UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Third Quarter – Fiscal Year 2013
January – March 2013

…Creating a Campus of Distinction

UNC CHARLOTTE

"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

GOAL #1

Improve Maintenance and Operation on the Campus

UNC CHARLOTTE

"People with goals succeed because they know where they're going"

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Successfully Adapt Existing Facilities to Meet New Requirements

UNC CHARLOTTE

"Fix your eyes forward on what you can do, not back on what you cannot change."

—Tom Clancy

GOAL #3

Deliver New Facilities that Support the University's Mission

UNC CHARLOTTE

"People don't want to communicate with an organization or a computer.

They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction."

- Theo Michelson, State Farm Insurance

GOAL #4

Perfect a Customer Focused Organization

UNC CHARLOTTE

"All growth depends upon activity. There is no development physically or intellectually without effort, and effort means work."

-- Calvin Coolidge,
30th U.S. president

GOAL #5

Develop a Valued, Well-trained, Motivated and Diverse Workforce

UNC CHARLOTTE

"The more positive you are when you think and work toward your goals, the faster you achieve them."

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship

UNC CHARLOTTE

Balance Score Card

CUSTOMER

Perspective

Strategic Objectives:

Work Request Process, Housekeeping Processes, Improve Process Reliability, Increase On-Time Delivery, Informal Project Administration, Enhance Customer Satisfaction

GOAL #1 – Improve Facilities Operations

Lead F. O.

Strategy:	**1.3**	Improve Work Request Process
Objective:	**1.3.1**	Decrease Percentage of Reactive Work Requests to < 58%
	1.3.2	Decrease Work Request Cycle Time by 5%

ACTION PLAN

- Actions Planned

1 – Old and New PM Modules are not connecting so the data is not a true count; data shown is not accurate.

2 – EDA's; we are working through challenges with the new status' they are opened up (completed not verified is not completed and taken to history).

3 - Continue to build PM program to cover all equipment and buildings.

4 – Continue increasing predictive maintenance measures as funds permit.

5 – Continue review of reactive work requests for routine services that should be moved to "scheduled services," or PM.

6 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

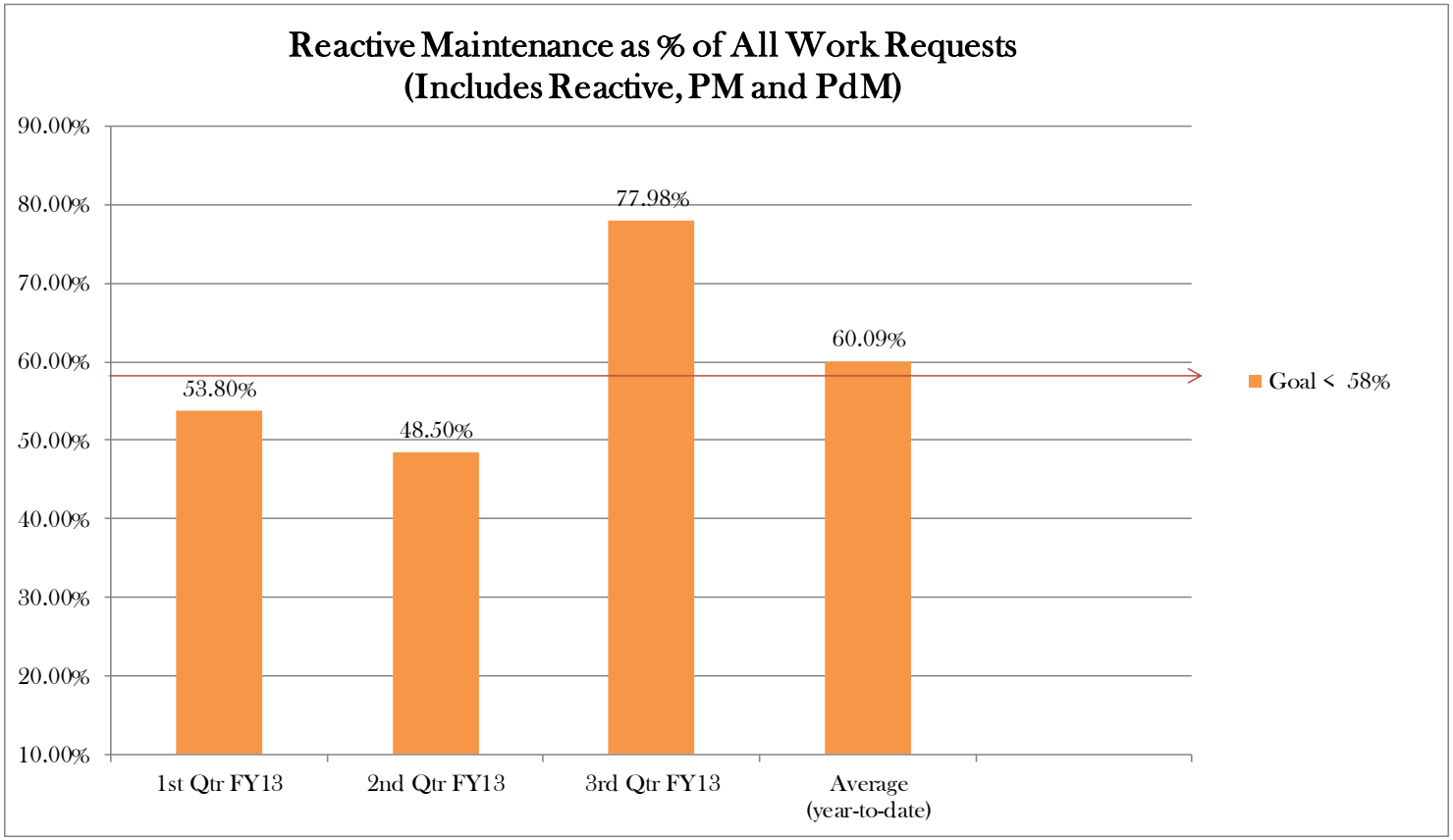
Lead F. O.

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.3** Improve Work Request Process
Objective: **1.3.1** Decrease Percentage of Reactive Work Requests to less than 58%

Measure: Percentage (Number of reactive work requests divided by total number of work requests including PM and predictive work requests) (APPA Benchmark)
Goal: Percentage to average < 58% for year.

Balanced Scorecard Category: Customer Perspective



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

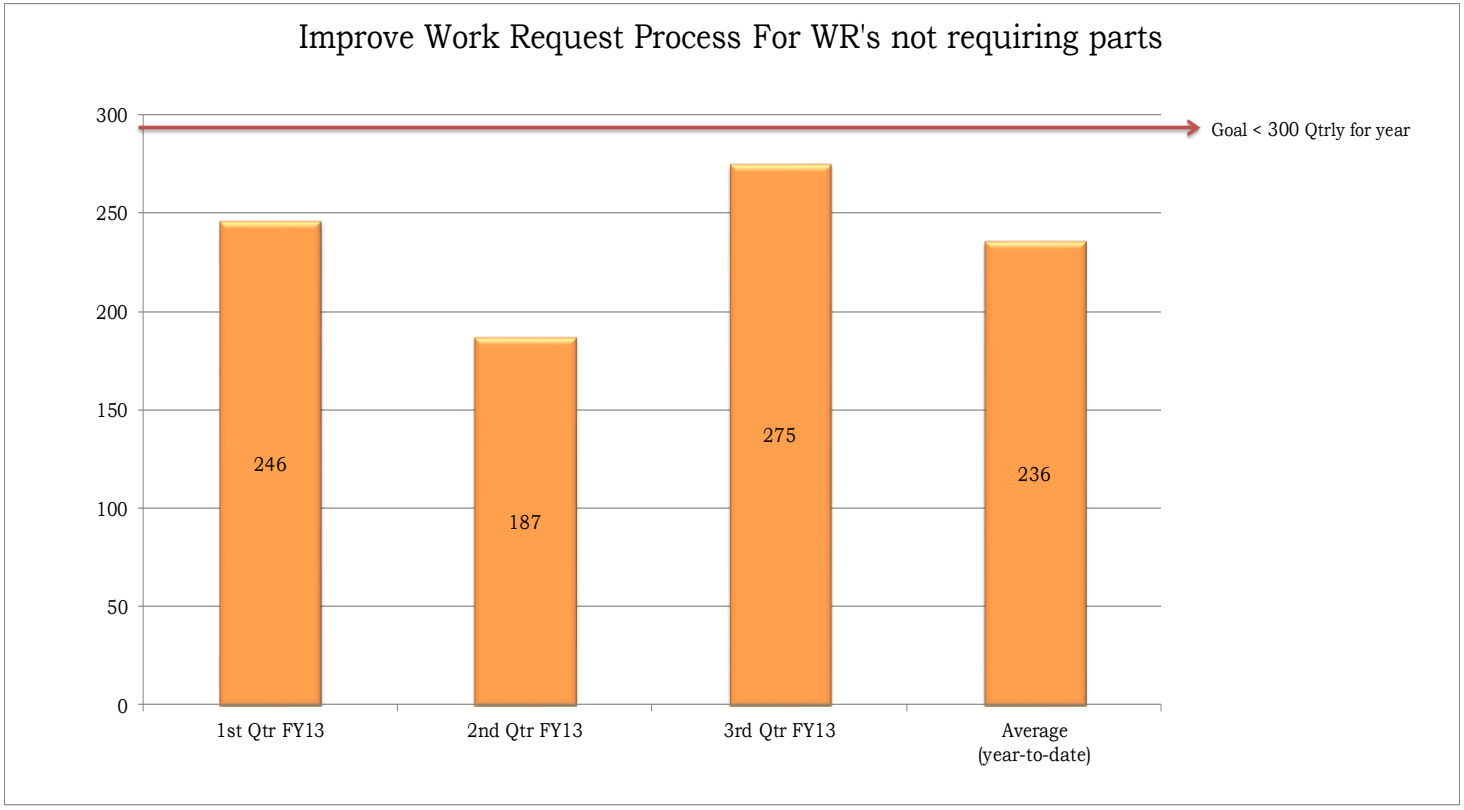
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.3** Improve Work Request Process
Objective: **1.3.2** Decrease Work Request Cycle Time by 5%

Measure: Hours from work request submission to work complete status (for WR's not requiring parts).

Goal: Less than 300 quarterly average for the year

Balanced Scorecard Category: Customer Perspective



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GOAL #1 – Improve Maintenance and Operations

Strategy: **1.4** Improve Housekeeping Processes
Objective: **1.4.1** Achieve APPA Level 2 in 98% of Buildings

Lead Housekeeping

ACTION PLAN

- Actions Complete
  - All buildings not in renovation audited (self audit)
  - Changed chart to reflect summary data for last four quarters
  - Initiated reorganization study

- Actions Planned
  - Continue quarterly self audits
  - Validate accuracy of self inspection
  - Continue reorganization study

Facilities Management Strategic Planning Session – 3rd Quarter FY 2013

Lead Housekeeping

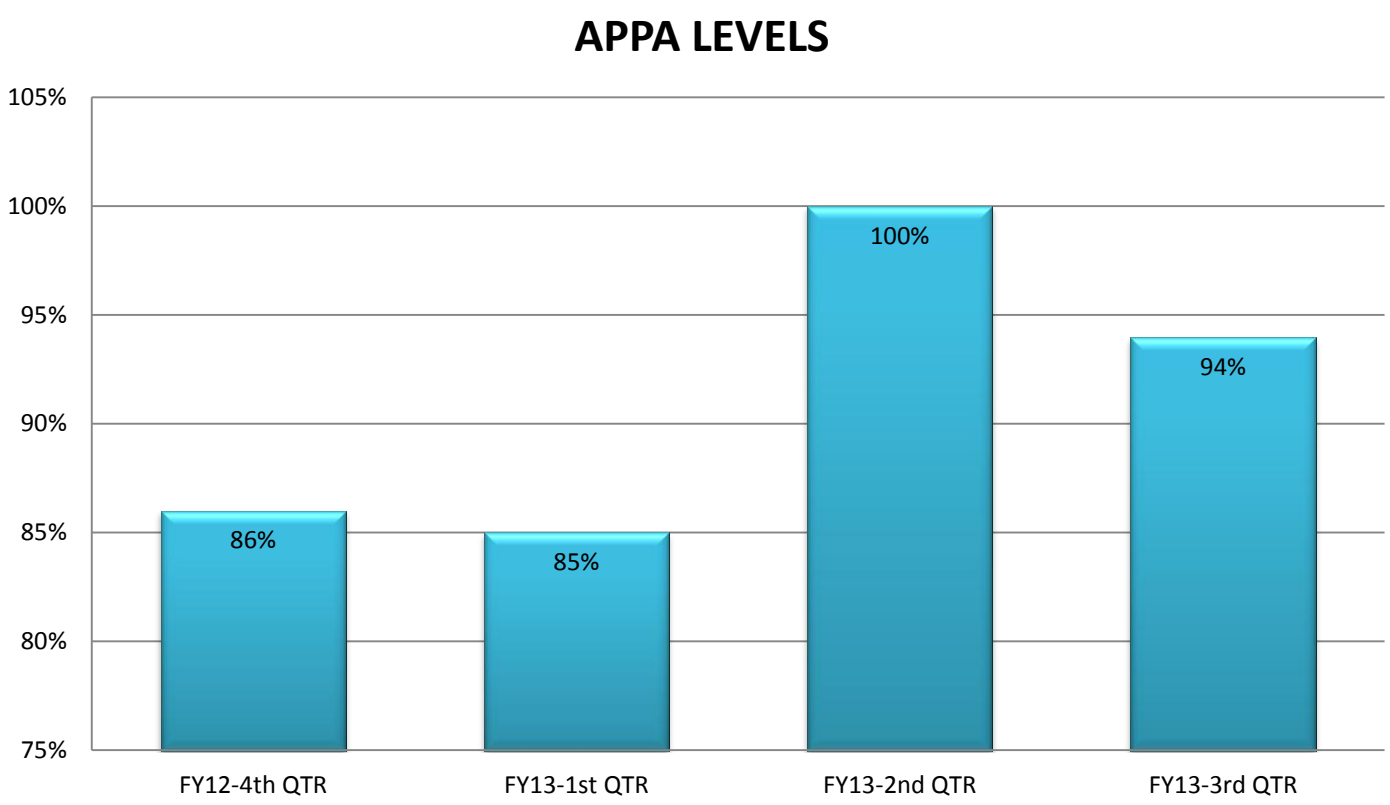
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: **1.4** Improve Housekeeping Processes
Objective: **1.4.1** Achieve APPA Level 2 in 98% of Buildings

Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Balanced Scorecard Category: Customer Perspective

Percentage = 94%



STATUS

GOAL #1 – Improve Facilities Operations

Strategy: **1.5** Improve Reliability
Objective: **1.5.3**
1.5.4

Lead
F. O.

ACTION PLAN

- Actions Planned

1 – Complete development of PM Program converting from old PM Module to new PM Module. Focus on new buildings (CCB and EPIC)

2 – Closer monitoring of PM completions by Supervisors and Managers.

3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.

4 – Prepare program for major equipment repairs and replacement.

5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

6 – Continue working with Simplex/Siemens to bring the new buildings online with the network.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead
F. O.

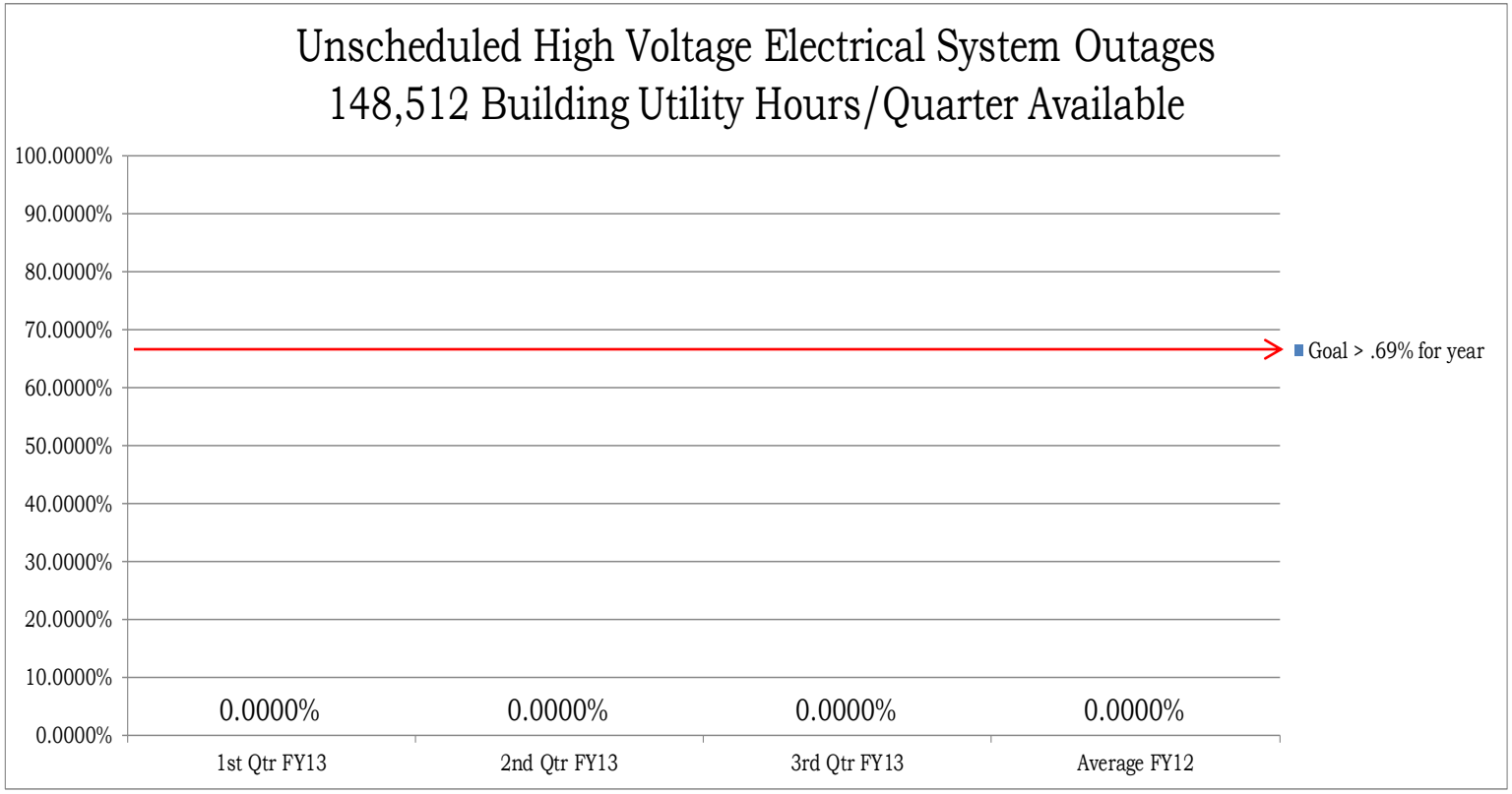
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.5** Improve Reliability
Objective: **1.5.3** Reduce Unscheduled High Voltage Electrical System Outages by 10%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than .69% for year.

Balanced Scorecard Category: Customer Perspective



STATUS

Lead F. O.

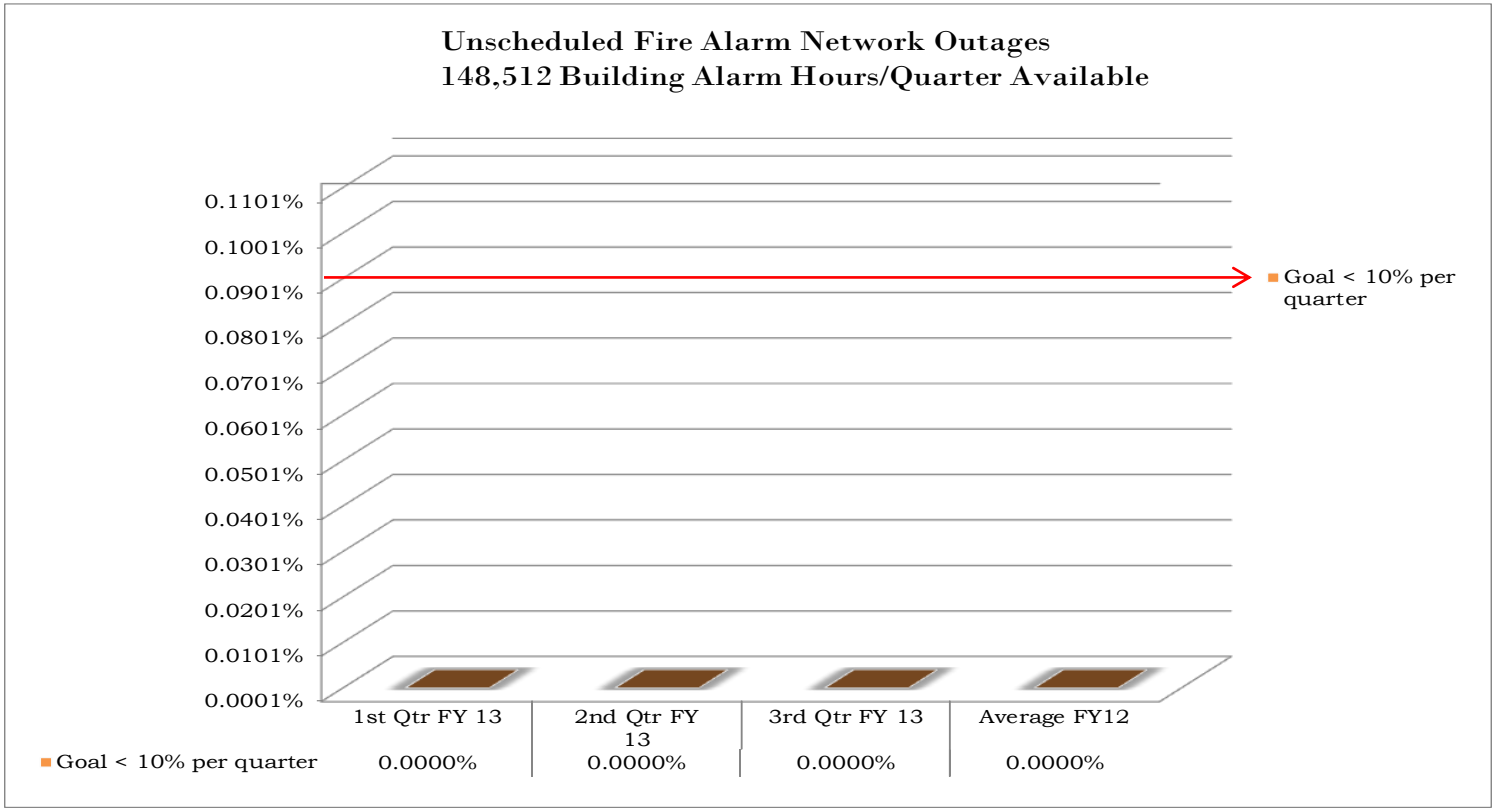
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.5** Improve Reliability
Objective: **1.5.4** Reduce Unscheduled Fire Alarm Network Outages by 10%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective



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Facilities Management Strategic Planning - Third Quarter FY 2013

Lead Design Services

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process

Objective 2.2.1 95% of Projects Designed on Time
97.0% achieved for FY12 with 94.0% in the 4th Quarter

Objective 2.2.2 85% of Estimates for Informal Projects within +/- 10% of Actual
97.2% achieved for FY12 with 96.6% in the 4th Quarter

Objective 2.2.4 90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date
95.9% achieved for FY12 with 94.4% in the 4th Quarter

Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase
100% achieved for FY12 (yearly goal only)

ACTION PLAN FOR IMPROVEMENT

Review and Implement process improvement updates based upon four committee recommendations:

- ☐ Eliminate or Streamline Design Services Processes
- ☐ Improve Customer Surveys
- ☐ Improve Customer Meetings
- ☐ Improve HUB Usage - Increase African American Percentage

Facilities Management Strategic Planning - Third Quarter FY 2013

Lead Design Services

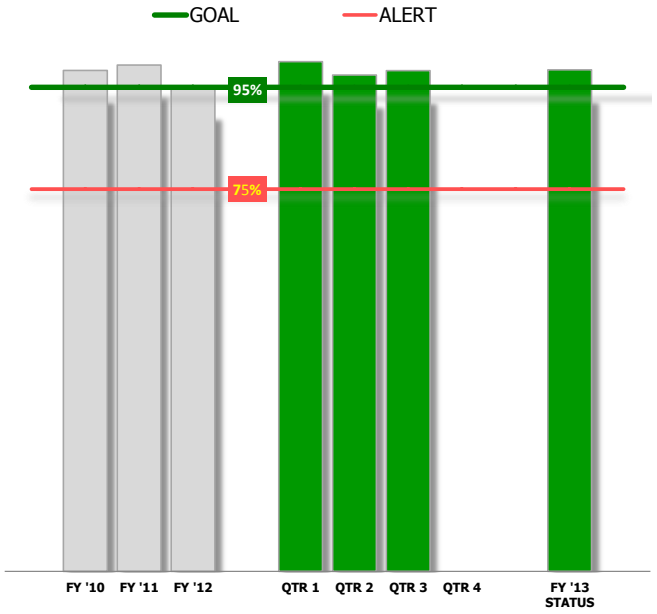
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.1 **95% of Projects Designed on Time**

Measure: Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)
Balanced Scorecard Category: Customer Perspective

95% of Projects Designed on Time

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not completed on time	Designed On Time
FY '10	*173*	*170*	*3*	*98.3%*
FY '11	*300*	*298*	*2*	*99.3%*
FY '12	*240*	*228*	*12*	*95.0%*
QTR 1	29	29	0	**100.0%**
QTR 2	38	37	1	**97.4%**
QTR 3	57	56	1	**98.2%**
QTR 4	0	0	0	**0.0%**
FY '13 STATUS	*124*	*122*	*2*	**98.4%**
			GOAL:	**95.0%**



GOAL 95.0% **STATUS 98.4%**

Facilities Management Strategic Planning - Third Quarter FY 2013

Lead Design Services

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy **2.2** Improve Informal Project Design and Construction Process
Objective **2.2.2** **85% of Estimates for All Construction within +/- 10% of Actual.**

Measure: Percentage (Number of Projects designed with actual costs within +/- 10% of estimate, divided by total number of projects designed)

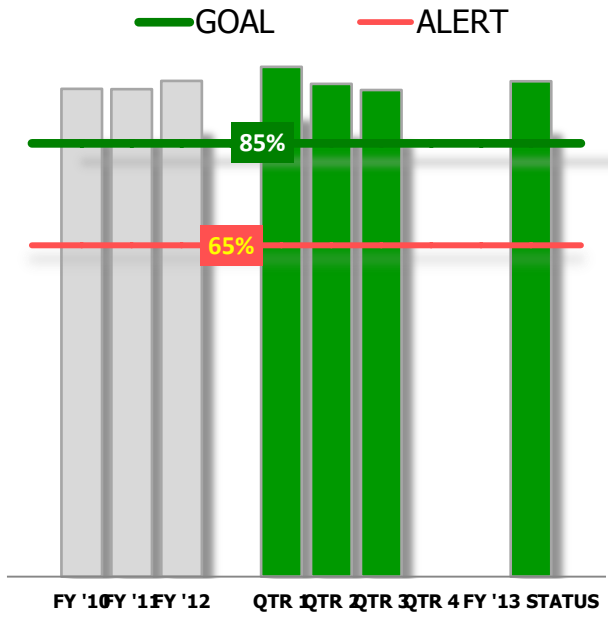
Balanced Scorecard Category: Customer Perspective

85% of Estimates for All Construction within 10% - 2.2.2

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '10	*255*	*244*	*11*	*95.7%*
FY '11	*297*	*284*	*13*	*95.6%*
FY '12	*218*	*212*	*6*	*97.2%*
QTR 1	32	32	0	**100.0%**
QTR 2	30	29	1	**96.7%**
QTR 3	44	42	2	**95.5%**
QTR 4	0	0	0	**0.0%**
FY '13 STATUS	*106*	*103*	*3*	**97.2%**

One project less 15% of estimate

GOAL: **85.0%**



GOAL 85.0%

STATUS 97.2%

Facilities Management Strategic Planning - Third Quarter FY 2013

Lead Design Services

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

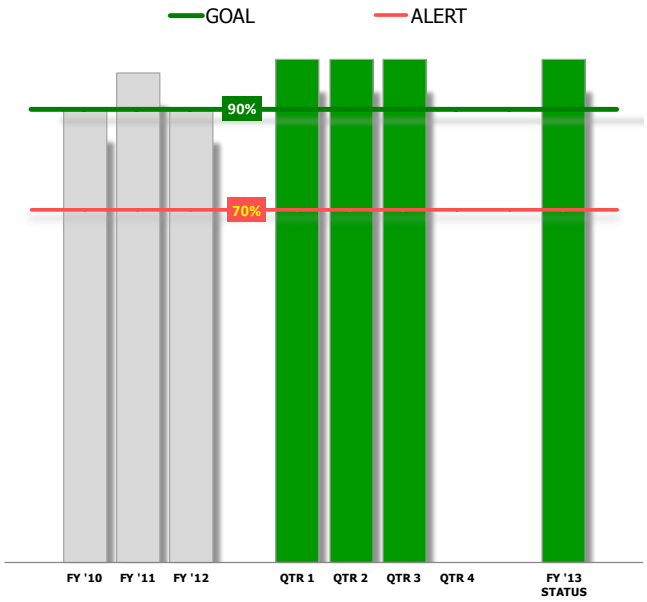
Strategy **2.2** Improve Informal Project Design and Construction Process
Objective **2.2.4** **90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

Measure: Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)

Balanced Scorecard Category: Customer Perspective

90% of All Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.5

QUARTERLY REVIEW	No. of Projects	No. that met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '10	*182*	*164*	*18*	*90.1%*
FY '11	*297*	*289*	*8*	*97.3%*
FY '12	*240*	*216*	*24*	*90.0%*
QTR 1	32	32	0	**100.0%**
QTR 2	45	45	0	**100.0%**
QTR 3	44	44	0	**100.0%**
QTR 4	0	0	0	**0.0%**
FY '12 STATUS	*121*	*121*	*0*	**100.0%**
			GOAL:	**90.0%**



GOAL 90.0%

STATUS 100.0%

This slide reserved for 2.2.6 annual graph report

Increase Project Volume by 10 Projects Per Year

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.4** Improve Administration of the Capital Construction Process
Objective **3.4.1** 90% of Capital Construction Projects completed on Schedule

ACTION PLAN

- Actions Complete

  N/A

- Actions Planned

  1. Keep schedules <u>current</u> & refer to them monthly
  2. Discuss schedule (baseline & current) with end users
  3. Inform designer and CM of each other's contractual agreements

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead Capital

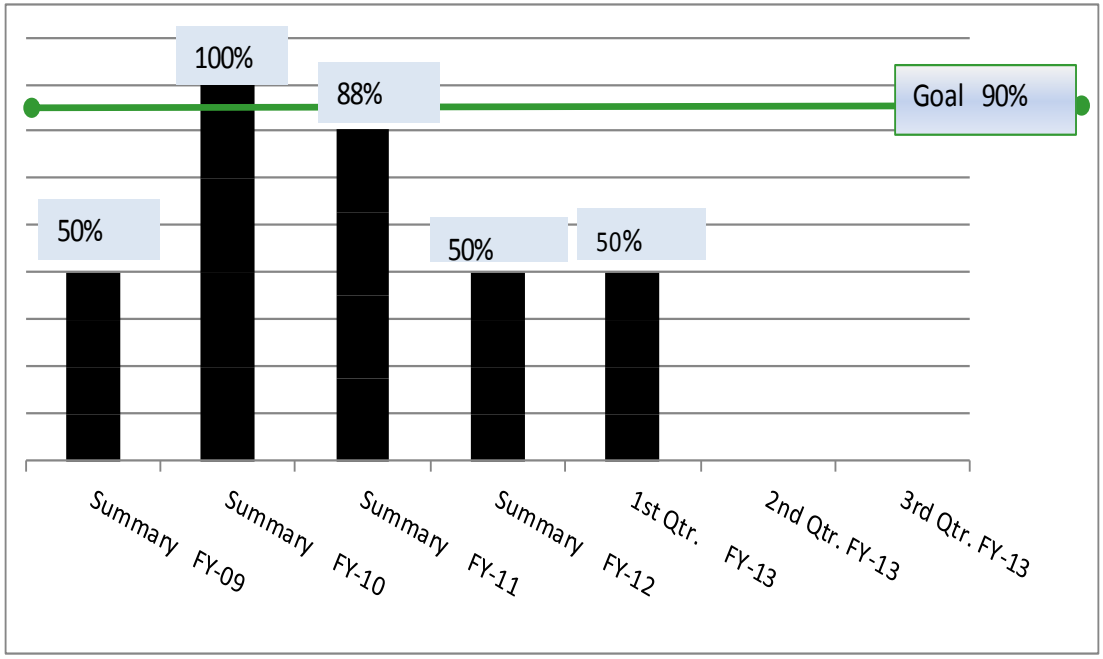
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy **3.4** Improve Administration of the Capital Construction Process
Objective **3.4.1** 90% of capital construction Projects completed on time

Measure: Percentage of construction projects completed on or before the contract completion date (CCD)

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-09	4	2	50%
Summary FY-10	6	0	100%
Summary FY-11	7	1	88%
Summary FY-12	6	6	50%
1stQtr. FY-13	1	1	50%
2ndQtr. FY-13	0	1	0%
3rd Qtr. FY-13	n/a	n/a	n/a



3rd Qtr. Objective is n/a
Year to date is 33%

Status

GOAL #4 – Perfect a Customer Focused Organization

Lead FBO

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%
Objective 4.1.2 Achieve overall FM Unit Customer Satisfaction of 85% (Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

ACTION PLAN

- Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers.

- Development of a Communications Strategy recommendation underway.
  - Web Advisory Group (WAG) has been formed to address customer usability, design and university compliance of FM entire website.
  - Research and visitations of other peer institution Communication Offices for learning opportunities, processes, challenges, pitfalls, etc.
  - External customer and internal employee Environmental Scan underway. Summary to be presented within next several weeks.
  - Increase external publicity (i.e. UNC Charlotte Magazine, Observer)

- Review processes and procedures from the Business and HR side
  - Concerns continue to surface regarding the impact of new technology on processes/procedures. Examples are People Admin and 49er Mart.
  - Review (lean) Time Sheet Processing. Processes have been mapped. **Project on hold** due to new university initiative?

GOAL #4 – Perfect a Customer Focused Organization

Strategy **4.1** Continually Improve Customer Service/Satisfaction
Objective **4.1.3** Decrease the Number of Hot/Cold Calls by 15%

Lead
F. O.

ACTION PLAN

- Actions Planned

1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
2 – Ensure that Zones are checking BAS and monitoring conditions
3 – Continue to develop controls section and cross train with Zones.
4 – Continue to work with Capital to get buildings commissioned and retro commissioned.
5 – Ensure that we are following UNCC Temperature Control Policy

Facilities Management Strategic Planning Session – Third Quarter FY 2013

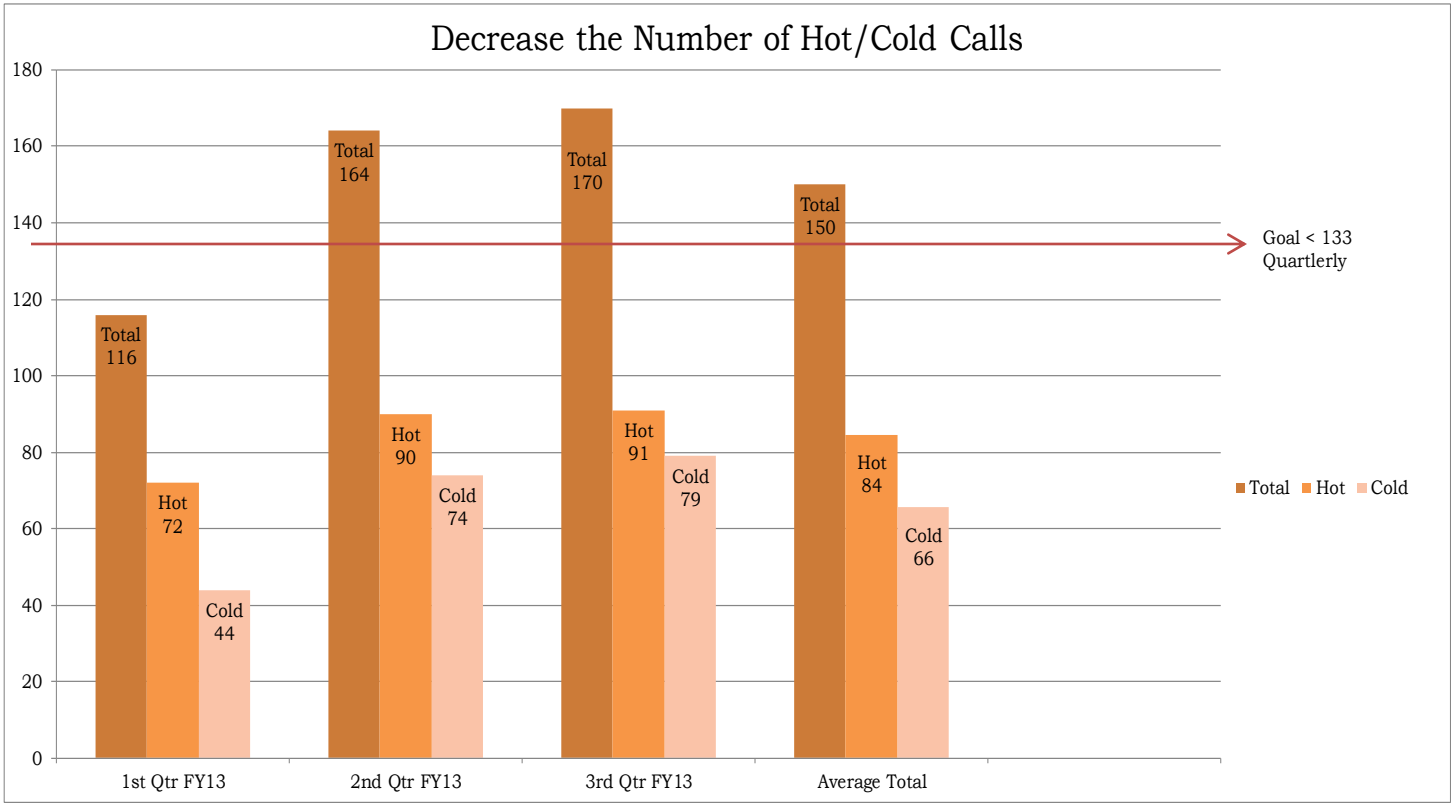
GOAL #4 – Perfect a Customer Focused Organization

Strategy **4.1** Continually Improve Customer Service/Satisfaction
Objective **4.1.3** Decrease the Number of Hot/Cold Calls by 10% from FY12 Average of 174 (Goal < 133)

Measure: Number of hot/cold calls submitted on work requests.

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective



STATUS

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Customer Satisfaction Survey

Customer Surveys are under review for improvement.
(see Action Plan for Improvement – Goal #2)

UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Strategic Objectives:

Manage Budget, Maximize Revenue Stream

Promote Fiscal Responsibility

Sustainable Practices

Conserve Natural Resources

Improve Employee Safety

Improve HUB Participation

GOAL #6 – Promote Good Stewardship

Lead FBO

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.1	Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.
Objective 6.1.2	Increase Grants and Supplemental Funding to the Department by 25%
Objective 6.1.3	Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

- ❑ The development of a FM Budgeting Basics Training program is underway. Section 1 (FM Budgeting 101) is complete. Program skeleton is under development; It is expected that there will be several sections, each targeted to specific areas, actions, etc. For example, Sherry Ceallaigh will create the section for Capital Finance. The entire training program will not be completed until at least August 2013.

- ❑ Continue to work through accounting issues such as use of account codes, receiving, after the fact vs. non-compliant requisitions, etc. Send reminders to responsible parties. Review cost accounting centers in preparation for future reporting requirements.

- ❑ Improve communication with the Controller's Office, the Budget Office and FM (Capital, Design Services and Real Estate/Land Use). Meetings are underway to develop guidelines for Financial Statement reporting and Fixed Assets concerns.

- ❑ Boast effort to locate external funding opportunities that align with FM's strategic vision, mission and goals;

GOAL #6 – Promote Good Stewardship

Lead Housekeeping

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.4** Achieve Custodial Costs/Student FTE Plus or Minus 5% of the APPA Average for Peer Institutions
(Internal UNC Peers = East Carolina, Greensboro)
(National Peers = University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University.

ACTION PLAN

- Actions Complete
  - Changed objective from cost per GSF to cost per student FTE
- Actions Planned
  - Monitor and report building environmental services cost/student FTE on an annual basis using data from APPA survey

Facilities Management Strategic Planning Session – 3rd Quarter FY 2013

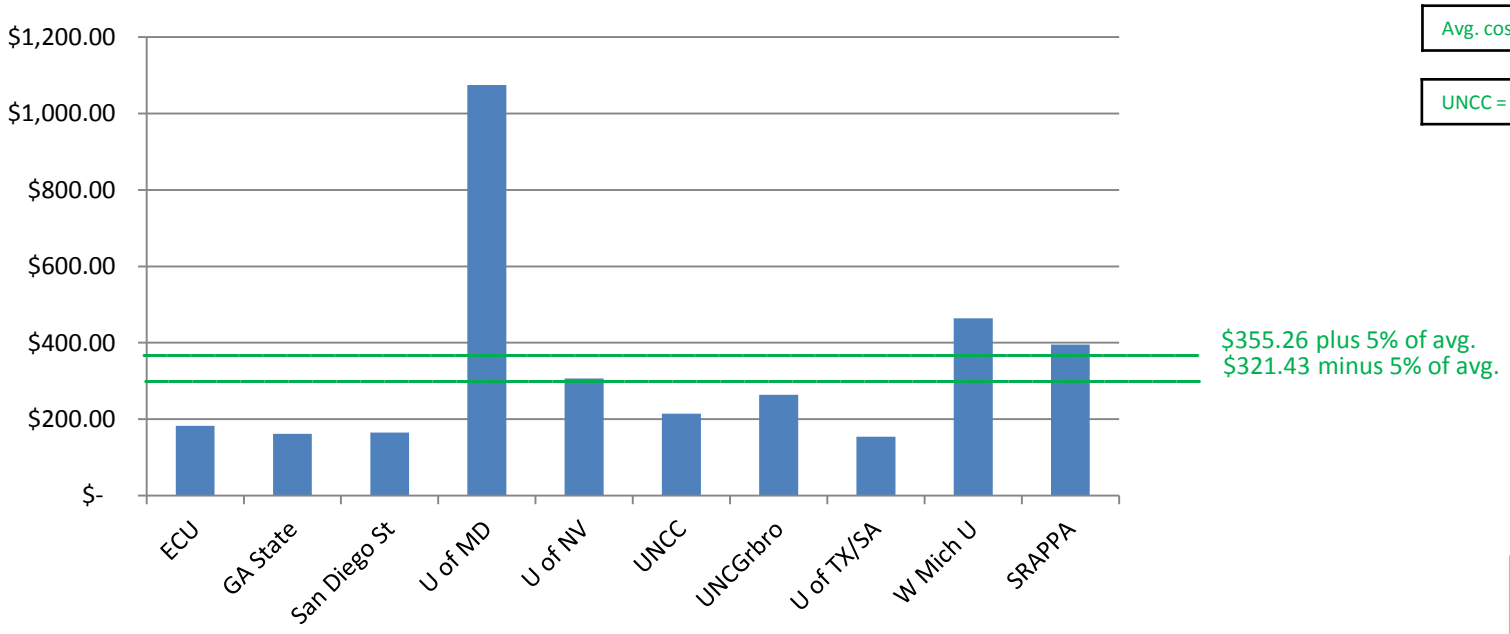
Lead Housekeeping

GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.4** Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal Peers = East Carolina, Greensboro) (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University.)
UNC

Measure: Custodial Costs/Student from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/GSF

Balanced Scorecard Category: Financial Perspective



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GOAL #6 – Promote Good Stewardship

Lead
F. O.

Strategy	**6.1**	Promote Fiscal Responsibility
Objective	**6.1.5**	Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average
	6.1.6	Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average
	6.1.7	Exceed Labor Services Payroll requirements by 10%

ACTION PLAN

- Actions Planned

1 – Make sure that data submitted is correct.

2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.

3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.

4 – Utilize UPA to help identify when falling behind in data entry

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

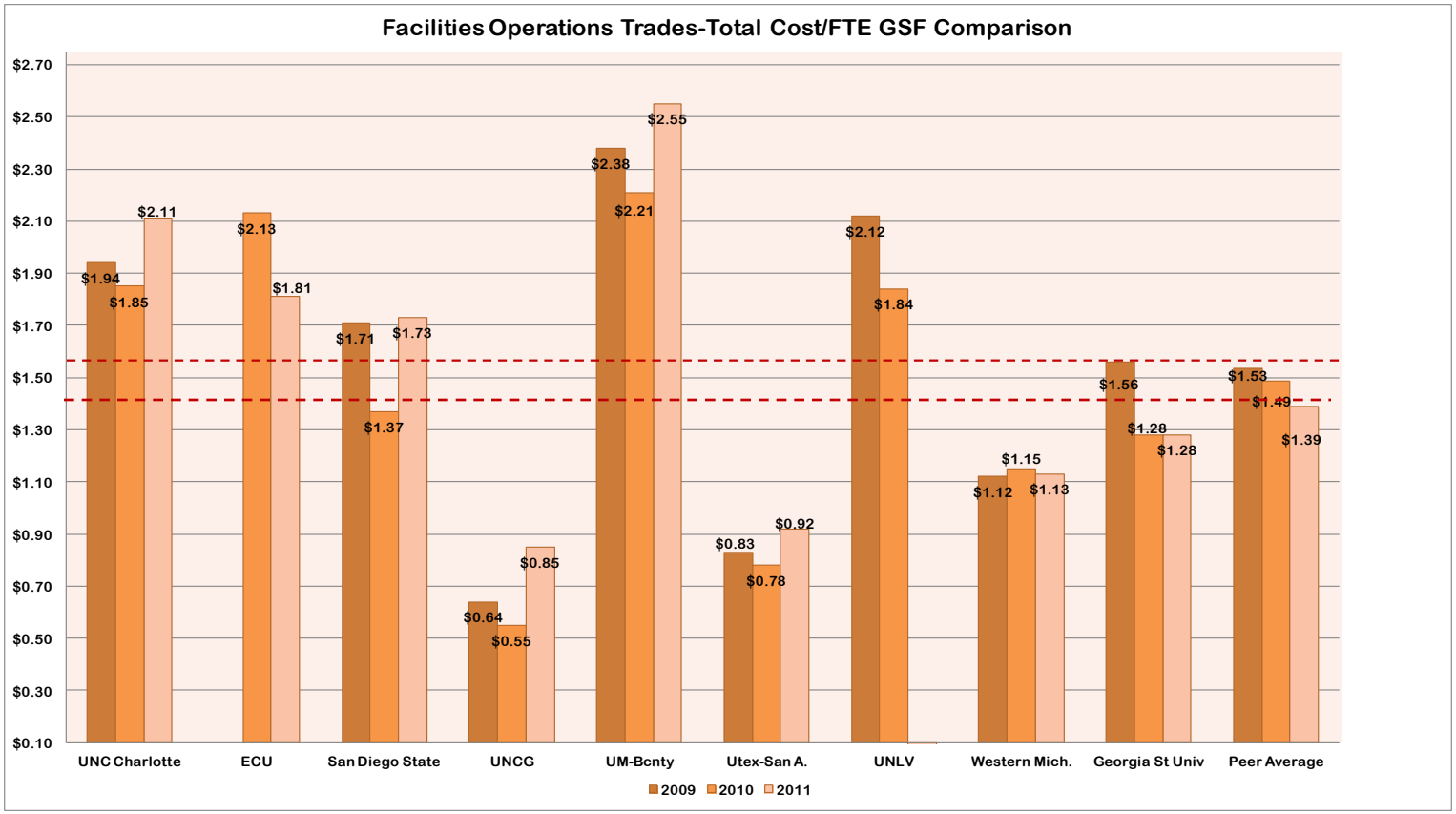
GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.5** Achieve Total Maintenance Cost/GSF ± 5% of APPA Average for Peer Group .

Measure: Maintenance cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective

Note: Peer average does not include institutions not reporting nor those which included auxiliaries (Western Michigan).



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Facilities Management Strategic Planning Session – Third Quarter FY 2013

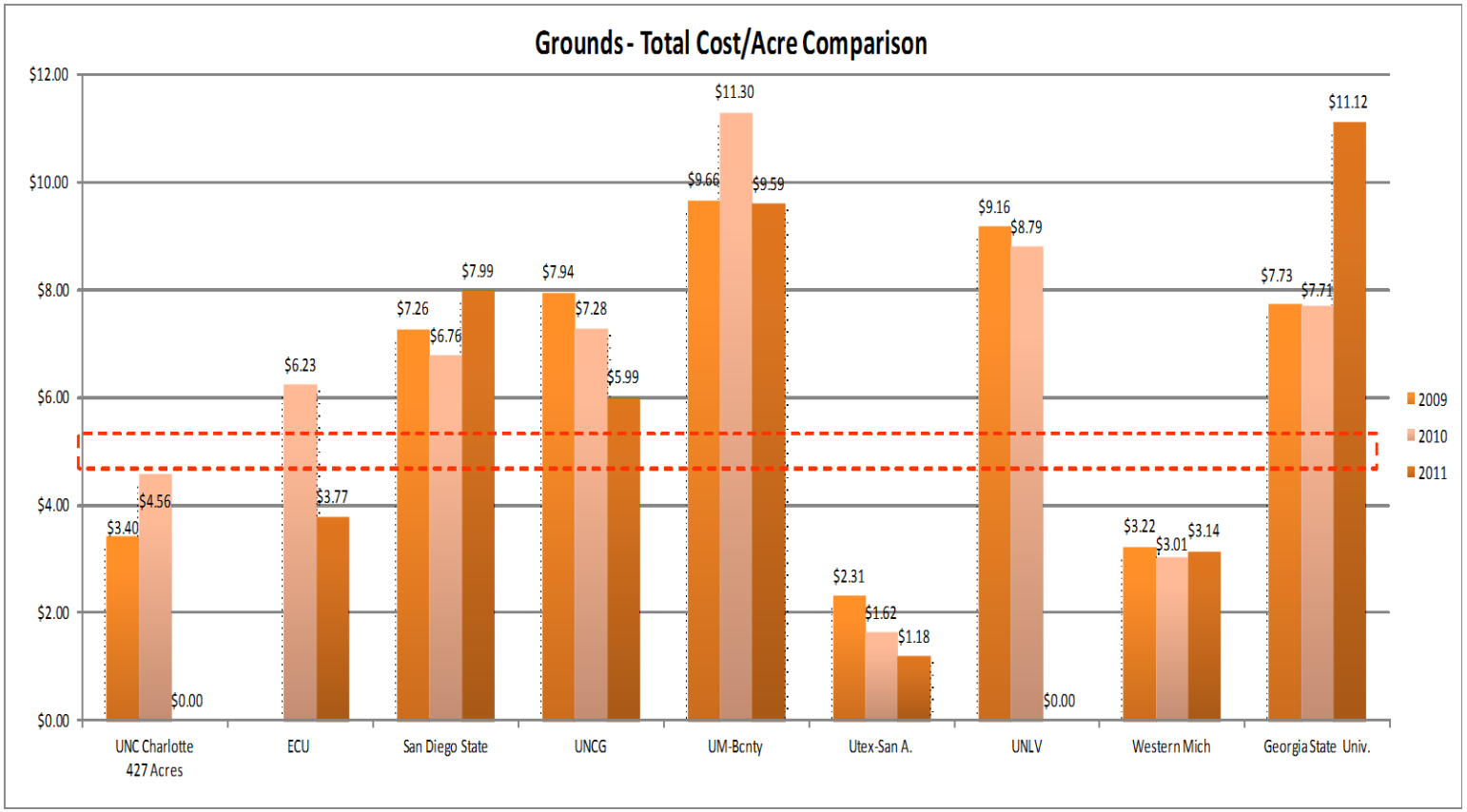
Lead F. O.

GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.6** Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group .

Measure: Landscape cost/Acre from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective



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Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

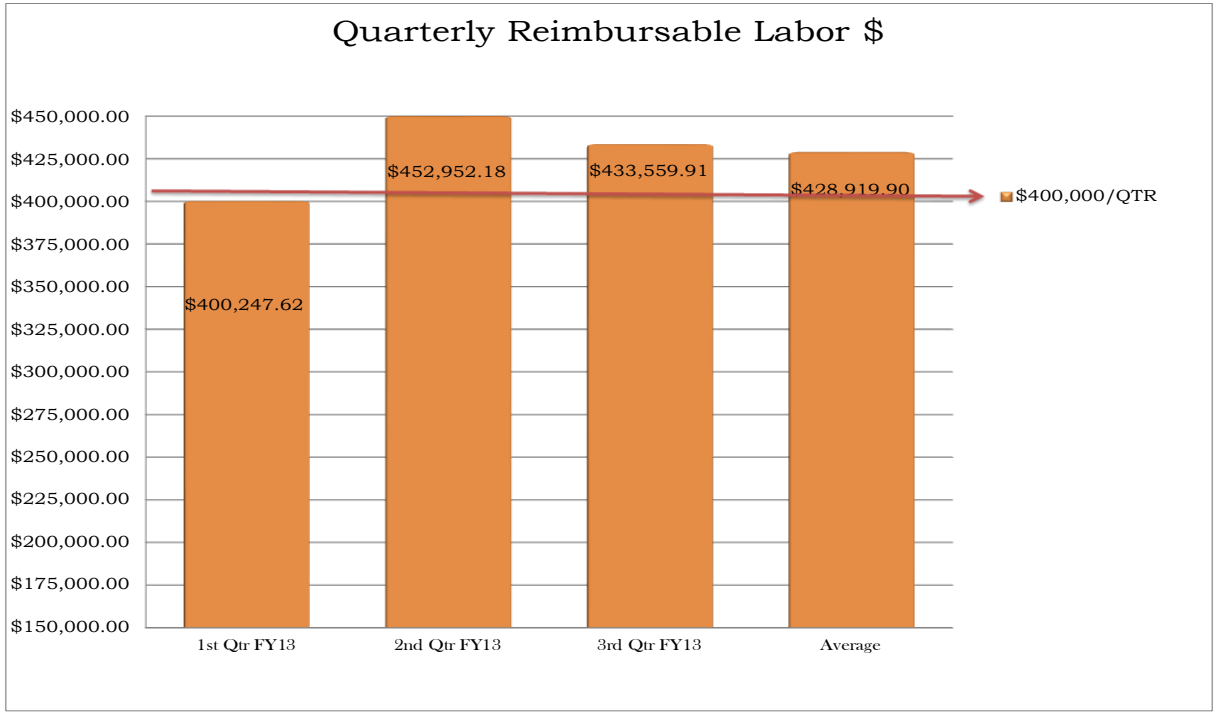
GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.7** Exceed Labor Services Payroll requirements by 10%

Measure: Projected verses actual earnings by shop by quarter ($400,000/Qtr) at current levels

Goal: $400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective



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GOAL #6 – Promote Good Stewardship

Strategy **6.2** **Develop a Sustainable Campus**

Objective **6.2.4** Implementation of sustainability plan actions

Lead Planning

ACTION PLAN

STARS Focus Areas

- Category 1: Education & Research (ER)
  - Co-Curricular Education
  - Curriculum
  - Research
- Category 2: Operations (OP)
  - Buildings
  - Climate
  - Dining Services
  - Energy
  - Grounds
  - Purchasing
  - Transportation
  - Waste
  - Water
- Category 3: Planning, Admin. & Engagement (PAE)
  - Coordination and Planning
  - Diversity and Affordability
  - Human Resources
  - Investment
  - Public Engagement
- Category 4: Innovation (IN)

Lead Planning

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

ACTION PLAN

- Campus Sustainability Report
- CAP implementation
- Eco-reps
- Survey
- Revolving Loan
- Campus Energy summit planning
- Building performance paper

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #6 – Promote Good Stewardship

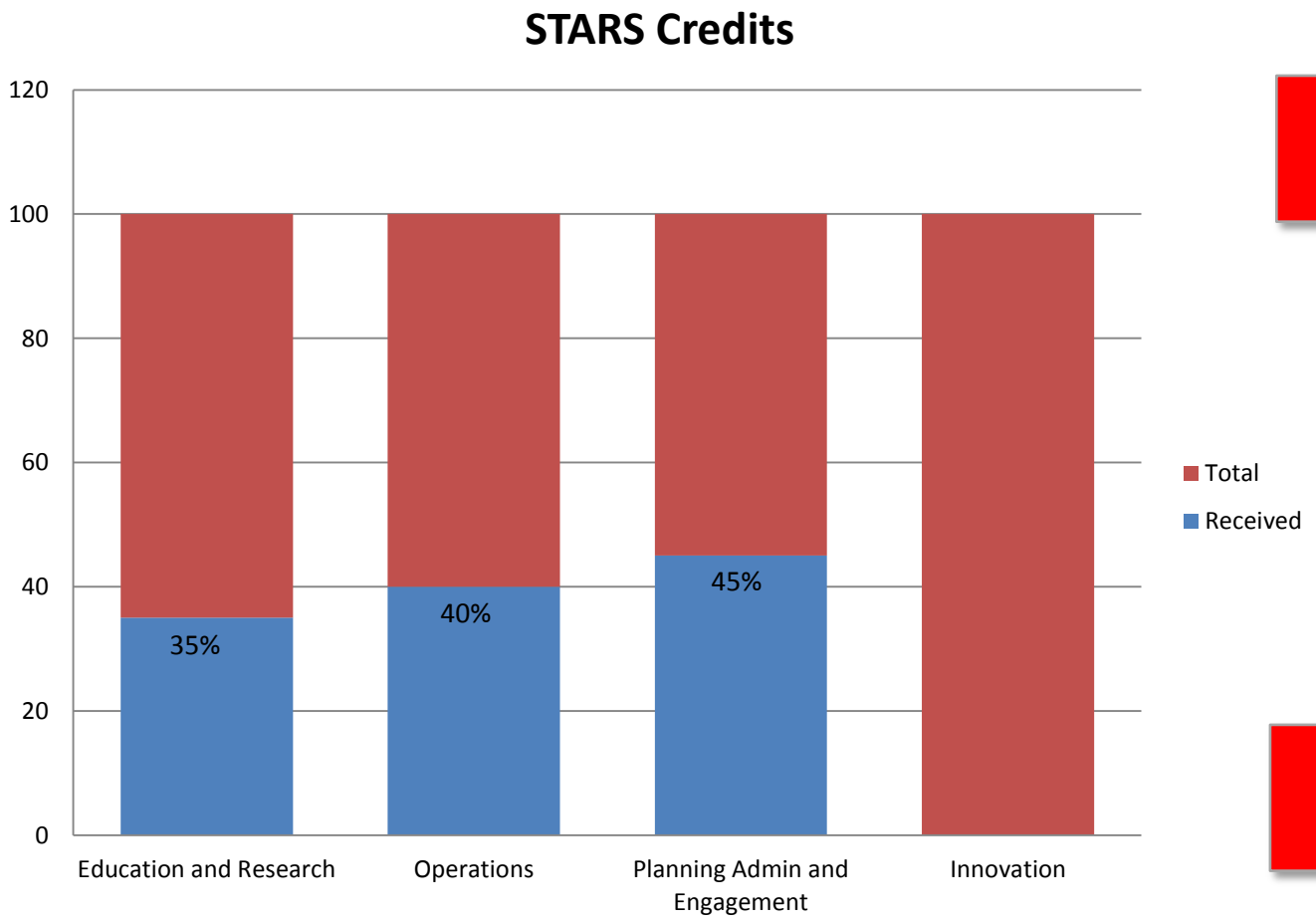
Strategy **6.2** **Develop a Sustainable Campus**

Objective **6.2.4** **Achieve 60% of STARS credits**

Measure: **Number of points completed in each category.**

Balanced Scorecard Category: Innovation and Learning

Lead Planning



30 %

Status

GOAL #6 – Promote Good Stewardship

Strategy **6.3** Conserve Natural Resources
Objective **6.3.1** Decrease Energy Usage 30% by FY2015

Lead Capital

STATUS

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Pursue lighting retrofits in bldgs. that still have T-12's
  - GA lighting only PC Construction by cal year end
  - IGA Starts in June
- Continue retro-commissioning program
- Upgrade BAS to enable setbacks
- Energy efficient equipment upgrades
- Get Performance Contract into construction
- Exterior Lighting upgrades to LED

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Lead Capital

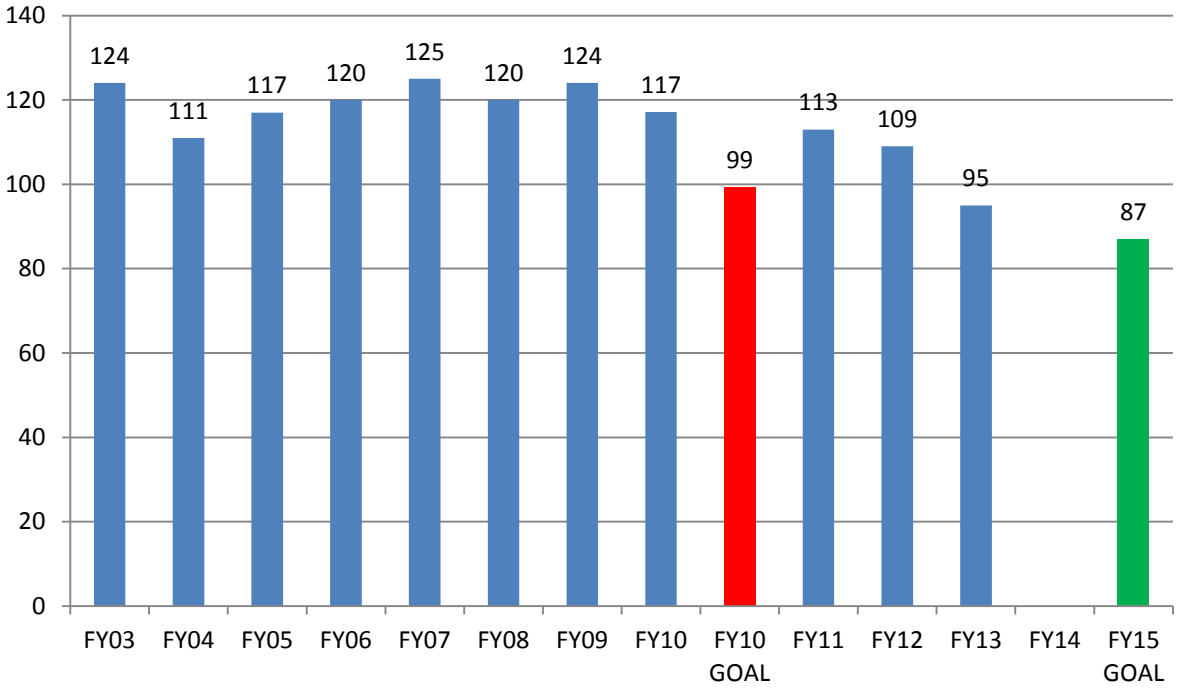
Strategy **6.3** Conserve Natural Resources
Objective **6.3.1** Decrease Energy Usage by 30% by FY2015

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



State Mandate
(Base Year FY 2003)

20% Reduction by FY 2010
30% Reduction by FY 2015

Facilities Management Strategic Planning Session – Third Quarter FY 2013
v
GOAL #6 – Promote Good Stewardship

Lead Capital

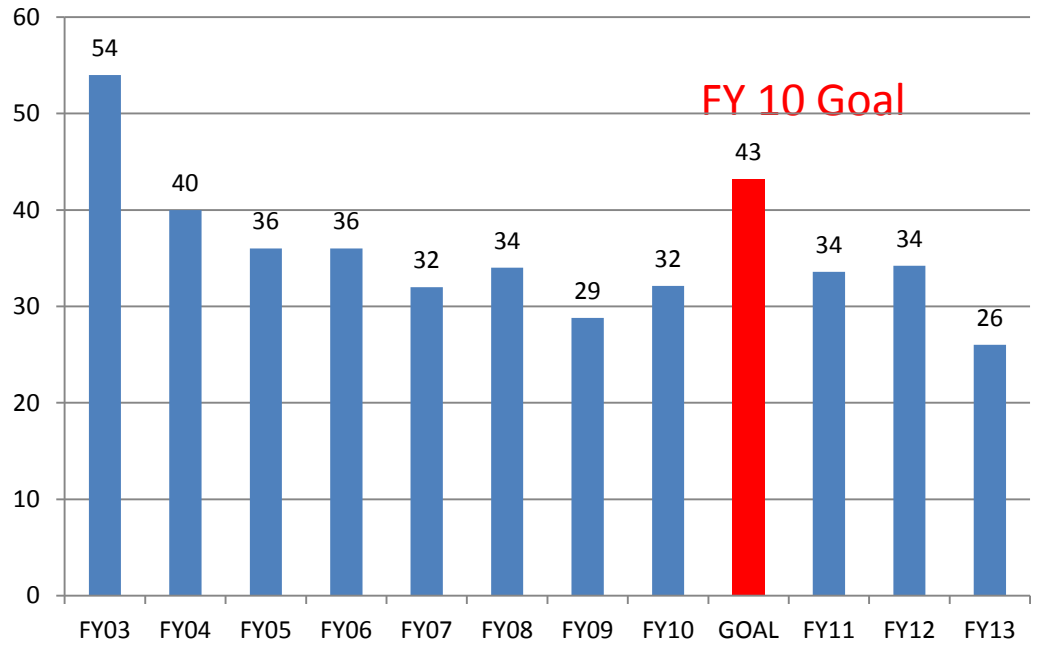
Strategy **6.3** Conserve Natural Resources
Objective **6.3.2** Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve valuable resources



ACTION PLANS FOR IMPROVEMENT

Objective 6.5.3 – Encourage Purchasing to establish a goal for African American participation

Continue –

- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms
- Encourage participation in all ethnic segments
- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and "*Good Faith Effort*" documentation to ensure compliance. Hold CM firms accountable!
- Program Compliance
- Education & Outreach

Facilities Management Strategic Planning Session – Third Quarter FY2013

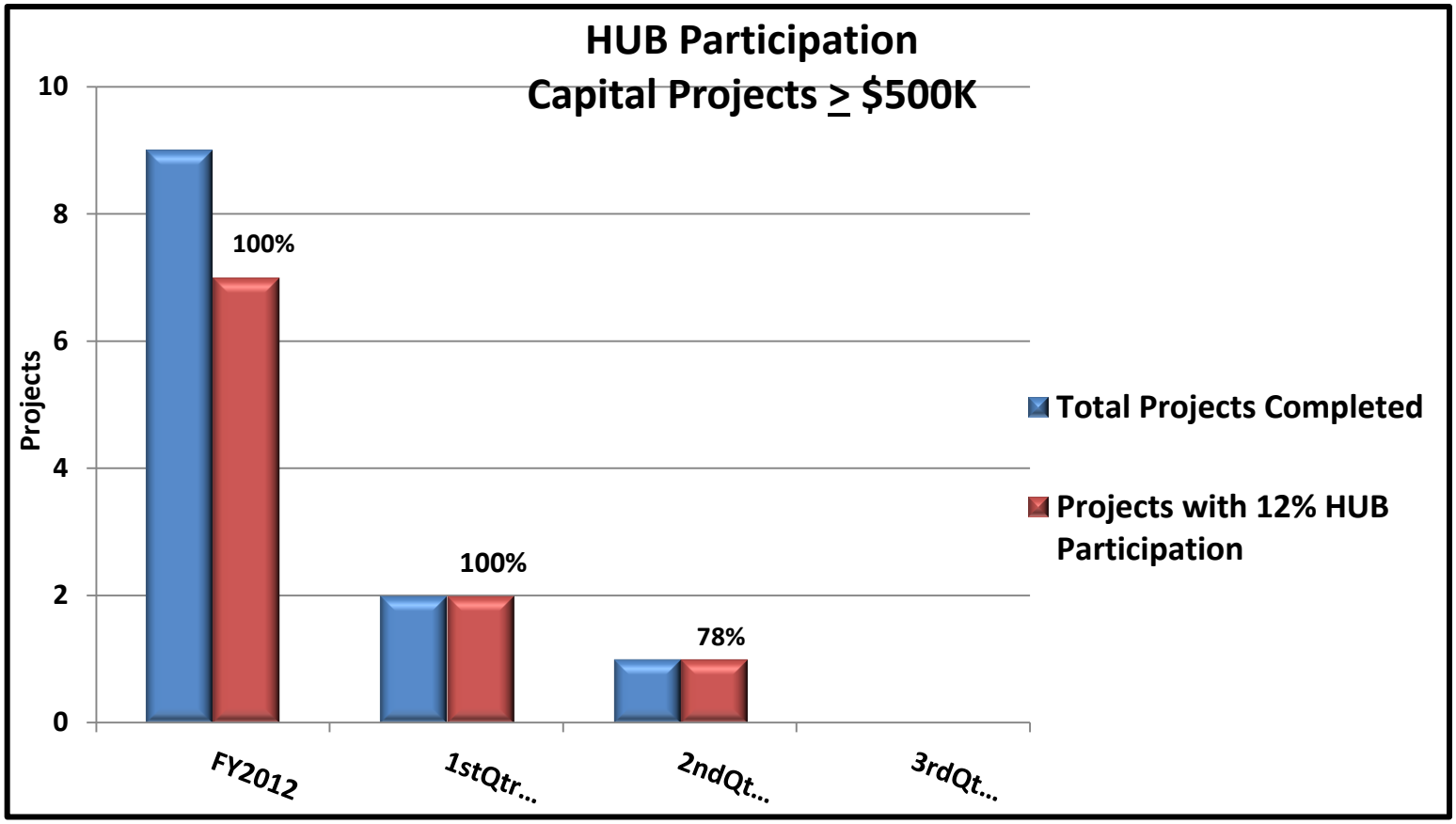
GOAL #6 – Promote Good Stewardship

Lead Capital

Strategy **6.5** Improve Historically Underutilized Business (HUB) Participation
Objective **6.5.1** 12% HUB participation on 80% of Capital Projects

Measure: Number of Individual Capital Projects achieving 12% HUB participation divided into Total Projects Completed

Balanced Scorecard Category: Financial Perspective



3rdQtr STATUS

FY2013 STATUS

Facilities Management Strategic Planning Session – Third Quarter FY2013

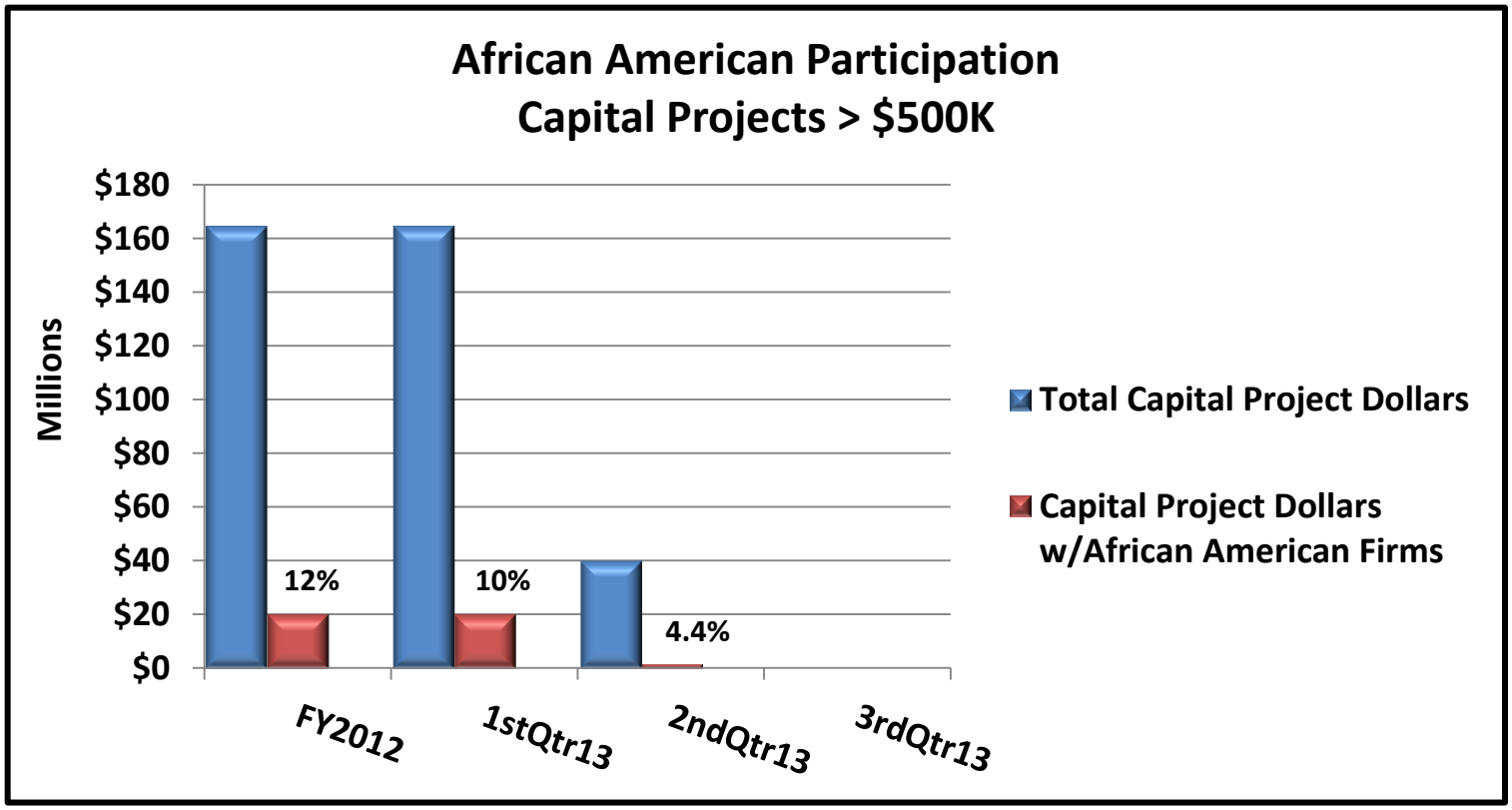
Lead Capital

GOAL #6 – Promote Good Stewardship

Strategy **6.5** Improve African American Participation on Capital Projects
Objective **6.5.2** 3% overall African American Participation on Capital Projects $500K and above

Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars

Balanced Scorecard Category: Financial Perspective



3rd Qtr STATUS

FY2013 STATUS

Facilities Management Strategic Planning Session – Third Quarter FY2013

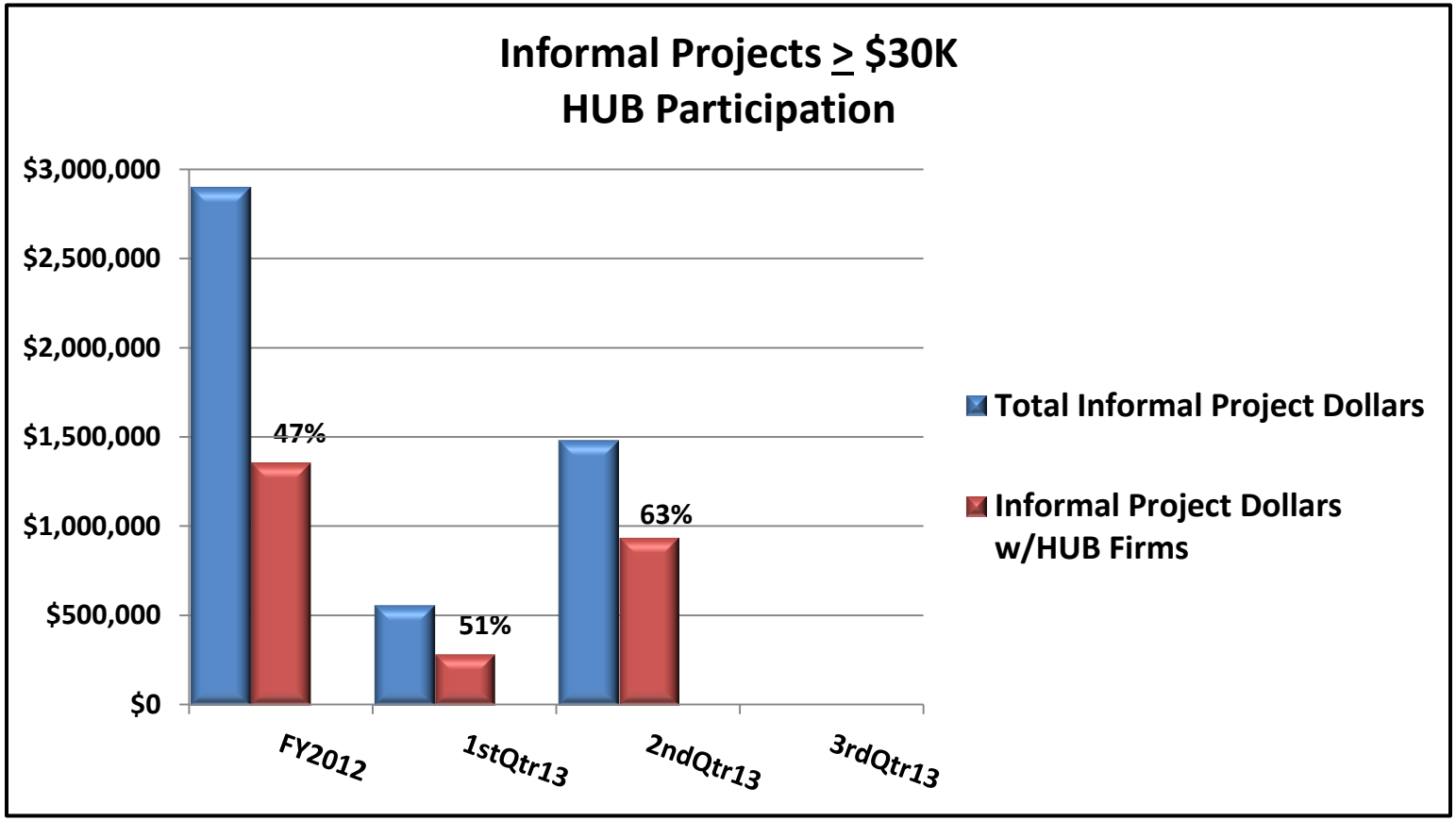
GOAL #6 – Promote Good Stewardship

Lead Capital

Strategy **6.5** Improve Historically Underutilized Business (HUB) Participation
Objective **6.5.3** 13% overall HUB participation on Informal contracts $30,000 and above

Measure: Total Informal Contract Dollars awarded to HUB Contractors divided by Total Contract Dollars

Balanced Scorecard Category: Financial Perspective



3rd Qtr STATUS

FY2013 STATUS

Facilities Management Strategic Planning - Third Quarter FY 2013

Lead Design Services

GOAL # 6 – Promote Good Stewardship

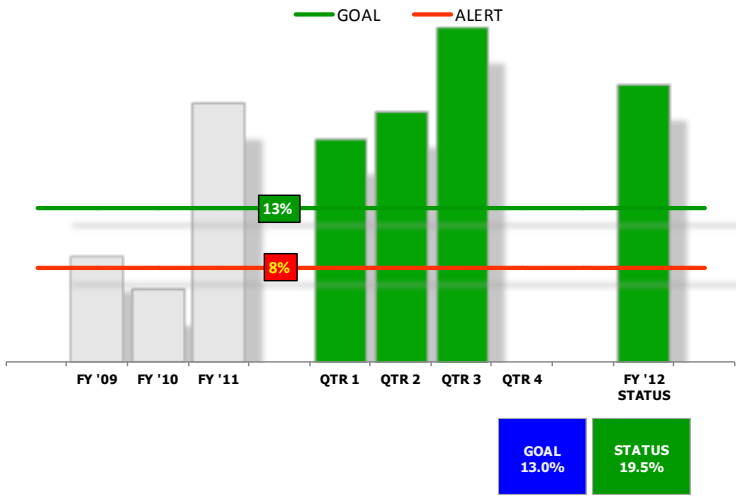
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.4 **13% overall HUB participation on informal projects below $30,000 including 3% African American**

Measure: Total % of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts

Balanced Scorecard Category: Financial Perspective

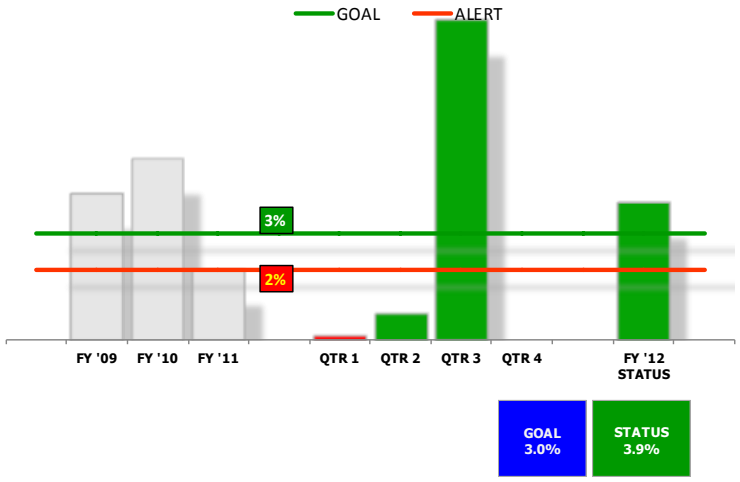
13% overall HUB participation on informal projects below $30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	*$ 996,756*	*$ 89,479*	*9.0%*
FY '10	*$ 1,452,202*	*$ 88,703*	*6.1%*
FY '11	*$ 3,924,102*	*$ 857,125*	*21.8%*
QTR 1	$ 547,272	$ 102,708	**18.8%**
QTR 2	$ 914,514	$ 193,163	**21.1%**
QTR 3	$ 953,785	$ 268,840	**28.2%**
QTR 4			**0.0%**
FY '12 STATUS	$ 2,415,571	$ 564,711	**23.4%**



3% African Am. participation on informal projects below $30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	*$ 996,756*	*$ 40,894*	*4.1%*
FY '10	*$ 1,452,202*	*$ 73,987*	*5.1%*
FY '11	*$ 3,924,102*	*$ 77,377*	*2.0%*
QTR 1	$ 547,272	$ 700	**0.1%**
QTR 2	$ 914,514	$ 6,825	**0.7%**
QTR 3	$ 953,785	$ 85,894	**9.0%**
QTR 4	$ -		**0.0%**
FY '12 STATUS	$ 2,415,571	$ 93,419	**3.9%**



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

Labor Availability, Logistics Efficiency, Optimize Supply Chain, Improve Process Reliability, Manage Technical Resources, Master/Project Planning Process, Capital Project Administration, Develop High-Quality Staff

GOAL #1 – Improve Facilities Operations

Strategy: **1.1** Improve Labor Availability
Objective: **1.1.1** Increase "Wrench Time" to over 80%

Lead
F. O.

ACTION PLAN

- Actions Planned

1 – Continue to stress reporting and recording of employee's time.
   a) Meet with shop supervisor and PA's to review
   b) Stress importance with all employees.
   c) Get supervisors to spot check employees and review white sheets in detail
2 - Get employees out of the shop
3 - Adjust goal to 70% (more realistic).
4 - Evaluate EDA's for future use. Do they increase our efficiency?

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

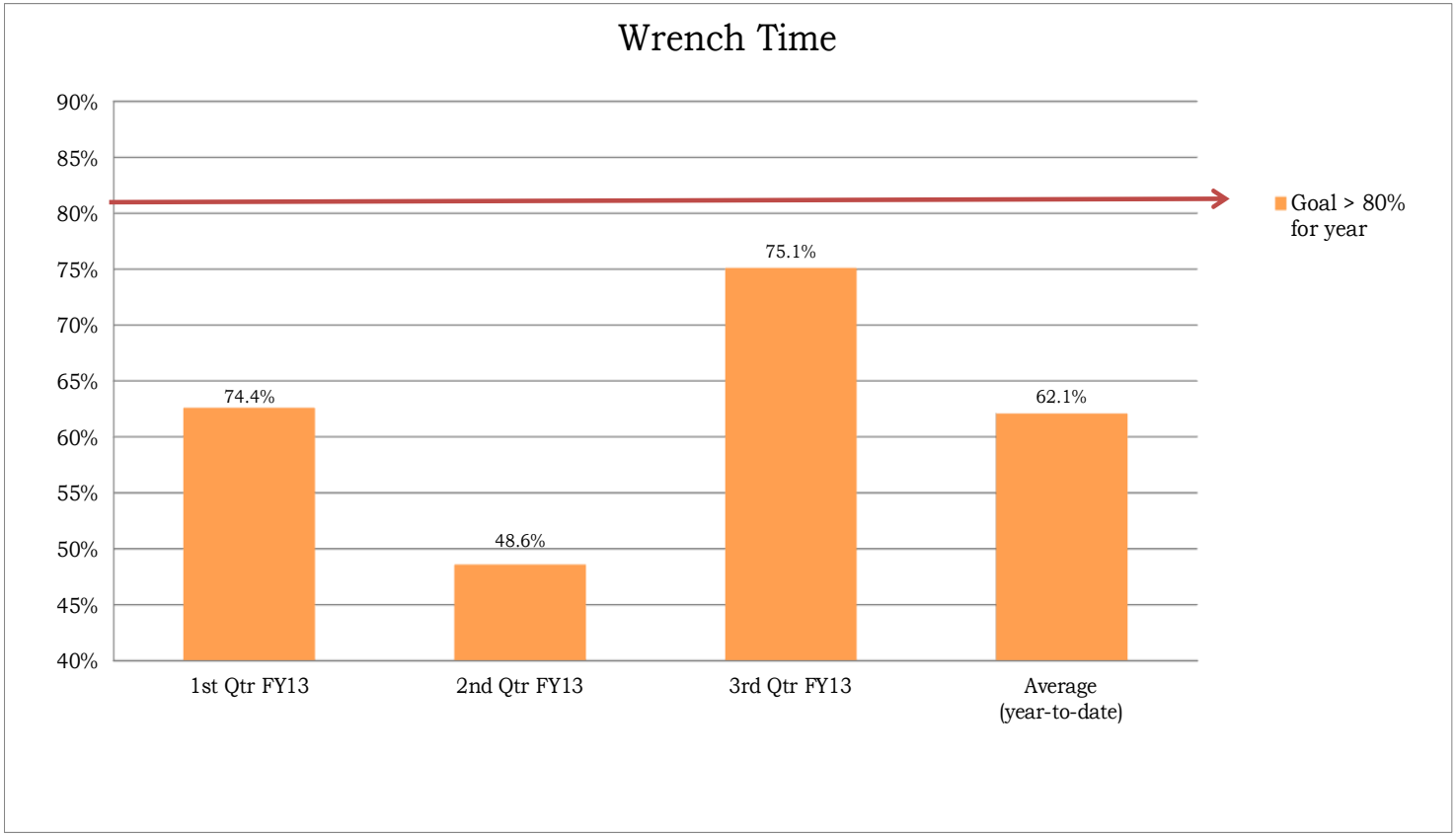
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.1** Improve Labor Availability
Objective: **1.1.1** Increase "Wrench Time" to over 80%

Measure: Hours (total hours charged to work requests divided by total hours recorded)

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Lead
F. O.

Strategy: **1.2** Improve Logistics Efficiency
Objective: **1.2.1** Improve Stock Fill Rate to 97%
Objective: **1.2.2** Reduce Average Non-stock Requisition to Receipt Time to 4.0 Days

ACTION PLAN

- Actions Planned

1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).

2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).

3 – Continue to monitor and reduce Req to PO processing time; send out daily reminders

4 – Continue to send out daily reminders for approvals.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

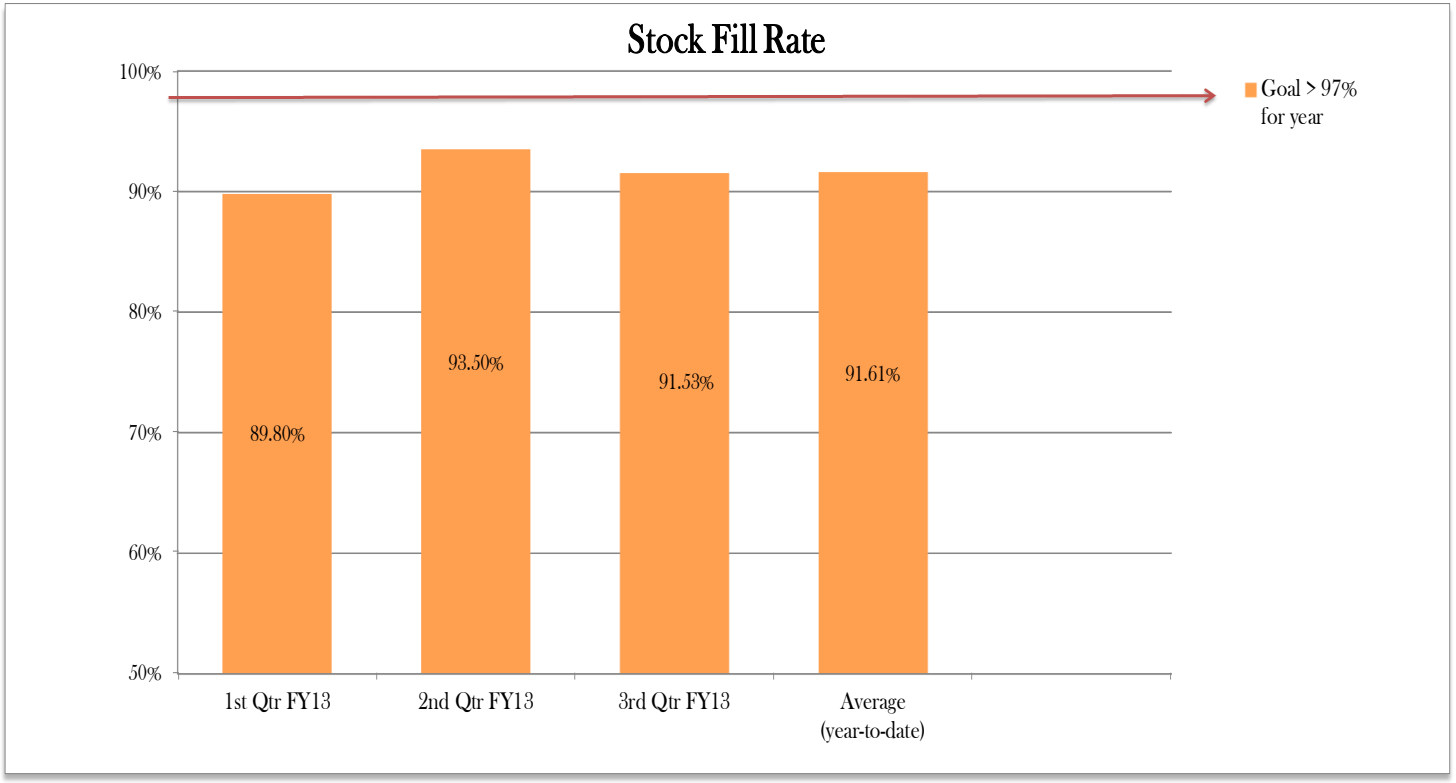
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.2** Improve Logistics Efficiency
Objective: **1.2.1** Improve Stock Fill Rate to 97%

Measure: Percentage Fill (SDI's Key Performance Indicator {KPI} – Stock Fill Rate)
Calculated on: Lines filled FY-to-date/Lines requested FY-to-date.

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

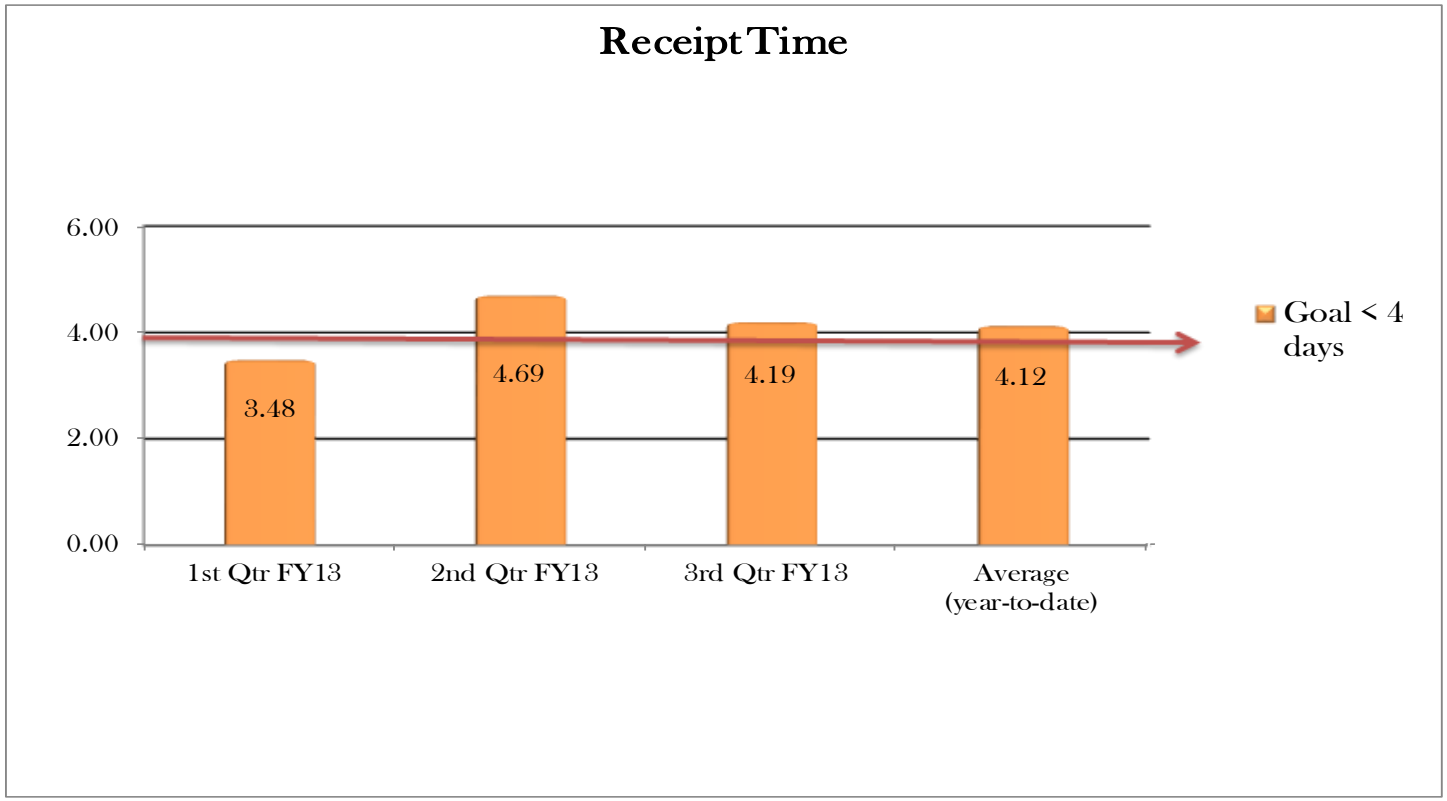
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.2** Improve Logistics Efficiency
Objective: **1.2.2** Reduce Average Non-stock Requisition to Receipt Time to less than 4.0 Days

Measure: Days (SDI's KPI – Non-stock Requisition to Receipt Time)
Calculation on: Weighted average of monthly request-to-receipt times.

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Lead
F. O.

Strategy:	**1.5**	Improve Reliability
Objective:	**1.5.1**	Improve Completion of Preventative Maintenance Work Requests to over 90%
	1.5.2	Decrease number of Unscheduled Equipment Replacement Projects by 15%

ACTION PLAN

- Actions Planned

1 – Complete development of PM Program converting from old PM Module to new PM Module. Focus on new buildings (CCB and EPIC)

2 – Closer monitoring of PM completions by Supervisors and Managers.

3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.

4 – Prepare program for major equipment repairs and replacement.

5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

6 – Continue working with Simplex/Siemens to bring the new buildings online with the network.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

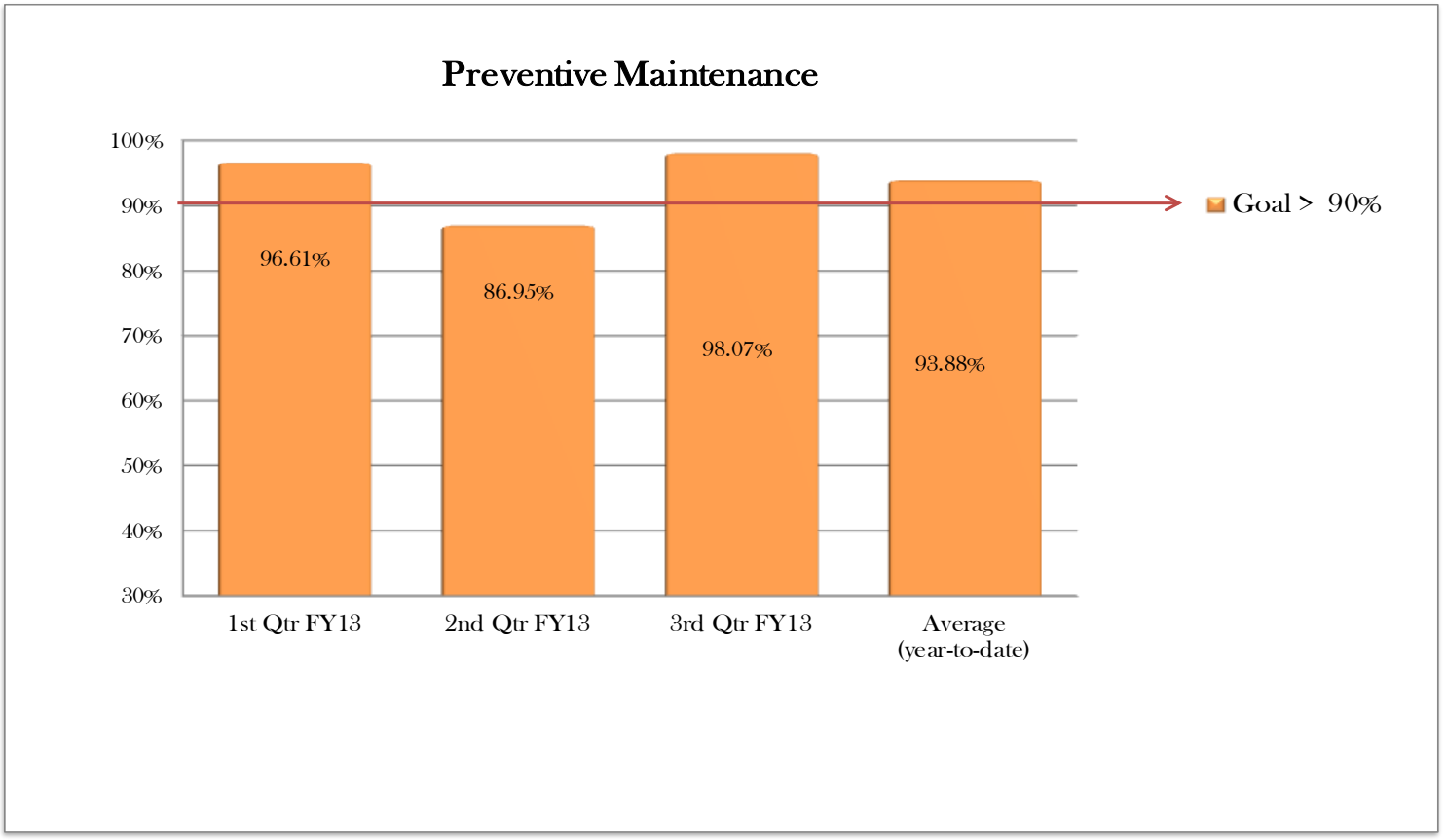
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.5** Improve Reliability
Objective: **1.5.1** Improve Completion of Preventative Maintenance Work Requests to over 90% from 87% last year.

Measure: Percentage of Preventive Maintenance Work Requests Completed vs. (Completed + Cancelled)

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2013

Lead F. O.

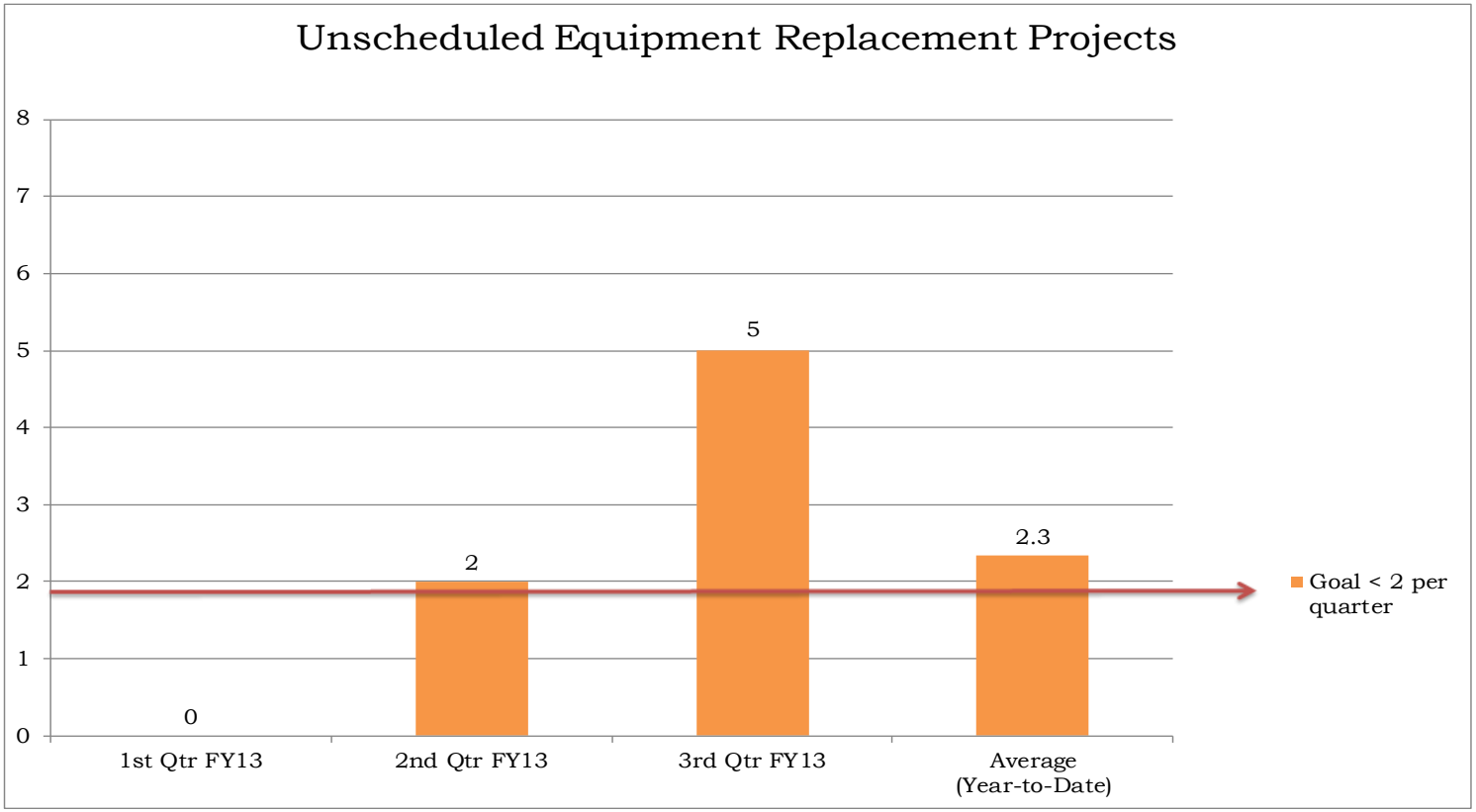
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: **1.5** Improve Reliability
Objective: **1.5.2** Decrease number of Unscheduled Equipment Replacement Projects by 15%

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process



STATUS

FM 5YP Prioritized Projects – FY13 - 14

1. Enterprise Data Assistant (EDA) FO-WR Project Zone Shops – Zones 2-4 EDA Issuing completed, Zone 1 - complete, Zone 5-6 – On Hold
2. Enterprise Data Assistant (EDA) FO-WR Project Core Shops- On Hold
3. Enterprise Data Assistant (EDA) Housekeeping Project - On Hold
4. ARCHIBUS - Equipment and PM Management – Development Complete
5. BAS R2 Upgrades- In progress
6. ARCHIBUS Key Management – Phase Two – Development Completed; Reports –On Hold
7. Facilities Condition Assessment Program (FCAP2) – Pilot Pending (On Hold)
8. Asset Management – Working with AUX and COE - Upgrade
9. SDI Punch In Implementation – In Process
10. Building Information Modeling (BIM) – Phase 1 (Standards) – In process
11. Capital Improvements – In Development
12. Primavera Upgrade – In process
13. ARCHIBUS Upgrade – View Upgrades in Progress

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy: **2.1** Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: **2.1.1** **Completion of the Facilities Management Five-Year Technology Plan by FY 2015**

Lead
FIS

ACTION PLAN

Actions Completed:

1. BIM Workgroup Scheduled / Conducted for Develop Standards
2. SDI Workgroup scheduled / conducted User Requirements Session
3. Capital Improvements-Scheduled/Conducted User Requirements session-Development Began-User View testing in progress
4. Allocated Funding for and Scheduled R2 Upgrades: Walkthroughs in Progress

Actions Planned:

1. ARCHIBUS Key Management Phase Two – Customer Reports.
2. Equipment and PM Management – Continue transition to New
3. Complete SDI Development-Meet with Customers; Complete UAT and Finalize for Production
4. Complete BAS Upgrades-Finalize Billing
5. Complete Primavera Upgrade
6. Complete Capital Improvements development: Complete Testing and Customer approval
7. BAS R2 upgrades: Review Vendor Work, Finalize & Complete Billing

Facilities Management Strategic Planning Session – Third Quarter FY 2013

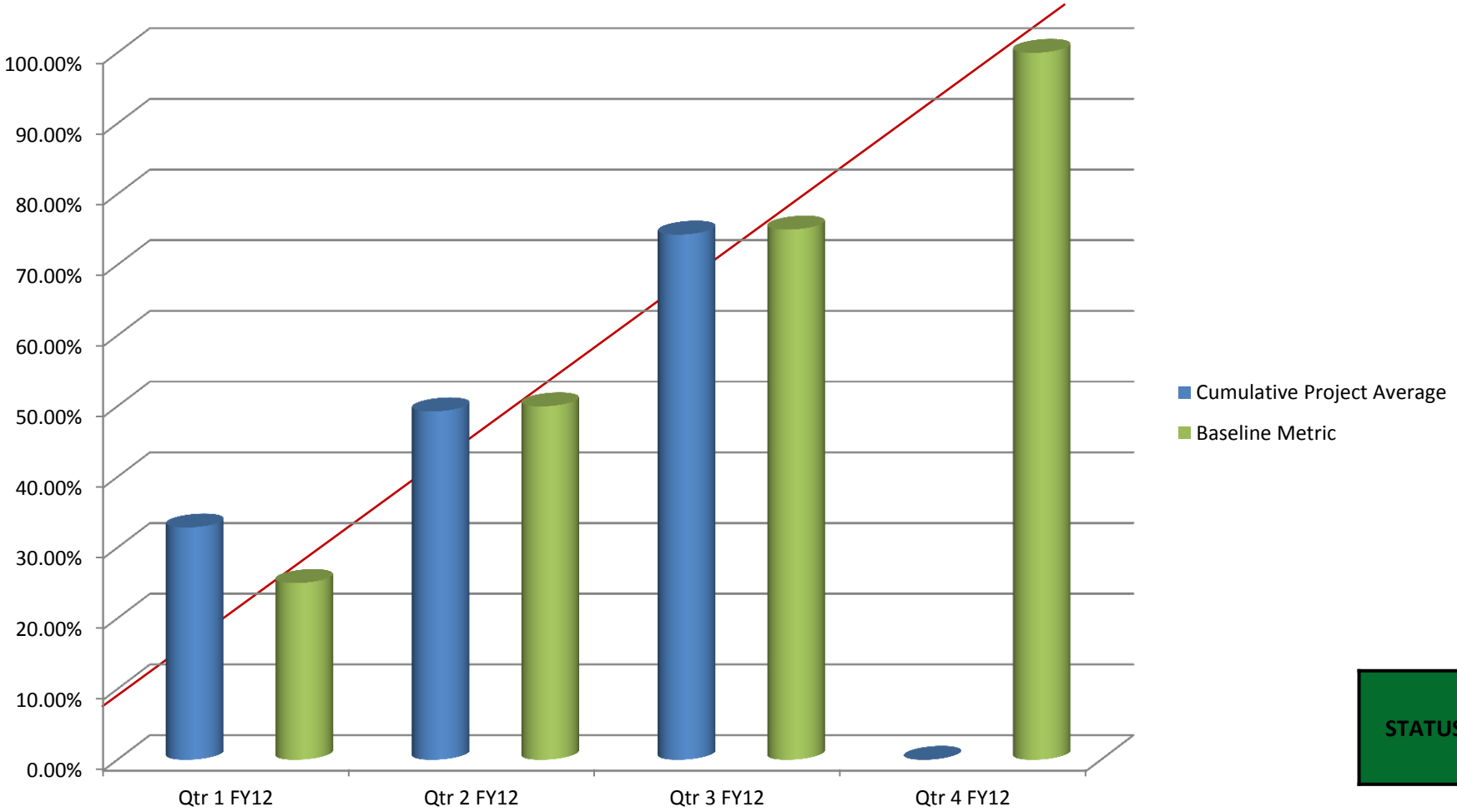
Lead FIS

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy: **2.1** Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: **2.1.1** **Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015**

Measure: **Completion of Five-Year Technology Milestones**
Task Completion Milestones Percentage (FY10 – FY15)

Balanced Scorecard Category: Internal Processes



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2013

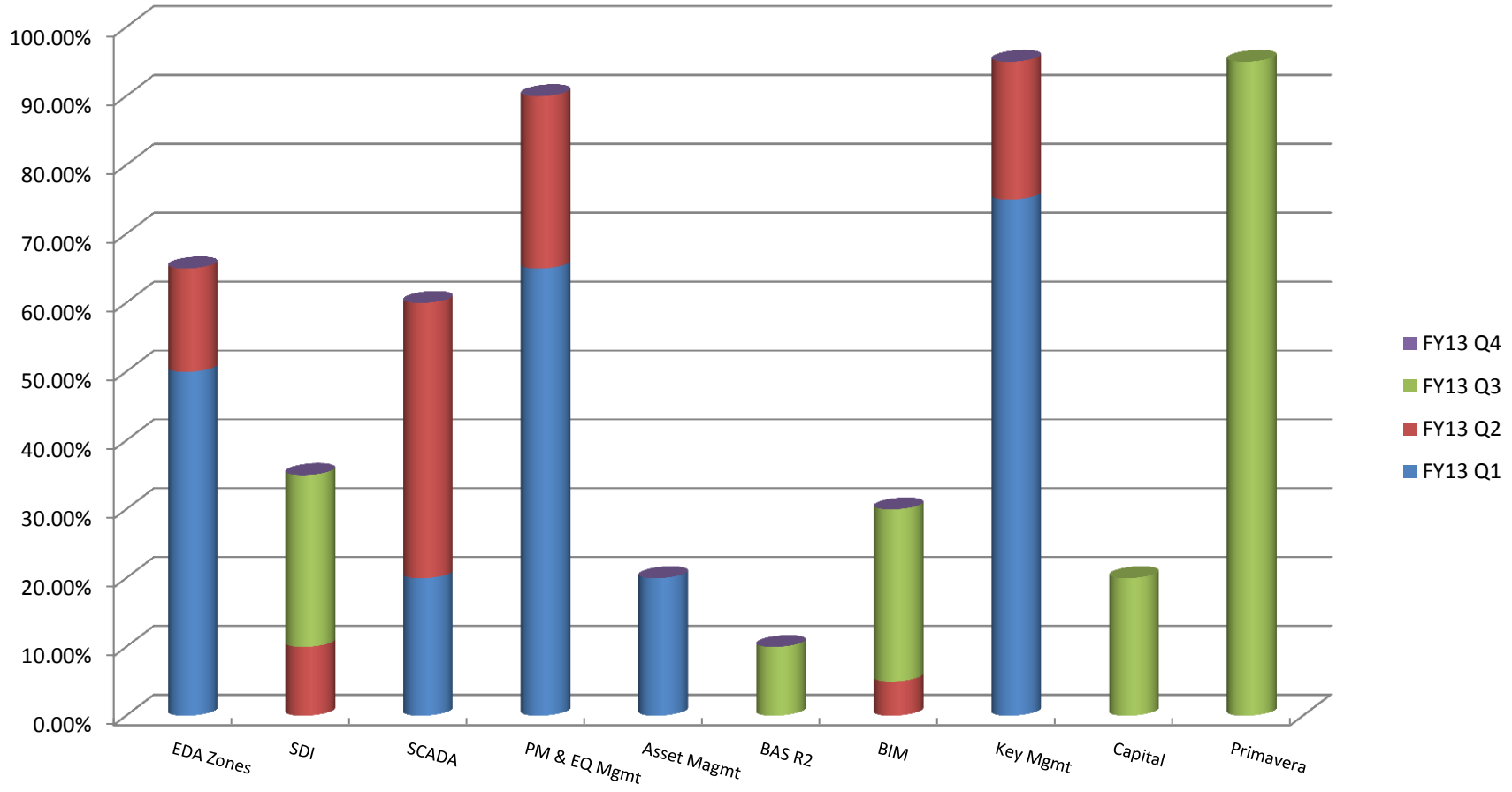
Lead FIS

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy: **2.1** Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: **2.1.1** **Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015**

Measure: **Completion of Five-Year Technology Milestones**
Task Completion Milestones Percentage (FY10 – FY15)

Balanced Scorecard Category: Internal Processes



GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013.

Lead Facilities Planning

ACTION PLAN

- **Actions Planned:**
  - **Student Affairs Data audit complete for static spaces**
  - **Academic Affairs Data Audit complete for static spaces**
  - **Athletics data audit complete**
  - **Athletics field verification underway**
  - **Business Affairs data audit complete for static spaces**
  - **General Counsel & Internal Audit data audit complete**
  - **General Counsel & Internal Audit field verification underway**
  - **University Advancement data audit complete**
  - **University Advancement field verification underway**
  - **Spot inspections & drawing updates for all Divisions continually being audited**
    - **Initiate a visual audit of space occupancy that will help in validating the data in Archibus.**
    - **All new construction & renovation spaces**

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #3 – Deliver New Facilities that Support the University's Mission

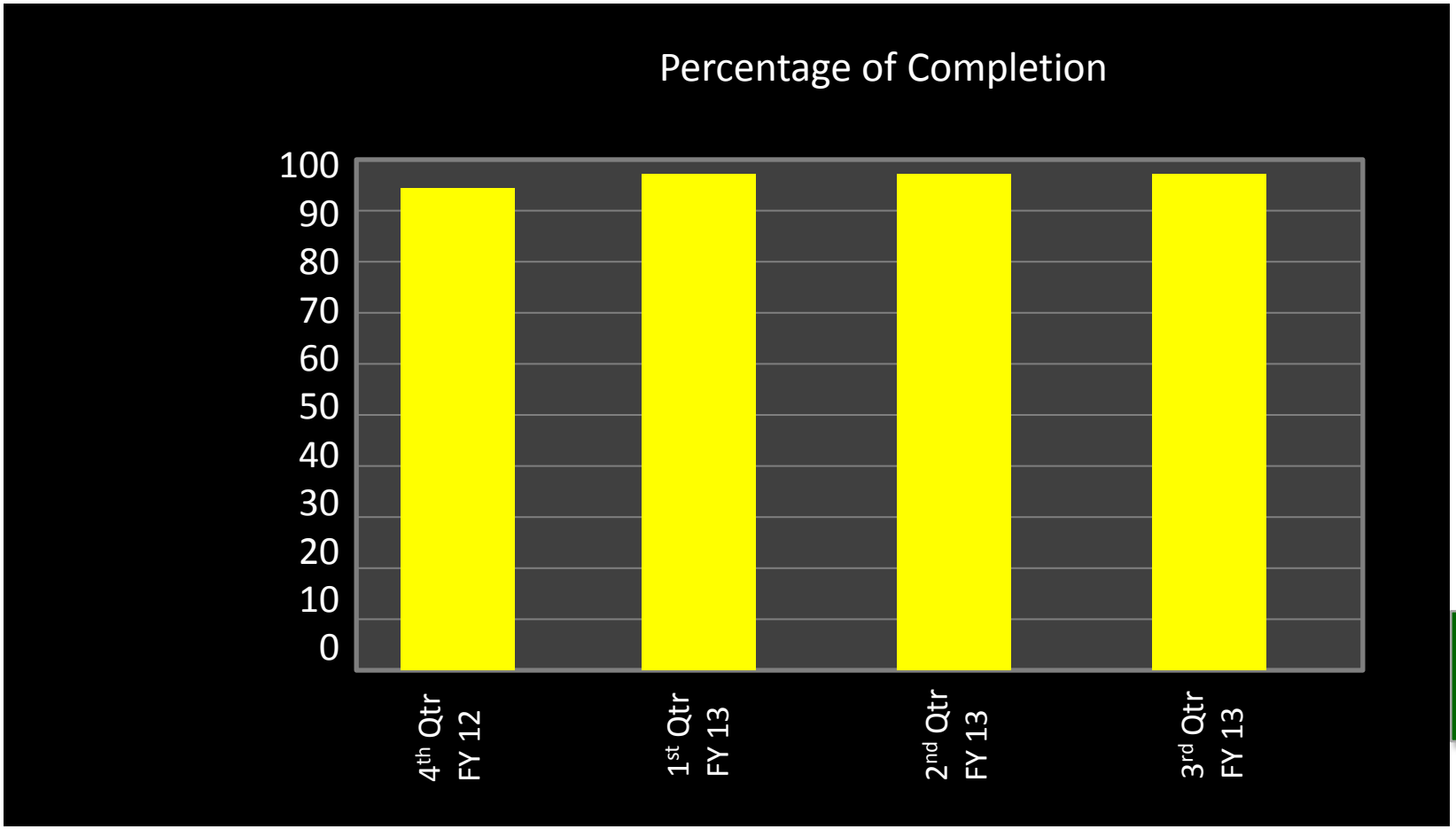
Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process

Lead Facilities Planning



Status

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.1 90% of designers under contract within 120 days of Project posting in CAPSTAT

ACTION PLAN

- Actions Completed

  Belk Gym Renovation contract over 229 days.

  Oak Hall Renovation contract over 163 days.

- Actions Planned
  1. Baseline Schedules – Accurate
  2. Baseline Schedules – Refer to them
  3. Push Designers to stay on schedule.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

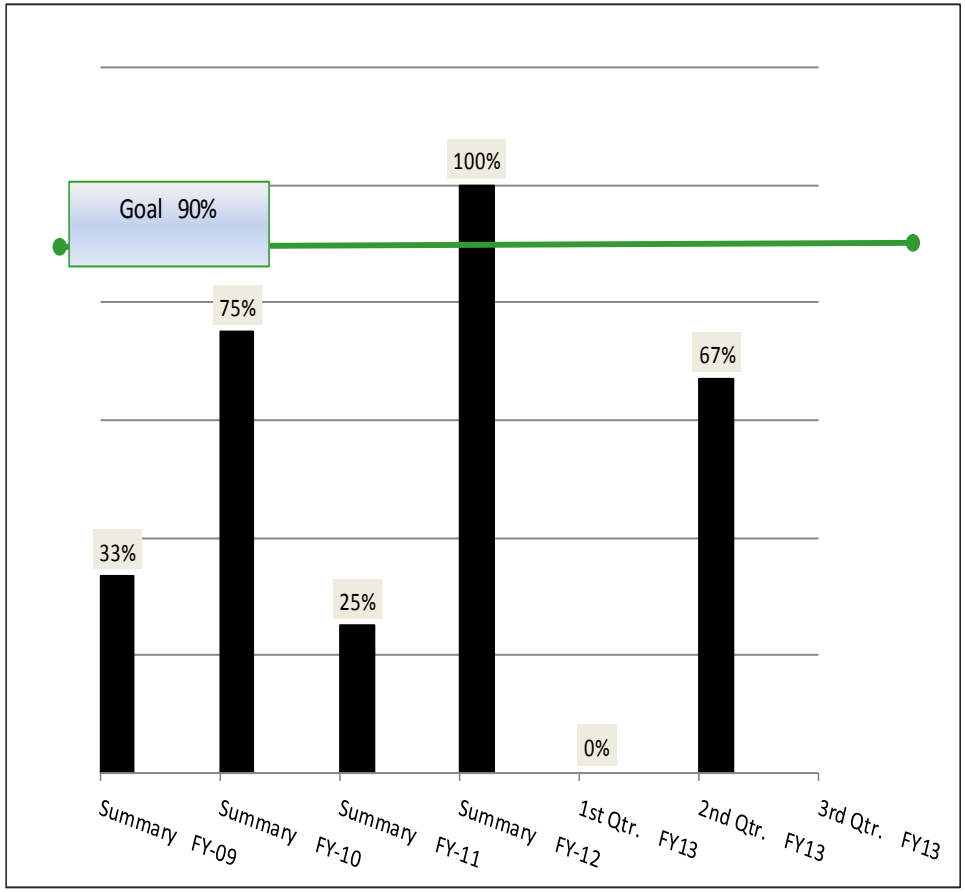
GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.3** Improve the Capital Design Process
Objective **3.3.1** 90% of designers under contract within 120 days of the project advertisement being posted on the web
Measure: Percentage of designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-09	9	3	4	33%
Summary FY-10	10	9	3	75%
Summary FY-11	11	2	6	25%
Summary FY-12	6	2	0	100%
1st Qtr. FY-13	6	0	1	0%
2nd Qtr. FY-13	3	2	1	67%
3rd Qtr. FY-13	3	0	2	0%



Objective for 3rd Quarter is 0%
Year to date is 50%

Status

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.3** Improve the Capital Design Process
Objective **3.3.2** 90% of designs complete by the scheduled completion date

ACTION PLAN

- Actions Completed

  Phase XII (early site).

- Actions Planned

  1. Baseline Schedules – Accurate
     a) Sherry, John & Jeanine to check
     b) Sherry to help PMs setup properly & maintain
  2. Keep end users up to date on overall schedule
     a) Update team at all scheduled design meetings
     b) Hold designer accountable
  3. Add milestones
     a) DD & CD Shops presentations & feedback
     b) Chancellor approvals (colors, exteriors, etc.)

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #3 – Deliver New Facilities that Support the University's Mission

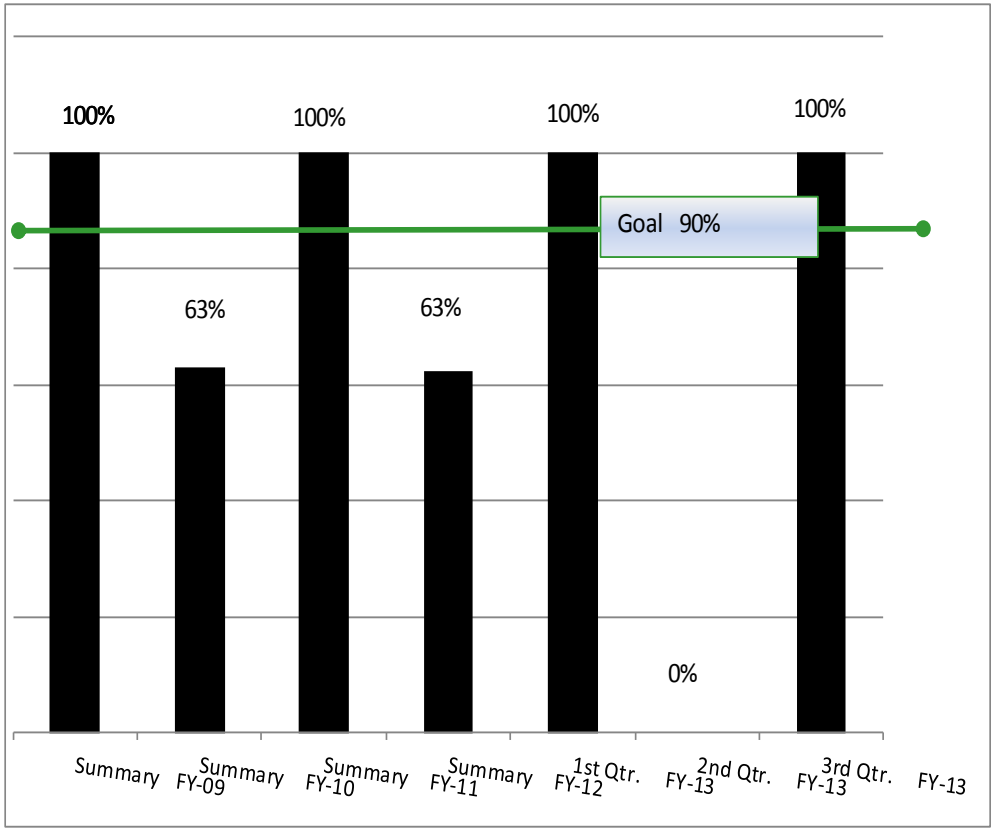
Lead Capital

Strategy **3.3** Improve the Capital Design Process
Objective **3.3.2** 90% of designs complete by the scheduled completion time

Measure: Percentage of designs completed on or before the original completion time

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	# not completed by scheduled time	% Designs complete by completion time
Summary FY-09	4	0	100%
Summary FY-10	9	5	63%
Summary FY-11	6	0	100%
Summary FY-12	5	3	63%
1st Qtr. FY-13	1	0	100%
2nd Qtr. FY-13	0	1	0%
3rd Qtr. FY-13	1	0	100.0%



Objective for 3rd Quarter is 100%
Year to date is 67%

Status

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.3** Improve the Capital Design Process
Objective **3.3.3** 90% of designs complete within design budgeted fee

ACTION PLAN

- Actions Completed

  N/A

- Actions Planned

  1. Print project budget / financial sheets & share with end users
  2. Monitor scope creep.
  3. Protect contingency
  4. Know project authorization

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.3** Improve the Capital Design Process
Objective **3.3.3** 90% of designs complete within design budgeted fee

Measure: Percentage of designs completed within the original design contract amount

Balanced Scorecard Category: Financial Perspective

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 & Initial Contract	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
Parking Deck I	$1,701,000	$1,044,000	$1,136,083	-38.6%	8.8%	1
Parking Deck J	$2,211,057	$946,200	$946,200	-57.2%	0.0%	1
PORTAL	$2,466,950	$2,200,000	$2,200,000	-10.8%	0.0%	1
RDH Renovation	$1,742,048	$1,981,410	$1,987,410	13.7%	0.3%	0
Res. Hall Ph. X	$2,809,632	$2,147,890	$2,147,890	-23.6%	0.0%	1
Res. Hall Ph. XI	$3,695,657	$2,078,598	$2,078,598	-43.8%	0.0%	1
Res. Hall Ph XII	$3,400,667	$2,733,245	$2,778,245	-19.6%	1.6%	1
RUP IV		$385,000	$385,000	0.0%	0.0%	1
Heck Dam	$190,000	$185,650	$185,650	-2.3%	0.0%	1
CRI Elect. Circuit	$77,636	$52,650	$62,250	-32.2%	18.2%	1
					Percentage of Projects within Design	90%

Objective is 90%

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.

Status

GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% (contingency)

ACTION PLAN

- Actions Complete

  N/A

- Actions Planned
  1. Maintain & Print project budgets & account reports monthly
  2. Share budgets with AVC and end users.
  3. Hold contingency for unforeseen conditions & project requirements.
  4. Manage scope creep.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

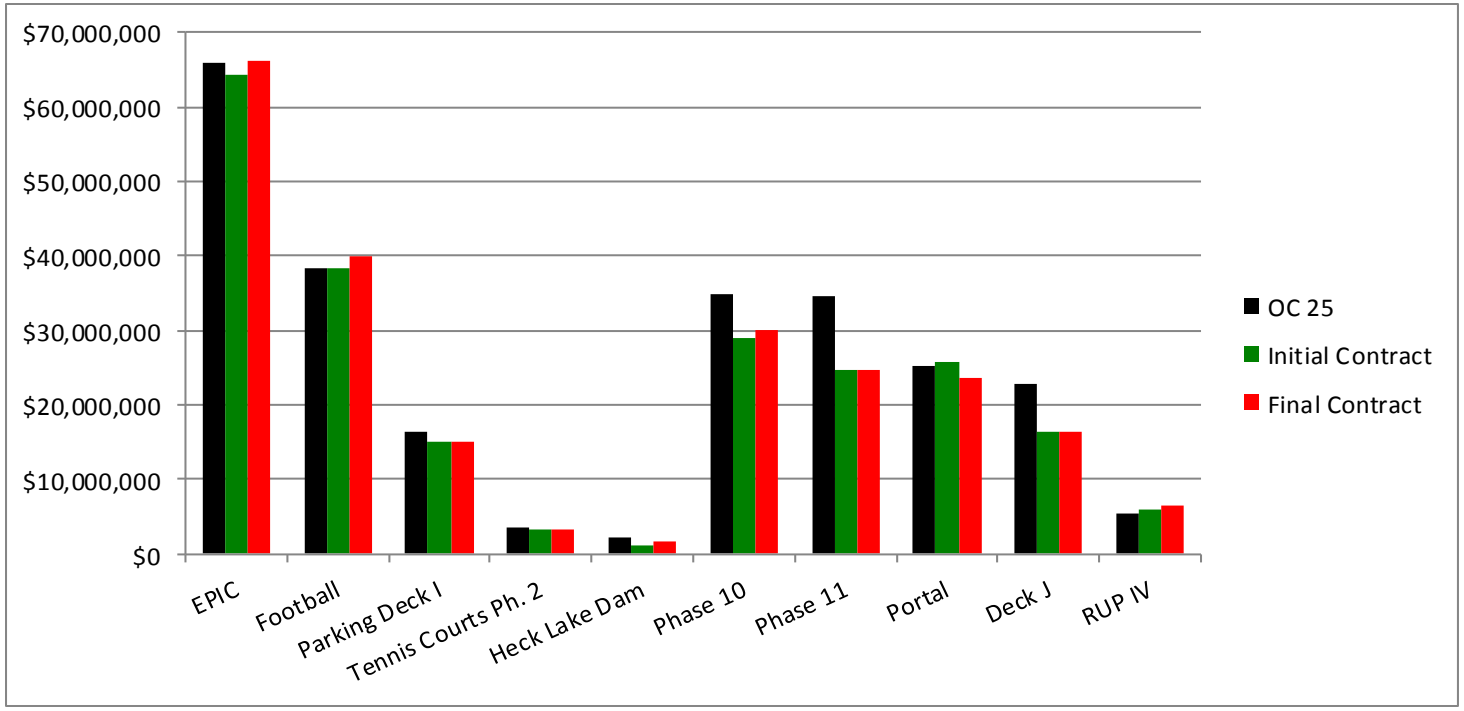
GOAL #3 – Deliver New Facilities that Support the University's Mission

Lead Capital

Strategy **3.4** Improve Administration of the Capital Construction Process
Objective **3.4.2** 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

Measure: Percentage of projects completed within the original contract amount or GMP plus 3% (contingency).

Balanced Scorecard Category: Internal Business Process



Objective is currently at 80%. Goal is 90%

Status

*Factors in contract $$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.

UNC CHARLOTTE

Balance Score Card
Learning & Growth
Perspective

Strategic Objectives:

Develop high quality staff

Retain high quality staff

Develop positive culture

Improve Employee Safety

Facilities Management Strategic Planning Session - Third Quarter FY 2013

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Lead FBO

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion

Objective 5.1.1 Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
Benchmark vacancy time of no longer than 120 calendar days - Exempt

Objective 5.1.2 100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

- ❑ Time-to-fill for both exempt and non-exempt positions are in the red.
- ❑ New vacancy reports have been established.
- ❑ The reports will be distributed to the appropriate FM units on a monthly basis.
- ❑ We will request a recruitment activity update for all vacancies from each FM unit.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

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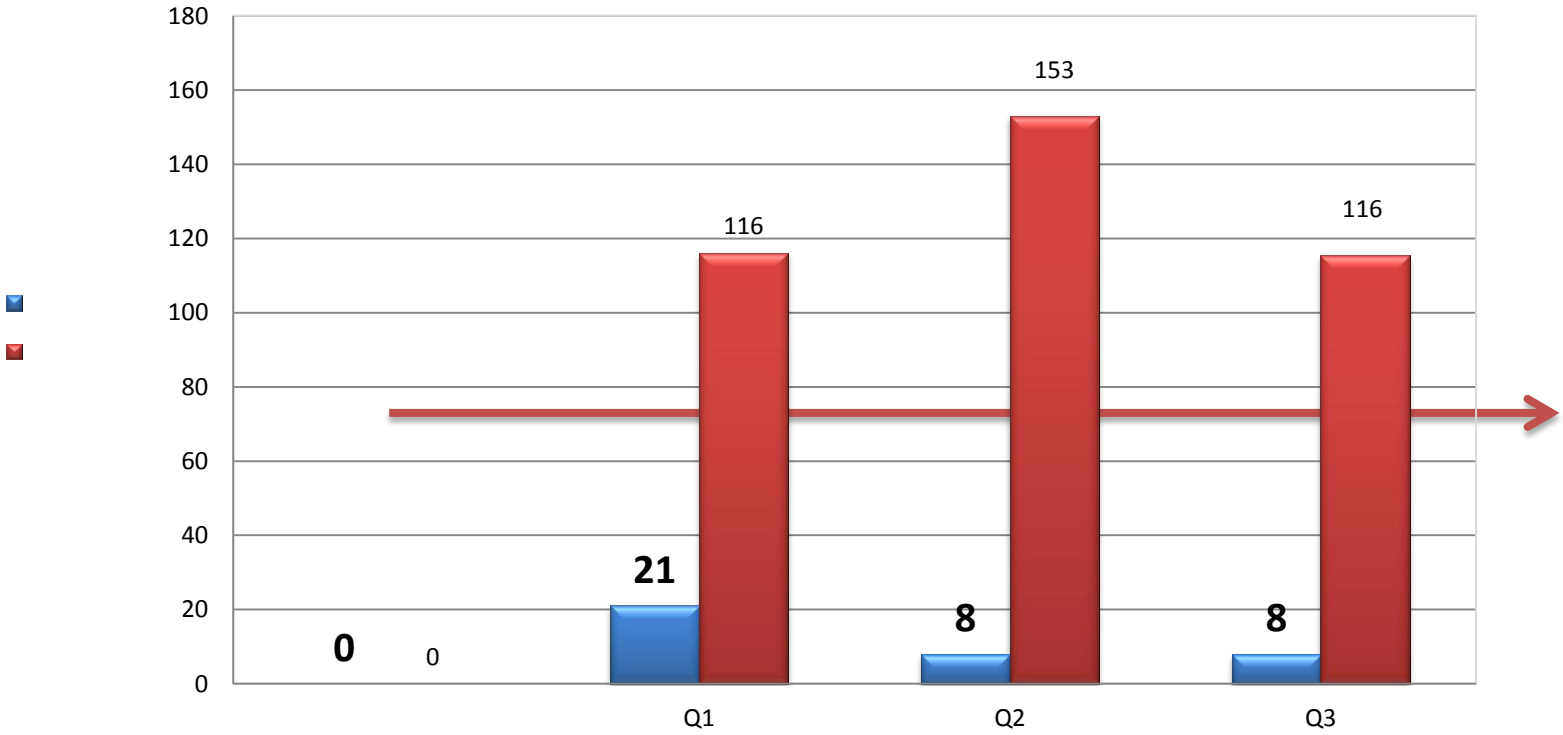
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy	**5.1**	Recruit a talented and diverse workforce in a timely fashion
Objective	**5.1.1**	Benchmark vacancy time of no longer than 80 calendar days – Nonexempt Benchmark vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant position

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Average Number of Days to Fill Nonexempt (Hourly) Vacancies



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GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Lead FBO

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.1 Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
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Measure: Days needed to fill vacant position

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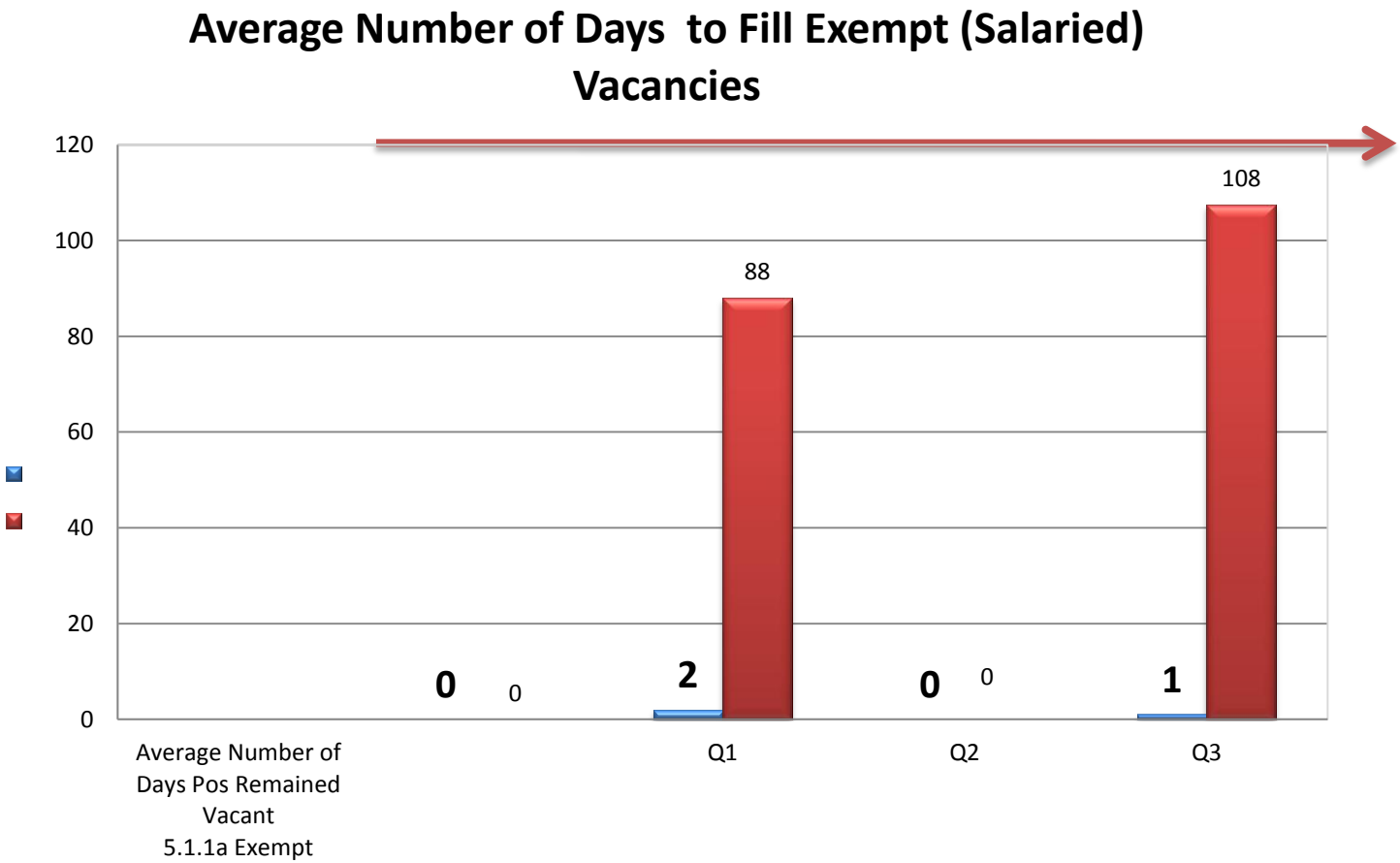


Goal:
120 days

STATUS

Facilities Management Strategic Planning Session - Third Quarter FY 2013

Lead FBO

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

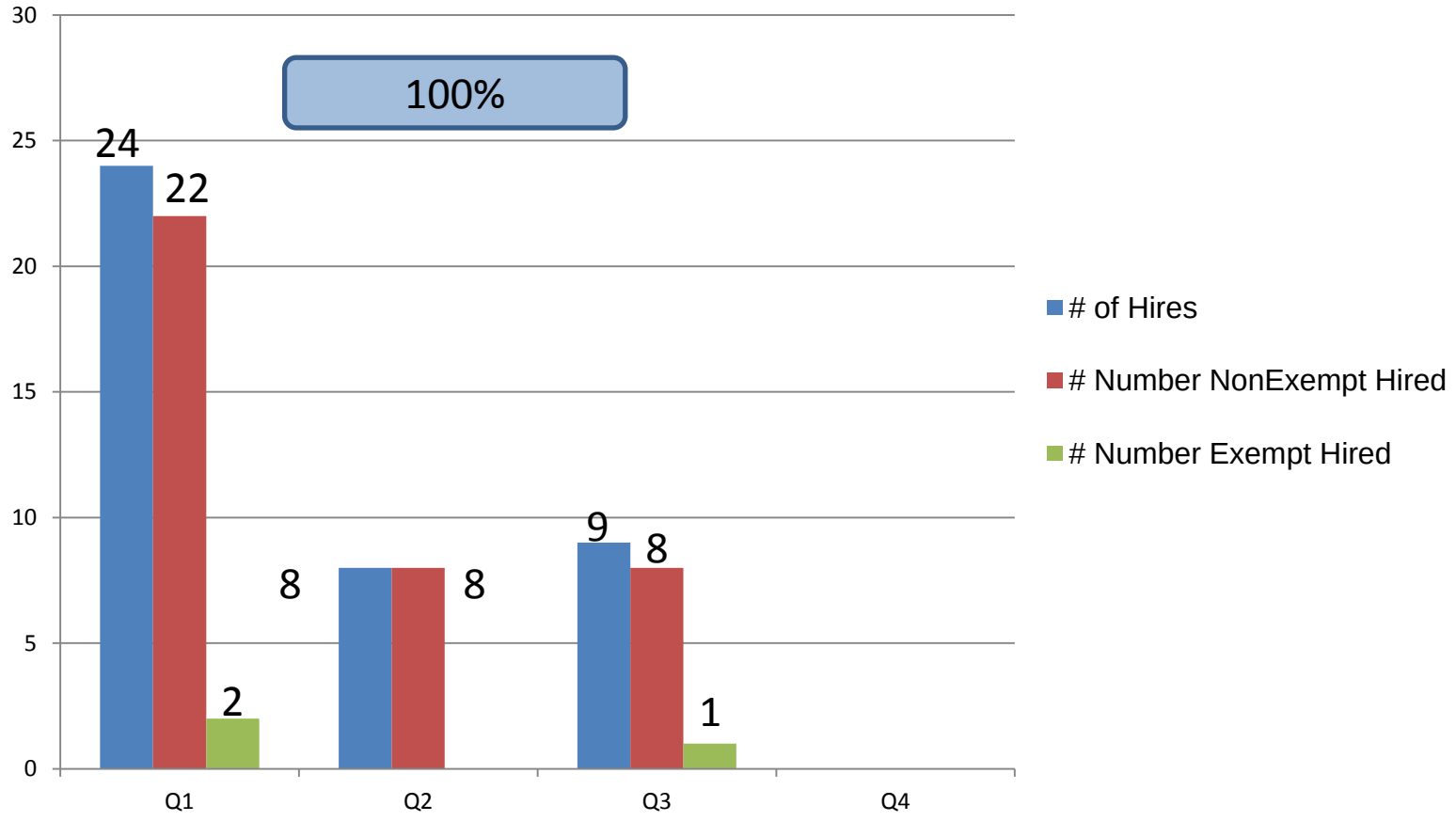
(22%)

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% of positions filled through targeted selection process by FY 201

Measure: **Completion of hiring checklist by hiring manager (including on-boarding)**

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Positions Filled Using Targeted Selection



STATUS

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.1 Increase Supervisor/Manager training to 40 Hours of per year.
Objective 5.2.2 Increase Employee training to 20 Hours per year.

ACTION PLAN

- Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas. Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best "bang for the buck" in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.

- W.I.G.– Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan; To date, have met with UNC Chapel Hill regarding their formula.

Facilities Management Strategic Planning Session – Third Quarter FY 2013

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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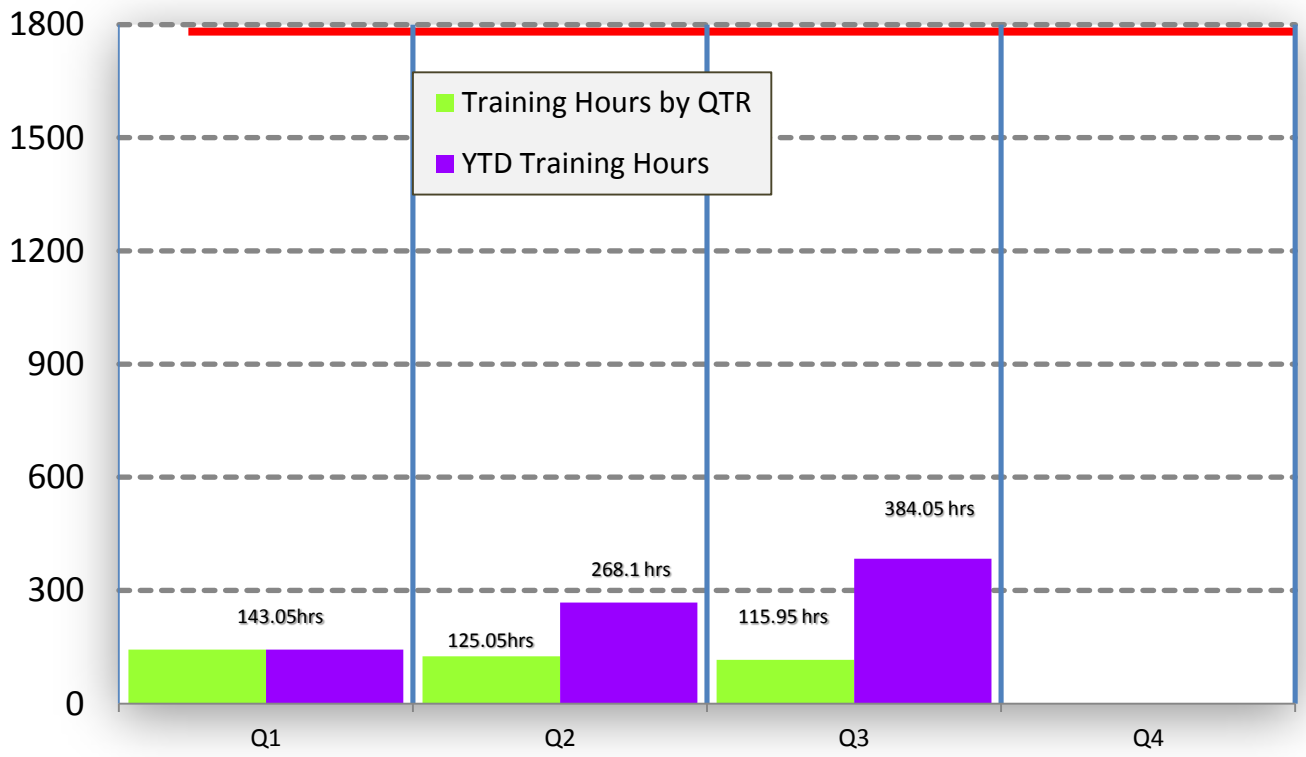
Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

Measure: Average Hours of Training provided to or Obtained by Supervisors and Managers

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

FY 13

Training Hours for Supervisors & Managers by Quarter



Annual Target = 40 hrs ea
*(45 X 40 hrs ea = **1,800 hrs**)*

Fiscal 2013 Results:

Goal
1800 hrs

Actual YTD
384.05 hrs (21.3 %)

STATUS

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GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy **5.2** Implement training system to enhance employee performance and provide career growth
Objective **5.2.2** Increase employees training to **20 Hours** per year.

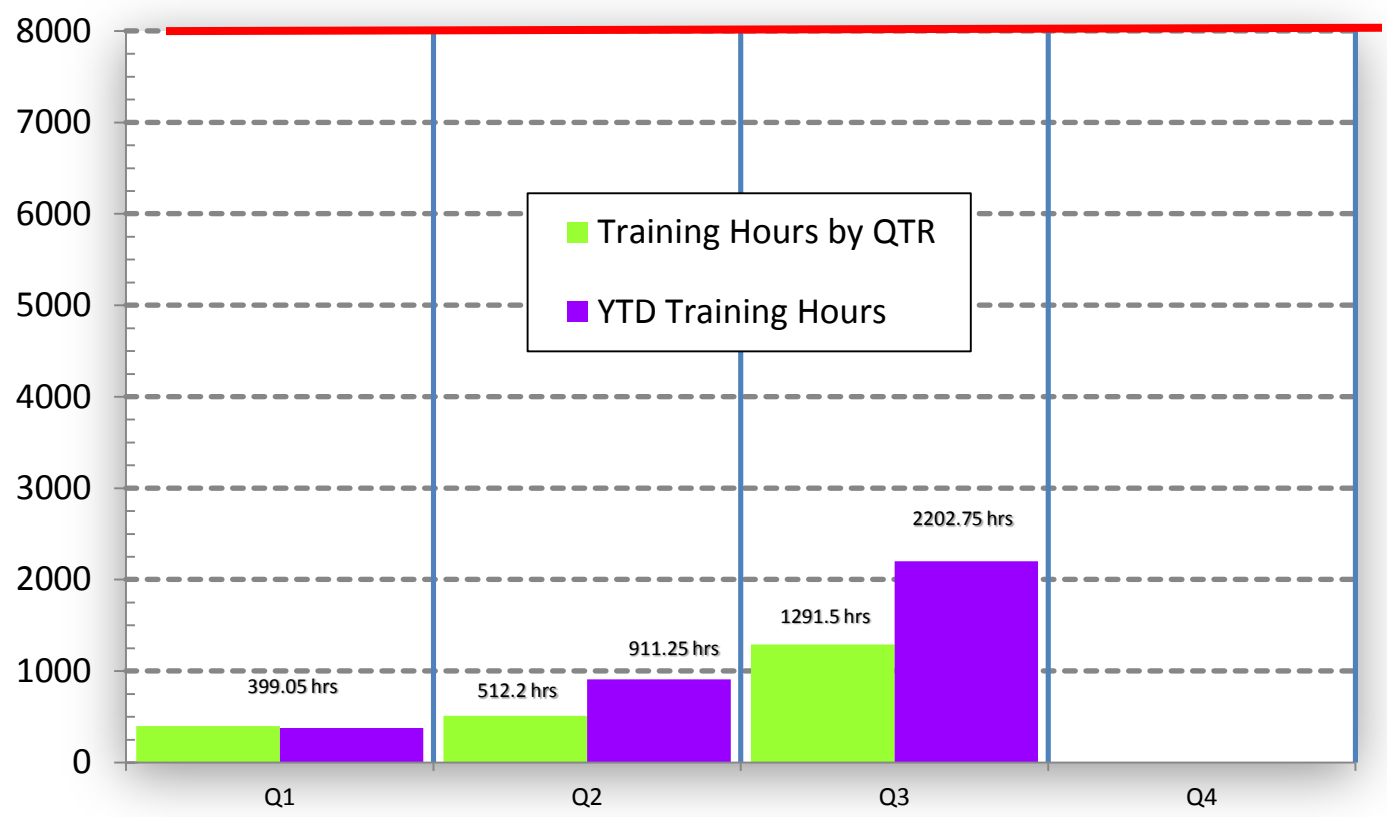
Measure: Average hours of training provided to or obtained by front line employees

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Training Hours

FY 13

Training Hours by Quarter *(non-management)*



Annual Target - 20 hrs ea
(400 employees x 20 hrs ea
= **8,000** hrs total)

Fiscal 2013Results:

Goal
8,000 hrs

Actual YTD
2202.75 hrs (27.5%)

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FY13 YTD Training Hours - Percentage of Target

Unit/Zone	YTD- 3rd Quarter
Auto	12%
Business Environmental Services	13%
Capital Projects	7%
Central Operation	0%
Design Services	2%
Facilities Business Office	85%
Facilities Information Systems	9%
Facilities Operations Admin	12%
Grounds	5%
High Voltage & Fire Alarms	4%
Lock Shop	10%
Planning (Architect & Real Estate)	14%
Recycling	38%

Unit/Zone	YTD – 3rd Quarter
Steam Plant	0%
Zone 1	11%
Zone 2	11%
Zone 3	12%
Zone 4	12%
Zone 5	9%
Zone 6	10%
Zone 7	22%

* Building Environmental Services & Recycling combined = 16%

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Lead FBO

Strategy 5.3 Retain a Quality Workforce

Objective 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

Objective 5.3.2 Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

CONTINUOUS IMPROVEMENT ACTION PLAN

- ❑ Working with CPCC/Rowan Community College to determine feasibility of a Co-op program within FM (Trades). Met in September to review program requirements. Will meet with Rowan in February and continue initiative.

- ❑ Development of a FM Learning Library which can house "quick hit" training resources for employees. ***In progress…***

- ❑ Investigate another "tier" in the Leadership Academy to keep "sharpening the saw". As referenced by Clyde in the previous training information.

- ❑ Production of NEO video. ***In development...***

Facilities Management Strategic Planning Session – 3rd Quarter FY 2013

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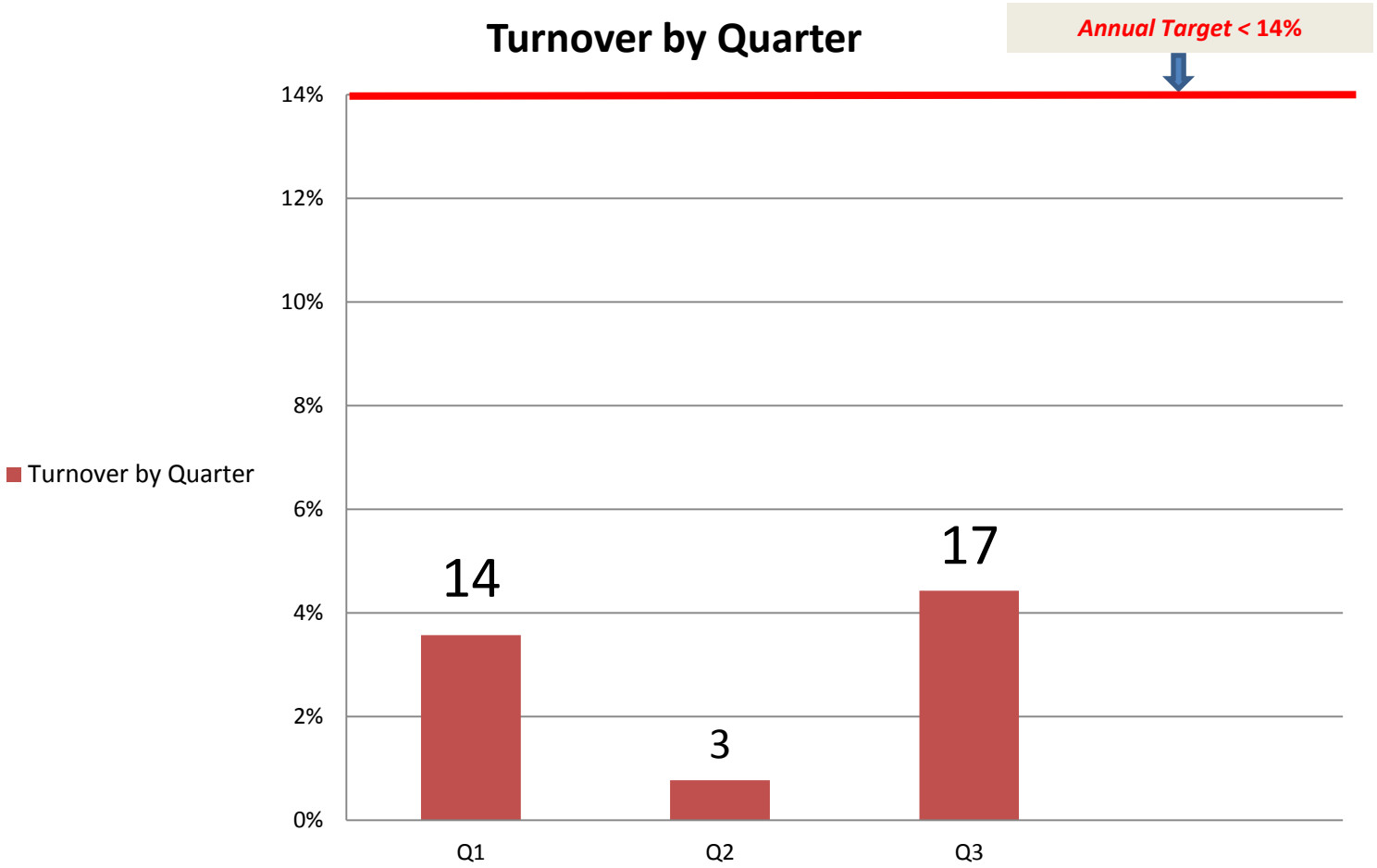
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy **5.3** Retain a Quality Workforce
Objective **5.3.1** Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth



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Facilities Management Strategic Planning Session – 3rd Quarter FY 2013

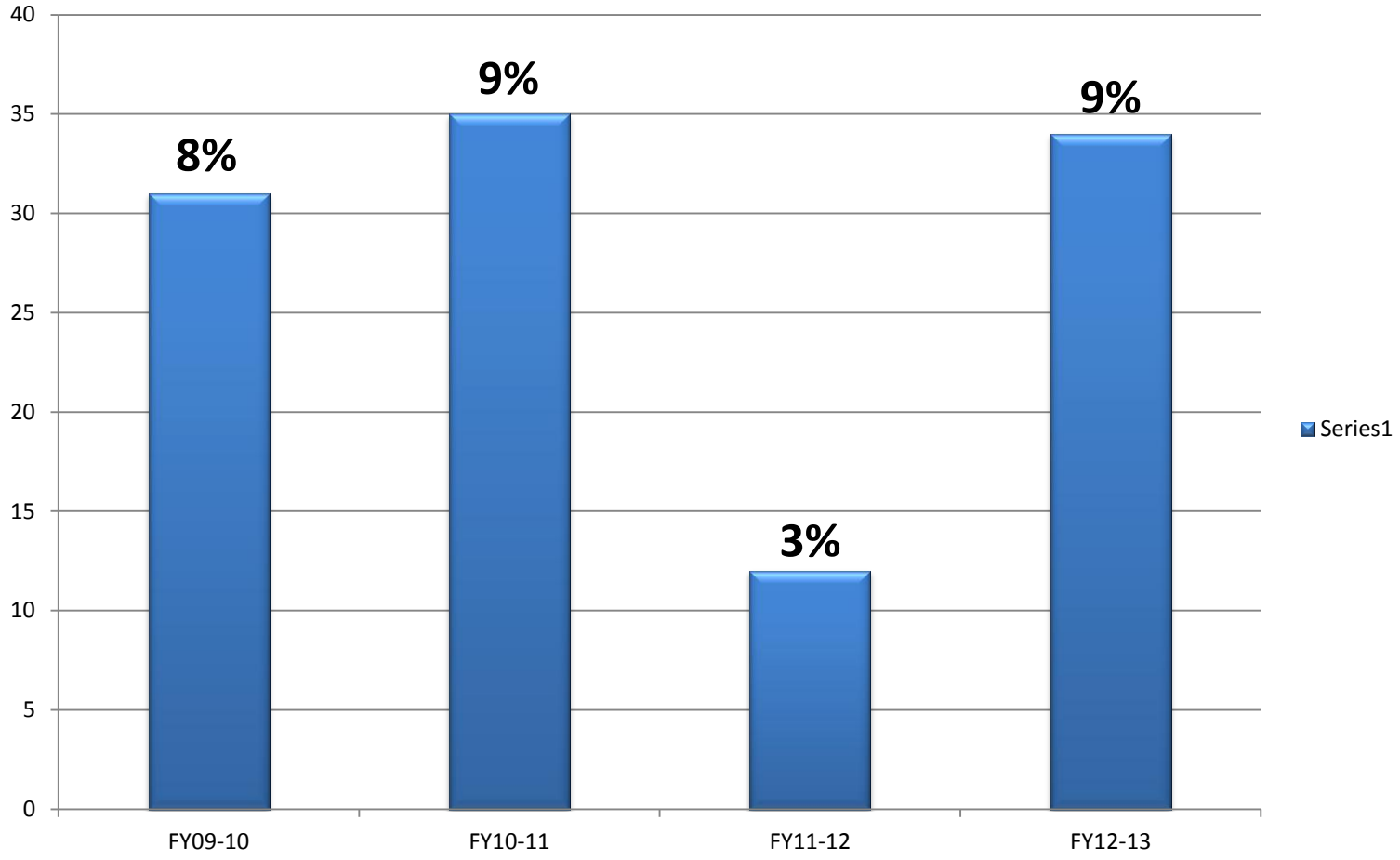
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Lead FBO

Strategy **5.3** Retain a Quality Workforce
Objective **5.3.1** Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth



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