EAB

How to Create an Executive-Level **Facilities Scorecard**

Facilities Forum

EAB

Who Should Read

Senior Facilities Officer

Director, Facilities Administration

Director, Facilities Management

How to Create an Executive-Level Facilities Scorecard

Three Ways to Use This Resource

- Filter Facilities performance metrics to a principled few for a scorecard
- Design a scorecard with a clear and impactful layout
- Effectively deploy your Facilities scorecard to the rest of campus

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The Facilities Forum serves Facilities leaders from colleges and universities across North America. Our dedicated research team works to identify and share proven solutions to higher education's toughest operations and maintenance, space management, and capital planning and design challenges. The Forum serves over 150 institutions and their heads of Facilities.

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Introduction

Defining a Facilities Executive-Level Scorecard

An executive-level scorecard is a document that presents the progress of principled metrics toward institutional goals. The purpose is to demonstrate and communicate the alignment between Facilities activities and the institution's strategic goals.

With a Facilities scorecard, external audiences should be able to quickly and clearly see the institution's strategic objectives, Facilities' corresponding initiatives, and Facilities' performance on associated progress measures. Because of its wide-ranging impact, *Harvard Business Review* called the balanced scorecard one of the 75 most influential ideas of the 20th century.

Scorecards vs. Dashboards

Often, the terms "dashboard" and "scorecard" are used interchangeably. However, there are a few important distinctions.

Dashboards focus on driving operational changes and managing the Facilities unit through the observation of certain internal metrics. By comparison, scorecards are a tool to explicitly map and showcase how Facilities activities directly advance strategic goals. While scorecards do track improvements like dashboards, their primary focus is to demonstrate strategic alignment to external stakeholders. In short, an executive scorecard is a physical manifestation of the impact Facilities has on the strategic plan.

Differences Between Scorecards and Dashboards

	Scorecard	**Dashboard**
Capsule Description	Map of how Facilities activities align to and reinforce broader institutional strategic objectives	Overview of performance on core operational measures
Audience	President, Provost, CBO,[1] and other institutional leaders	SFO,[2] Facilities leadership, and CBO; in some cases, campus-wide audience
Principal Aim	Explicitly demonstrate to senior leaders the alignment between Facilities activities and institution's strategic goals	Enable Facilities leaders to pinpoint meaningful trends in core metric performance that merit responsive action
Contents	Strategic objectives, initiatives, and performance on associated progress measures	Data on metric performance relative to targets, historical performance, and related metrics
Limitation	Does not allow for analysis of pace of progress or of nonstrategic indicators	Does not measure strategic initiative impact on advancement of key priorities

1) Chief Business Officer.
2) Senior Facilities Officer.

Source: Balanced Scorecard Step-by-Step for Government and Nonprofit Agencies; EAB interviews and analysis.

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Executive Framework

Content in This Resource

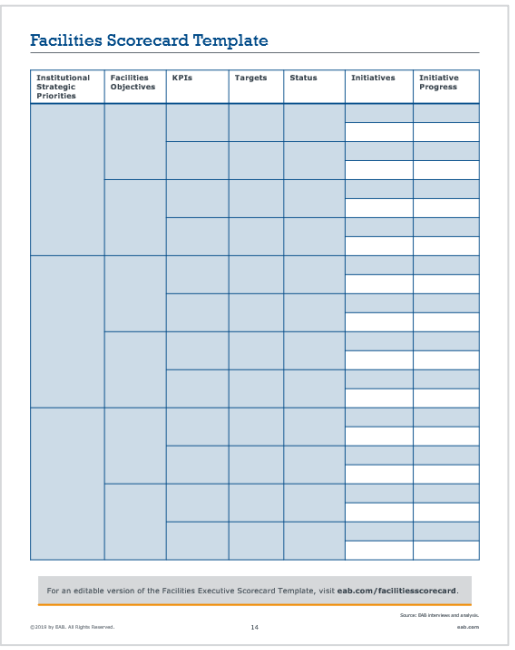
To help leaders create impactful executive-level Facilities scorecards, this publication details three essential steps:

1. **Select Appropriate Executive-Level Scorecard KPIs**
2. **Build an Executive-Level Scorecard**
3. **Effectively Deploy an Executive-Level Scorecard**

The first section explores options for selecting the right metrics and KPIs for scorecards and provides sample KPIs Facilities leaders can use. The second section provides guidance on designing an executive-level scorecard, as well as examples from Facilities units at higher ed institutions. The third section discusses strategies for updating the Facilities scorecard and sharing it with stakeholders across campus.

Facilities Scorecard Template

Section 2 provides a template Facilities leaders can use in designing their executive-level scorecard. An editable version is also available at eab.com/facilitiesscorecard.


Facilities Scorecard Template

Institutional Strategic Priorities	Facilities Objectives	KPIs	Targets	Status	Initiatives	Initiative Progress

For an editable version of the Facilities Executive Scorecard Template, visit **eab.com/facilitiesscorecard**.

Source: EAB interviews and analysis.

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Source: EAB interviews and analysis.

1 Select Appropriate Executive-Level Scorecard KPIs

2 Build an Executive-Level Scorecard

3 Effectively Deploy an Executive-Level Scorecard

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How to Select Appropriate Scorecard KPIs

Five Levels of Information to Include

Every scorecard should include five levels of information. First, a scorecard should include institutional strategic priorities and the corresponding Facilities strategic objectives that stem from these priorities. Next, the key performance indicators (KPIs) on the scorecard should track progress toward strategic objectives, and targets should be included so viewers can gauge Facilities' performance. Last, a scorecard should include the strategic initiatives Facilities will take to progress toward its targets.

	Description	Example
Strategic Priorities	• Backbone for strategy; roughly four to eight • Usually derived from mission statement	Operational Efficiency
Strategic Objectives	• Stem from strategic priorities; typically 40 to 60 • Adapted annually to every few years	Prioritize preventive maintenance (PM) work to decrease resources spent on reactive work
KPIs	Indicators that track progress toward objectives	PM/RM Ratio (ratio of preventive maintenance to reactive maintenance tasks completed)
Target	• Indicator goals that motivate performance • Frequently reset to ensure continuous improvement	70%/30%
Strategic Initiatives	Set of actions to raise metrics above target levels	Develop prioritized PM schedule that reflects condition and strategic importance of assets

Metrics should flow directly from strategic objectives

Many institutions mistakenly track metrics that assess strategic initiative progress

While Facilities tracks hundreds of metrics on an annual basis, only a few KPIs should be elevated to a scorecard. Of these KPIs, 20% should be **volume indicators**, or raw numbers that provide information on volume or scale (e.g., number of work orders completed annually). The other 80% of scorecard KPIs should be **relative indicators—**calculations of multiple metrics that provide information with comparative context (e.g., percentage of work orders categorized as emergency).

Relative indicators should be the majority of KPIs on a scorecard because they more strongly convey performance. Many stakeholders may struggle to understand if a specified number of work orders completed, for example, is good, bad, or neutral. Conversely, the comparative nature of relative indicators is often easier for a lay audience to understand and react to.

Source: EAB interviews and analysis.

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How to Select Appropriate Scorecard KPIs (cont.)

Three Options to Select Scorecard KPIs

Facilities leaders have several options when filtering their current metrics down to a few principled KPIs. Below are three recommended approaches.

1. SFO and executive team work together to complete an extensive mapping exercise to translate strategic priorities into Facilities KPIs.
2. SFO adopts EAB's recommended KPIs that have already been mapped to common strategic priorities.
3. SFO chooses KPIs based on the scorecard audience, using EAB's stakeholder-specific lists.

These three options are explored on the following pages.

Source: EAB interviews and analysis.

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Translate Strategic Priorities into Facilities KPIs

Option 1

The key to creating an impactful scorecard is ensuring that chosen measures directly link to institutional strategic objectives. Without this strategic filter, the metrics may not reflect institutional or Facilities priorities and could even promote counterproductive initiatives. Follow the steps below to determine scorecard KPIs.

Identify Institutional Strategic Priorities

Read the institution's mission statement to find long-term goals guiding high-level decisions. While some institutions have many strategic priorities, it is best to choose four to eight to focus on for a scorecard. If there are any priorities that are especially significant for the institution, be sure to include them.

Match Facilities Strategic Objectives to Institutional Priorities

Pinpoint objectives that Facilities is already working toward that fit under the umbrella of institutional priorities. Alternatively, consider creating new objectives that would better align Facilities with these strategic priorities.

List Metrics that Measure the Progress of Facilities Strategic Objectives

List metrics that track Facilities' progress on its strategic objectives. Ensure metrics rely on easily accessible and accurate data, can be tracked frequently, are balanced across categories, and can be communicated easily to an external audience. The definition and rationale for all metrics on the scorecard should be easy to understand and replicate.

Set Facilities Targets

Adopt performance goals to measure KPIs against. Source these targets from institutional mandates, industry benchmarks, or Facilities staff. Targets can also simply focus on continuous improvement; however, to avoid low standards, institutions should set both short-term and long-term improvement goals.

Plan for Strategic Initiatives

With good targets, a Facilities unit will always be working to improve in at least some areas. Map strategic initiatives that will help raise KPIs to or above target levels.

Source: EAB interviews and analysis.

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Adopt Facilities Metrics Mapped to Strategic Priorities

Option 2

If your team needs a jumping-off point for its scorecard or simply lacks time to complete the mapping exercise in Option 1, use these sample Facilities metrics that are already mapped to common strategic priorities. Many of these metrics are relative indicators that compare multiple measures to evaluate efficiency and capture the performance of the unit.

Sample Facilities Metrics Mapped to Institutional Strategic Priorities

Academic Excellence

- Seat utilization rate
- Percentage of classrooms meeting technology standards
- Work order response time for E&G[1] buildings

Student Experience

- Student campus safety rating
- Campus cleanliness score
- Average student satisfaction rating with Facilities services

Sustainability

- Energy consumption (MBTU/GSF)[2]
- Renewable energy as percentage of total energy consumption
- Recycled waste in pounds per FTE student enrolled

Financial Stewardship

- Total energy cost per GSF
- Capital project cash flow execution
- Operations and maintenance expenditure per GSF

Operational Efficacy

- Average work order close time
- Number of preventable service calls
- Ratio of preventive maintenance to reactive maintenance work orders completed

Research

- Net assignable square feet of research lab space per PI[3]
- Indirect cost recovery per GSF
- Lab renovation on-time completion rate

1) Education and general.
2) Million BTUs per gross square foot.
3) Principal investigator.

Source: EAB interviews and analysis.

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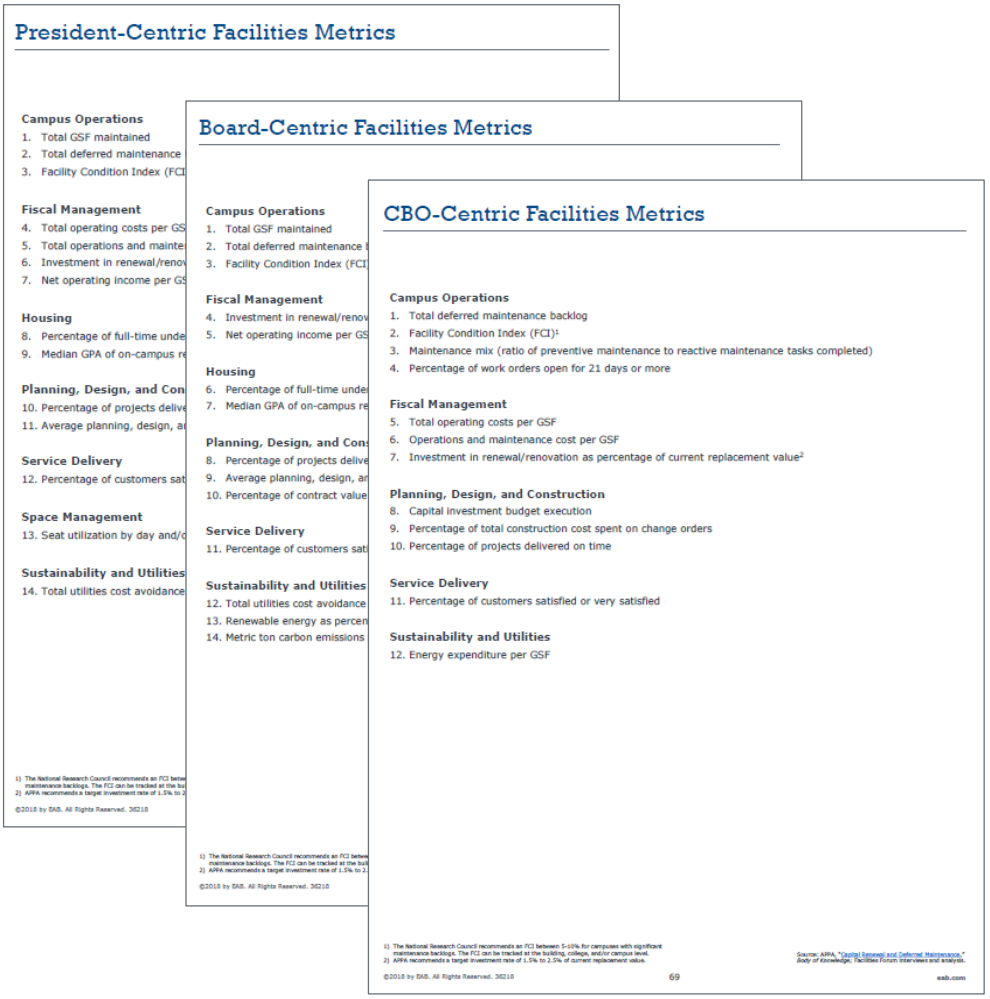
Use EAB's Leader-Centric Facilities Metrics

Option 3

The audience of a scorecard can also be a determining factor in metric designation. Certain campus leaders are likely to be interested in certain Facilities functions, and conversations will tend to focus on these areas. For this reason, EAB compiled Leader-Centric Facilities Metrics for the executives most likely to read a Facilities scorecard. Download these guides here or at **eab.com/facilitiesscorecard**.



President-Centric Facilities Metrics

Campus Operations
1. Total GSF maintained
2. Total deferred maintenance
3. Facility Condition Index (FCI

Fiscal Management
4. Total operating costs per GS
5. Total operations and mainte
6. Investment in renewal/renov
7. Net operating income per GS

Housing
8. Percentage of full-time unde
9. Median GPA of on-campus re

Planning, Design, and Con
10. Percentage of projects delive
11. Average planning, design, a

Service Delivery
12. Percentage of customers sat

Space Management
13. Seat utilization by day and/c

Sustainability and Utilities
14. Total utilities cost avoidance

1) The National Research Council recommends an FCI betwe
maintenance backlogs. The FCI can be tracked at the bu
2) APPA recommends a target investment rate of 1.5% to 2

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Board-Centric Facilities Metrics

Campus Operations
1. Total GSF maintained
2. Total deferred maintenance
3. Facility Condition Index (FCI

Fiscal Management
4. Investment in renewal/renov
5. Net operating income per GS

Housing
6. Percentage of full-time unde
7. Median GPA of on-campus re

Planning, Design, and Cons
8. Percentage of projects delive
9. Average planning, design, ar
10. Percentage of contract value

Service Delivery
11. Percentage of customers sati

Sustainability and Utilities
12. Total utilities cost avoidance
13. Renewable energy as percen
14. Metric ton carbon emissions

1) The National Research Council recommends an FCI betwe
maintenance backlogs. The FCI can be tracked at the buil
2) APPA recommends a target investment rate of 1.5% to 2

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CBO-Centric Facilities Metrics

Campus Operations
1. Total deferred maintenance backlog
2. Facility Condition Index (FCI)[1]
3. Maintenance mix (ratio of preventive maintenance to reactive maintenance tasks completed)
4. Percentage of work orders open for 21 days or more

Fiscal Management
5. Total operating costs per GSF
6. Operations and maintenance cost per GSF
7. Investment in renewal/renovation as percentage of current replacement value[2]

Planning, Design, and Construction
8. Capital investment budget execution
9. Percentage of total construction cost spent on change orders
10. Percentage of projects delivered on time

Service Delivery
11. Percentage of customers satisfied or very satisfied

Sustainability and Utilities
12. Energy expenditure per GSF

1) The National Research Council recommends an FCI between 5-10% for campuses with significant maintenance backlogs. The FCI can be tracked at the building, college, and/or campus level.
2) APPA recommends a target investment rate of 1.5% to 2.5% of current replacement value.

Source: APPA, "Capital Renewal and Deferred Maintenance," *Body of Knowledge*; Facilities Forum interviews and analysis.

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Source: EAB interviews and analysis.

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Scorecard Design Principles

Rules to Follow in Scorecard Creation

The main purpose of an executive-level scorecard is to connect Facilities initiatives to institutional strategic goals. Thus, the strategic priorities should drive the design as well as the objectives, metrics, and initiatives on the scorecard.

Visually, a scorecard should be as clear and simple as possible. Color-coding and brevity help the reader and encourage faster comprehension. Uniformity is important as well. Metrics reported in a consistent time frame or that show trends over time allow for more strategic analysis. The table below outlines the five characteristics of effective scorecard design in more detail.

Characteristics of Effective Scorecard Design

Characteristic	Description
Explicit Connection to Strategic Goals	Explicitly maps Facilities goals to institutional strategic plan and/or specific strategic priorities, sometimes through a numbering system
Concise	Uses simple layout (e.g., table) to organize a limited number of Facilities objectives (10 to 15); uses accessible, nontechnical language
Metrics in Context	Includes trends over time (e.g., Q1 and Q2 performance), metric targets, and brief metric definitions when necessary
Color-Coded	Deploys color-coding to indicate metric progress. Binary color scheme (e.g., red and green) is the simplest way to track progress; multi-chromatic scheme provides nuance but may require color definitions
Consistent Time Frame	Clearly indicates frequency of data collection (e.g., monthly, quarterly) and assesses all metrics across same time frame

Leaders can use the EAB template on the next page as a starting point for Facilities scorecards. An editable version can be downloaded here or at **eab.com/facilitiesscorecard**.

In addition, exemplar scorecards from three Facilities units are shown on pages 15 to 17.

Source: EAB interviews and analysis.

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Facilities Scorecard Template

Institutional Strategic Priorities	Facilities Objectives	KPIs	Targets	Status	Initiatives	Initiative Progress

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Source: EAB interviews and analysis.

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University of West Georgia

UWG Highlights Eight Key Facilities Goals Within Single-Page Scorecard

Screenshot of University of West Georgia's (UWG) Campus Planning and Facilities Scorecard

AVP Campus Planning & Facilities
Division of Business and Finance
Scorecard 2017-2018

1 - Alert	2 - Area of concern	3 - Goal met	4 - Met stretch goal	5 - Met super stretch goal

Imperative	Goal	Weight	Scale	Outcome	Score	Weighted Score	Status
Student Success	First Time Freshmen: Number of fall degree-seeking first-time freshman (full time) in the fall census.	15%	5 = 2515 4 = 2470 3 = 2420 2 = 2375 1 = < 2375			0	
Operational Success	Customer Satisfaction: Overall CP&F customer satisfaction rating	15%	5 = 100% 4 = 95% 3 = 90% 2 = 85% 1 = 80%			0	
Academic Success	Work Order Response Time: Facilities met standard response time for routine and urgent work requests in Tier 1 E&G buildings.	15%	5 = >95% 4 = 90% 3 = 85% 2 = 75% 1 = <75%			0	

Includes color-coded scores to allow audience to quickly gauge progress

First column explicitly links each goal to specific institutional priority

Concise and scannable language, focusing on eight major Facilities goals in a single-page document

The **University of West Georgia** recognizes that strategic priorities are the hallmark of a scorecard, and dedicates the first column of the scorecard to this category. They list the Facilities-specific goal next; for example, by focusing on customer satisfaction, Facilities will help the institution meet its goal of operational success. The scorecard also has a clear, color-coded key and corresponding numbers to gauge progress.

Source: University of West Georgia, Carrollton, GA; EAB interviews and analysis.

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University of North Carolina at Charlotte

UNC Charlotte Uses Numbering System to Link Objectives to Strategic Goals

Screenshot of University of North Carolina at Charlotte's Facilities Management Balanced Scorecard

Objective	Tactic	Lag Measures/Lead Measures	Target	Actual	1st Quarter
Improve Work Request Process	1.3.1	Decrease Number of Work Orders Over 14 Days Old	15% (891)	1054	
	1.3.2	Decrease Work Request Cycle Time	10% (512.32 days)	645.5	
Improve BES Process	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	69%	
Facility Systems Reliability	1.5.3	Fewer Than 5 Unscheduled Outages per Quarter	<5	5	
	1.5.4	Improve Ratio of Preventive/Predictive Work Requests to Reactive Request	50%	53.9%	
Improve Design & Construc Process	2.2.1	95% of Construction Projects Meet Scheduled BOD	95%	93.3%	
	2.2.2	Review Project Capacity- Goal 250 per year	250	N/A	
Capital Construction Process	2.6.1	90% of Capital Construction Projects Completed On Time	90%	0%	
Supporting Facilities	2.9	Develop plan for supporting research facilities	Action Plan Only	☑	
Improve Customer Service	3.1.1	Achieve Overall FM Customer Satisfaction of 93%	93%		90% Annual
	3.1.2	Decrease number of Hot and Cold Calls by 20%	<145	143	
	3.1.3	90% of Informal Project Customers Satisfied or Very Satisfied	90%	100%	
	3.1.4	90% of Reactive Work Request Customers Satisfied or Very Satisfied	90%	N/A	Under review
	3.1.5	Build Brand Awareness	Action Plan Only	☑	
Quality Work Environment	4.3.1	90% Employees Satisfied or Very Satisfied Working in FM	90%	N/A	
	4.3.2	87% Employees Satisfied or Very Satisfied in Each Unit	87%	N/A	

Facilities objectives written in concise, comprehensible language

Numbering system links objectives to broader strategic goals

Color-coding allows audience to quickly assess progress on goals

The **University of North Carolina at Charlotte** prioritizes Facilities objectives in the first column and clearly color-codes the final column. The institution also maps each Facilities objective to an institutional strategic goal.

Source: University of North Carolina at Charlotte, Charlotte, NC; EAB interviews and analysis.

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University of Washington

UW Measures Progress on Nine Facilities Objectives With Color-Coding System

UNIVERSITY of WASHINGTON

Screenshot of University of Washington's (UW) Facilities Services Balanced Scorecard

FY2017 BSC – Q4

Perspective		Objective	#	Measure	Owner	6/30/16 Target	6/30/16 Actual	9/30/16 Target	9/30/16 Actual
Enhance the customer / stakeholder experience	C1	Deliver a campus ready for business each day	C1.1	Preventive vs Corrective Maintenance	TBD	New Measure (Q1 FY2017)		N/A	17.6%
			C1.2	FS Repair vs Campus Identified	Christine Lucier	New Measure (Q1 FY2017)		>60%	44%
			C1.3	Resilience Planning	TBD				Mea
Build capacity	L1	Hire, train and develop for excellence	L1.1	Employee Engagement	Page Russel				Measure in P
	L2	Create a safe and injury-free environment	L2.1	FS-wide incident rate	Tracey Mosier	<2	2.2	<2	2.3
	L3	Recognize and celebrate contributions	L3.1	Recognizing, Respecting, Listening	Page Russel				See individual and tean
Reduce Cost / Increase Value	F1	Deliver cost-effective services	F1.1	Recharge Center Working Capital	Lori Natsume	<10	9, -6	<10	13, -4
			F1.2	Direct Labor to Job Availability	Lori Natsume	=3	2	=3	2
			F1.3	AIM Work Order Actual vs Estimate	Eric Dauplaise	>80%	30.7%	>50%	29.5%
			F1.4	Steam Cost	Mark K.	<14.78	$10.67	<14.78	$11.62
			F1.5	Resource Conservation Program: RCM ROI	Norm Menter	>1	2.15	>1	11.28

Facilities objectives categorized into color-coded divisional theme

Scorecard highlights nine nontechnical Facilities objectives

Binary color-coded tracking system clearly indicates goal progress

The **University of Washington** uses two types of color-coding. On the left, the colors signify divisions, and on the right, a second scheme (green or red) shows metric progress. The University of Washington also highlights Facilities objectives that are important to the institution.

Source: University of Washington, Seattle, WA; EAB interviews and analysis.

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How to Effectively Deploy Scorecards

Sharing and Updating the Executive-Level Scorecard

Scorecard creation is just the first step in the life and use of an executive-level scorecard. In order for a scorecard to be impactful, it must also be effectively deployed. There are two components to effective scorecard deployment.

Strategically Share the Scorecard

Ensure that campus leaders see and understand how Facilities is supporting the institution in its strategic priorities. Relevant campus leaders should have both paper and electronic copies of the scorecard, especially if the SFO meets with them to discuss it. Additionally, publish the scorecard on the Facilities website so all campus stakeholders can reference it if they are interested or have questions.

Consistently Update the Scorecard

Metrics included in the scorecard should be based on data that is readily available, enabling easy updates. Designate a staff member to take a leadership role in gathering new data each month and updating the scorecard metrics, graphs, and color signifiers according to recent trends. This will ensure an up-to-date scorecard is always available for interactions with senior leaders.

Source: EAB interviews and analysis.

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