Who Partners with Sightlines?

Robust membership includes colleges, universities, consortia and state systems

Sightlines is proud to announce that:
- 450 colleges and universities are Sightlines clients including over 325 ROPA members.
- Consistently over 90% member retention rate
- We have clients in over 40 states, the District of Columbia and four Canadian provinces
- More than 125 new institutions became Sightlines members since 2013

Sightlines advises state systems in:
- Alaska
- California
- Florida
- Hawaii
- Maine
- Massachusetts
- Minnesota
- Mississippi
- Missouri
- Nebraska
- New Hampshire
- New Jersey
- Pennsylvania
- Texas

Serving the Nation’s Leading Institutions:
- 70% of the Top 20 Colleges*
- 75% of the Top 20 Universities*
- 34 Flagship State Universities
- 14 of the 14 Big 10 Institutions
- 9 of the 12 Ivy Plus Institutions

* U.S. News 2016 Rankings
A Vocabulary for Measurement

The Return on Physical Assets – ROPA℠

The annual investment needed to ensure buildings will properly perform and reach their useful life “Keep-Up Costs”

Annual Stewardship

The accumulation of repair and modernization needs and the definition of resource capacity to correct them “Catch-Up Costs”

Asset Reinvestment

The effectiveness of the facilities operating budget, staffing, supervision, and energy management

Operational Effectiveness

The measure of service process, the maintenance quality of space and systems, and the customers opinion of service delivery

Service

Asset Value Change

Operations Success
## Peer Institutions

<table>
<thead>
<tr>
<th>Institution</th>
<th>Location</th>
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<tbody>
<tr>
<td>Loyola University Maryland</td>
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<td>Creighton University</td>
<td>Omaha, Nebraska</td>
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**Comparative Considerations**

Size, technical complexity, region, geographic location, and setting are all factors included in the selection of peer institutions.
Historical Challenges
Old Campus Age Profile

70% of space falls into "high risk" category

Renovation Age vs. Peers

Campus Age by Category

SLU '04 SLU '16 SLU '26 Peer Average Average '04 Peer Average '16

Under 25 10 to 25 25 to 50 Over 50

45% 51% 25% 14% 20%
31% 19% 14% 28% 23%
15% 16% 19% 32% 22%

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1/11/2017

Saint Louis University Presentation 2016
Capital Spending Shortfall Compared to Peers

$124M less in total Capital Spending since 2004 based on peer average

Capital Spending vs. Peers

- Total AS $ w/o Infra/GSF
- Total AR $ w/o Infra/GSF
- Average

Sightlines LLC
1/11/2017
Capital Spending Shortfall Compared to Targets

Leads to growing Deferred Maintenance figure

Total Capital Investment vs. Funding Target

$ in Millions

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Saint Louis University Presentation 2016
Space vs. Wealth Relationship

SLU space wealth profile in challenging quadrant

Database Distribution - Wealth v. Space

Less Resources | More Resources

1,200
1,000
800
600
400
200
0

$0 | $200,000 | $400,000 | $600,000 | $800,000 | $1,000,000 | $1,200,000 | $1,400,000 | $1,600,000

Wealth per Student

GSF/Student

Less Students | More Students

Saint Louis University

Peers

Students FTEs: 11,766
TY15 data
Endowment 2015 from NACUBO: 1,093,348,000
Space: 6,243/464 – All Occupied Space – Does Not Include Parking Garages

Sightlines
Space vs. Wealth Peers

Wealth Comparison

<table>
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<tr>
<th>Wealth per Student</th>
<th>SLU</th>
<th>Space Peers</th>
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Space Comparison

<table>
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Schools with a similar Space Profile to SLU, have approx. $300,000 more wealth per student to take care of their space.

Schools with a similar Wealth Profile to SLU, have 100 GSF per student less to take care. At SLU, that equates to 600,000 GSF.

Students FTEs: 11,766
Endowment 2016 from NACUBO: 1,093,348,000
Space: 8,241/464 – All Occupied Space Does Not Include Parking Garages
Current Impacts
Rate of Change Doubles Peers

Over 13 years, SLU’s AR Need grew 75% compared to peers at 30%
Peers Outspending on Durable Assets

SLU is investing less than half into Building Envelope and Systems compared to peers

Total Envelope/Mechanical Project Spending ($/GSF)
Greater Strain on Maintenance

Maintenance Staffing

Maintenance Supervision

Maintenance Materials

General Repair / Impression

Institutions arranged by Tech Rating

- Peer Group Member Average
- Average without E
Customer Survey Helps Target Specific Projects

Buildings with lowest HVAC satisfaction have higher $/GSF in HVAC related need

Lowest Satisfaction Buildings

Difference between below average satisfaction buildings and all buildings in $/GSF in HVAC Need

*BPS Data includes HVAC, Heating, Cooling and Mechanical Need. Survey results include distracting noises, temperature and undesirable odors.
HVAC Contracted Repairs Indicating Signs of DM?

Increased HVAC contracted repairs are often indicators of Deferred Maintenance spilling over into operations.
Buildings With Higher Backlog Increase Operational Costs
Custodial Covering Just Under Peer Levels

Custodial Staffing

Custodial Supervision

Custodial Materials

Cleanliness

Institutions arranged by Density Factor

Peer Group Member Average
Grounds Staff Yielding Higher Results

Grounds Staffing

Grounds Supervision

Grounds Materials

Grounds Inspection Score

Institutions arranged by Grounds Intensity

*Average Line without J

Peer Group Member Average

SLU
Steady Consumption Decrease Since FY13

SLU consuming below peer average
Energy Consumption vs. Peers

![Energy Consumption Chart]

- **SLU**
- **Peers**

Legend:
- Composite Fossil BTU/GSF
- Composite Electric BTU/GSF
- Average