingerprints, all of which will be difficult to remove. Lack of attention obvious.
Washroom & Shower Fixtures	Fixtures and tile gleam and are odor-free. Supplies are adequate.	Fixtures and tile gleam and are odor-free. Supplies are adequate.	Fixtures and tile have some dull spots and upon further observation have buildup of dirt. Slight odor is apparent. Supplies are adequate.	Fixtures and tile are dull, dingy and stained. Odor is obvious. Some supplies are inadequate (less than 5% missing).	Fixtures and tile are dull, dingy and stained. Odor is overwhelming. Supplies are inadequate (more than 5% missing).
Trash Containers & Pencil Sharpeners	Hold only daily waste, and are clean and odor-free.	Hold only daily waste, and are clean and odor-free.	Hold only daily waste, and are clean and odor-free.	Have old trash and shavings. They are stained and marked. Trash containers smell sour.	Light fixtures are dirty with dust balls and flies. Many lamps (more than 5%) are burned out.

2

Metrics & KPIs

How do you know you are successful?

What is a metric?

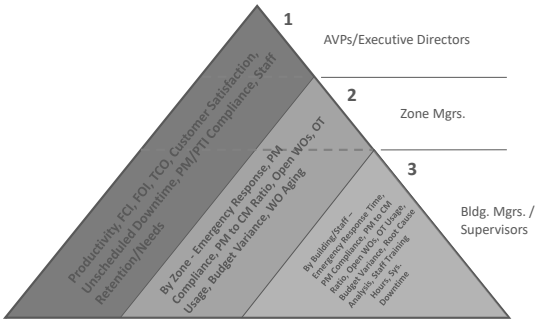
Metric Description	Std.	Metric Description	Std.
Facility Condition Index (FCI)	<0.05	Stockroom Turns / Year	2 - 3
Deferred Maintenance Backlog	Trend	Annual Training Hours	>40 hrs.
On-the-job Wrench Time	>60%	Maint. Cost / Replacement Cost	3 - 4%
PM / CM Ratio	70 / 30	Percent Return Work	<5%
Unscheduled Maintenance Downtime	<2%	Mean Time Between Failures	Trend
PM Schedule Compliance	>95%	% Failures Assessed: Root Cause	>75%
CM Schedule Compliance	>90%	Maintenance OT Percentage	5-15%
Unscheduled Man-Hours	<10%	% WO Covered by Estimates	>90%
WO Turn-Around Time	Trend	On-Site Supervisor Time	>65%
Emergency Response Time	<15 min.[2]	Stockroom On-Time Delivery	>97%
Stockroom Service Level	>97%	Material / Part Performance	>98%

FEA FACILITY ENGINEERING ASSOCIATES

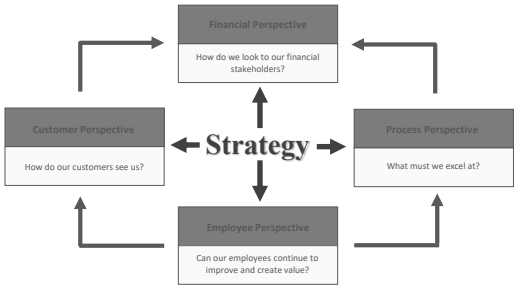
FEA's Metrics Database of O&M Performance Measures

Balanced Scorecard Perspective	Measurement		Target		CMMS	Priority	Type Metric	KPI Level
Customer Perspective		G	Y	R				
1. Customer Awareness, Response, and Feedback	On-Site Supervisor Time	>66%	40-65%	<40%	✔	1	Outcome	3
	Annual Customer Expectations Calibration	APPA L1	APPA L2	APPA L3		3	Process	2
	Proactive Manager Contacts w/ Customers	>1/qtr	1/qtr	None		2	Process	2,3
	Custodial QA Inspection Hits	<5 / Insp.	5-10 / Insp.	>10 / Insp.	✔	3	Outcome	2
	Emergency Response Time Compliance	>95%	85-95%	<85%	✔	4	Outcome	3
	Emergency Response Times	<15 min.	15-30 min.	>30 min.	✔	1	Process	2,3
	Percent of Rework (call backs)	<3%	3-5%	>5%	✔	2	Outcome	2
	Customer Satisfaction	>95%	90-95%	<90%	?	1	Outcome	1,2
	Percent WO with Customer Feedback	>15%	10-15%	<10%	✔	3	Process	2,3
	Top Ten WO Trouble Codes	# & Type	# & Type	# & Type	✔	2	Process	2,3
Process Perspective								
1. PM, PdM/PT&I, and RCM (Planned Maintenance)	Workforce Productivity	>80%	45-60%	<45%	✔	1	Outcome	1,2,3
	WOs Initiated by Staff as Result of Inspections/RCM	>75%	50-75%	<50%	✔	2	Process	2
	Equipment Uptime	>99%	98-96%	<96%	✔	3	Process	3
	Unscheduled Downtime	<2%	2-5%	>5%	✔	1	Process	1,2,3
	Number of Preventable Breakdowns	<2%	2-5%	>5%	✔	1	Process	2,3
	Equipment Downtime Caused by Breakdowns	Trend	Trend	Trend	✔	2	Process	2,4
	Breakdowns Caused by Poor PM	Trend	Trend	Trend	✔	3	Process	2,5
	Mean Time Between Failures (MTBF)	Trend	Trend	Trend	✔	4	Process	2,6
	Mean Time To Repair (MTTR)	Trend	Trend	Trend	✔	5	Process	2,7
	Emergency Man Hours (%)	<2%	2-5%	>5%	✔	6	Process	2,8
	Hours Spent on Unscheduled WOs	<10%	10-25%	>25%	✔	3	Process	2,3
	PM to CM Ratio	>80%	65-80%	<65%	✔	1	Process	2
	PM Schedule Completion Rate	>95%	85-95%	<85%	✔	2	Process	1,2,3
	PM Compliance for Critical Systems	100%	90-99%	<90%	✔	2	Process	2
	PM Efficiency	<2%	2-5%	>5%	✔	2	Process	2
	Overdue PM Tasks	<5%	5-10%	>10%	✔	2	Process	2
	PT&I Completion Rates to Schedule	>95%	85-95%	<85%	✔	5	Process	1,2,3
	PT&I WO's as Percent of Total PM	>10%	10-15%	>15%	✔	2	Process	2
	Savings Attributed to PT&I	Trend	Trend	Trend	✔	2	Process	2
	Number of Failures Averted Due to PT&I	Trend	Trend	Trend	✔	2	Process	2
	Root Cause Analyses (% Failures Assessed)	>75%	50-75%	<50%	✔	2	Process	2,3
	Percentage of Repetitive Equipment Failures	Trend	Trend	Trend	✔	2	Process	2
	Savings Attributed to RCM Program	Trend	Trend	Trend	✔	2	Process	2
	OEE vs. Percentage of Critical Equipment (Availability)	>99%	98-96%	<96%	✔	2	Process	2
2. Stores/Stockroom/Warehouse Management	Inactive Stock (No Movement in Past 12 mo.)	<2%	2-5%	>5%	✔	2	Process	2
	Materials/Stockroom Turns per Year	2 - 3	1 or 4-5	0 or >5	✔	3	Process	2
	Materials On-Time Delivery	>97%	90-97%	<90%	✔	4	Process	3

KPI Reporting Levels (Roll ups)

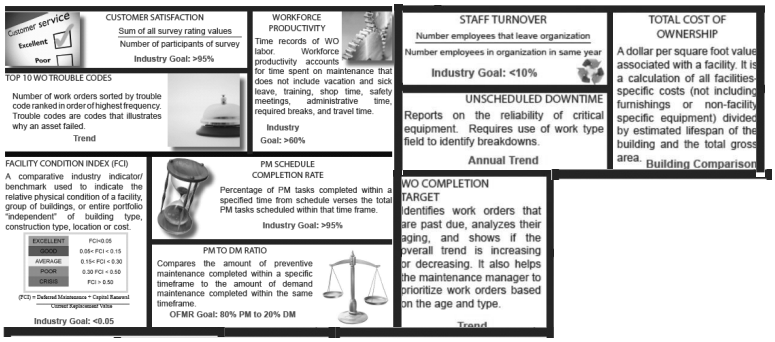


Balanced scorecard

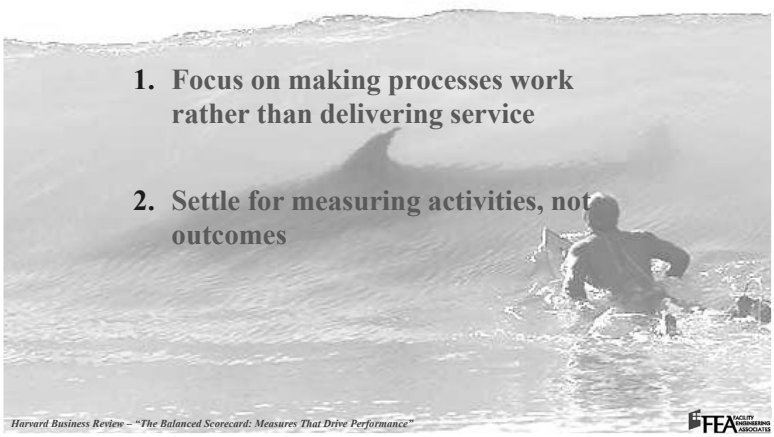


Source: The Balanced Scorecard, Measures that Drive Performance, Harvard Business Review, 1992

Top 10 Maintenance KPIs



Key elements organizations overlook



Unintentionally incentivizing the wrong behaviors

- **Response time to service calls**: Institutions track this metric to help improve customer service. However, publicly posting this metric sends the signal to staff that responding to service calls is more critical than scheduled work. As a result, staff prioritize service calls over preventive maintenance tasks.
- **Preventive maintenance completion rates**: This metric is intended to encourage staff to complete all of their assigned preventive work orders. However, asking staff to focus on this metric can lead to artificially high completion rates. Some institutions report staff close out tasks that are not fully resolved.
- **Time to close work orders**: This metric aims to minimize the number of open work orders and maximize the volume of work completed across all staff. However, staff often close work orders before they are finished and open new ones, duplicating the work to reduce their time to close.
- **Cost per work order**: The purpose of tracking cost per work order is to minimize costs. But asking staff to manage this metric often leads to staff completing only the cheapest fixes and re-logging more expensive work for later.

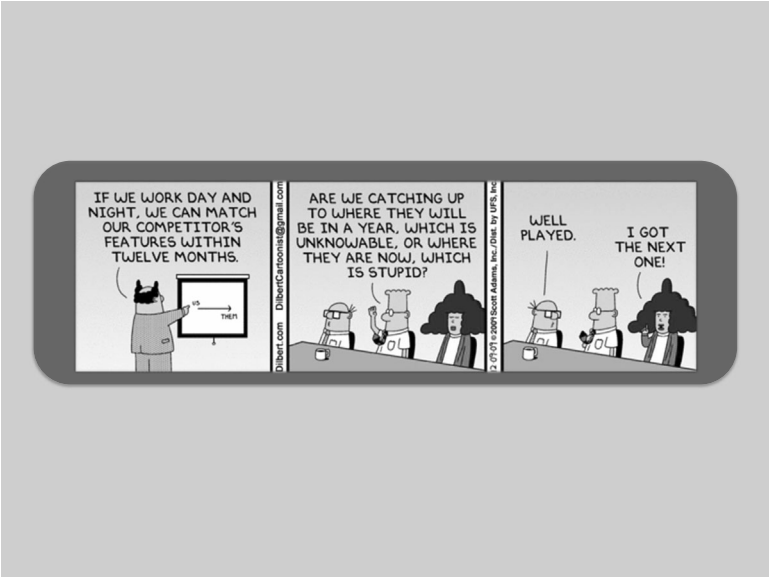
Recommended Operational Metrics

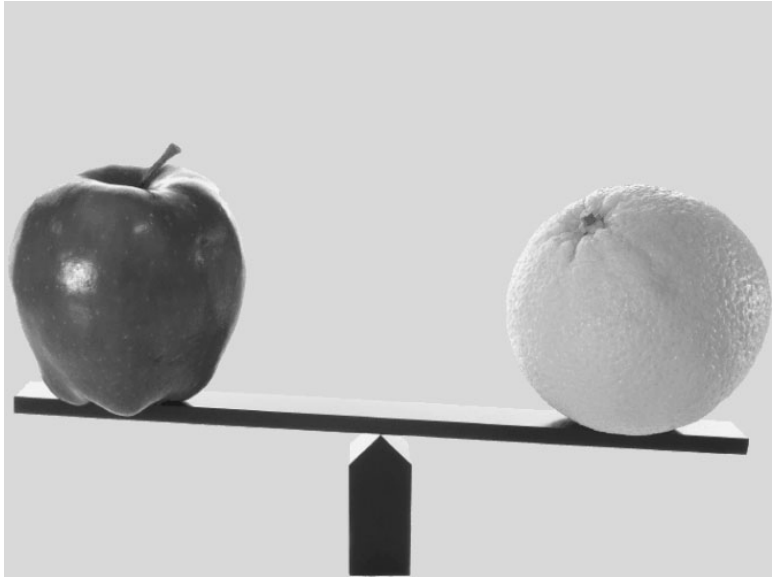
Metric	Definition	Directionality
Number of Service Calls	Number of customer-initiated work orders	↓
Compliance Completion Rate	Percentage of required preventive maintenance tasks completed	↑
Maintenance Mix (PM/RM)	Ratio of preventive maintenance to reactive maintenance tasks completed	↑
Rework	Number of work orders submitted as a result of an error in recently performed maintenance	↓
Follow Up Work Orders per 100 PM Checks	Number of follow up work orders for repairs submitted during 100 preventive maintenance checks	↓
Work Order Queue (Backlog) per Employee	Number of open preventive maintenance work orders in an employee's queue	↓

Recommended Strategic Metrics

Metric	Definition	Directionality
Number of Preventable Service Calls	Number of customer-initiated work orders that could have been prevented through performing scheduled preventive maintenance	↓
System Runtime/Downtime	Number of days running without failure or time and extent of system shutdown	↑ / ↓
Proactive Maintenance	Number of work orders submitted by staff for issues observed in the field	↑
Failure Code	Indicator of why an asset failed to facilitate better maintenance interventions	N/A
Normalized Investment	Money spent on new equipment due to inadequate preventive maintenance	↓
Customer Satisfaction	Customer responses on work order satisfaction questionnaires	↑

Benchmarking

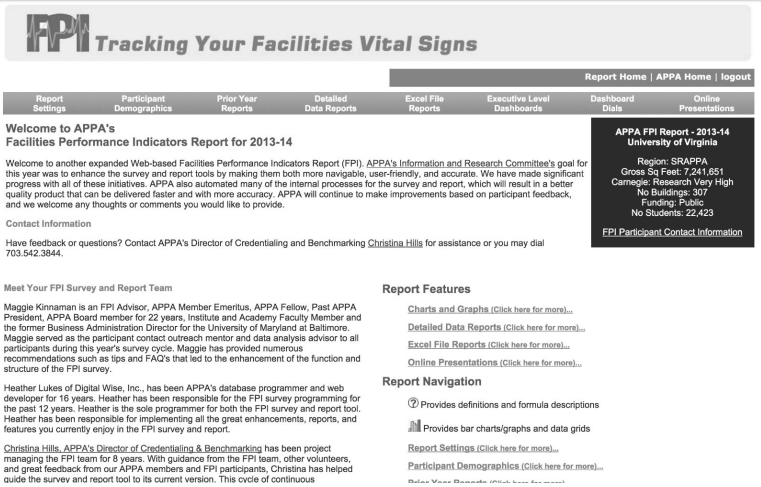




Sources for benchmarking Facilities organizations

- APPA Facilities Performance Indicators
- Sightlines
- Educational Advisory Board (EAB) Facilities Forum
- Energy: DOE Building Performance Database
- Facilities Engineering Associates (FEA)
- Others…

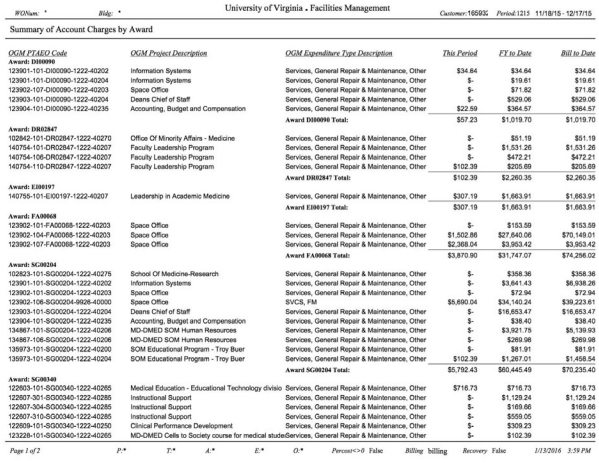
Hands on: APPA Facilities Performance Indicators (FPI)



4

Reports, Dashboards & Visualizations

Reports



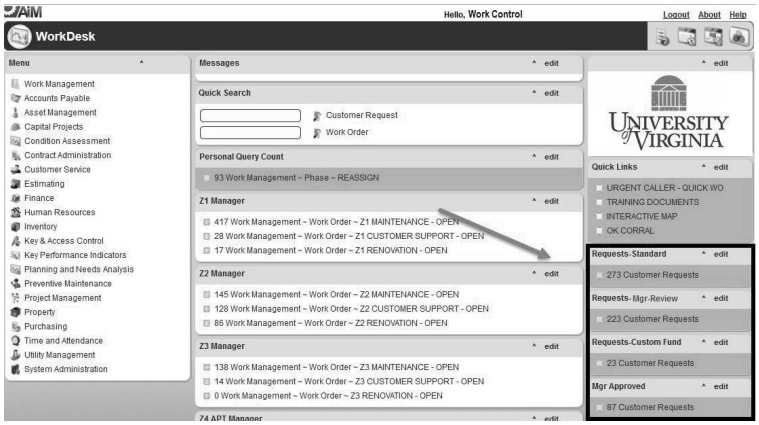
WONum: * Bldg: * University of Virginia . Facilities Management Customer:16593 Period:1215 11/18/15 - 12/17/15

Summary of Account Charges by Award

OGM PTAEO Code	OGM Project Description	OGM Expenditure Type Description	This Period	FY to Date	Bill to Date
Award: DI00090					
123901-101-DI00090-1222-40202	Information Systems	Services, General Repair & Maintenance, Other	$34.64	$34.64	$34.64
123901-101-DI00090-1222-40204	Information Systems	Services, General Repair & Maintenance, Other	$-	$19.61	$19.61
123902-107-DI00090-1222-40203	Space Office	Services, General Repair & Maintenance, Other	$-	$71.82	$71.82
123903-101-DI00090-1222-40204	Deans Chief of Staff	Services, General Repair & Maintenance, Other	$-	$529.06	$529.06
123904-101-DI00090-1222-40235	Accounting, Budget and Compensation	Services, General Repair & Maintenance, Other	$22.59	$364.57	$364.57
		Award DI00090 Total:	$57.23	$1,019.70	$1,019.70
Award: DR02847					
102842-101-DR02847-1222-40270	Office Of Minority Affairs - Medicine	Services, General Repair & Maintenance, Other	$-	$51.19	$51.19
140754-101-DR02847-1222-40207	Faculty Leadership Program	Services, General Repair & Maintenance, Other	$-	$1,531.26	$1,531.26
140754-106-DR02847-1222-40207	Faculty Leadership Program	Services, General Repair & Maintenance, Other	$-	$472.21	$472.21
140754-110-DR02847-1222-40207	Faculty Leadership Program	Services, General Repair & Maintenance, Other	$102.39	$205.69	$205.69
		Award DR02847 Total:	$102.39	$2,260.35	$2,260.35
Award: EI00197					
140755-101-EI00197-1222-40207	Leadership in Academic Medicine	Services, General Repair & Maintenance, Other	$307.19	$1,663.91	$1,663.91
		Award EI00197 Total:	$307.19	$1,663.91	$1,663.91
Award: FA00068					
123902-101-FA00068-1222-40203	Space Office	Services, General Repair & Maintenance, Other	$-	$153.59	$153.59
123902-104-FA00068-1222-40203	Space Office	Services, General Repair & Maintenance, Other	$1,502.86	$27,640.06	$70,149.01
123902-107-FA00068-1222-40203	Space Office	Services, General Repair & Maintenance, Other	$2,368.04	$3,953.42	$3,953.42
		Award FA00068 Total:	$3,870.90	$31,747.07	$74,256.02
Award: SG00204					
102823-101-SG00204-1222-40275	School Of Medicine-Research	Services, General Repair & Maintenance, Other	$-	$358.36	$358.36
123901-101-SG00204-1222-40202	Information Systems	Services, General Repair & Maintenance, Other	$-	$3,641.43	$6,938.26
123902-101-SG00204-1222-40203	Space Office	Services, General Repair & Maintenance, Other	$-	$72.94	$72.94
123902-106-SG00204-9926-40000	Space Office	SVCS, FM	$5,690.04	$34,140.24	$39,223.61
123903-101-SG00204-1222-40204	Deans Chief of Staff	Services, General Repair & Maintenance, Other	$-	$16,853.47	$16,853.47
123904-101-SG00204-1222-40235	Accounting, Budget and Compensation	Services, General Repair & Maintenance, Other	$-	$38.40	$38.40
134867-101-SG00204-1222-40206	MD-DMED SOM Human Resources	Services, General Repair & Maintenance, Other	$-	$3,921.75	$5,139.93
134867-106-SG00204-1222-40206	MD-DMED SOM Human Resources	Services, General Repair & Maintenance, Other	$-	$269.98	$269.98
135973-101-SG00204-1222-40200	SOM Educational Program - Troy Buer	Services, General Repair & Maintenance, Other	$-	$81.91	$81.91
135973-101-SG00204-1222-40204	SOM Educational Program - Troy Buer	Services, General Repair & Maintenance, Other	$102.39	$1,267.01	$1,458.54
		Award SG00204 Total:	$5,792.43	$60,445.49	$70,235.40
Award: SG00340					
122603-101-SG00340-1222-40265	Medical Education - Educational Technology divisio	Services, General Repair & Maintenance, Other	$716.73	$716.73	$716.73
122607-301-SG00340-1222-40285	Instructional Support	Services, General Repair & Maintenance, Other	$-	$1,129.24	$1,129.24
122607-304-SG00340-1222-40285	Instructional Support	Services, General Repair & Maintenance, Other	$-	$169.66	$169.66
122607-310-SG00340-1222-40285	Instructional Support	Services, General Repair & Maintenance, Other	$-	$559.05	$559.05
122609-101-SG00340-1222-40250	Clinical Performance Development	Services, General Repair & Maintenance, Other	$-	$309.23	$309.23
123228-101-SG00340-1222-40265	MD-DMED Cells to Society course for medical studes	Services, General Repair & Maintenance, Other	$-	$102.39	$102.39

Page 1 of 2 P:* T:* A:* E:* O:* Percent<>0 False Billing billing Recovery False 1/13/2016 3:59 PM

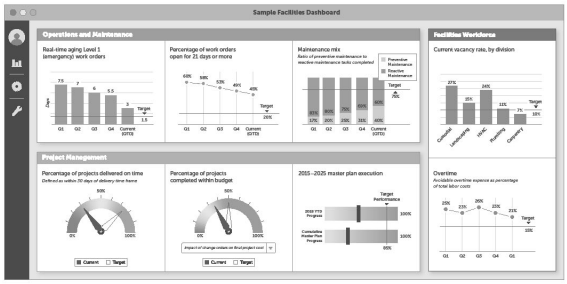
Dashboards



Dashboards

How to Create an Impactful **Facilities Dashboard**

Dashboards can be powerful tools. They enable Facilities leaders to cut through the noise of data overload and focus on a subset of metrics that enable better management and operational decisions. But selecting the right metrics—and laying them out in an accessible format—can be difficult to get right. Read on to see what an accessible dashboard looks like and to see a list of metrics to consider tracking more closely.



Characteristics of Effective Dashboard Creation and Design

Selecting Key Performance Indicators

1. **Apply pragmatic screens** to focus in on right metrics for your campus.
   - Set aside metrics that are not regularly tracked, not supported by reliable data, or difficult to communicate to others.
   - If potentially important data is difficult to retrieve, recognize the accessibility limitations of those metrics before elevating to the final dashboard.
2. **Ensure a balance** across metric categories.
   - Force trade-offs in overrepresented areas by sorting metrics by function or strategic perspective.
   - Goal is to ensure leaders have a balanced look across all units and won't miss worrisome trends.
3. **Account for amb-specific imperatives.**
   - Add "hot-seat" metrics that shed light on pressing yet temporary areas of concern.
   - Potential pressures could be new president coming in or facilities-specific concerns.
4. **Map metrics to strategic objectives.**
   - Identify metrics that most directly measure progress on facilities' strategic objectives.
   - Check that metrics are the outcomes you want to achieve, not the measure of how you'll get there.

Employing a User-Friendly Layout and Format

5. **Keep it concise.**
   - Limit static (i.e., paper-based) dashboards to three pages or fewer.
   - Ensure interactive dashboards have drop-down menus or variable inputs to allow audience to display desired amount of information.
6. **Make your data visualizations accessible** to a lay audience.
   - Clearly label the title and key using nontechnical language.
   - Convey trend information by including historic data points, performance target, and desired directionality.

Not Sure Where to Start? Consider These Metrics First:

Campus Operations
- Distribution of buildings by age range
- Workload (GSF) coverage per custodial FTE
- Facility Condition Index, for campus and by building
- Average work order completion time

Facilities Workforce
- Percentage of employees over age of 55
- Vacancy rate by position
- Avoidable overtime expense as percentage of total labor costs
- Percentage of employees "satisfied" or "very satisfied" working here

Fiscal Management
- Operating budget execution
- Capital project expenditure per project GSF
- Investment in renewal/renovation as percentage of current replacement value
- Operations and maintenance investment as a percentage of current replacement value

Housing
- Percentage of full-time undergraduate students who live on campus
- Percentage of students satisfied with overall housing experience
- Median GPA of on-campus resident vs. nonresident

Project Management
- Percentage of projects delivered on time
- Percentage of projects delivered on time by broad project stage
- Percentage of projects completed within budget
- Percentage of design, bid, and construction customer satisfaction scores

Safety and Compliance
- Percentage of work orders classified as emergency maintenance
- Total number of public safety incidents reported
- Crime rate per 1,000 students
- Ratio of public safety officers to student FTEs
- Average time between public safety incident report and resolution

Service Delivery
- Average time to complete work order requests by priority code
- Average post-work order satisfaction score
- Average number of successful cold calls per building
- Percentage of customer-requested projects completed on time

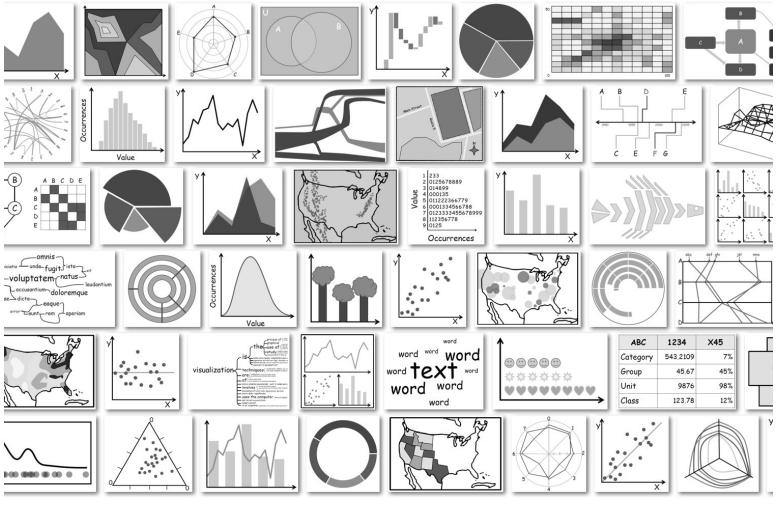
Space Management
- Average square ft/ seat
- Average square ft/ faculty, staff/hour
- Room utilization rate by day/hour

Sustainability and Utilities
- Energy consumption per GSF
- Utility outages per month
- Total utilities cost per student FTE
- Renewable energy as percentage of total energy consumption

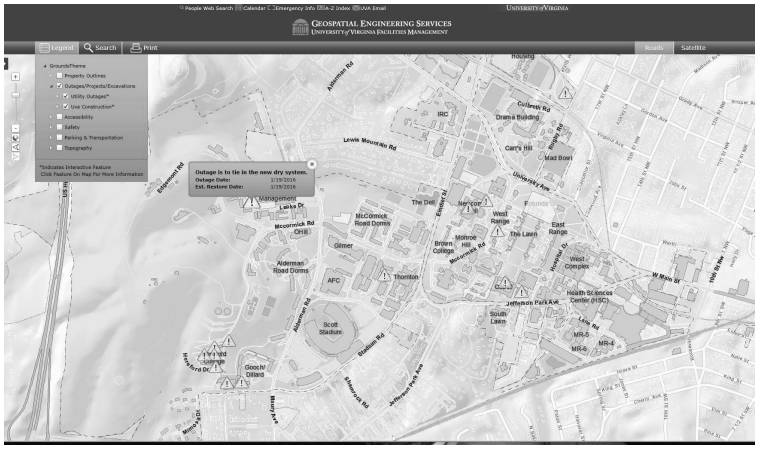
EAB | Facilities Forum

For a full compendium of facilities metrics and dashboards, visit eab.com/FacilitiesDashboard

Visualizations



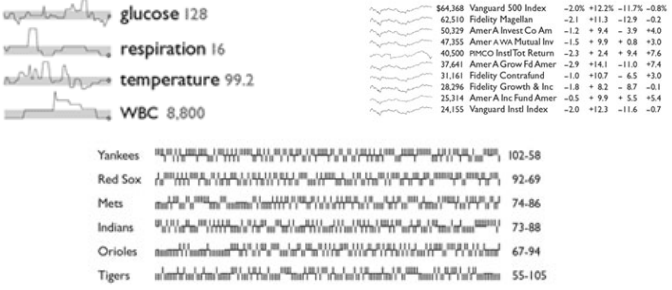
GIS & mapping



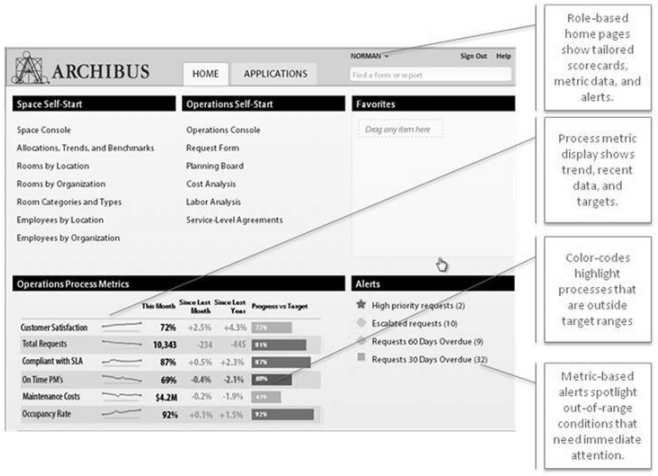
Other visualizations: Word clouds

Wordle.net

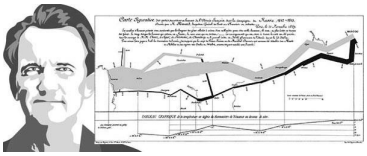
Other visualizations: Sparklines



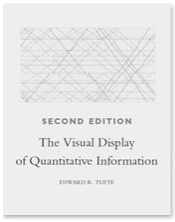
Other visualizations: Sparklines in action

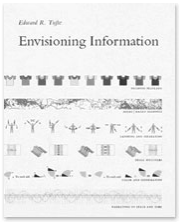


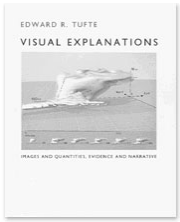
Visualizations: Edward Tufte



www.edwardtufte.com



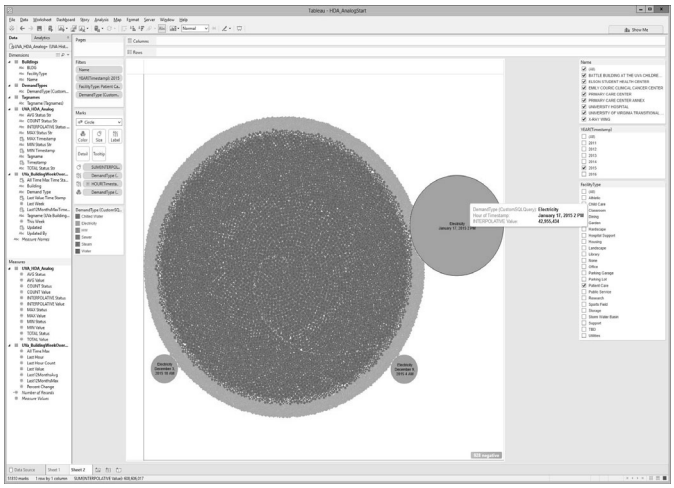




Data Analytics, Modeling & Predictive Analytics

Hands on: Analytics with Tableau

Analytics: Can you find the anomaly?



6

Facilities Informatics

Health informatics

Health Informatics (HI) is the intersection of clinical, IM/IT and management practices to achieve better health.

HI involves the application of information technology to facilitate the creation and use of health related data, information and knowledge. Health informatics enables and supports all aspects of safe, efficient and effective health services for all Canadians (e.g., planning, research, development, organization, provision, evolution of services, etc.). Health Informatics Professionals develop and deploy information and systems solutions, drawing on expert knowledge from fields such as computer science, information management, cognitive science, communications, epidemiology, management sciences and health sciences. Examples of health informatics applications include the design, development, implementation, maintenance and evaluation of:

- communication protocols for the secure transmission of healthcare data
- electronic patient record systems (regionally, provincially, territorially or nationally)
- evidence-based clinical decision support systems
- classification systems using standardized terminology and coding
- case management systems (e.g., for community, home and long-term care)
- access and referrals systems for healthcare services
- patient monitoring systems (e.g., computer controlled bedside monitors and patient home monitoring devices)
- digital imaging and image processing systems
- telehealth technologies to facilitate and support remote diagnosis and treatment
- internet technology for engaging patients in their own care
- public health surveillance and protection systems
- methodologies and applications for data analysis, management and mining
- clinical information data warehouses and reporting systems
- business, financial, support and logistics systems

source: COACH: Canada's Health Informatics Association

Facilities informatics (as modeled after health informatics)

Facilities Informatics (FI) is the intersection of facilities management, IM/IT and management practices to achieve better facilities.

FI involves the application of information technology to facilitate the creation and use of facilities related data, information and knowledge. Facilities informatics enables and supports all aspects of safe, efficient and effective facilities services for the University (e.g., planning, research, development, organization, provision, evolution of services, etc.). Facilities Informatics Professionals develop and deploy information and systems solutions, drawing on expert knowledge from fields such as computer science, information management, cognitive science, communications, facilities management and management sciences. Examples of facilities informatics applications include the design, development, implementation, maintenance and evaluation of:

- communication protocols for the secure transmission of facilities data
- electronic facilities record systems (regionally, provincially, territorially or nationally)
- evidence-based decision support systems
- classification systems using standardized terminology and coding
- work management systems
- facilities monitoring systems (e.g., computer controlled BAS systems)
- digital imaging and image processing systems
- geospatial systems
- telework and mobile technologies to facilitate and support remote diagnosis and treatment
- internet technology for engaging customers
- methodologies and applications for data analysis, management and mining
- facilities information data warehouses and reporting systems
- business, financial, support and logistics systems
- … and more

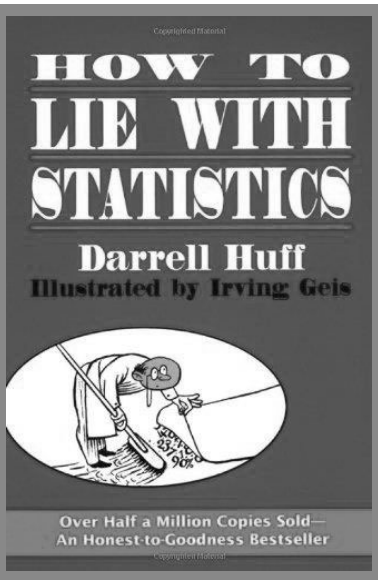
Adopted from: COACH: Canada's Health Informatics Association

Facilities Informatics

APPA Facilities Informatics workgroup

- Whitepaper: Informatics Maturity Model for Facilities
- Data
- Whitepaper: The Case for Facilities Informatics
- Whitepaper: Living labs
- FPI 2.0

Final thoughts…



Integrity

- Don’t lie!
- Don’t cherry pick
- Understand that representations create different impressions
- Document, document, document! (Site sources, references, explain w/ footnotes)
- Have & understand a clear takeaway

Questions and/or comments?

Thank you

UNIVERSITY of VIRGINIA

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U.Va. Facilities Management

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(434) 982-4796 office

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This concludes The American Institute of Architects Continuing Education Systems Course

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