STRATEGIC THEMES AND DRIVERS (w/Customer Satisfaction Element)

Facilities Management Mission Statement
To provide a quality learning, research, and living environment for the benefit of students, faculty, staff, and the community by planning, building, operating, and maintaining the campus of the University of North Carolina at Charlotte.

Facilities Management Vision
To be a leader in Facilities Management distinguished by safety and excellence.
To be a proficient, responsive and adaptable "team of teams"
To provide high quality services and facilities in an environmentally sustainable manner
To create a "campus of distinction"!

Facilities Management FY 2018 Balanced Scorecard

Perspective	Objective	Tactic	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	YTD
Customer — *To achieve our vision, how must we view & treat our customers?*	Improve Work Request Process	1.3.1	Decrease Number of Work Orders Over 14 Days Old	15% (2080)	2721	Red			Red	
		1.3.2	Decrease Work Request Cycle Time	10% (512.32 days)	543.00					
	Improve BES Process	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	82%			Red		
	Facility Systems Reliability	1.5.3	Fewer Than 5 Unscheduled Outages per Quarter	<5	6	Yellow	Green	Yellow		
		1.5.4	Improve Ratio of Preventive/Predictive Work Requests to Reactive Request	50%	41.0%	Green	Yellow	Red		
	Improve Design & Construc Process	2.2.1	95% of Construction Projects Meet Scheduled BOD	95%	96%	Green				
		2.2.2	Review Project Capacity- Goal 220 per year	220					Annual	
	Capital Construction Process	2.6.1	90% of Capital Construction Projects Completed On Time	90%	60		Red	Red		
	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%	Bi-Annual - Reported in July 2016					
		3.1.2	Decrease number of Hot and Cold Calls by 20%	<145	168	Green	Yellow	Green		
		3.1.3	95% of Informal Project Customers Satisfied or Very Satisfied	95%	100%	Green	Yellow	Green		
		3.1.4	90% of Reactive Work Request Customers Satisfied or Very Satisfied	90%	No slide					
		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%	Bi-Annual - Reported in July 2017 at 89%					
		4.3.2	87% Employees Satisfied or Very Satisfied in Each Unit	87%	Bi-Annual - Reported in July 2017					
Financial — *To financially sustain our mission, what must we focus on?*	Promote Fiscal Responsibility	5.1.1	100% of Financial Accounts within Budget	100%					Annual	
		5.1.2	Increase Supplemental Funding to Dept by 10% Annually	10%					Grants / Awards	
		5.1.3	Admin Cost/GSF ± 5% APPA Avg for Peer Institutions	+/-5% (.404)	0.85			Annual (Red)		
		5.1.4	Custodial Costs/Student ± 5% APPA Avg for Peer Institutions	+/-5%					Annual	
		5.1.5	Maint Cost/GSF ± 5% APPA Avg for Peer Institutions	+/-5% (1.48)					Annual	
		5.1.6	Landscape Cost/Acre ± 5% APPA Avg for Peer Institutions	+/-5% (4.30)					Annual	
		5.1.7	All Receipt Supported Funds Accounts Have Positive Balance	+ ($2.92M)	$777,796.00				Annual	
	Conserve Natural Resources	5.3.1	Decrease Energy Usage by 40% by FY2025	40%	32%	Green	Green	Green		
	Improve HUB Participation	5.4.1	12% HUB participation on 80% of Capital Projects	12% on 80%	100%	Red	Green	Green		
		5.4.2	5% African American Participation on Capital Projects	5%	12%	Green	Green	Green		
		5.4.3	15% HUB Participation on Informal Contracts >= $30K	15%	87%	Green	Green	Green		
		5.4.4	13% HUB Participation on Informal Projects <$30K	13%	62.7%	Red	Green	Green		
		5.4.5	3% African American Participation on Informal Projects <$30K	3%	9.58%	Red	Green	Green		
Internal Processes — *To satisfy and delight our customers, which operational processes must we excel in?*	Improve Labor Availability	1.1.1	Maintain "Wrench" Time to 70%	70%	70.4%	Green	Green	Green		
	Improve Logistics Efficiency	1.2.1	Improve Non-stock on-time delivery	95%	93.6%	Yellow	Yellow	Yellow		
		1.2.2	Reduce Average Non-Stock Requisition to Receipt Time	3.5 days	3.71	Yellow	Yellow	Yellow		
	Facility Systems Reliability	1.5.1	Improve Completion of PM Work Requests	90%	83.0%	Red	Red	Red		
		1.5.2	Decrease Unscheduled Equipment Replacement Projects	<2	1.00	Yellow	Red	Green		
	Maximize FM Effectiveness	2.1.1	Complete 40% of FM Five Year Technology Plan	100% of FY18	65%	Green	Red			
	Develop CRDM Program	2.3.1	Refine FCI Tracking Method; use method to recommend projects to improve campus FCI by 5% NLT July 2017	100%	No slide	Red				
	Space Planning & Utilization	2.4.1	Assignable square footage of space allocation for specific room uses for new and renovation projects will be within +/- 10% of recommended range. (Action Plan)	= / 10%	☑	Yellow		Green		
	Capital Planning & Design	2.5.1	Develop Lifecycle cost analysis & funding process for capital projects	Action Plan Only	☑					
		2.5.2	90% of Designers Under Contract w/n 120 days of posting	90%	100%	Green				
		2.5.3	90% of Designs Complete by Scheduled Completion Date	90%	75%	Green	Red	Red		
		2.5.4	90% of Designs Complete w/n Design Budgeted Fee	90%	50%	Green	Red	Red		
	Capital Construction Process	2.6.2	95% Completed w/n Original Construction Amt or CMP plus 3% new or 5% renovation	95%	80%		Green	Red		
	Execute Master Plan Phase I	2.7.1	80% of Capital Projects detailed in Phase I of MP complete	80%	No slide					
	Strategic Real Estate Acquisition	2.8	Develop Comprehensive Plan for Strategic Real Estate Acquistion - Lease and Purchase	Action Plan Only / Purchase/Lease	☑		Yellow			
Innovation & Learning — *How will we sustain our ability to change and improve?*	Recruit Qualfied Workforce	4.1.1	Vacancy Time <=80 days (nonexempt); <=120 (exempt)	80 days/120 days	142 / 137	Red	Red	Green		
		4.1.2	Reduce Number of Employees Terminated During Probation Period	<5%	0.14%	Green	Green	Green		
	Improve Workforce Development	4.2.1	Increase Supervisor/Mgr Training to 40 Hours per Year	1960 hours	Pending	Green			Annual	
		4.2.2	Increase Employees Training to 20 Hours per Year	7760 hours	Pending	Green			Annual	
	Improve Employee Safety	4.4.1	Reduce Number of Reportable Accidents by 20% Annually	17	9	Red	Annual (27)			
		4.4.2	98% Mandatory Compliance Training Completed Annually	98%	No slide				Annual	
	Improve Workforce Performance	4.5	Improve Workforce Performance	Action Plan Only	☑					
	Develop a Sustainable Campus	5.2.1	Increase Recycling of Construction & Demo Materials 80%	80%	No data			Red		
		5.2.2	Increase Percent of Solid Waste Diversion to 45%	45%	33%	Green	Yellow	Green		
		5.2.3	Achieve Gold Rating on S.T.A.R.S. NLT Dec 2018	100%	40%	Green	Green	Green		
		5.2.4	Implement 60% of Campus Sustainability Plan Best Practices	60%	63%	Green	Green	Green		

LEGEND:

Met Target	🟩	100% performance to target ratio
Near Target	🟨	90-99% performance to target ratio
Needs Attention	🟥	Below 90% performance to target ratio
No Data Available	⬜	Unable to Measure or In Progress

Goal 1 - Continuously Improve Operation of Campus Facilities
Goal 2 - Create a Reliable and Sustainabile Physical Infrastructure
Goal 3 - Foster a Customer Focused Organization
Goal 4 - Recruit, Develop, and Retain Quality Employees
Goal 5 - Promote Good Stewardship