



UNC CHARLOTTE

Facilities Management

Strategic Planning Session

First Quarter – Fiscal Year 2013

July – September 2012



...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

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%

Lead
F. O.

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 – First Quarter FY 2013

Lead
F. O.

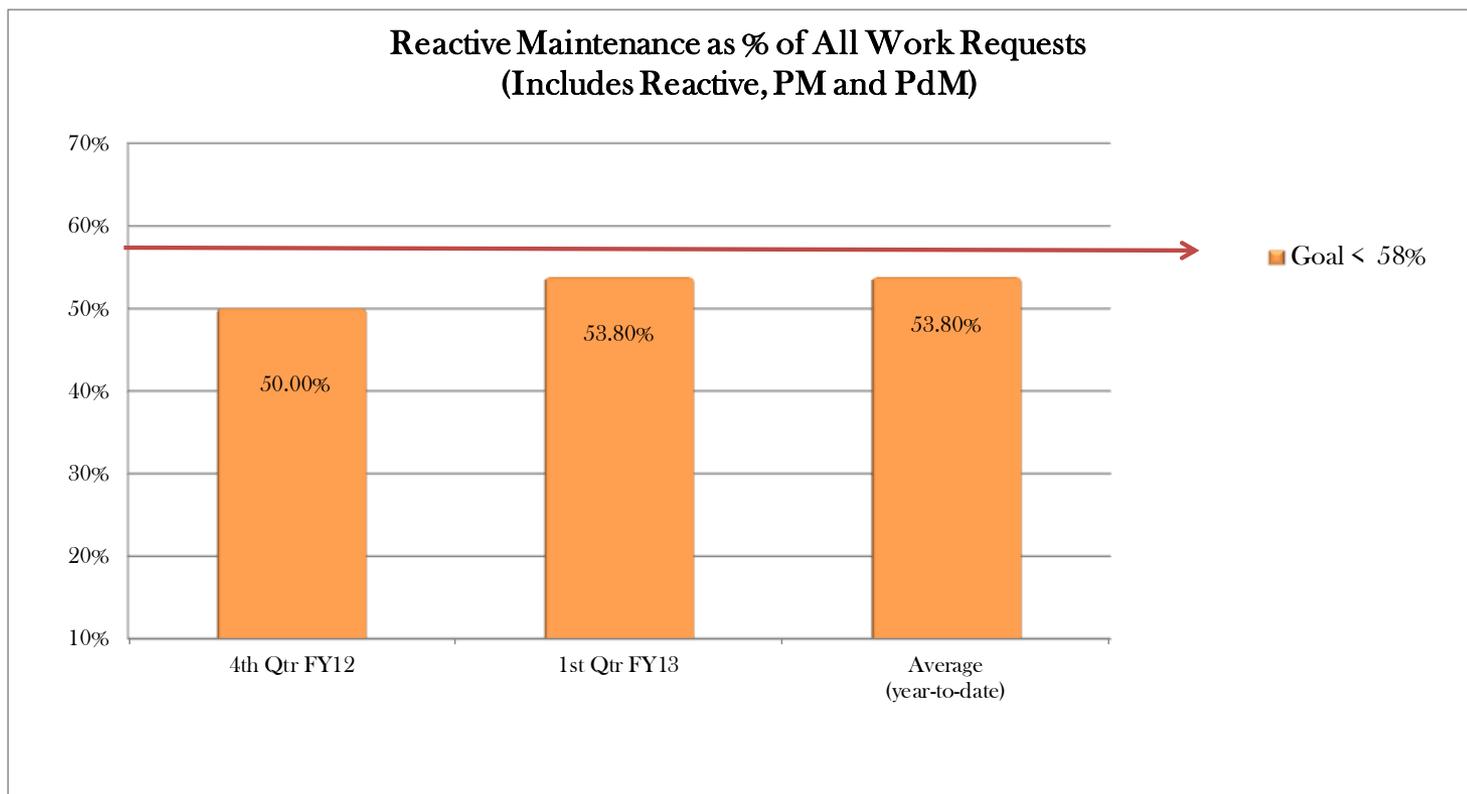
GOAL #1 – Improve maintenance and operations of the Campus

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 Service



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
F. O.

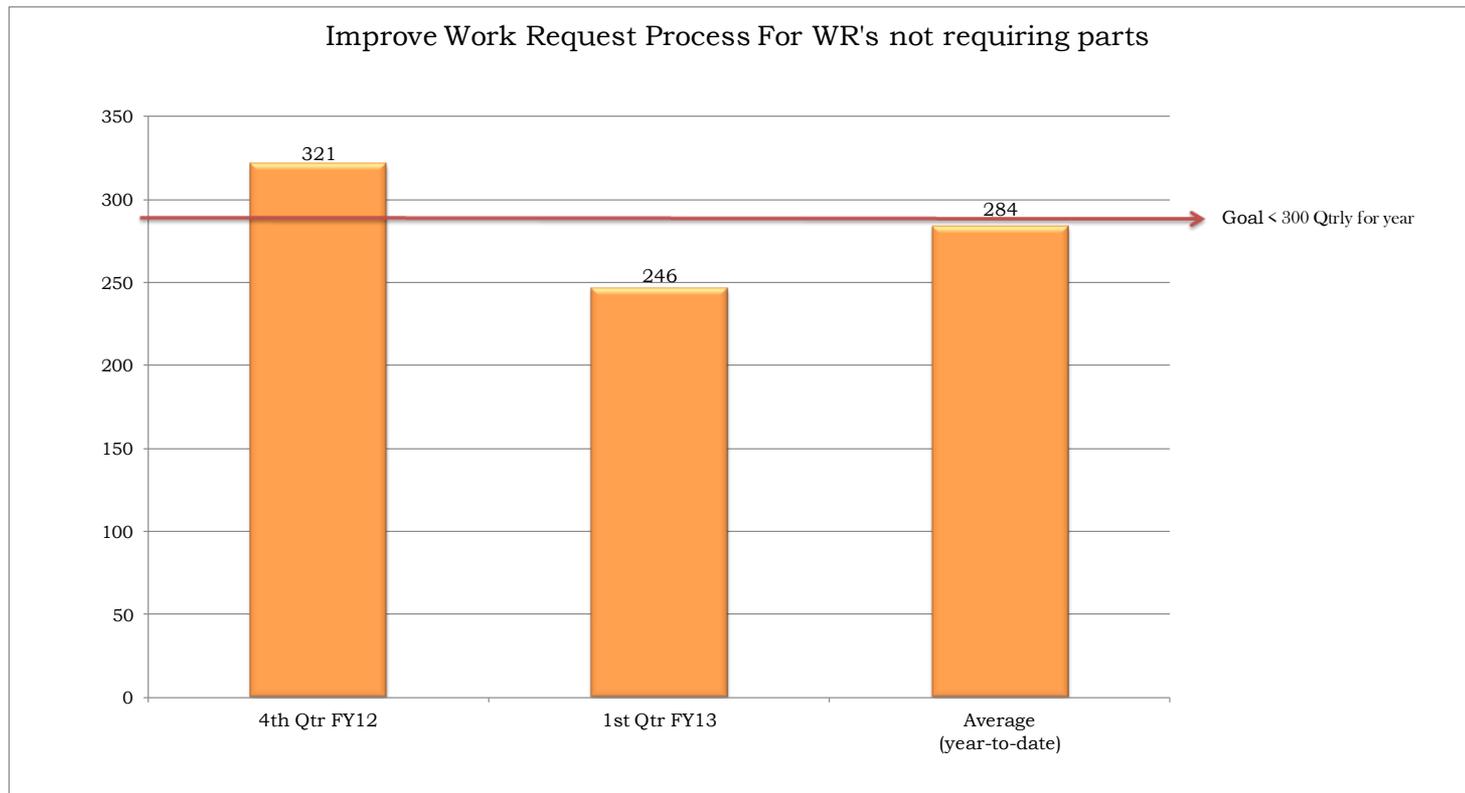
GOAL #1 – Improve maintenance and operations of the Campus

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 Service



STATUS

GOAL #1 – Improve Facilities Operations

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%
	1.5.3	Reduce Unscheduled High Voltage Electrical System Outages by 10%
	1.5.4	Reduce Unscheduled Fire Alarm Network Outages by 10%

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 – First Quarter FY 2013

Lead
F. O.

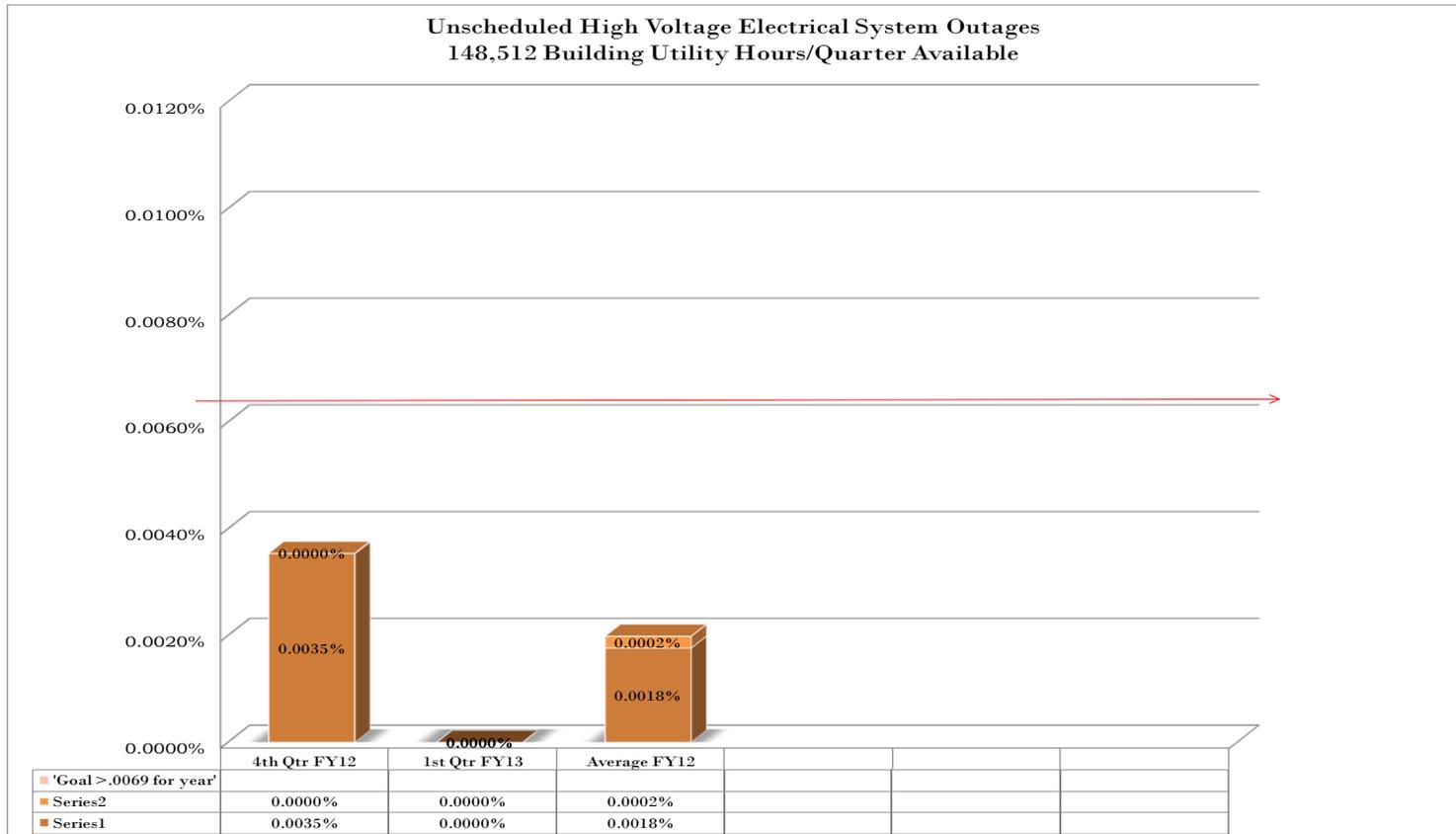
GOAL #1 – Improve maintenance and operations of the Campus

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 .0069 for year.

Balanced Scorecard Category: Customer Service



STATUS

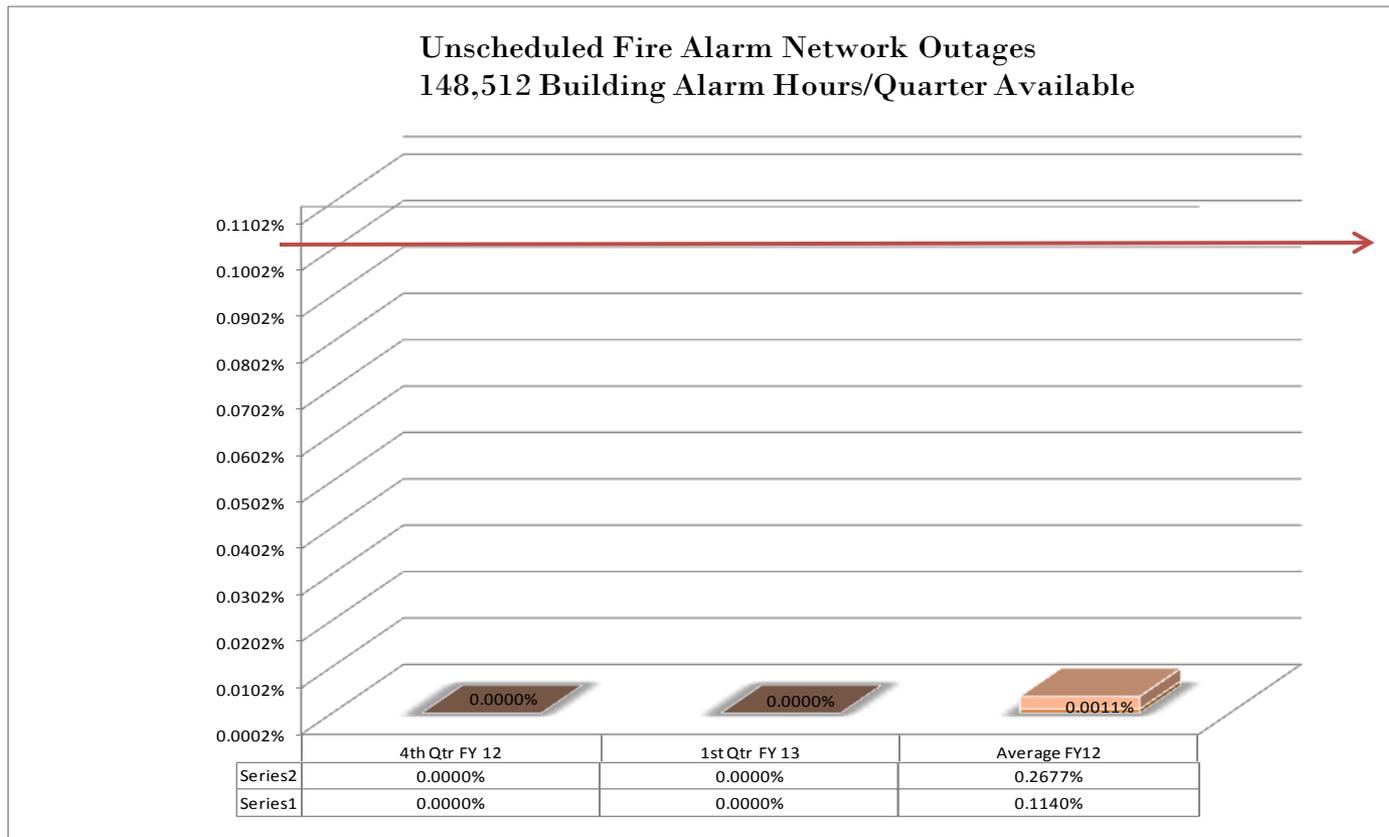
GOAL #1 – Improve maintenance and operations of the Campus

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 Service



STATUS

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** 95% of Estimates for in house construction within +/- 10% of Actual
97.2% achieved for FY12 with 96.6% in the 4th Quarter
- Objective 2.2.4** 95% 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 updates based upon the four committee recommendations - **Modifications identified near end of 1st Quarter FY13.**
 1. Streamline Design Services Processes
 2. Customer Surveys
 3. Customer Meetings and Customer Relations
 4. HUB Usage, Increase African American Participation
- Complete Classroom Capacity and egress information by developing individual building standards - **This is an ongoing process driven by building and project needs.**

IMPLEMENTED ACTION PLANS

- Project schedules from Scope & Budget phase through, Design, Construction and Closeout - **This is an ongoing process.**
- Continue to establish proven steps to beneficial occupancy via departmental meetings - **This is an ongoing process.**
- "Wildly Important Goal" - Customer involvement with project Punch List process - **This is an ongoing process..**

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

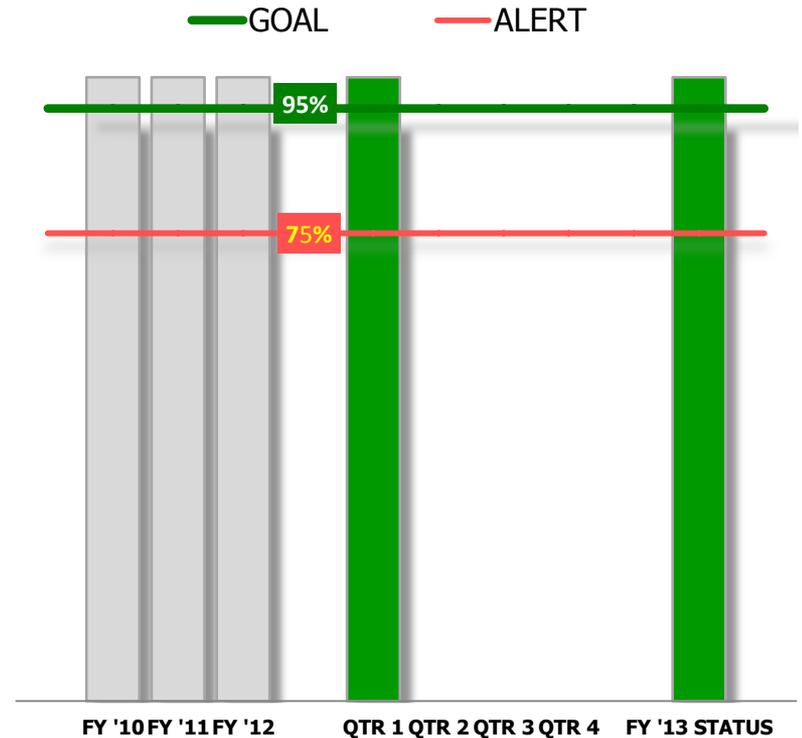
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.1 **95% of Projects Designed on Time**

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

Balanced Scorecard Category: Customer Service

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	23	23	0	100.0%
FY '11	49	49	0	100.0%
FY '12	22	22	0	100.0%
QTR 1	28	28	0	100.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '13 STATUS	28	28	0	100.0%



GOAL 95.0%	STATUS 100.0%
----------------------	-------------------------

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

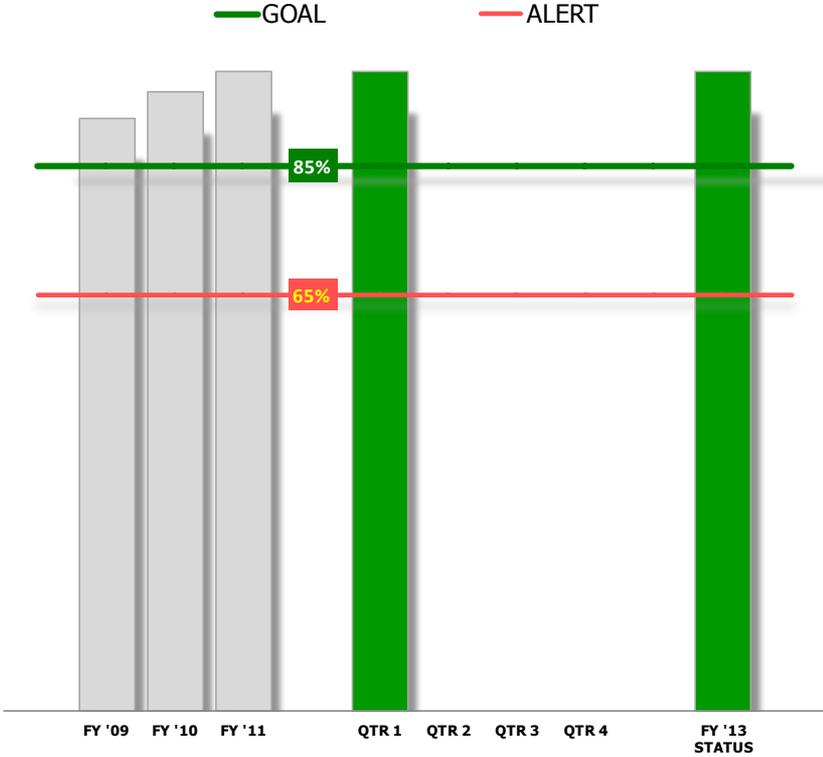
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 **85% of Estimates for All Construction within +/- 10% of Actual.**

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

Balanced Scorecard Category: Customer Service

95% 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	27	25	2	92.6%
FY '11	31	30	1	96.8%
FY '12	32	32	0	100.0%
QTR 1	32	32	0	100.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '13 STATUS	32	32	0	100.0%



GOAL 0.0%	STATUS 100.0%
---------------------	-------------------------

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

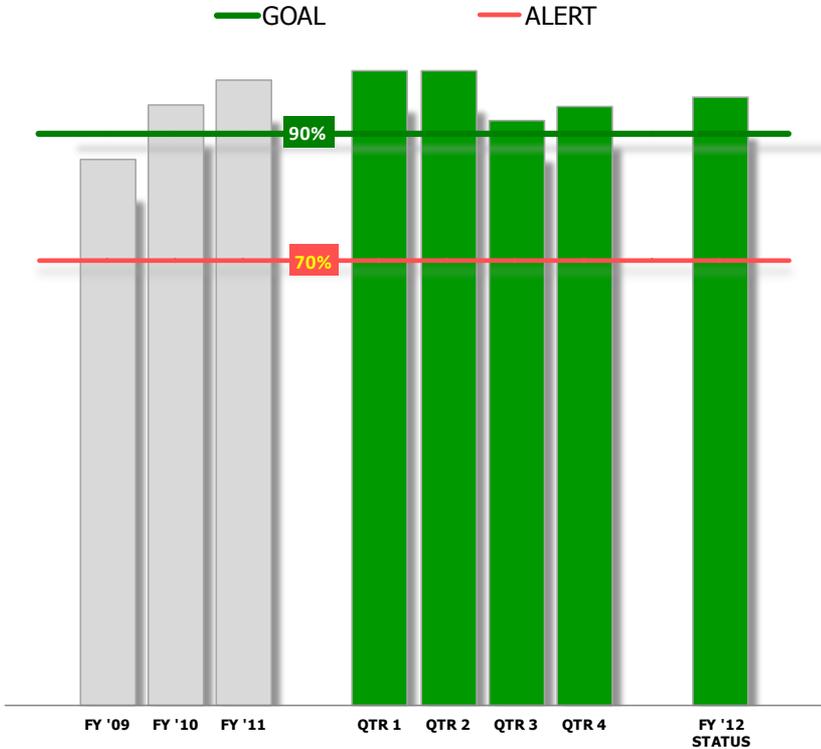
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 **90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

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

Balanced Scorecard Category: Customer Service

95% of All Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.4

QUARTERLY REVIEW	No. of Projects	No. of met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '10	27	25	2	92.6%
FY '11	31	31	0	100.0%
FY '12	32	32	0	100.0%
QTR 1	32	32	0	100.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '13 STATUS	32	32	0	100.0%



GOAL
90.0%

STATUS
100.0%

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead Design Services

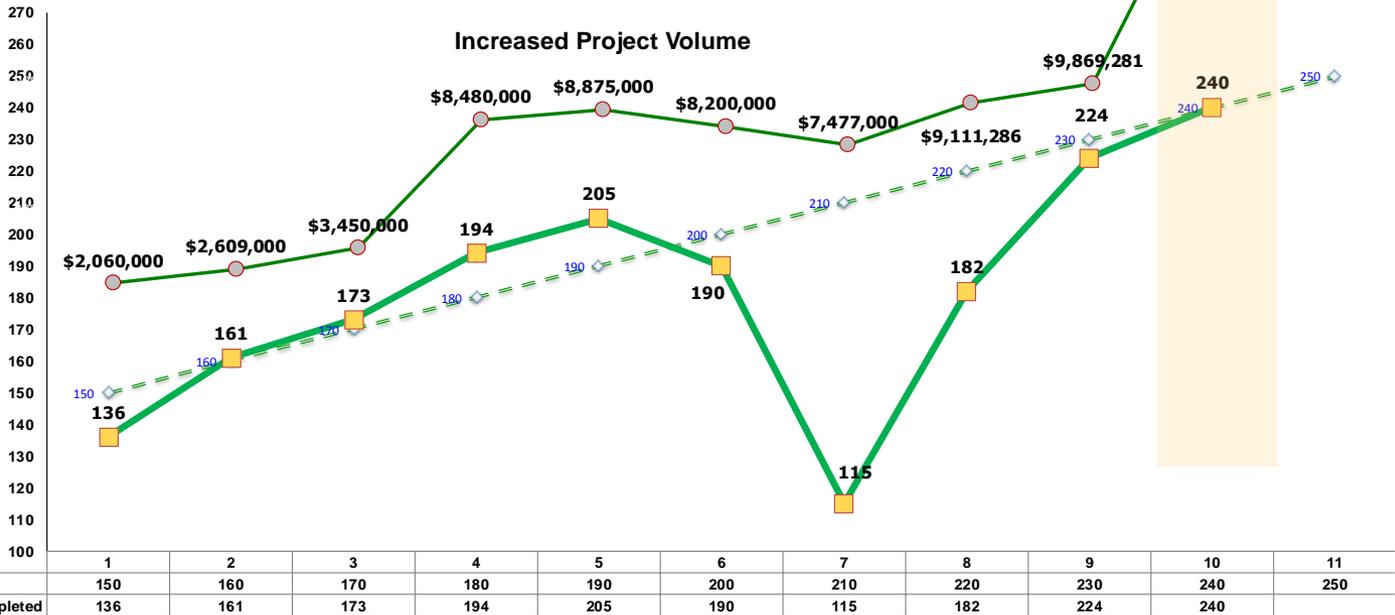
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.6 **Increase Project Volume by 10 projects per year - Project Counts by Phase**

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Service

Increase Project Volume by 10 Projects per year											
GOAL	1	2	3	4	5	6	7	8	9	10	11
	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
	150	160	170	180	190	200	210	220	230	240	250
\$25,000,000 Projects Completed	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
	136	161	173	194	205	190	115	182	224	240	13
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,286	\$9,869,281	\$19,393,759	\$644,333
AVGS/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$44,059	\$80,807	\$49,564



THIS IS A FISCAL YEAR GOAL - REVIEWED QUARTERLY

GOAL 100%

STATUS 100.0%

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.
- ❑ Hired Communications Officer. On-boarding underway. 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

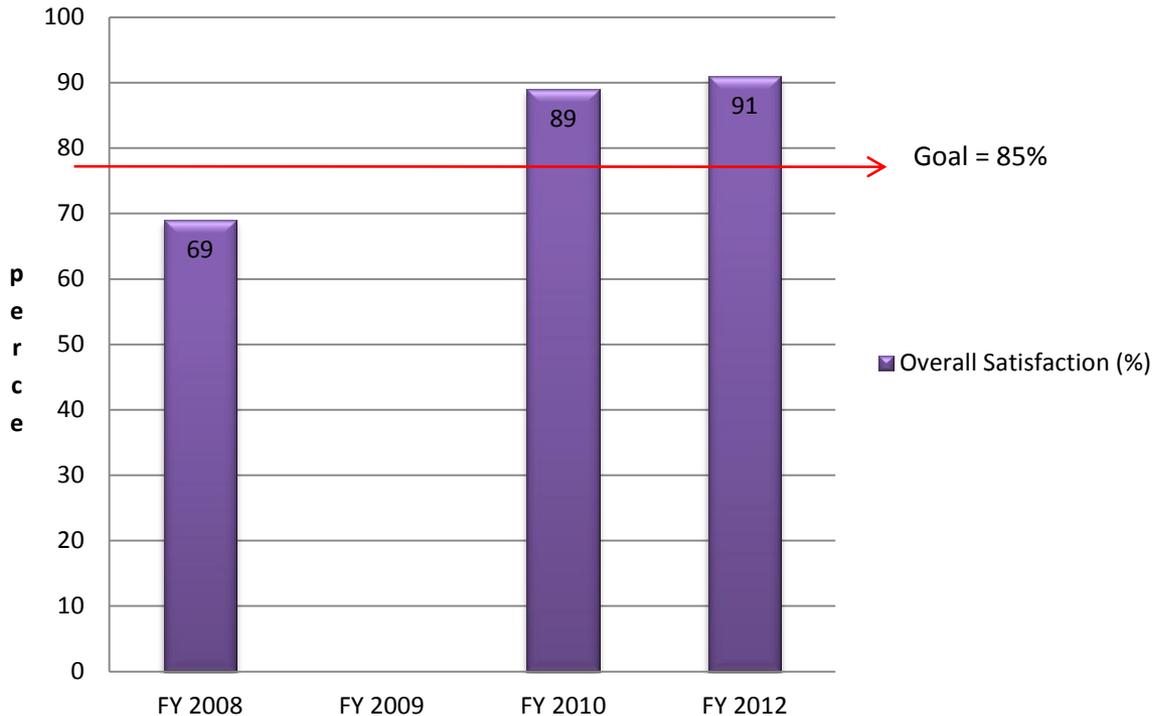
Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%

Annual objective

Measure: **Annual** Customer Survey Results: Percentage of customers agreeing or strongly agreeing with the statement: "Overall I am satisfied with the service I received from Facilities Management."

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Annual objective

Measure: Annual Customer Survey Results

Balanced Scorecard Category: Customer Perspective

Unit Customer Satisfaction Survey Rating Comparison (%)



STATUS

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
- 5 – Ensure that we are following UNCC Temperature Control Policy

Facilities Management Strategic Planning Session – First Quarter FY 2013

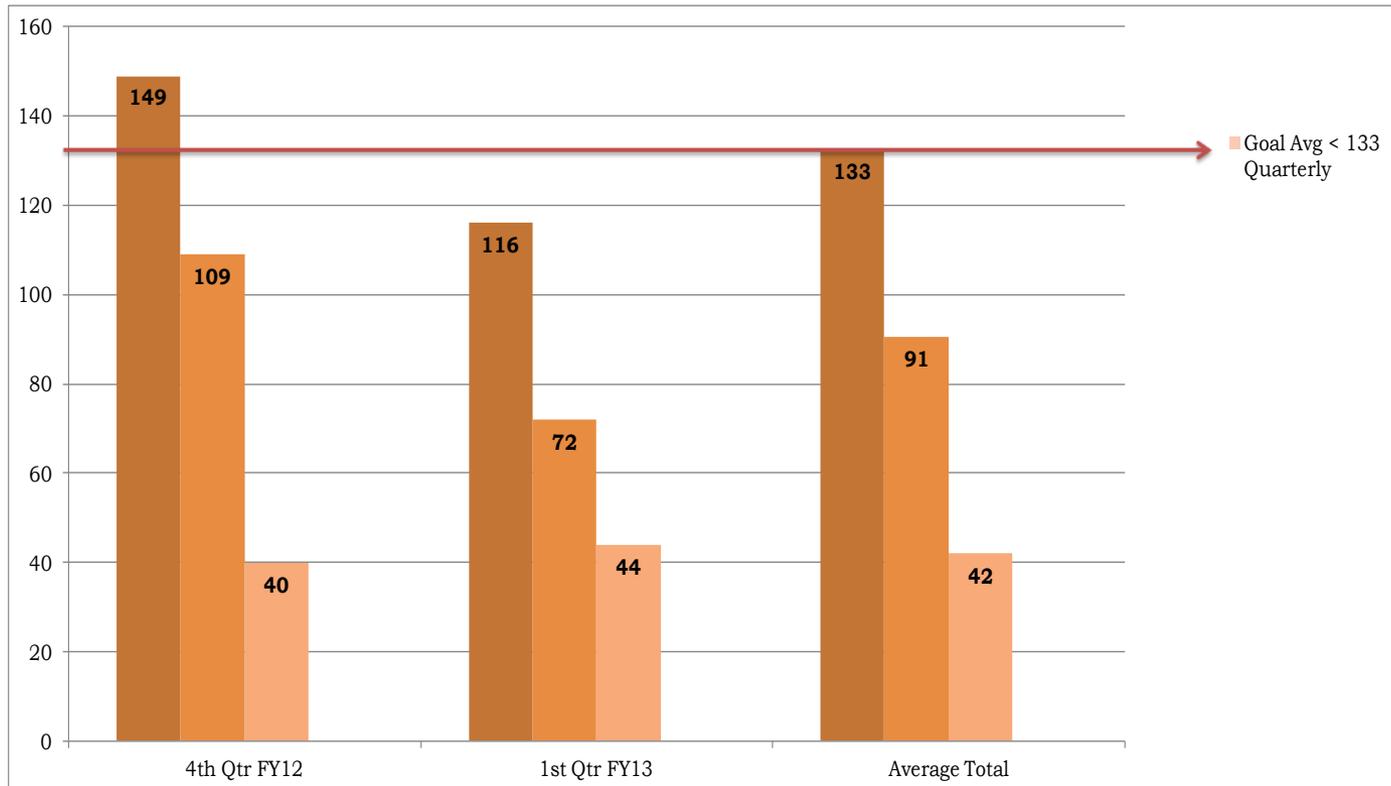
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% from FY10 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

GOAL #4 – Perfect a Customer Focused Organization

Lead
Design
Services

Strategy 4.1 Continually improve customer service/satisfaction

Objective 4.1.4 90% of Informal Project Customers Satisfied or Very Satisfied

ACTION PLAN FOR IMPROVEMENT

- Currently Customers are reluctant to respond to the questionnaire due to its length and requested level of detail.
- Work with FIS to revise the questionnaire as currently sent to our Customers - We would like this to be accomplished within the next 90 days.**
- The concept of the on-line questionnaire is good. We need to find a way to encourage much more Customer participation.

GOAL #4 – Perfect a Customer Focused Organization

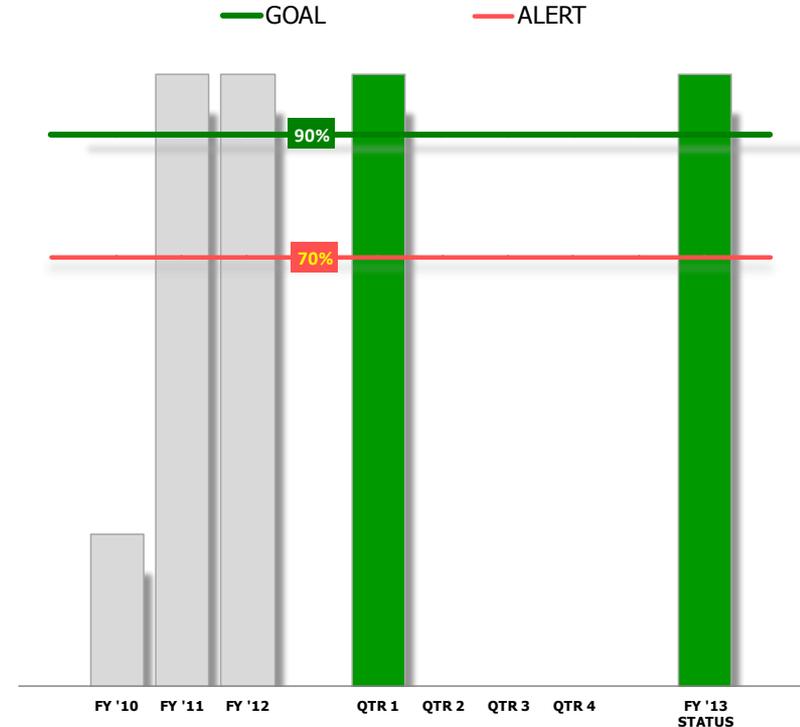
Strategy 4.1 Continually improve customer service/satisfaction
Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

Measure: Results from Interactive Web-based Customer Questionnaire. (Process automated through Archibus)

Balanced Scorecard Category: Customer Perspective

95% of Informal Project Customers Satisfied or Very Satisfied with services Received

QUARTERLY SURVEY	Number of Projects Surveyed	Very Satisfied 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied
FY '10	4	1	0	1	1	0	0	25.0%
FY '11	4	3	1	0	0	0	0	100.0%
FY '12	1	1	0	0	0	0	0	100.0%
QTR 1	2	2	0	0	0	0	0	100.0%
QTR 2	0	0	0	0	0	0	0	0.0%
QTR 3	0	0	0	0	0	0	0	0.0%
QTR 4	0	0	0	0	0	0	0	0.0%
FY '13 STATUS	2	2	0	0	0	0	0	100.0%



GOAL
90.0%

STATUS
100.0%



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

- Budget for Facilities Management will not be received until October 2012. Upon receipt, allocation plan will be created for review and approval by AVC-FM. A major challenger this year will be how to fund the \$150,000 request for training. FBO is reviewing potential strategies to obtain a solution.
- The Labor Services fund balance continues to be negative. Business Office is working with FO to identify potential leaks;
- The development of a FM Budgeting Basics Training program is underway. Directors were asked to provide topics for the training. Received input from two departments only. Anticipated completion of Section 1 (FM Budgeting 101) is February 2013. Program skeleton is under development; It is expected that there will be several sections, each targeted to specific areas, actions, etc. The entire training program will not be completed until 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;

Facilities Management Strategic Planning Session – 1st Quarter FY 2013

Lead
FBO

GOAL #6 – Promote Good Stewardship

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.

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS: June 30, 2012

ACCOUNT DESCRIPTION	2011-12 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE
OVERTIME AND PREMIUM PAY	\$ 290,950	7%	\$ 290,921	\$ 29	\$ 290,950	\$ -
STUDENT AND TEMPORARY WAGES	\$ 18,979	0%	\$ 18,979	\$ -	\$ 18,979	\$ -
PERSONAL SERVICE CONTRACTS	\$ 129,068	3%	\$ 128,673	\$ 396	\$ 129,068	\$ -
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 893,363	22%	\$ 851,457	\$ 5,746	\$ 857,203	\$ 36,160
OTHER ADMINISTRATIVE EXPENSES	\$ 52,663	1%	\$ 50,463	\$ 2,200	\$ 52,663	\$ -
DOMESTIC TRAVEL/TRAINING	\$ 84,412	2%	\$ 84,412	\$ -	\$ 84,412	\$ -
FIXED PURCHASED SERVICES (Maint Agr)	\$ 291,532	7%	\$ 290,297	\$ -	\$ 290,297	\$ 1,235
OTHER PURCHASED SERVICES	\$ 374,223	9%	\$ 372,913	\$ 1,310	\$ 374,223	\$ -
SUPPLIES	\$ 1,443,241	36%	\$ 1,402,577	\$ 13,386	\$ 1,415,963	\$ 27,278
EQUIPMENT/IT	\$ 386,406	10%	\$ 383,171	\$ 2,033	\$ 385,204	\$ 1,202
CAPITAL OUTLAY	\$ 12,394	0%	\$ 12,348	\$ -	\$ 12,348	\$ 46
FIXED CHARGES	\$ 24,848	1%	\$ 24,848	\$ -	\$ 24,848	\$ -
RECYCLING	\$ 37,515	1%	\$ 39,220	\$ -	\$ 39,220	\$ (1,705)
FACILITIES MANAGEMENT Main Operating Funds	4,039,594		3,950,279.23	25,099.57	3,975,378.80	64,215.18

LENGTH OF TIME:12 MONTHS	100.00%
Percentage of Actual Expenditures	97.79%
Percentage: Actuals + Pending Commitments	98.02%

STATUS

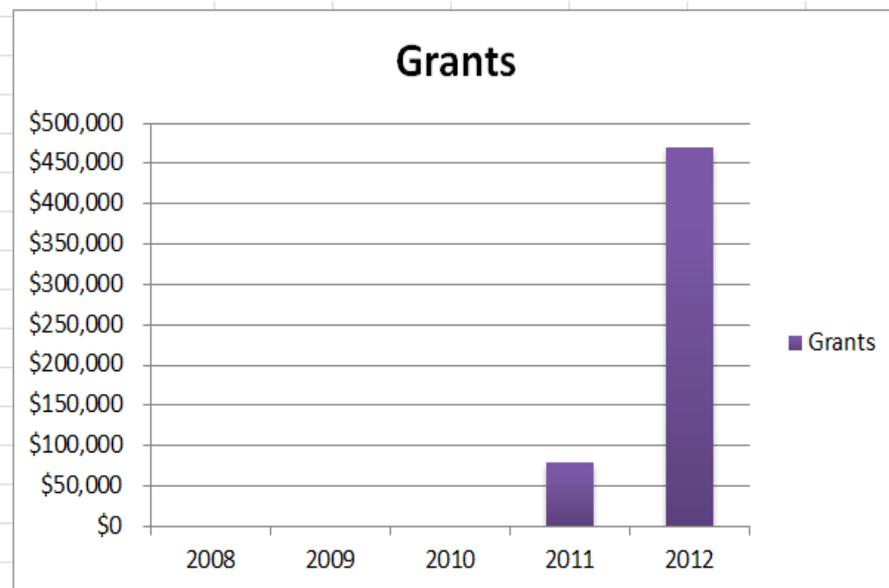
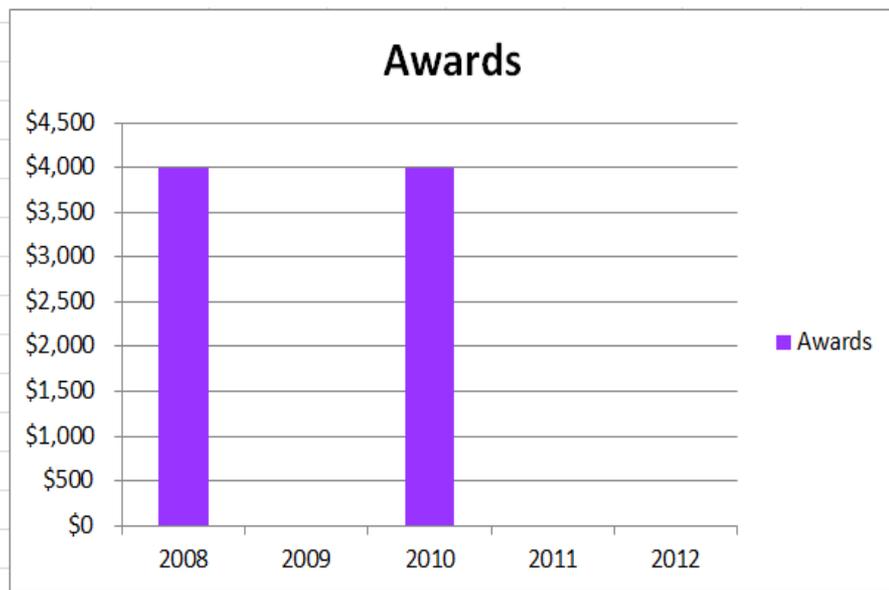
Lead
FBO

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.2 Increase Grants and Supplemental Funding to the Department by 25%

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective



STATUS

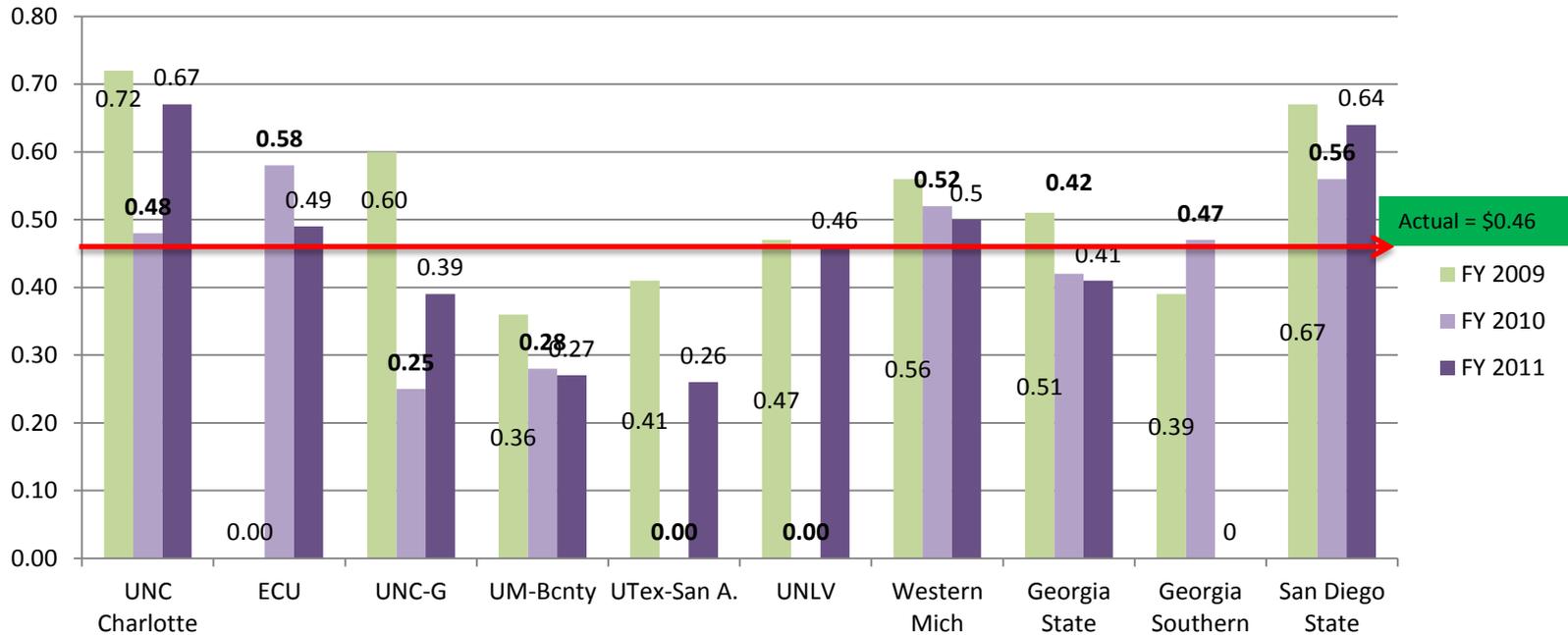
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

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

Balanced Scorecard Category: Financial Perspective

Total Administrative Cost/GSF



STATUS -
HOLD

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 – First Quarter FY 2013

Lead
F. O.

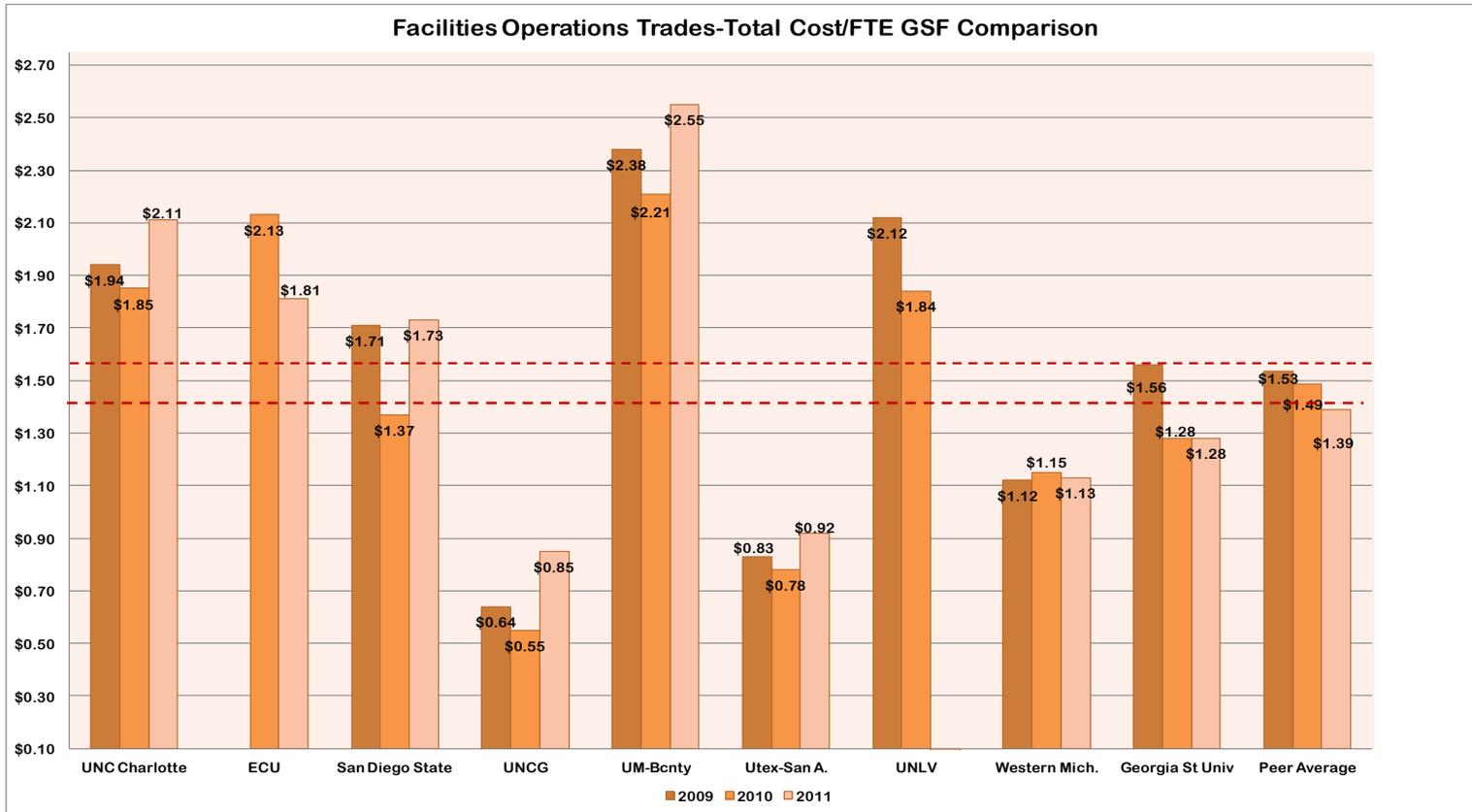
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.5 Achieve Total Maintenance Cost/GSF \pm 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).



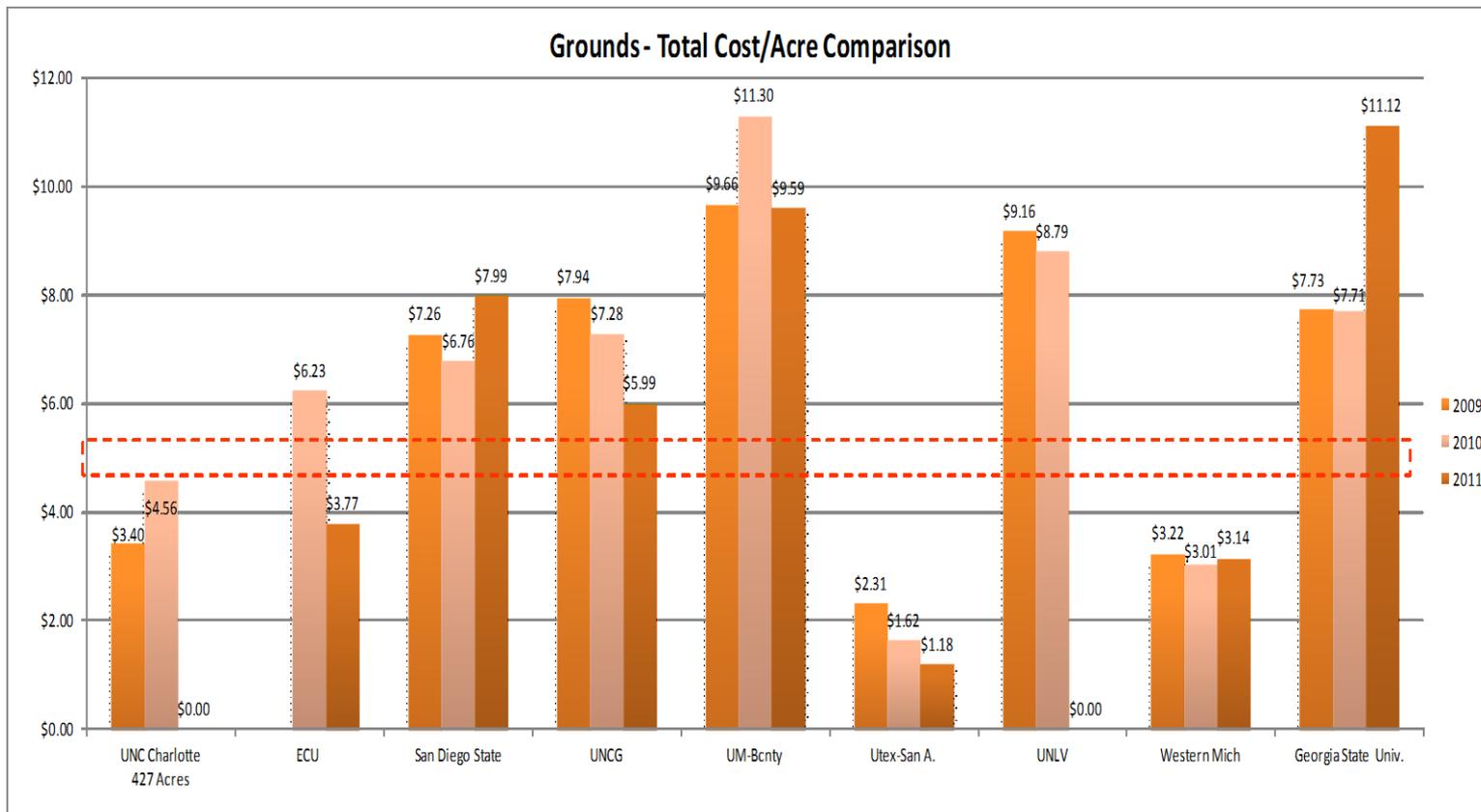
STATUS

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



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
F. O.

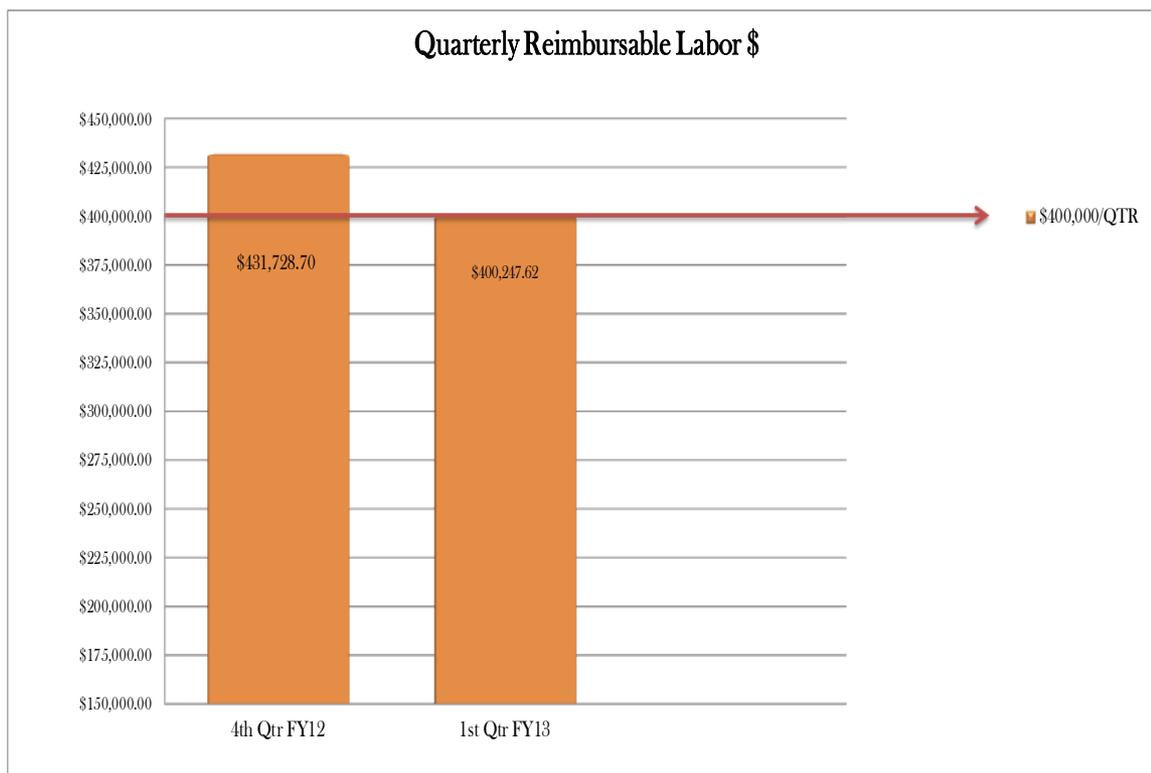
GOAL #6 – Promote Good Stewardship

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



STATUS

GOAL #6 – Promote Good Stewardship

Lead
Recycling

Strategy	6.2	Develop a Sustainable Campus
Objective	6.2.1	Increase Recycling of Construction and Demolition Materials on Informal Projects and Renovations to 50% of Total C&D Waste
Objective	6.2.2	Increase Recycling of Construction and Demolition Materials on Capital/Formal Projects to 50% of Total C&D Waste
Objective	6.2.3	Increase Percent of Solid Waste Recycled on Campus by 5% in five year (base year 2008)

ACTION PLAN

- Objective 6.2.1
 - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
 - Continue working on ceiling tile recycling – get approval for older buildings that have been abated and work on a roll-off option for recycling smaller projects.
- Objective 6.2.2
 - Continue monitoring projects and acting as resource for contractors.
- Objective 6.2.3
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Fall Campus Clean UP, Sustainability Week, provide tours and presentations across campus
 - Waste audits for campus to determine amount of recyclables in waste stream
 - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees
 - Designing Comprehensive Compost program for campus
 - Assist Brian Guns and NC APPA for the 2013 NC APPA conference at UNC Greensboro



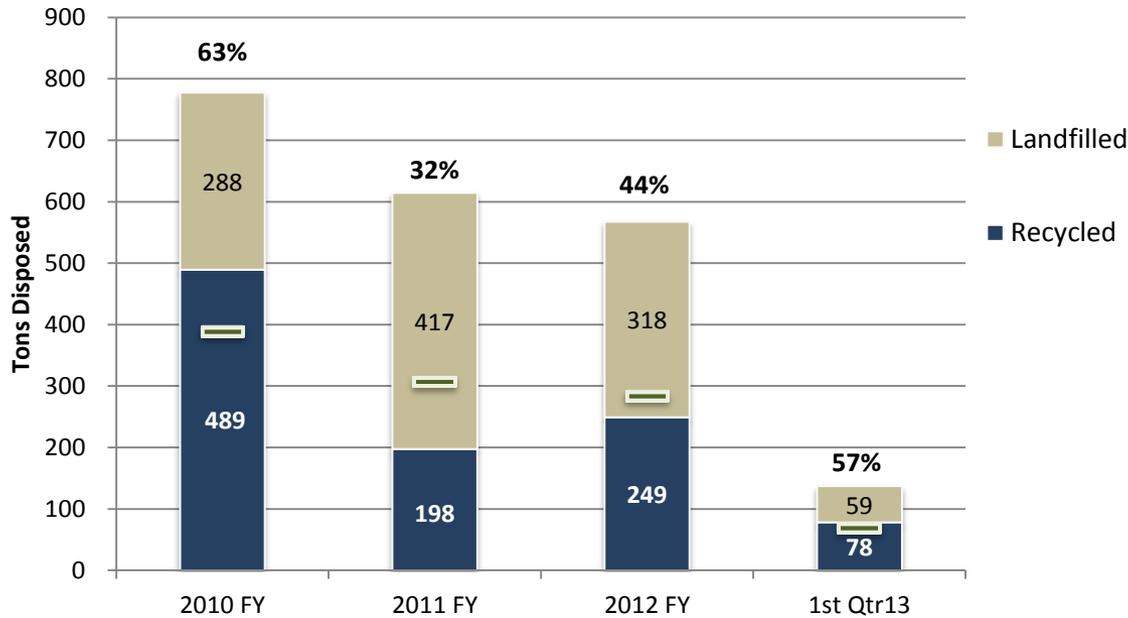
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 Increase Recycling of Construction and Demolition Materials on Renovations to 50% of Total C&D Waste

Measure: Pounds of C & D waste recycled divided by total pounds of C & D waste

Balanced Scorecard Category: Financial Perspective

Informal Projects - Materials Disposed
1st Qtr FY13





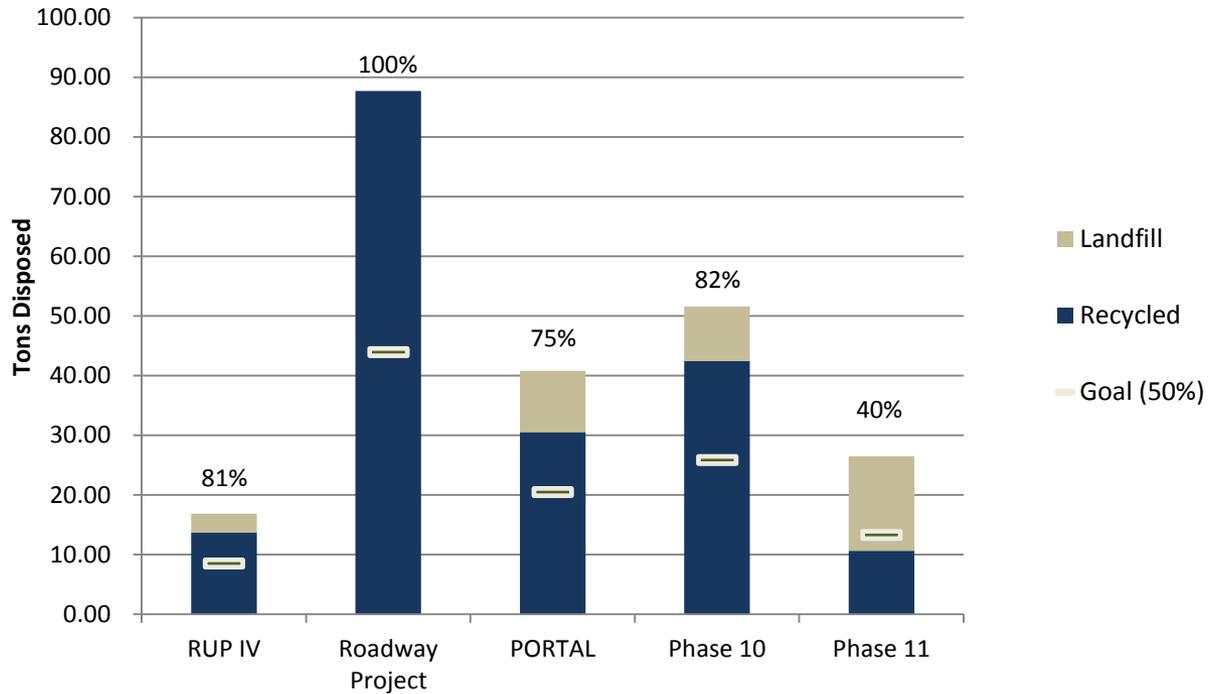
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.2 Increase Recycling of Construction and Demolition Materials on Capital Projects to 50% of Total C&D Waste

Measure: Pounds of C & D waste recycled divided by total pounds of C & D waste

Balanced Scorecard Category: Financial Perspective

Capital Projects - Materials Disposed
1st Qtr FY13



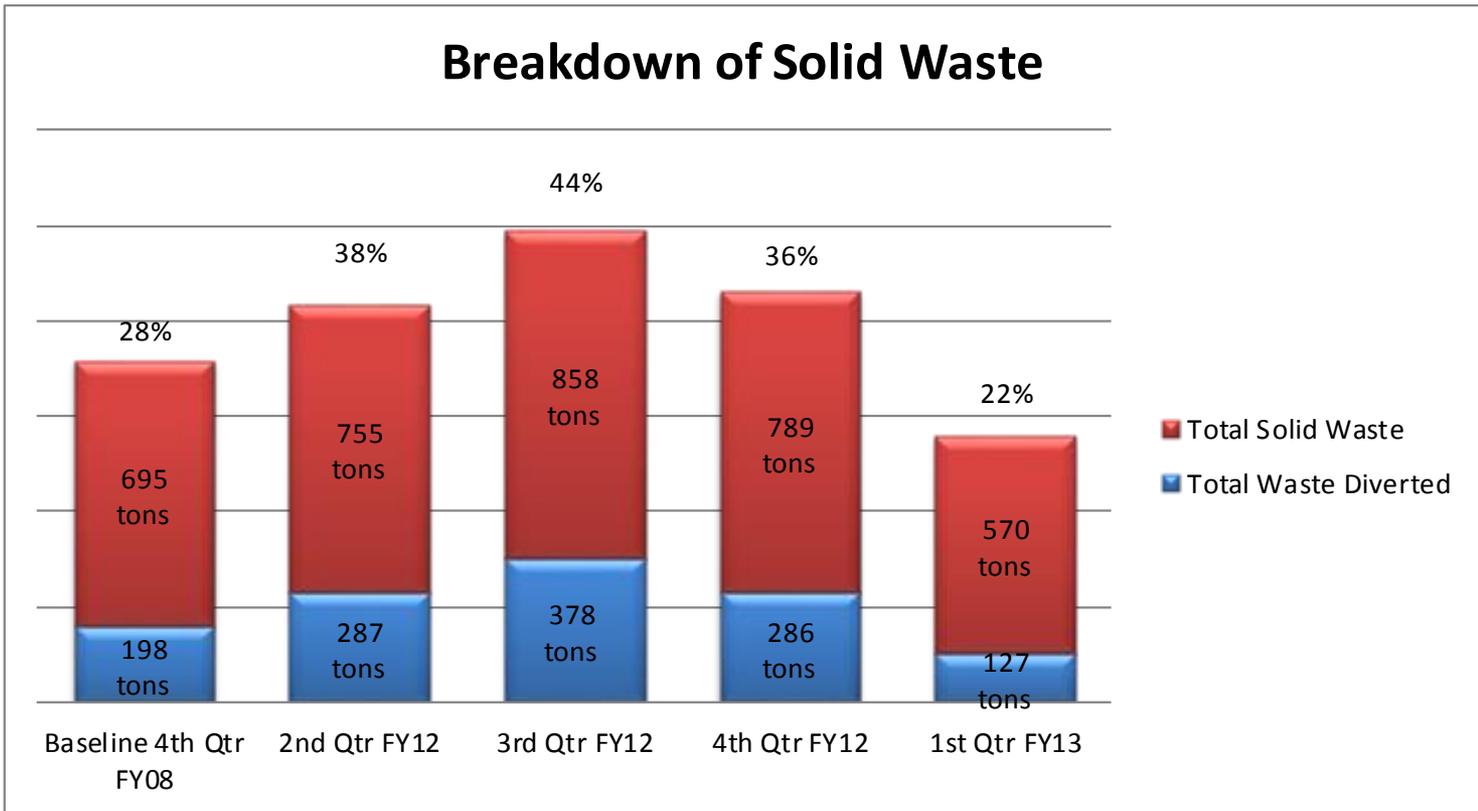


GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.3 Increase Percent of Solid Waste Recycled on Campus by 5%

Measure: Pounds of solid waste recycled annually divided by total solid waste

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship

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

Objective **6.2.4** Implementation of sustainability actions

Lead
RELU

ACTION PLAN

- **Actions Planned**
 - Analysis of STARS/APPA Assessment
 - GHG Inventory 2 – data gathering
 - IT analysis
 - Appalachian Energy Summit follow up
 - Campus Sustainability Report (draft)
 - Implement Eco reps
 - Climate Action Plan Implementation
 - Sustainability Resource Centre

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
RELU

GOAL #6 – Promote Good Stewardship

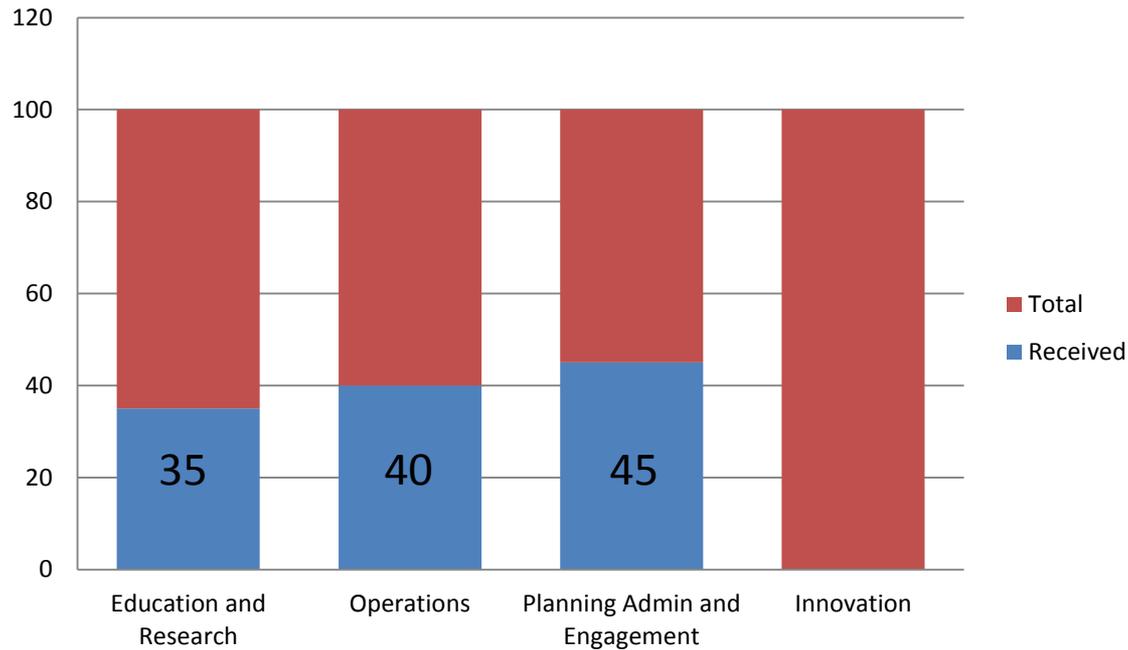
Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Achieve 50 % of STARS

Measure: Number of points completed in each category.

Balanced Scorecard Category: Innovation and Learning

STARS Credits



Status

GOAL #6 – Promote Good Stewardship

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

**Lead
Capital**

**ACTIONS TO REDUCE CAMPUS
ENERGY USAGE**

STATUS

- Pursue lighting retrofits in bldgs. that still have T-12's
- Continue retro-commissioning program
- Upgrade BAS to enable setbacks
- Energy efficient equipment upgrades
- Get Performance Contract into construction

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
Capital

GOAL #6 – Promote Good Stewardship

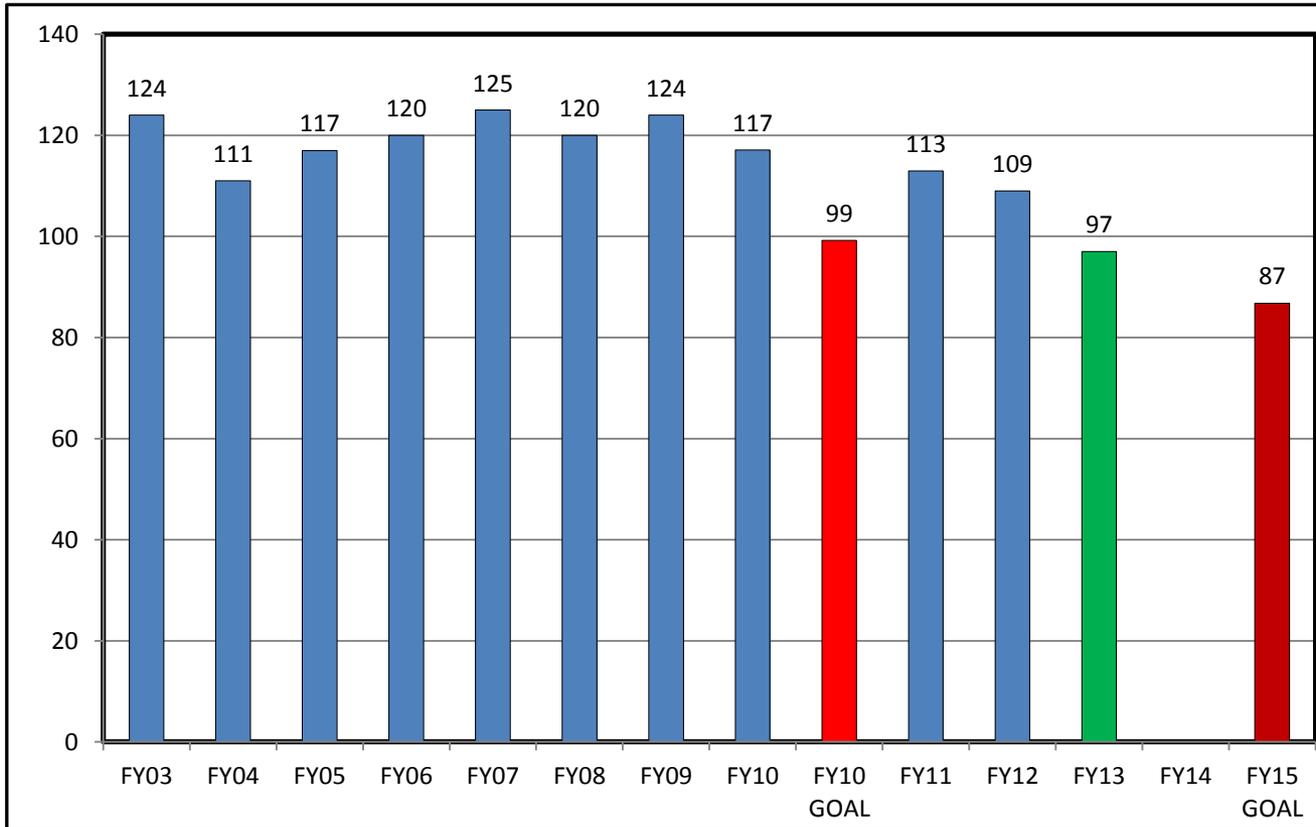
Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 30% by FY2015

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

GOAL #6 – Promote Good Stewardship

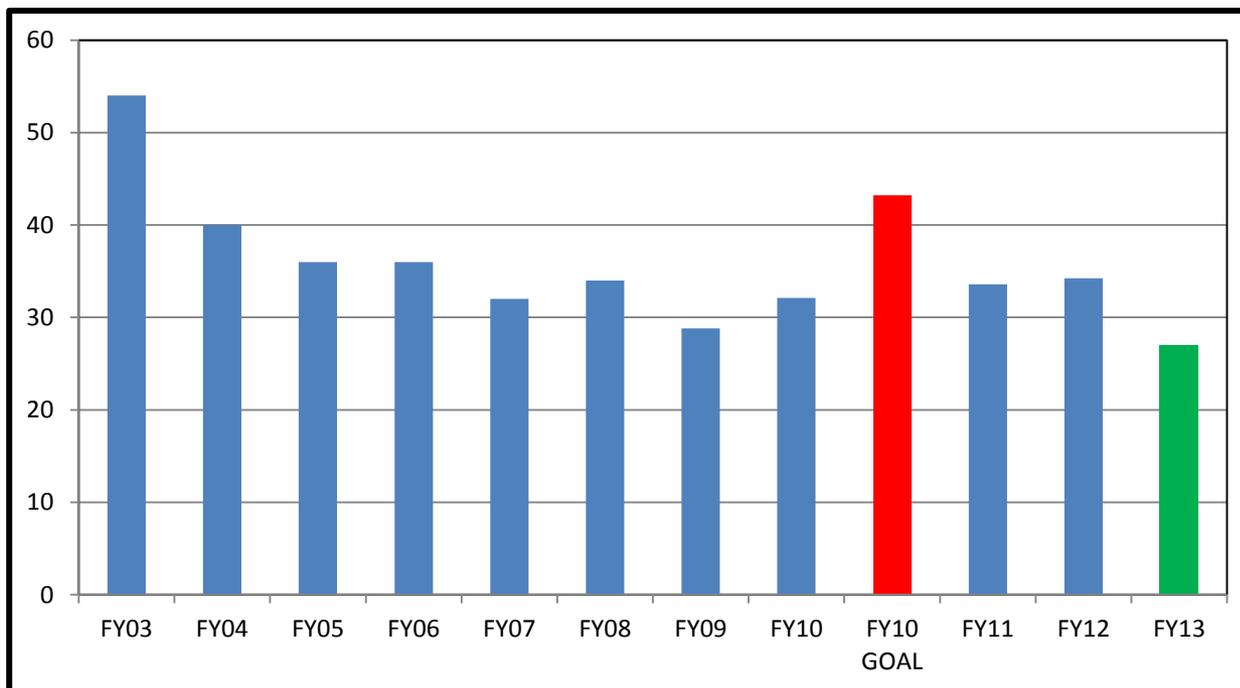
Strategy **6.3** Conserve Natural Resources
Objective **6.3.2** Decrease Water Usage by 20% by FY2010

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 – First Quarter FY2013

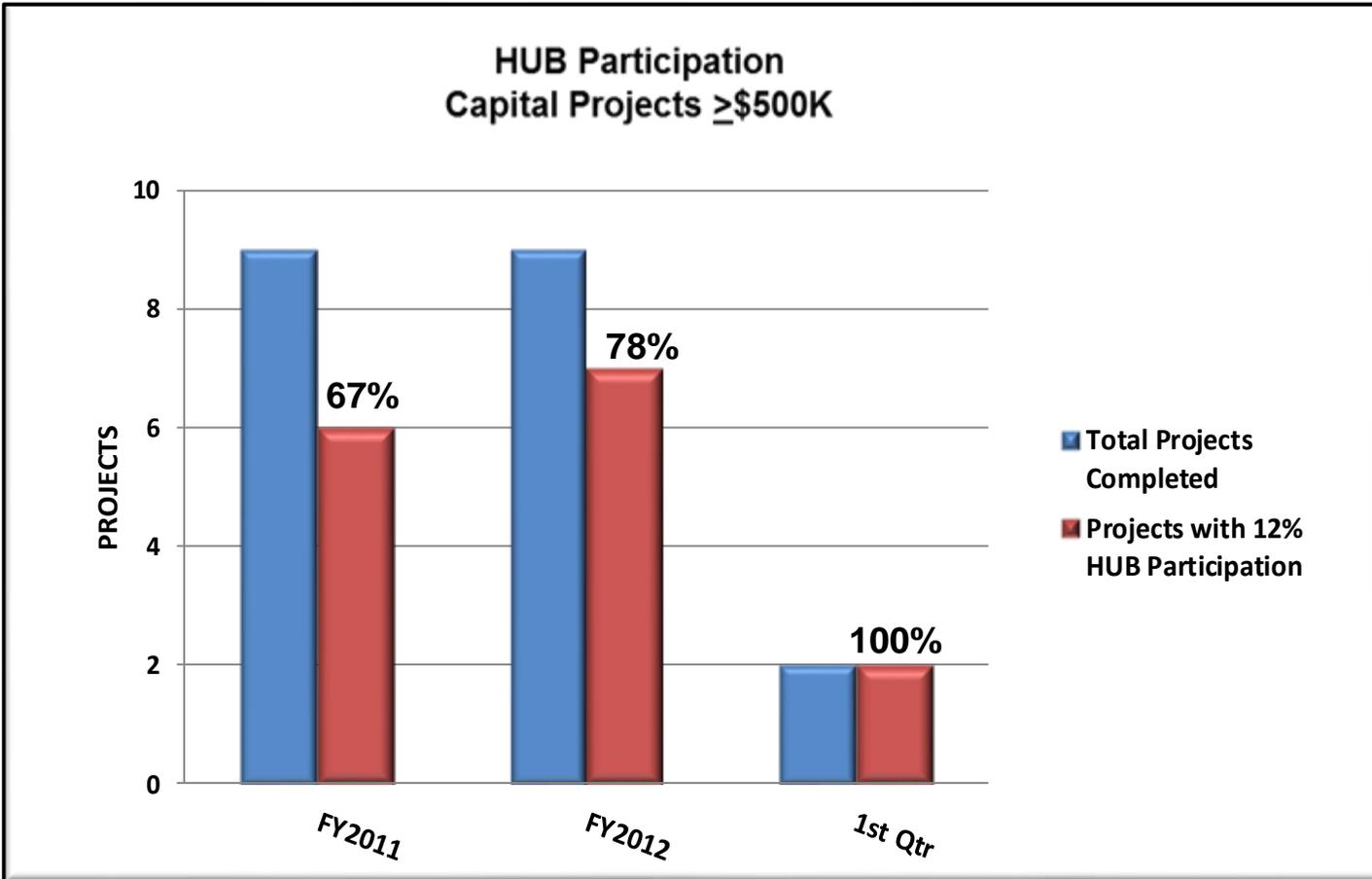
Lead
Capital

GOAL #6 – Promote Good Stewardship

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



Scott Hall Sprinklers – 12.3%
Parking Deck I – 18%

1stQtr
STATUS

FY2013
STATUS

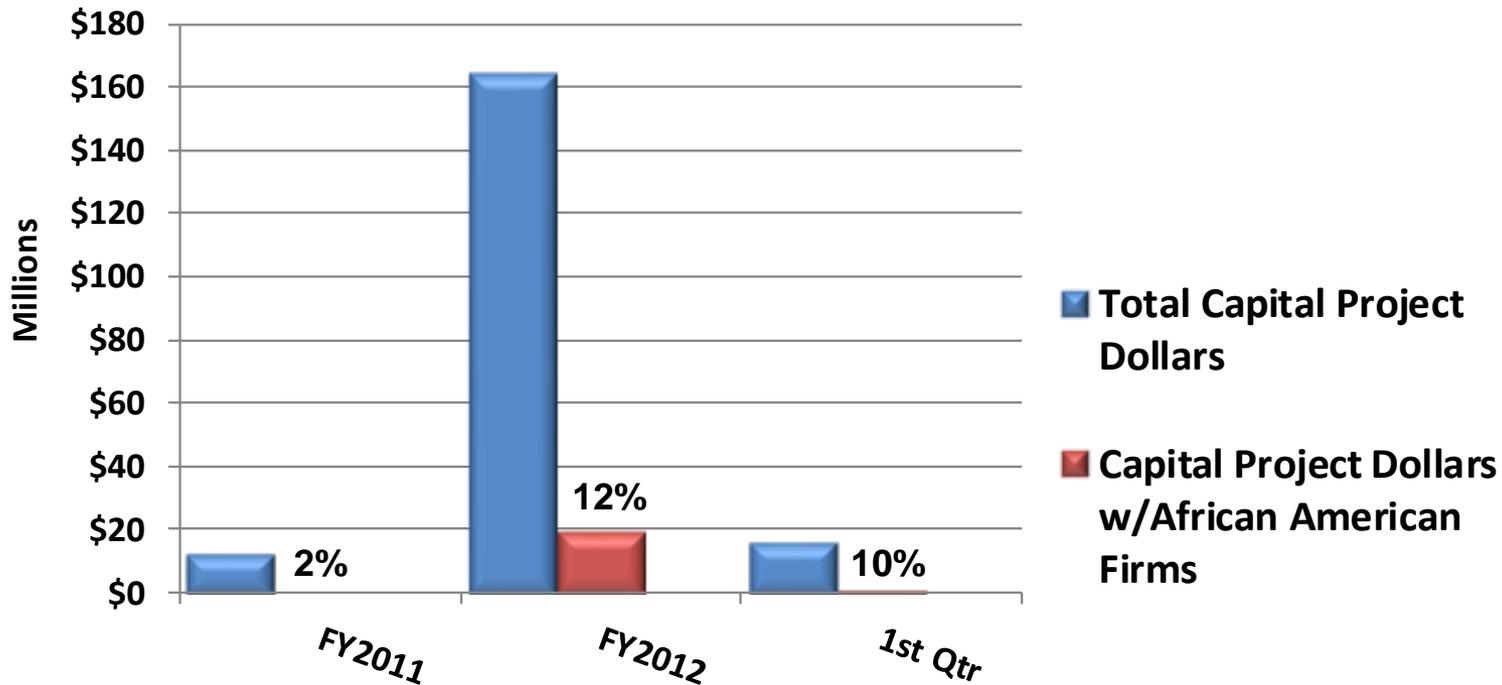
GOAL #6 – Promote Good Stewardship

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

Capital Projects \geq \$500K African American Participation



1stQtr
STATUS

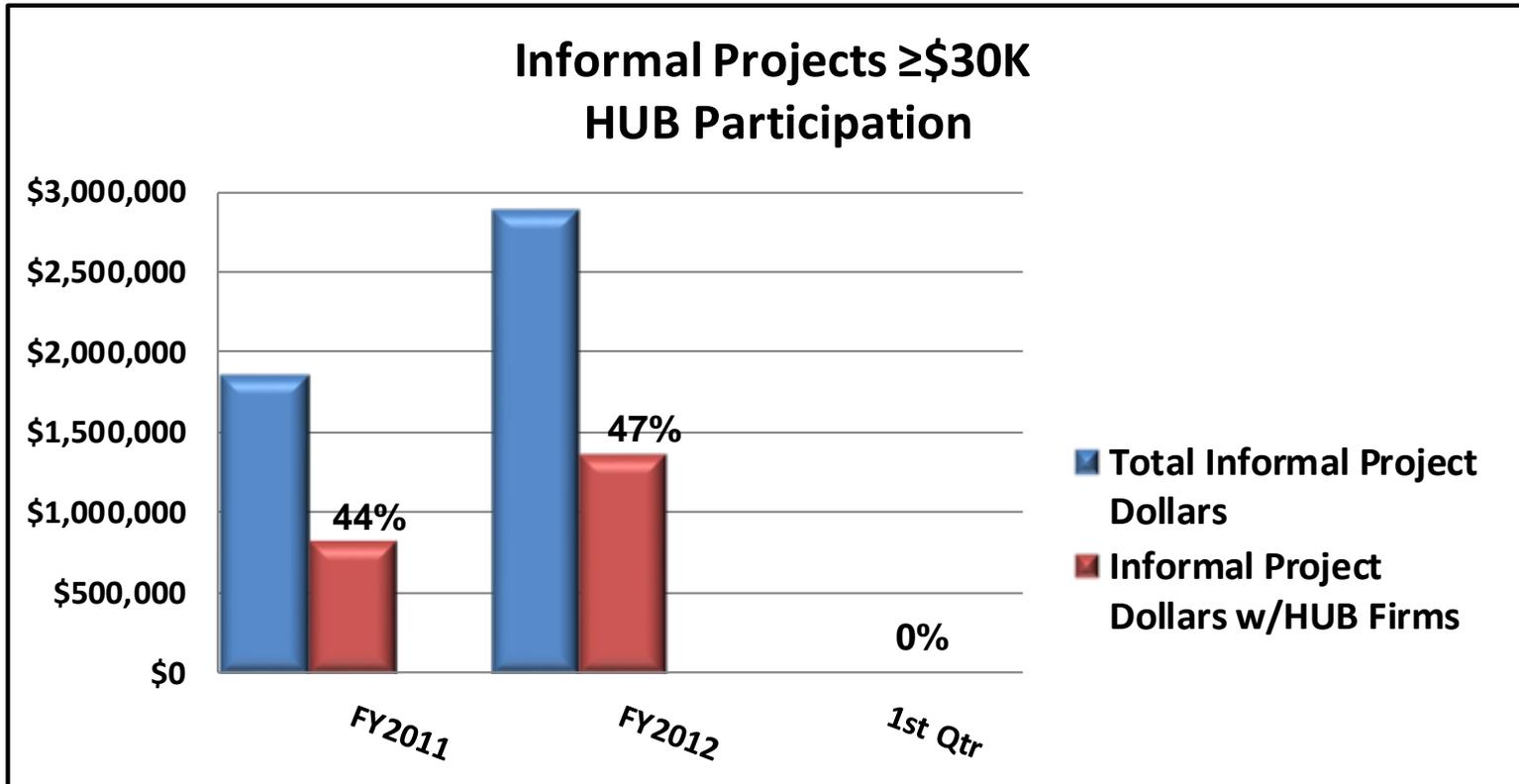
FY2013
STATUS

GOAL #6 – Promote Good Stewardship

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



1stQtr
STATUS

FY2013
STATUS

GOAL # 6 – Promote Good Stewardship

Lead
Design
Services

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 participation.

ACTION PLAN FOR IMPROVEMENT

- Amanda Caudle assigned as Design Service Coordinator to work with Dorothy Vick, Doug Pierce and JOC Contractors in seeking new HUB Contractor opportunities - All Coordinators are encouraged to try new vendors for work on our Under \$30 K projects. Amanda advises other Coordinators of new opportunities - **This is ongoing.**
- Continue refining HUB reporting information in regards to Strategic Planning information - **This is ongoing.**
- Continue to work with FIS on reports for extracting project data from Archibus - **This is ongoing.**

GOAL # 6 – Promote Good Stewardship

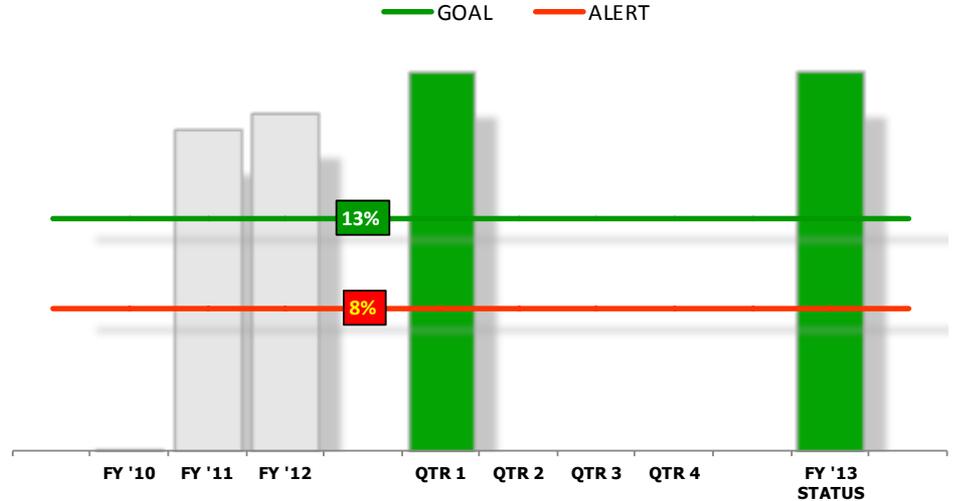
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Internal Business Process

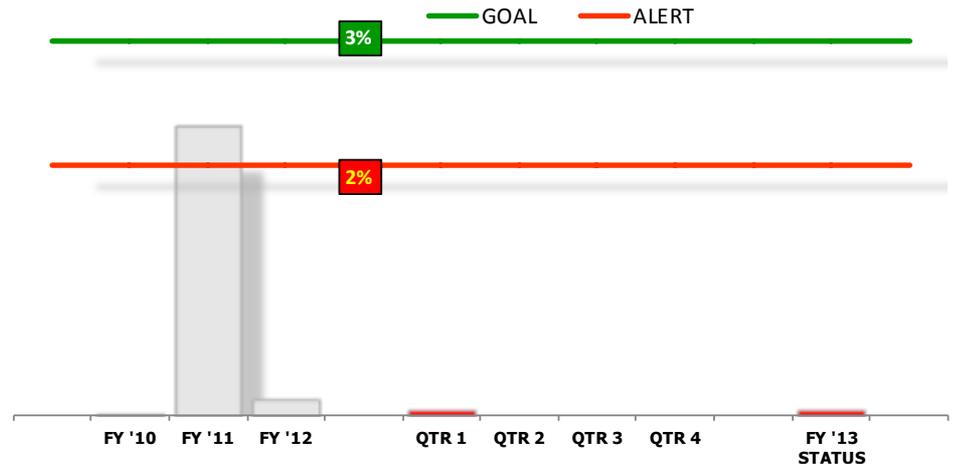
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '10	\$ 270,045	\$ 0	0.0%
FY '11	\$ 684,520	\$ 122,224	17.9%
FY '12	\$ 547,272	\$ 102,708	18.8%
QTR 1	\$ 921,622	\$ 194,407	21.1%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '13 STATUS	\$ 921,622	\$ 194,407	21.1%



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 '10	\$ 270,045	\$ 0	0.0%
FY '11	\$ 684,520	\$ 15,750	2.3%
FY '12	\$ 547,272	\$ 700	0.1%
QTR 1	\$ 921,622	\$ 400	0.0%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '13 STATUS	\$ 921,622	\$ 400	0.0%





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 - Utilize EDA’s for more accurate data.

Facilities Management Strategic Planning Session – First 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

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

Lead
F. O.

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 – Give PA’s ability to approve up to \$500.00 when Supervisor is not available.

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
F. O.

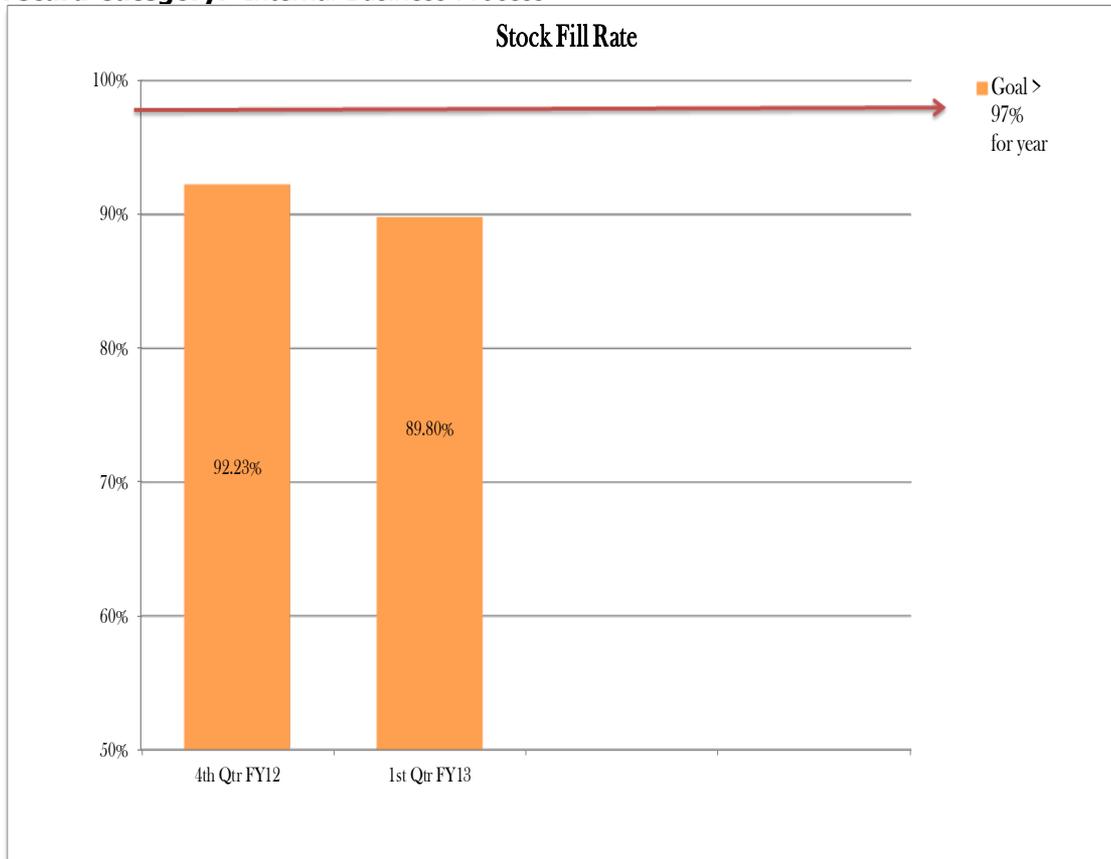
GOAL #1 – Improve maintenance and operations of the Campus

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 – First Quarter FY 2013

Lead
F. O.

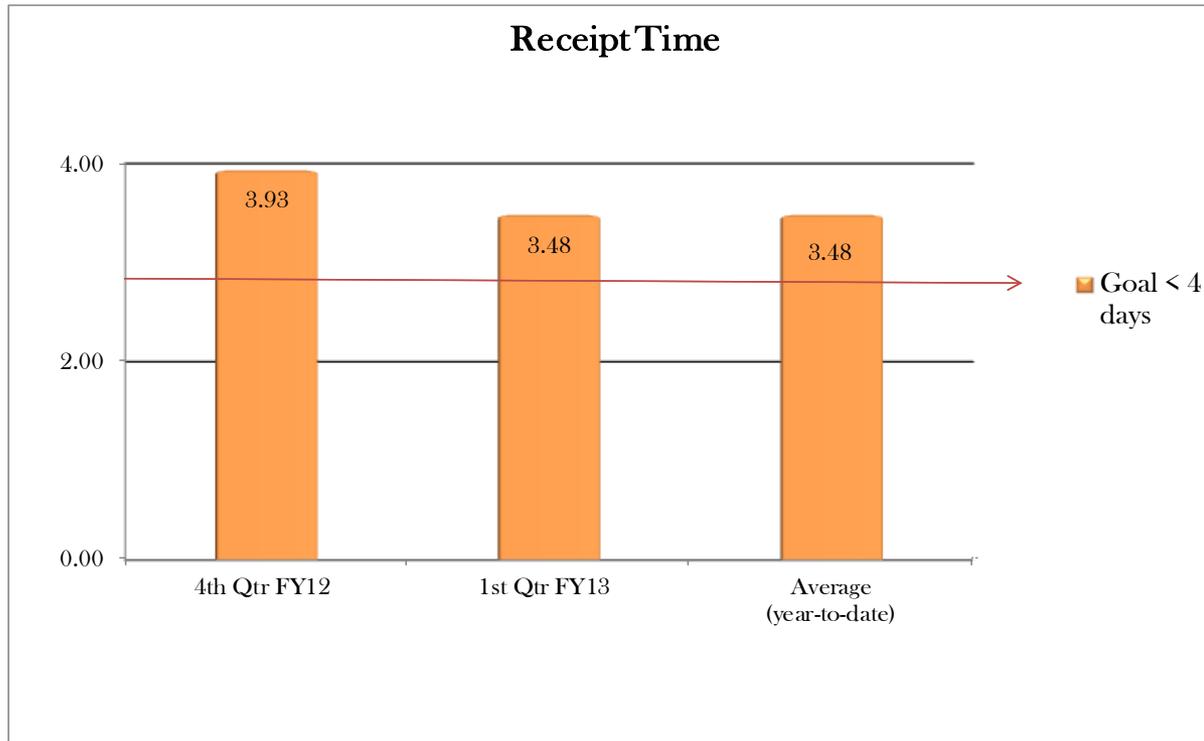
GOAL #1 – Improve maintenance and operations of the Campus

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

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%
	1.5.3	Reduce Unscheduled High Voltage Electrical System Outages by 10%
	1.5.4	Reduce Unscheduled Fire Alarm Network Outages by 10%

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 – First Quarter FY 2013

Lead
F. O.

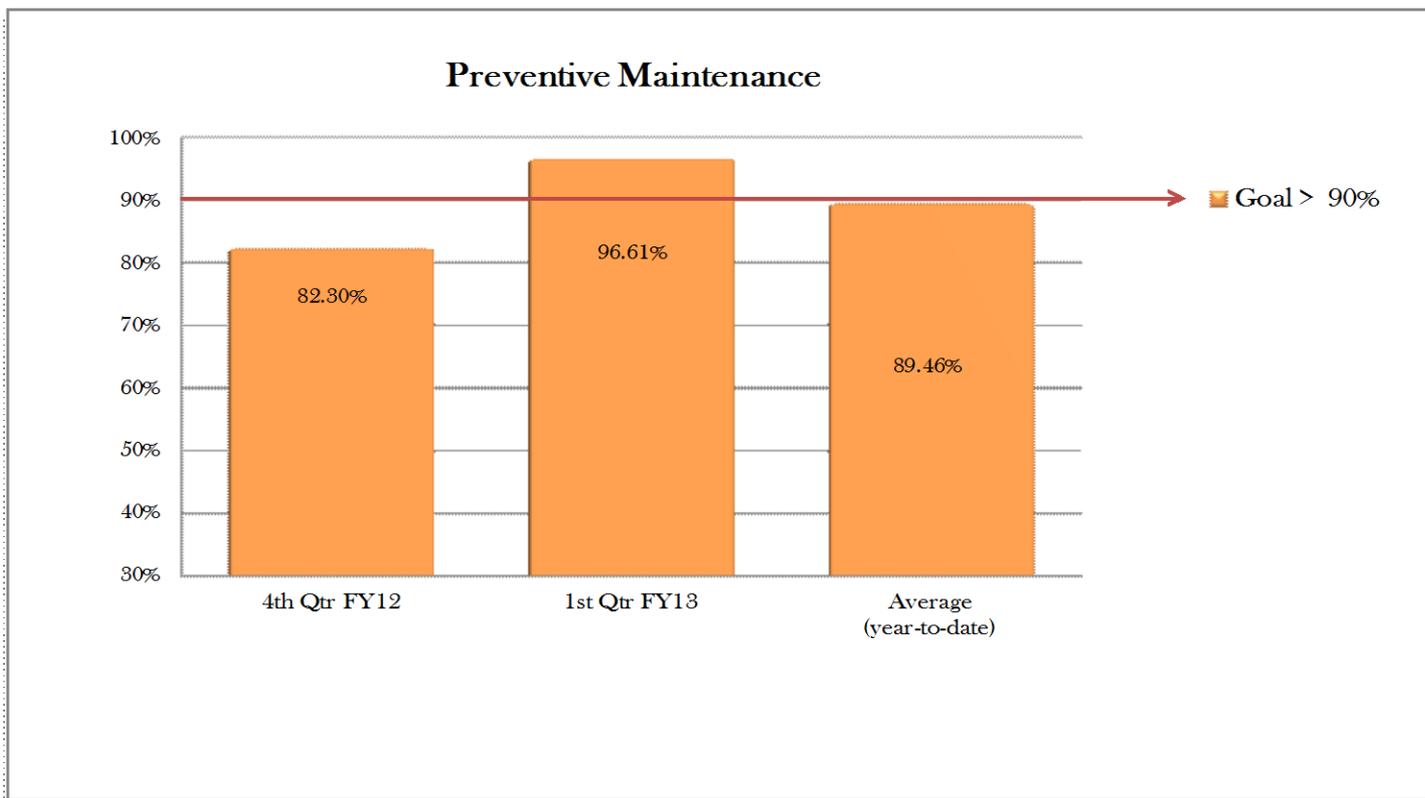
GOAL #1 – Improve maintenance and operations of the Campus

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 – First Quarter FY 2013

Lead
F. O.

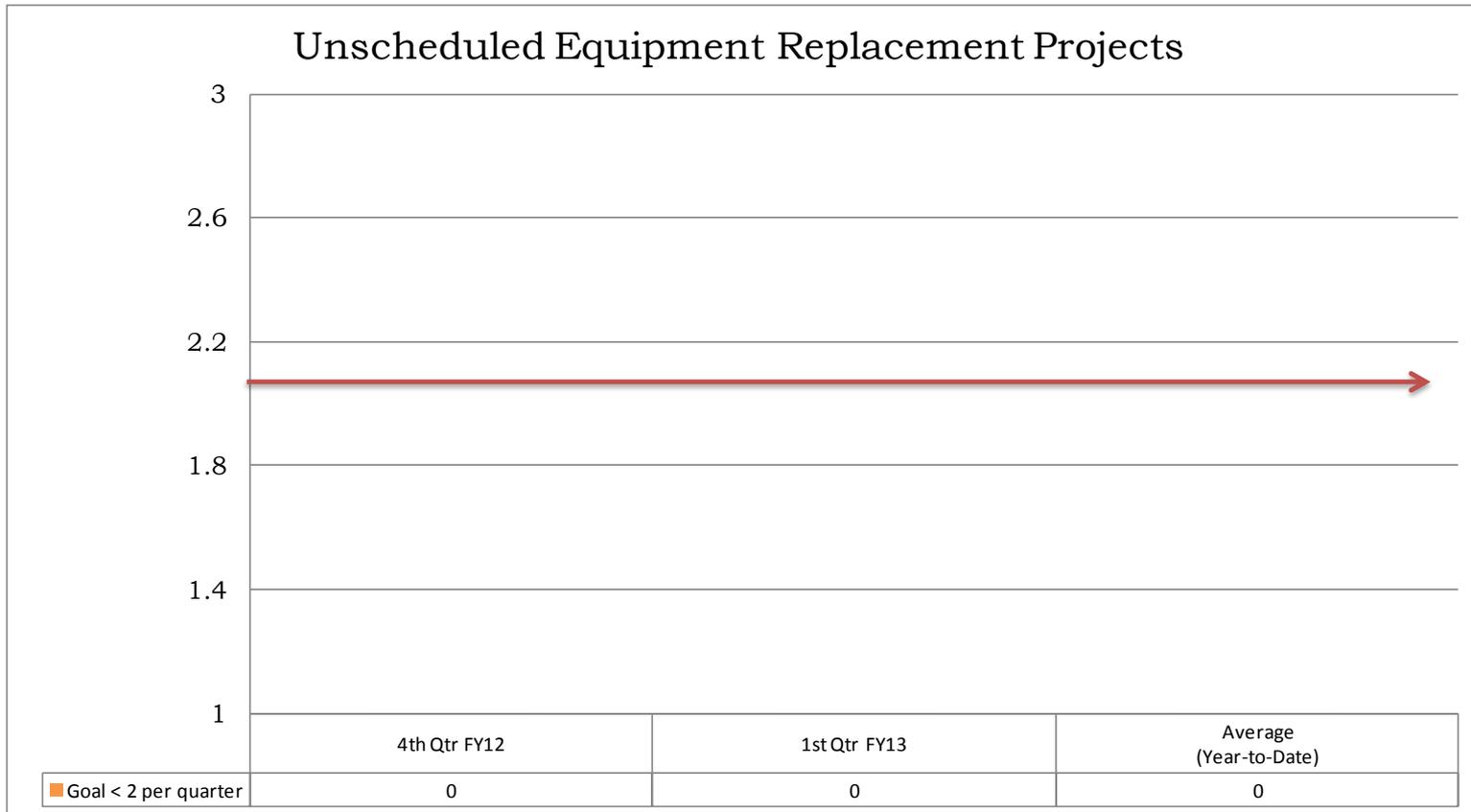
GOAL #1 – Improve maintenance and operations of the Campus

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 8 EDAs, 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 – In Transition
5. Key Management Phase 2 - Transition
6. BAS Standards and SCADA – Phase One - Completed
7. ARCHIBUS Key Management – Phase Two – Transition to new system
8. Facilities Condition Assessment Program (FCAP2) – Pilot Pending
9. Asset Management – Working with AUX and COE
10. FY13-14 Project Prioritization Scheduled

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

Lead
FIS

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**

ACTION PLAN

Actions Completed:

1. ARCHIBUS Equipment and PM Management – Now live and the transition of old PMs have begun.
2. Enterprise Data Assistant (EDA) FO-WR– FO Active EDA's: 14 in Zone 2, 4 in Zone 4, 1 in Zone 1
3. BAS Critical Alarms – Now in Live Bioinformatics Pilot with Police Dispatch and Zone 2.
4. ARCHIBUS Key Management Phase Two – Work through buildings to transition to new Key System
5. Facilities Condition Assessment Program (FCAP2) – Completed Development and was placed on Hold for pilot
6. Construction Parking Passes – Completed Pilot with Administrators and transitioned Live to the rest of FM.

Actions Planned:

1. Enterprise Data Assistant (EDA) FO-WR Project – Continue adding EDA's to Zone shops
2. BAS Critical Alarms – Finalize Pilot with Bioinformatics.
3. ARCHIBUS Key Management Phase Two – Continue Buildings transition Key Management
4. Facilities Condition Assessment Program (FCAP2) – Perform Pilot and start Phase 3
5. Equipment and PM Management – Continue transition
6. Develop Scope for Capital Phase 2

Facilities Management Strategic Planning Session – First Quarter FY 2013

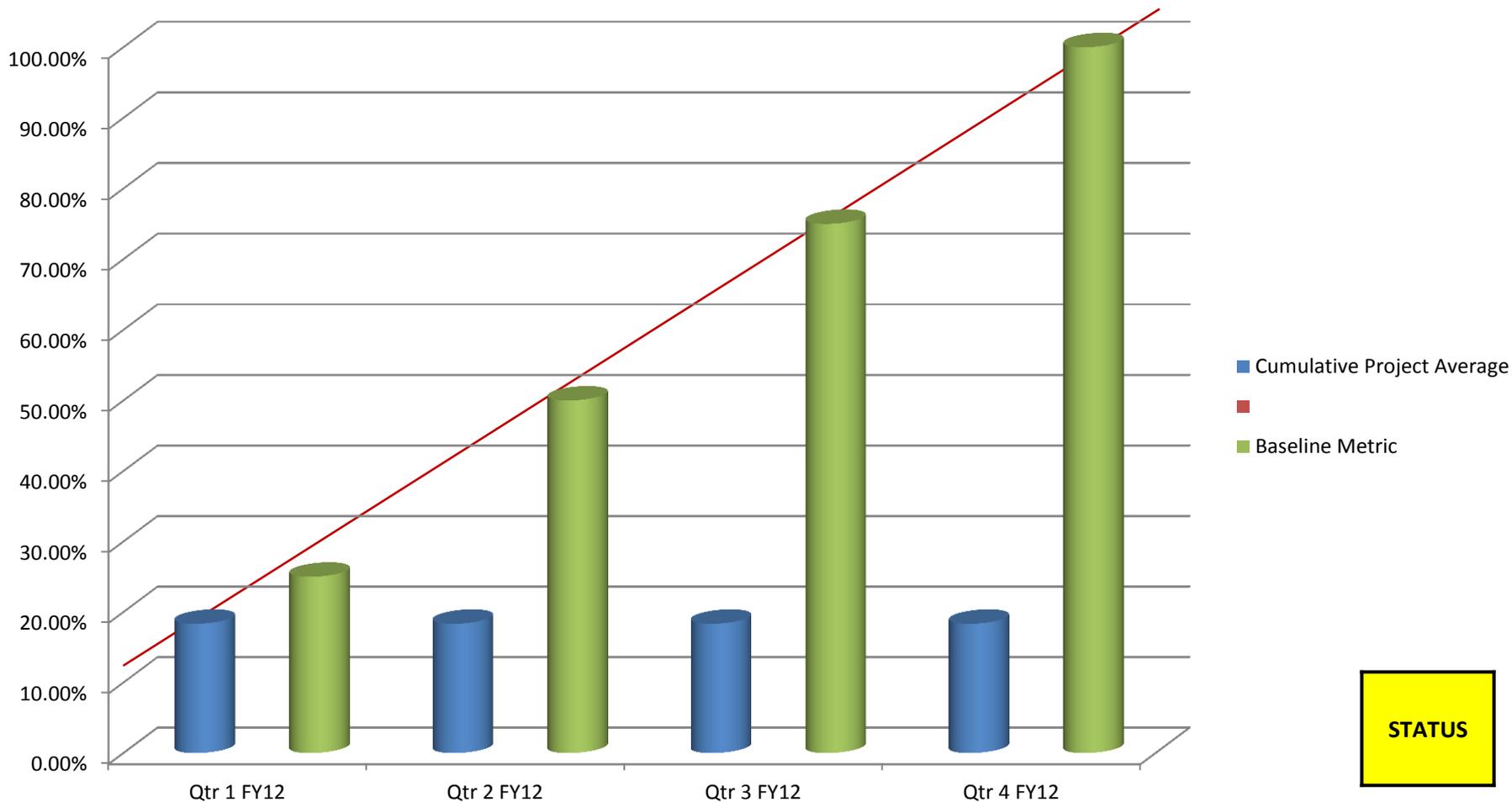
Lead
FIS

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 – First Quarter FY 2013

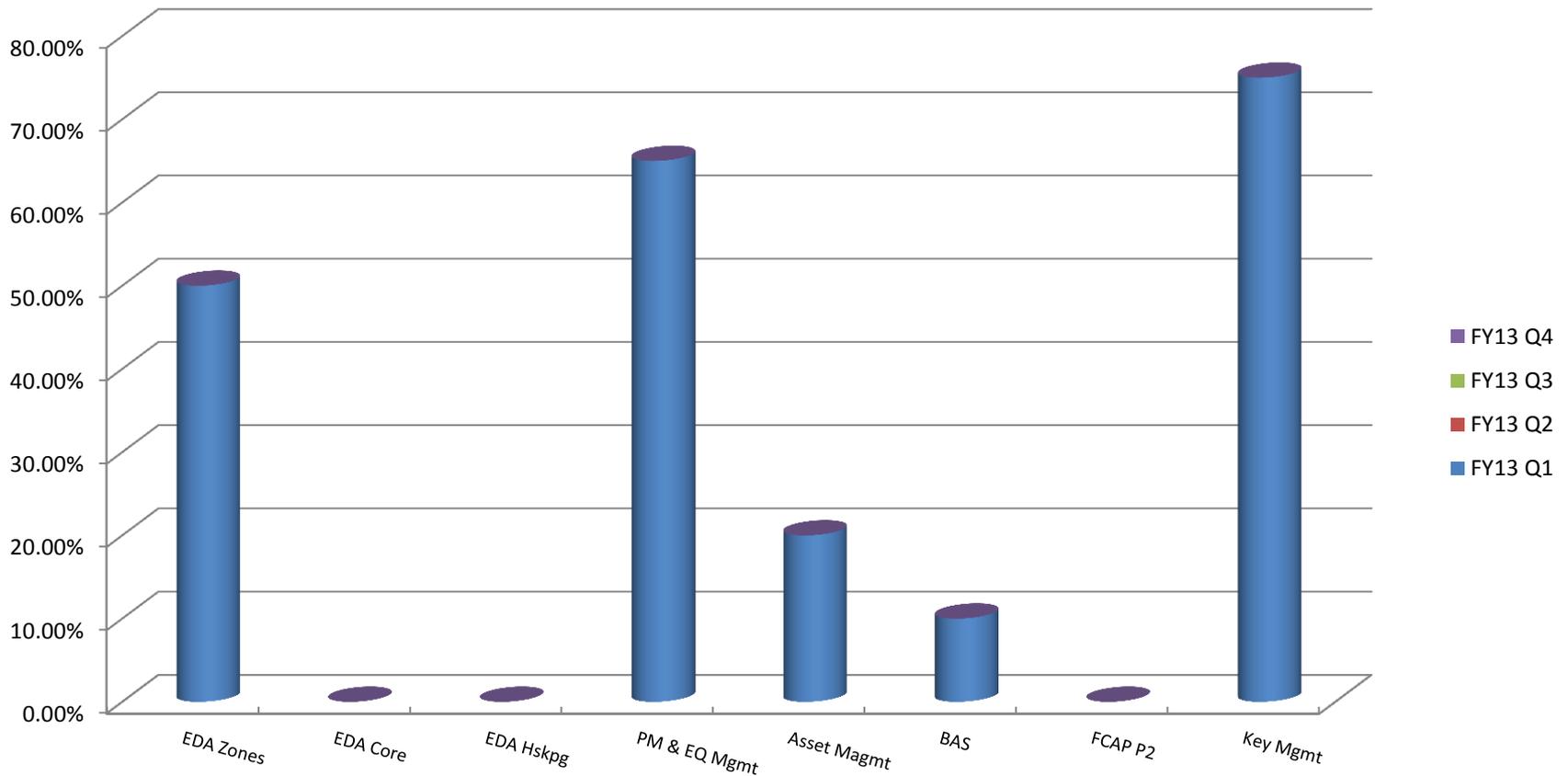
Lead
FIS

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 #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.3: Improve capital renewal/ deferred maintenance planning, prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

Lead
Architectural
Planning

ACTION PLAN

- **Actions Planned:**
 - **Amend the objective above to reflect phase 2**
 - **Work with other sections in FM on the process.**
 - **Work with FIS on the dashboard (incl. accuracy)**

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

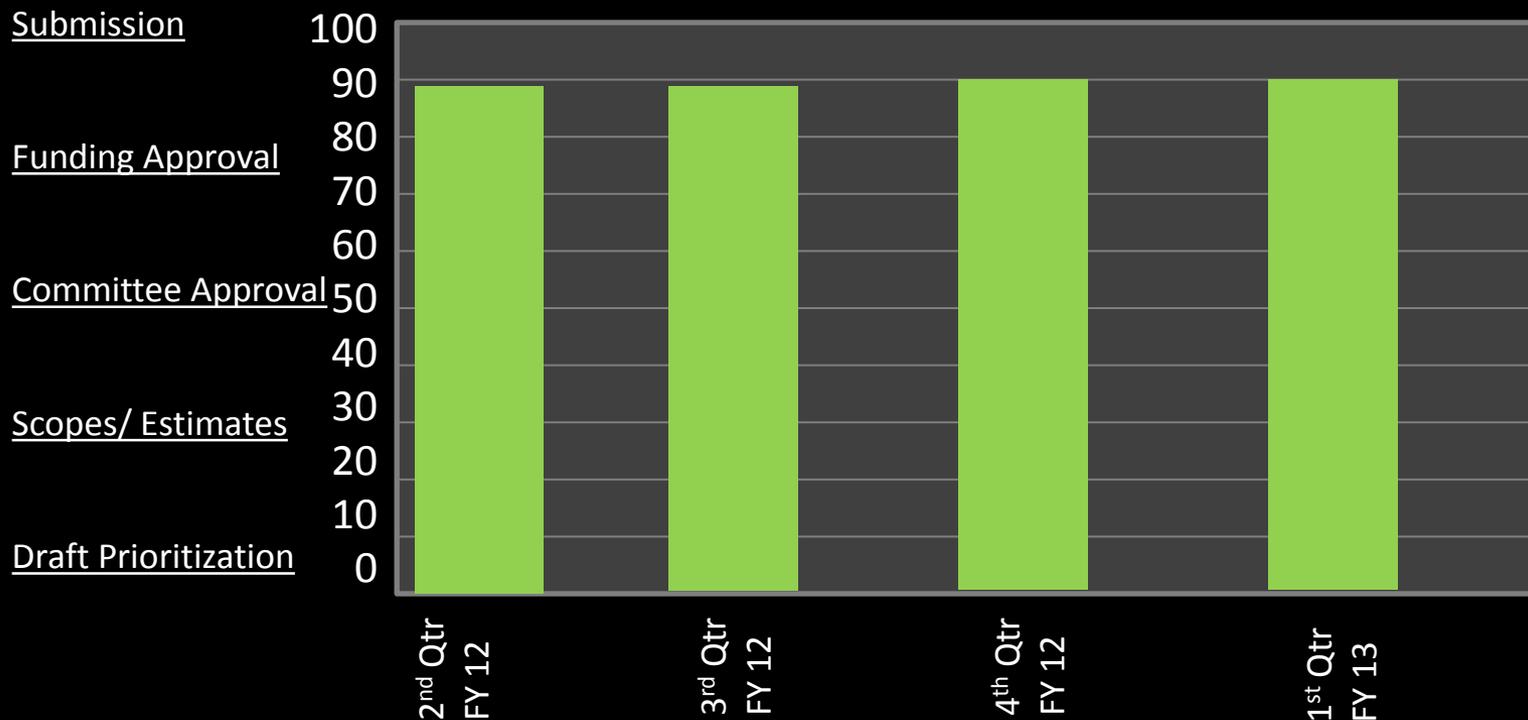
Strategy 2.3: Improve capital renewal/ deferred maintenance planning; prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

Percentage of Completion – 90%



Status

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 December 2012.

ACTION PLAN

- **Actions Planned:**
 - **Student Affairs Data audit complete for static spaces**
 - **Academic Affairs Data Audit complete for static spaces**
 - **Athletics data audit to be completed by end of year**
 - **Business Affairs data audit complete for static spaces**
 - **General Counsel & Internal Audit data audit in progress**
 - **University Advancement data audit complete**
 - **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**

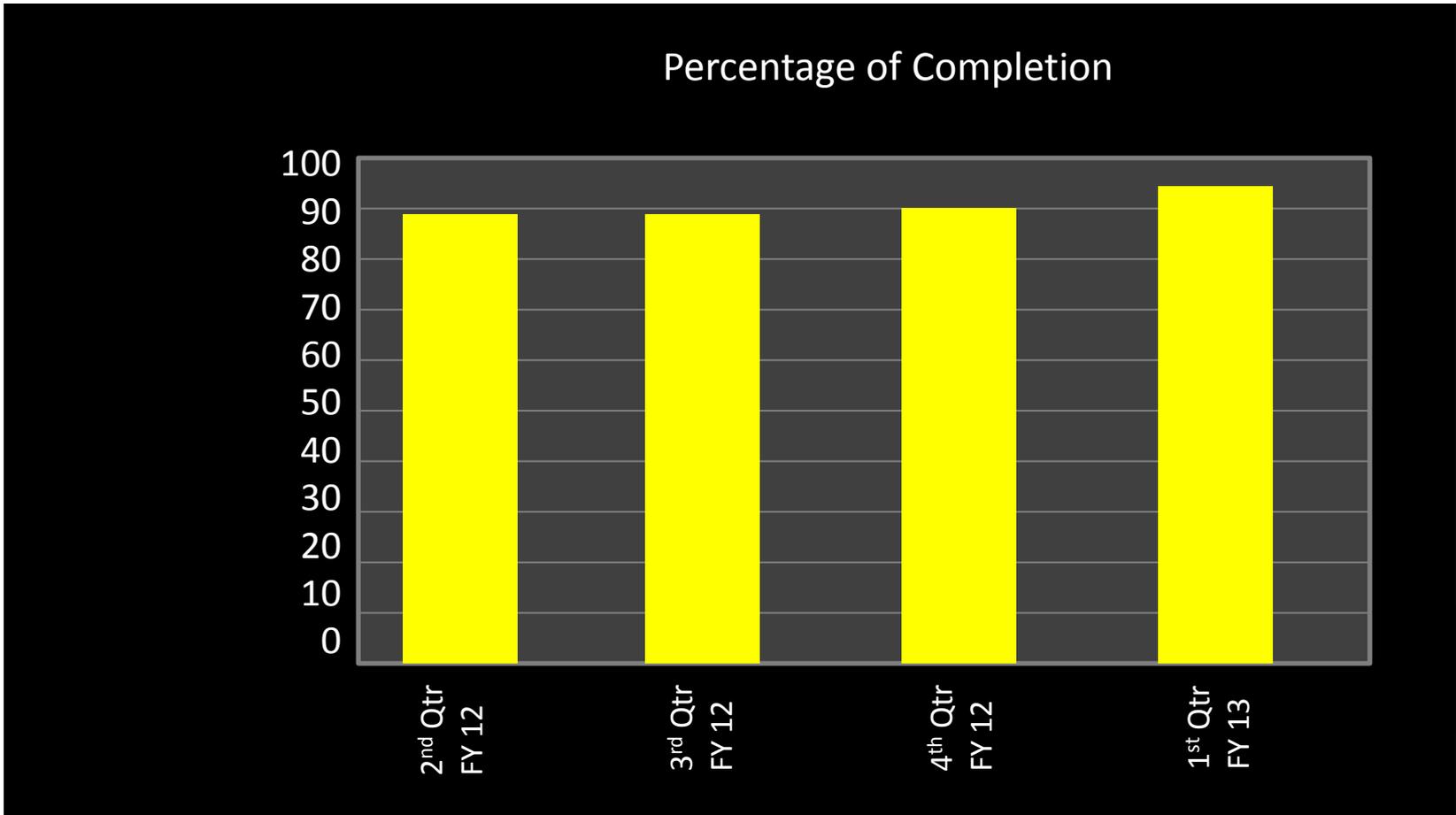
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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 December 2012.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process



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

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2012

Appropriated Projects

- Science Building *
- Burson Building Modernization and Expansion *
- Arts and Humanities Building
- Physical Plant Complex
- Student Health and Wellness Center
- Student Academic Success and Retention Center *
- Atkins Library Modernization *
- Belk Gym Modernization *
- Reese
- Storrs
- Colvard
- Friday
- Land Acquisition
- Smith and Cameron
- Center City II

* Pending AA review , changes, and approval

ACTION PLAN

- **Actions Planned:**
 - **Obtain guidance on direction of CID Phase II in order to determine next set of needs.**
 - **Begin work on CID projects for hand-off to Capital.**

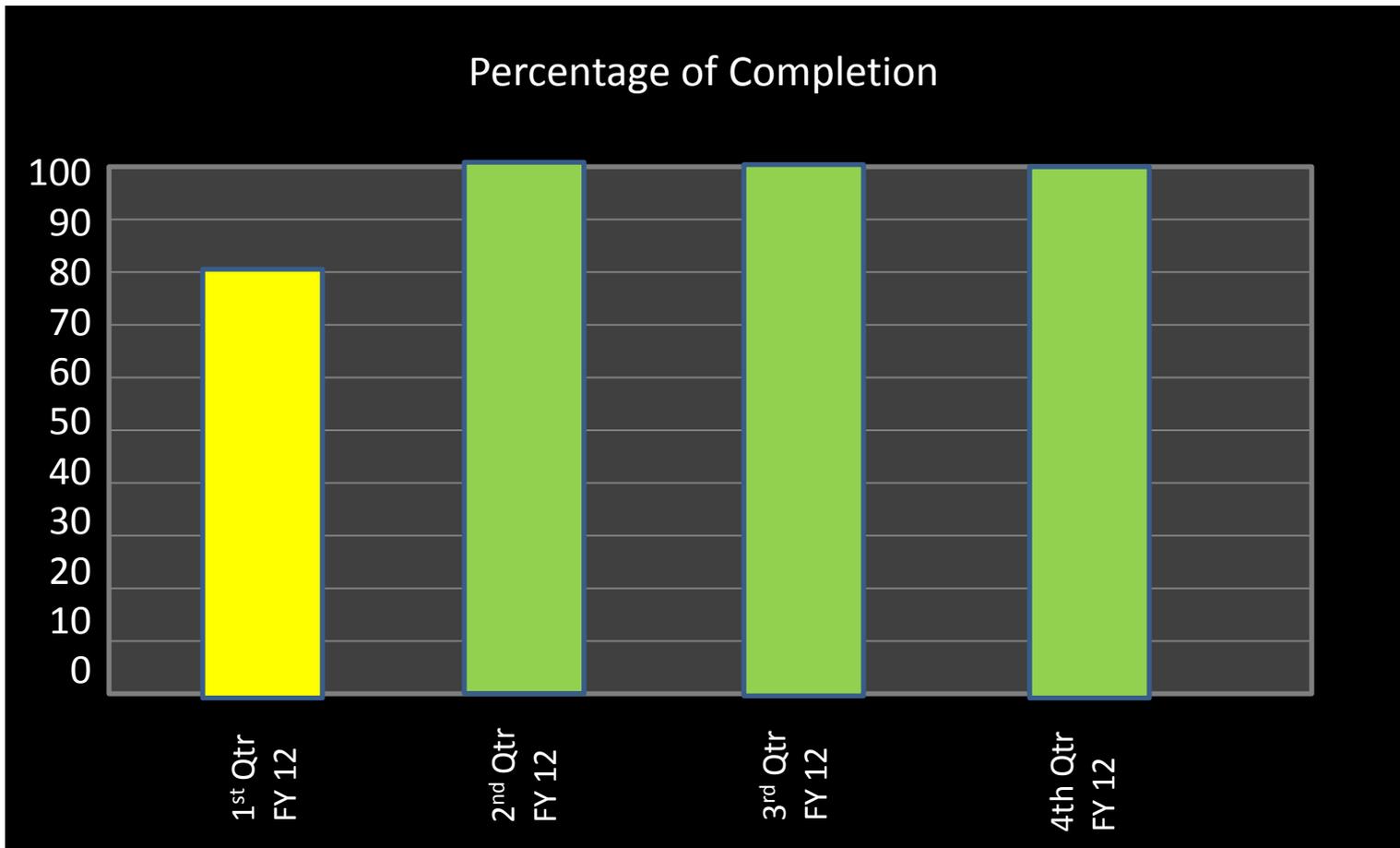
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by end of FY 12.

Measure: % of projects with completed (pre-programs, OC25s, and Approvals).

Balanced Scorecard Category: Internal Business Process



Status **

** Non-appropriated

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

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

Lead
Capital

ACTION PLAN

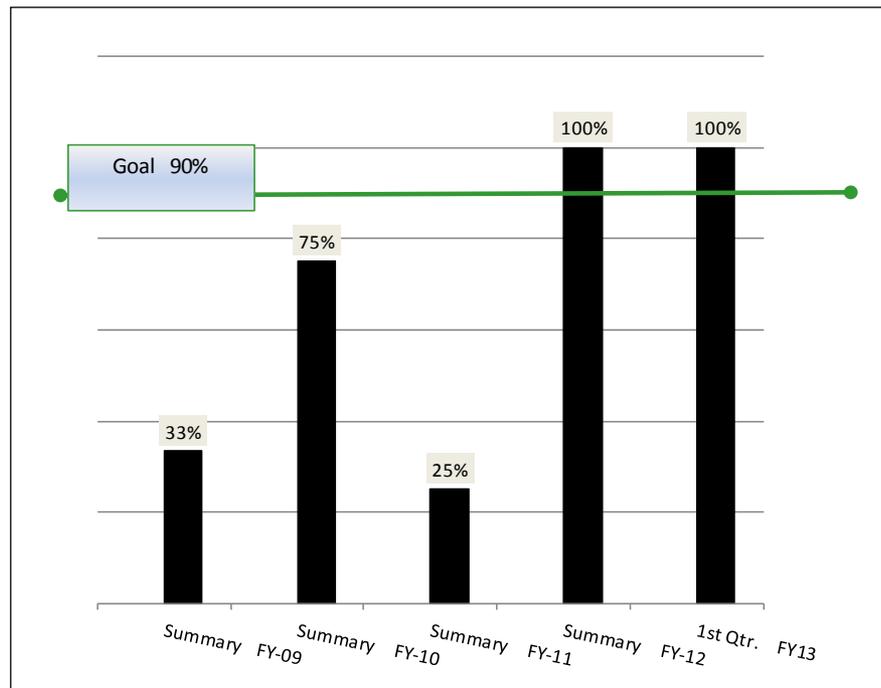
- Actions Completed
 - Residence Hall Phase 12 contract over 120 days.
- Actions Planned
 1. Baseline Schedules – Accurate
 2. Baseline Schedules – Refer to them
 3. Push Designers to get fee estimates in promptly
 4. Work to allow staff to conduct designer interview without BOT chair.

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

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%



Objective for 1st Quarter is 0%
 Year to date is 0%

Status

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - CRI Electrical Circuit design complete.
- Actions Planned
 1. Baseline Schedules – Accurate
 2. Baseline Schedules – Refer to them
 3. Keep end users up to date on overall schedule

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead Capital

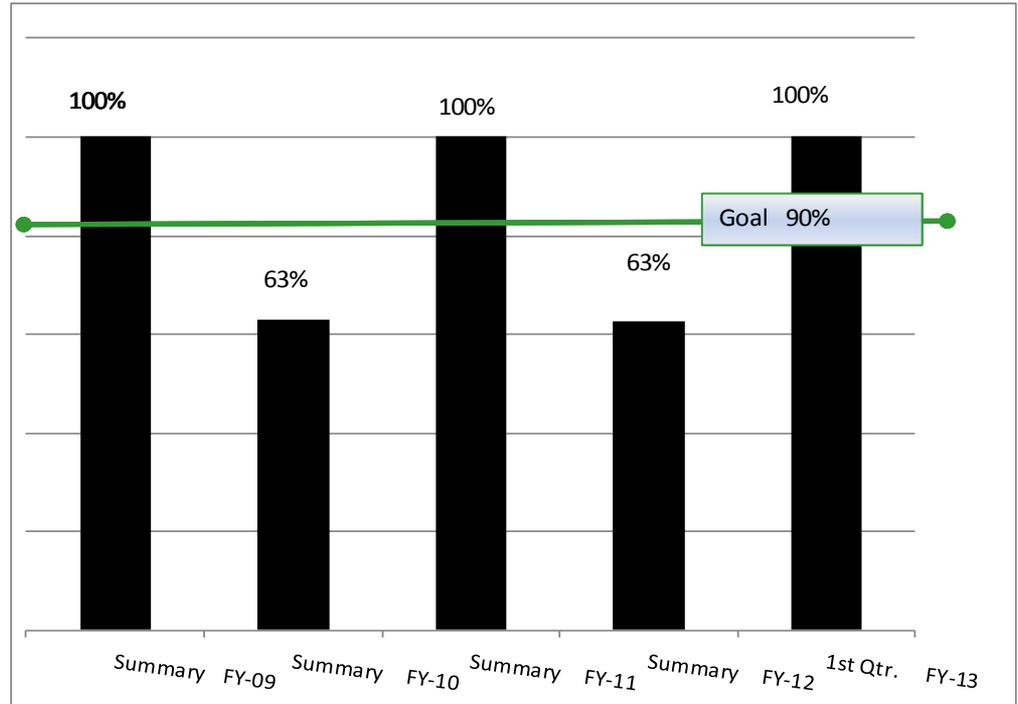
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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%



Objective for 1st Quarter is 100%
 Year to date is 100%

Status

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - CRI Electrical Circuit within budget.
- Actions Planned
 1. Print project budget / financial sheets & share with end users
 2. Monitor scope creep.
 3. Protect contingency

Facilities Management Strategic Planning Session – First Quarter FY 2013

**Lead
Capital**

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

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)
Football/Sports	\$3,950,000	\$3,166,022	\$3,404,882	-19.8%	7.5%	0
Motorsports II	\$399,000	\$303,000	\$303,700	-24.1%	0.2%	0
Parking Deck I	\$1,701,000	\$1,044,000	\$1,136,083	-38.6%	8.8%	0
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			0.0%	0.0%	0
Res. Hall Scott	\$265,817	\$210,000	\$210,000		0.0%	1
RUP IV		\$385,000	\$385,000	0.0%	0.0%	1
Tennis Courts	\$292,972	\$275,000	\$275,000	-6.1%	0.0%	1
Heck Dam	\$190,000	\$185,650	\$185,650	-2.3%	0.0%	1
Demo Phase III	\$45,455	\$32,500	\$32,500	-28.5%	0.0%	1
Demo Phase IV						
CRI Elect. Circuit	\$77,636	\$52,650			#VALUE!	
					Percentage of Projects within	52.9%

Status

Objective is 90%

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

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

Strategy 3.4
Objective 3.4.1

Improve Administration of the Capital Construction Process
90% of Capital Construction Projects completed on Schedule

Lead
Capital

ACTION PLAN

- Actions Complete
 - Scott Hall Sprinkler
 - Parking Deck I
- Actions Planned
 1. Keep schedules current & refer to them monthly
 2. Discuss schedule (baseline & current) with end users

Facilities Management Strategic Planning Session – First Quarter FY 2013

**Lead
Capital**

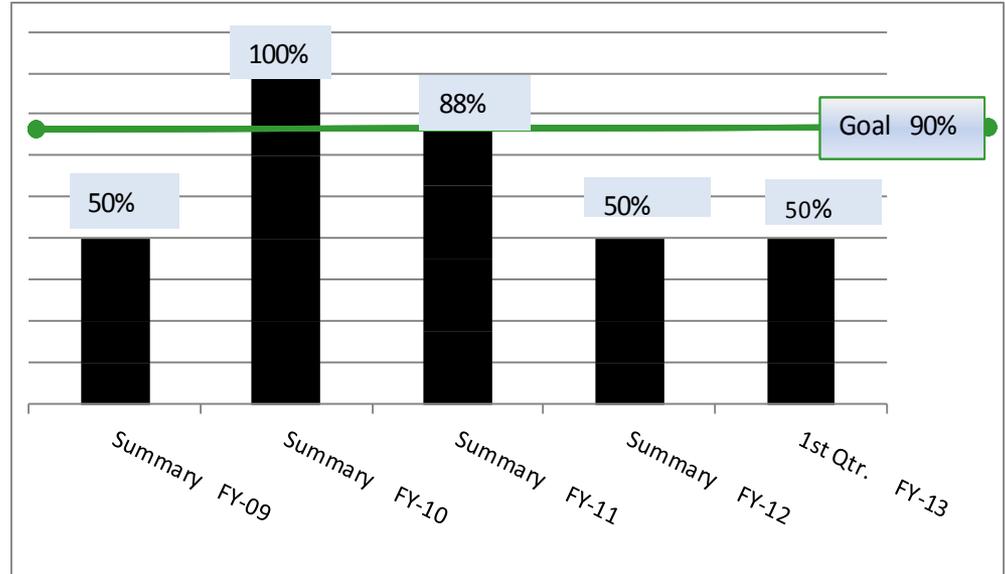
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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 Service

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%



1st Qtr. Objective is 50%
 Year to date is 50%

Status

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

Lead
Capital

Strategy 3.4
Objective 3.4.2

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

ACTION PLAN

- Actions Complete
 - 1.

- 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 – First Quarter FY 2013

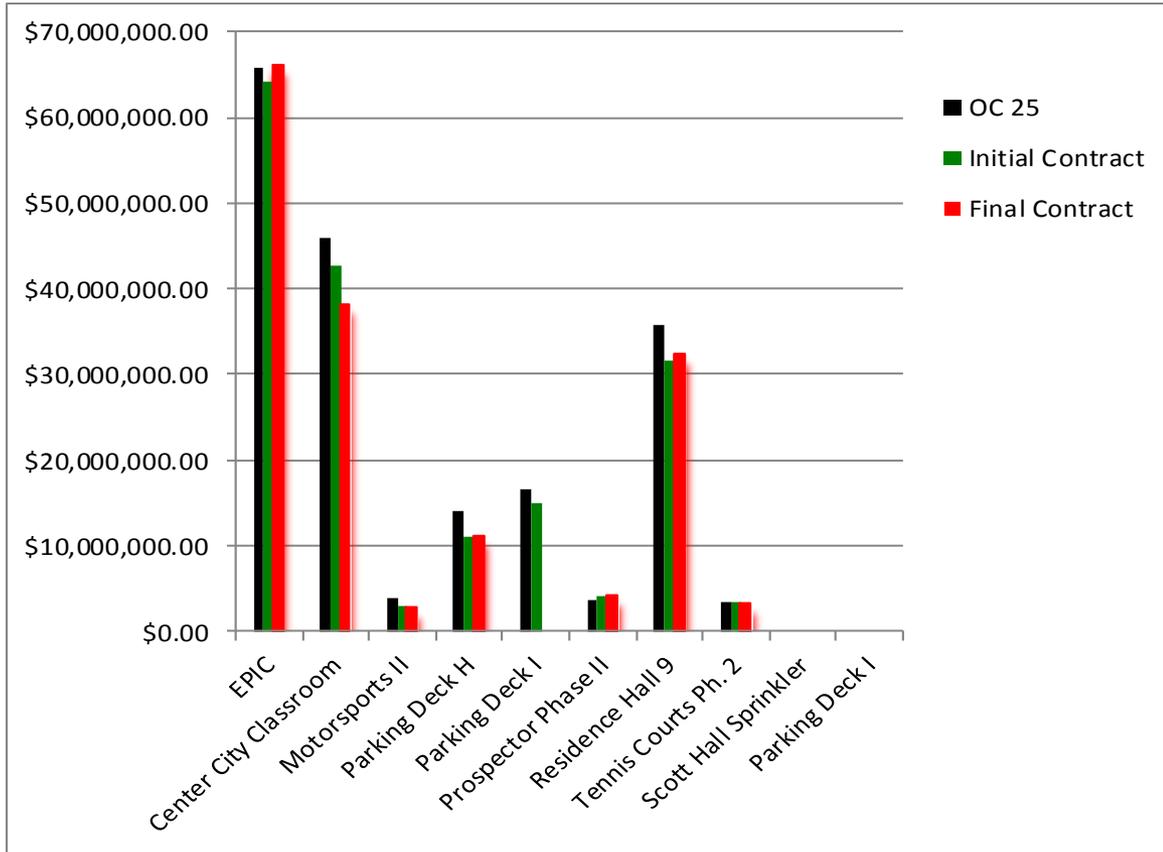
Lead
Capital

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 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



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

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 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.
 5. Continue After Action Reviews to increase Customer Satisfaction
 6. Work with new CRI/FM liaison Chip Yensan to further improve Capital Construction Process.

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

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. 80% of infrastructure projects integrated into Capital Construction Project Scopes

Lead
Architectural
Planning

ACTION PLAN

- **Actions Planned:**
 - **Ensure projects in CRDM are appropriately listed – Parent/ Child relationships**
 - **Update and review projects based on updated information.**
 - **Integrate CID information – above and below the line. Move projects as applicable.**
 - **Incorporate CRDM process with Customers**

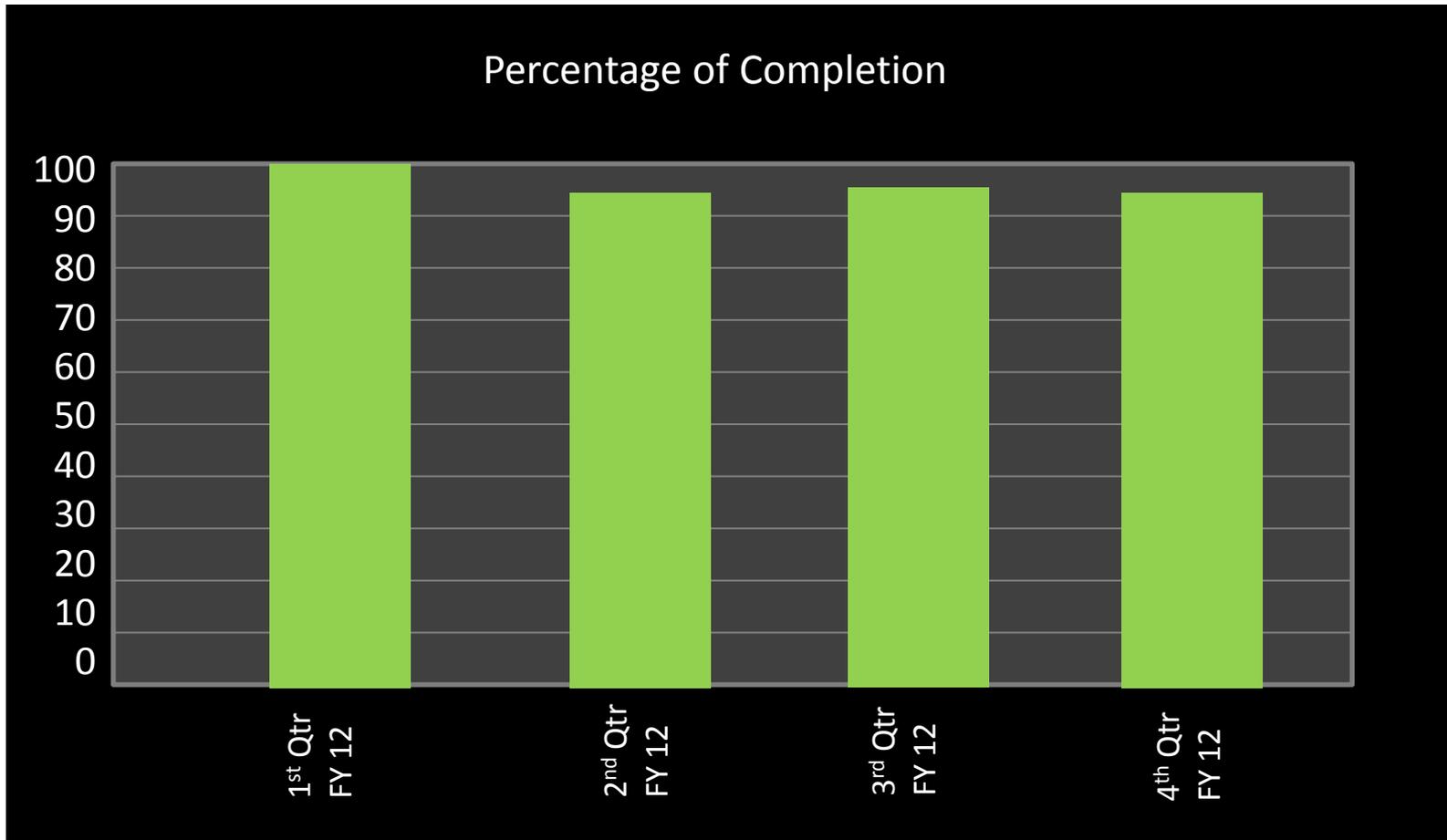
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. 80% of infrastructure projects integrated into Capital Construction Project Scopes

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)

Balanced Scorecard Category: Internal Business Process



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

Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications

Objective 3.6.1. 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

ACTION PLAN

- **Actions Planned:**
 - **Receive input from the Departments**
 - **Compile changes**
 - **Conduct next committee meeting and updates**

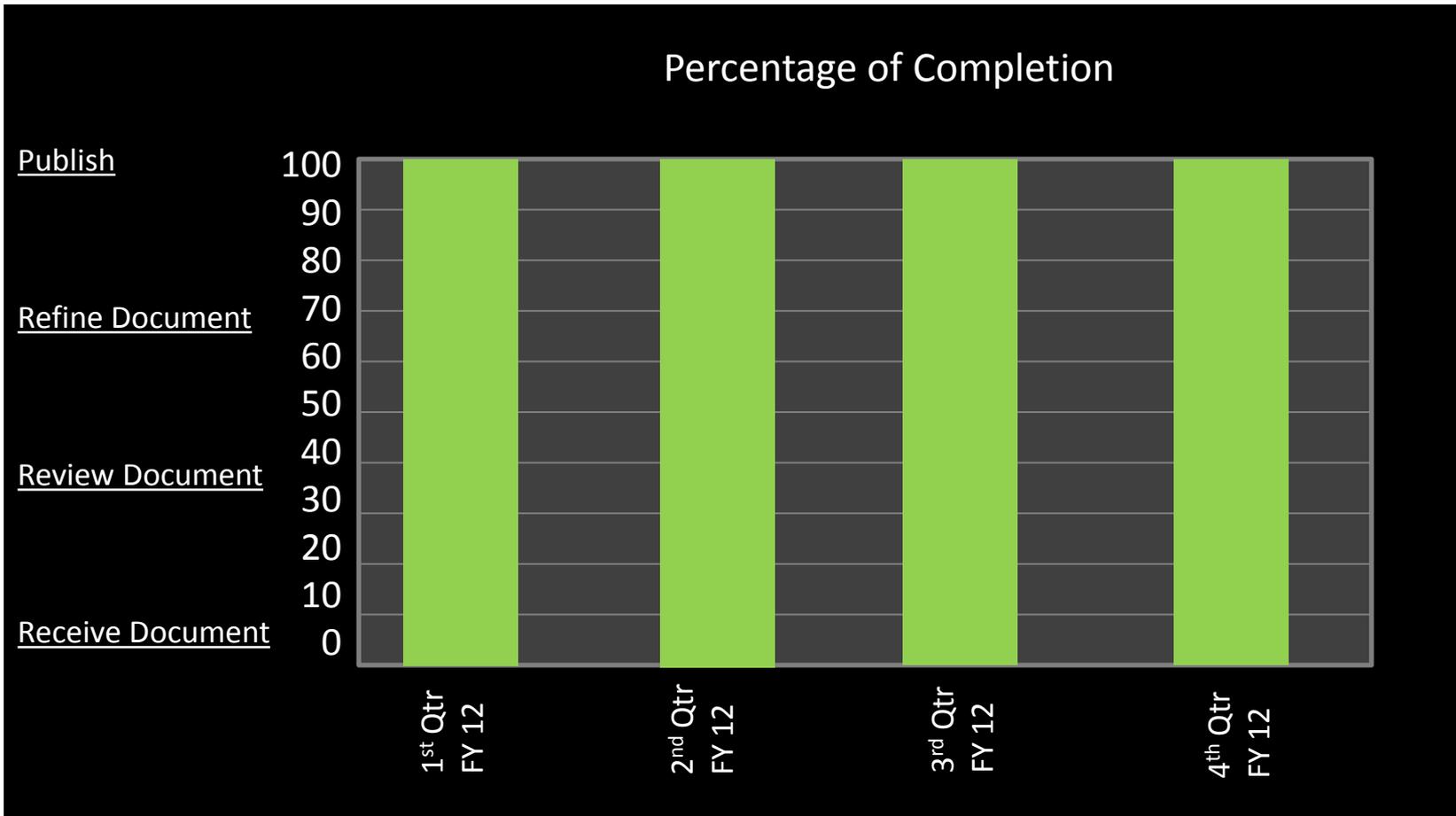
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications

Objective 3.6.1. 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process





UNC CHARLOTTE

Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

- Develop high quality staff**
- Retain high quality staff**
- Develop positive culture**
- Improve Employee Safety**

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

Objective 5.1.2

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

ACTION PLAN

- ❑ Continue to work with Budget Office and monitor days unfilled. Currently, receiving a periodic report that provides days vacant. Special note for those positions nearing the 6 month vacant status. These are reported to OSP.

- ❑ **W.I.G.** Develop Targeted Selection on-line training session

Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
FBO

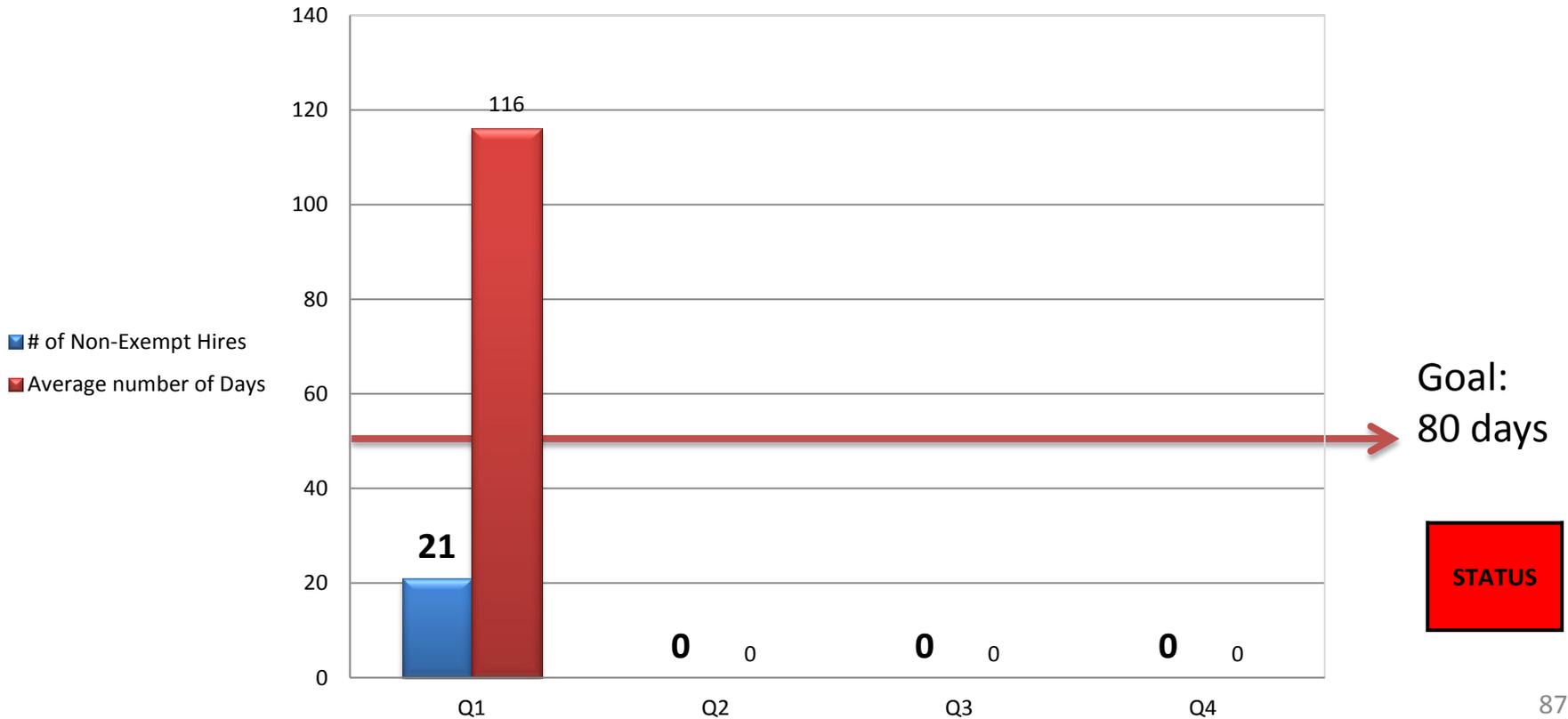
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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



Facilities Management Strategic Planning Session – First Quarter FY 2013

Lead
FBO

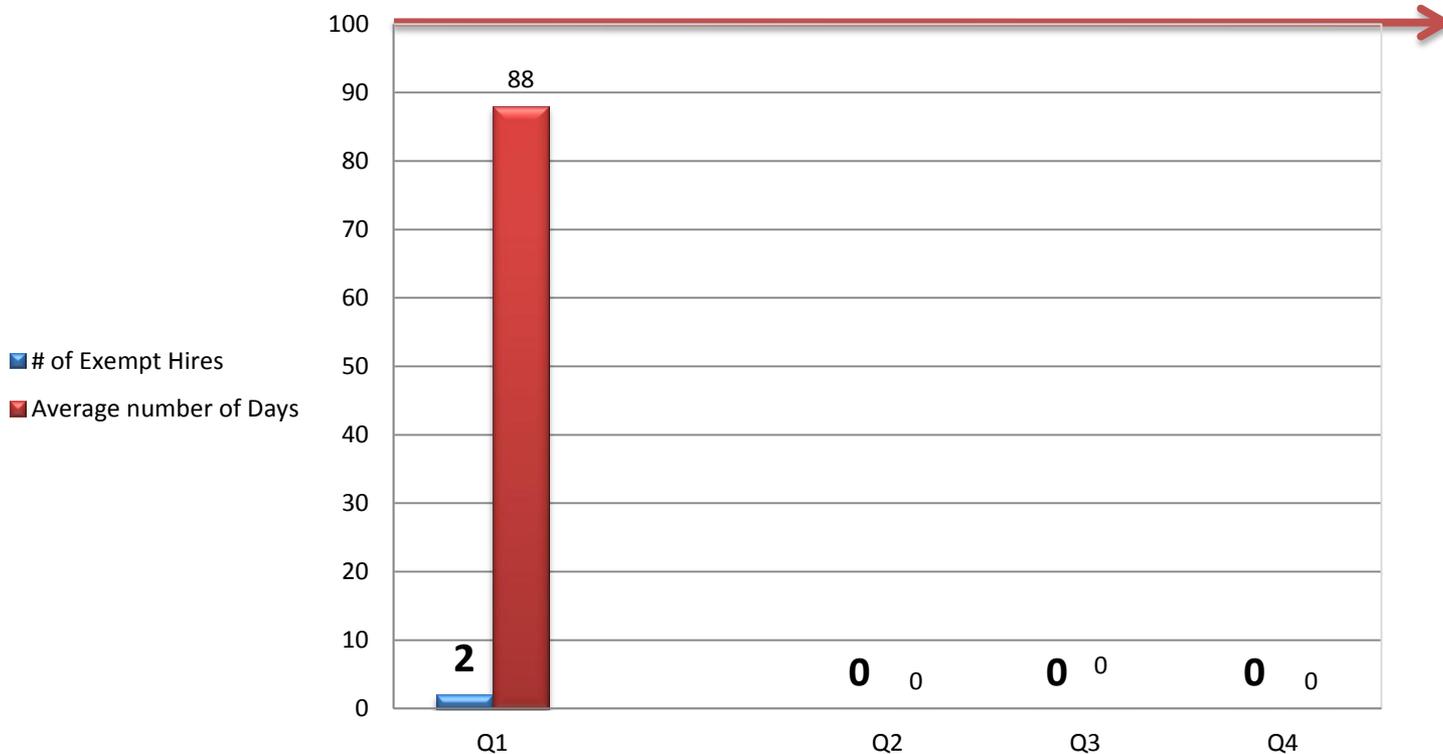
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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 Exempt (Salaried) Vacancies



Goal:
120 days

STATUS

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

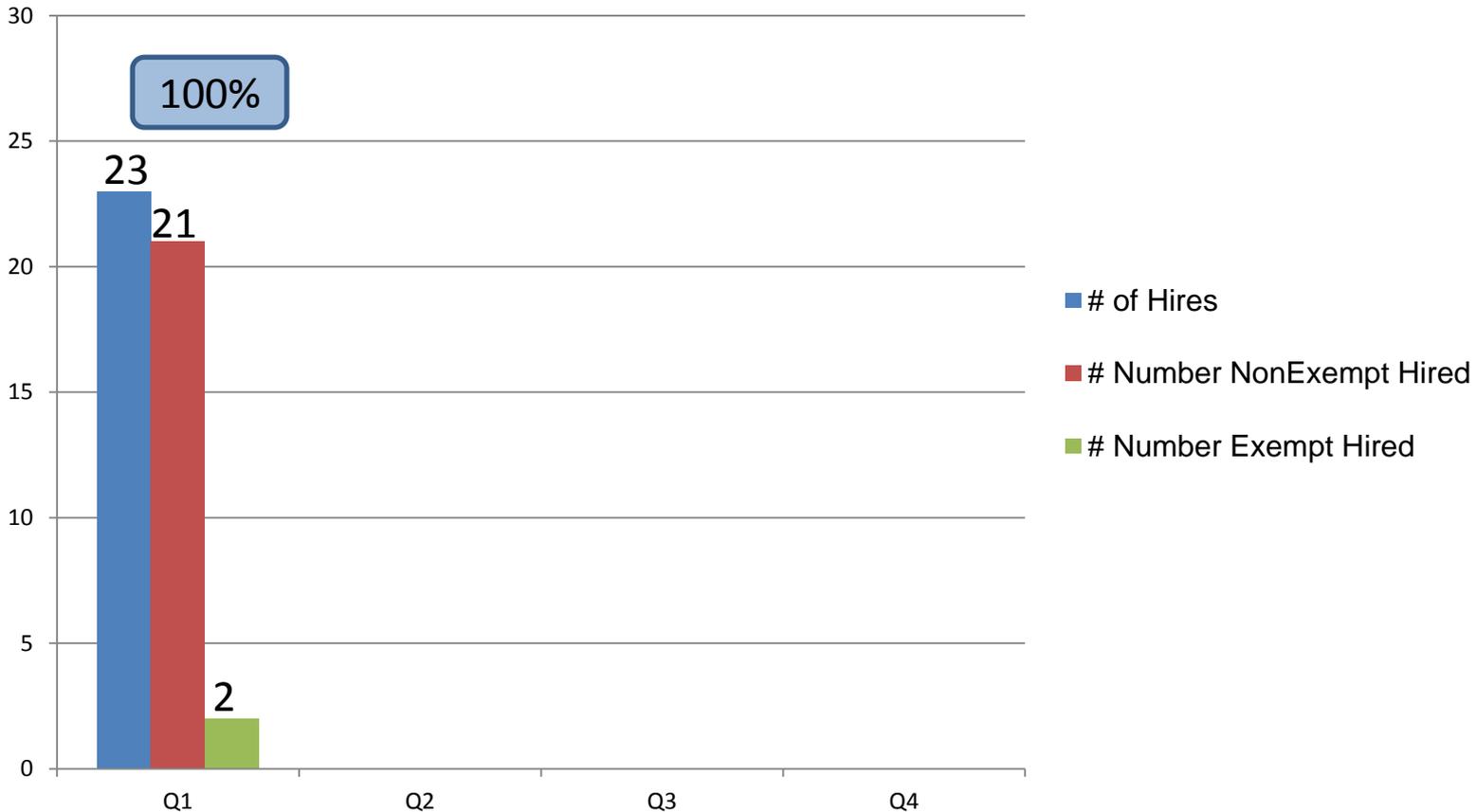
(22%)

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 2010

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



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

- ❑ “Graduation acknowledgement” for participants completing the Leadership Academy that completed the program was presented at July 2012 All Employees Meeting.
- ❑ 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.
- ❑ Host 2012 APPA Supervisor’s Toolkit Training in October 2012 at CCB.
- ❑ 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.
- ❑ With the completion of Level I – Fundamental Series Of the Leadership Academy Program, Brainstorming the creation/development of Level II- Advanced Series And Level III- Mastery Series are underway. Anticipated completion and presentation to AVC-FM in July 2013

Facilities Management Strategic Planning Session – First Quarter FY 2013

**Lead
FBO**

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 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

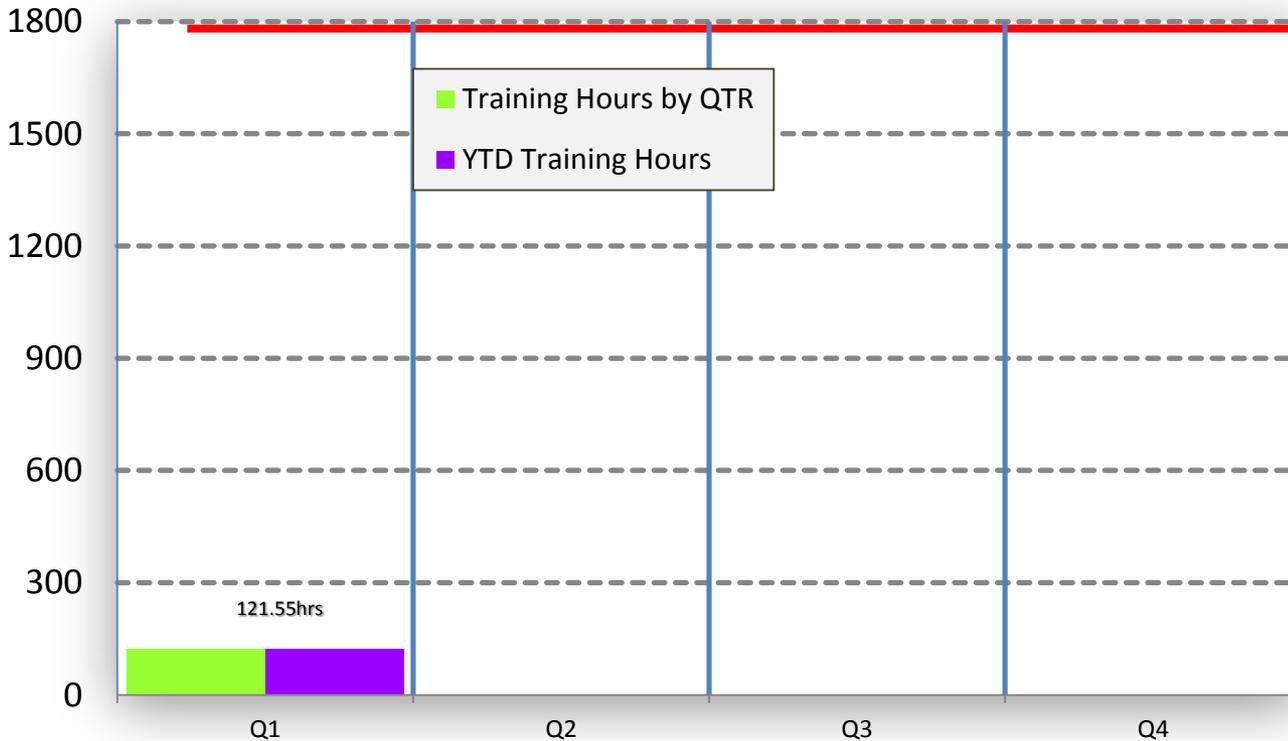
Measure: Average Hours of Training provided to or Obtained by Supervisors and Managers

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

FY 13

Training Hours for Supervisors & Managers by Quarter

Training
Hours



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

Fiscal 2013 Results:
 Goal
 1800 hrs
 Actual YTD
 121.55 hrs (6.75%)

STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2013

**Lead
FBO**

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.

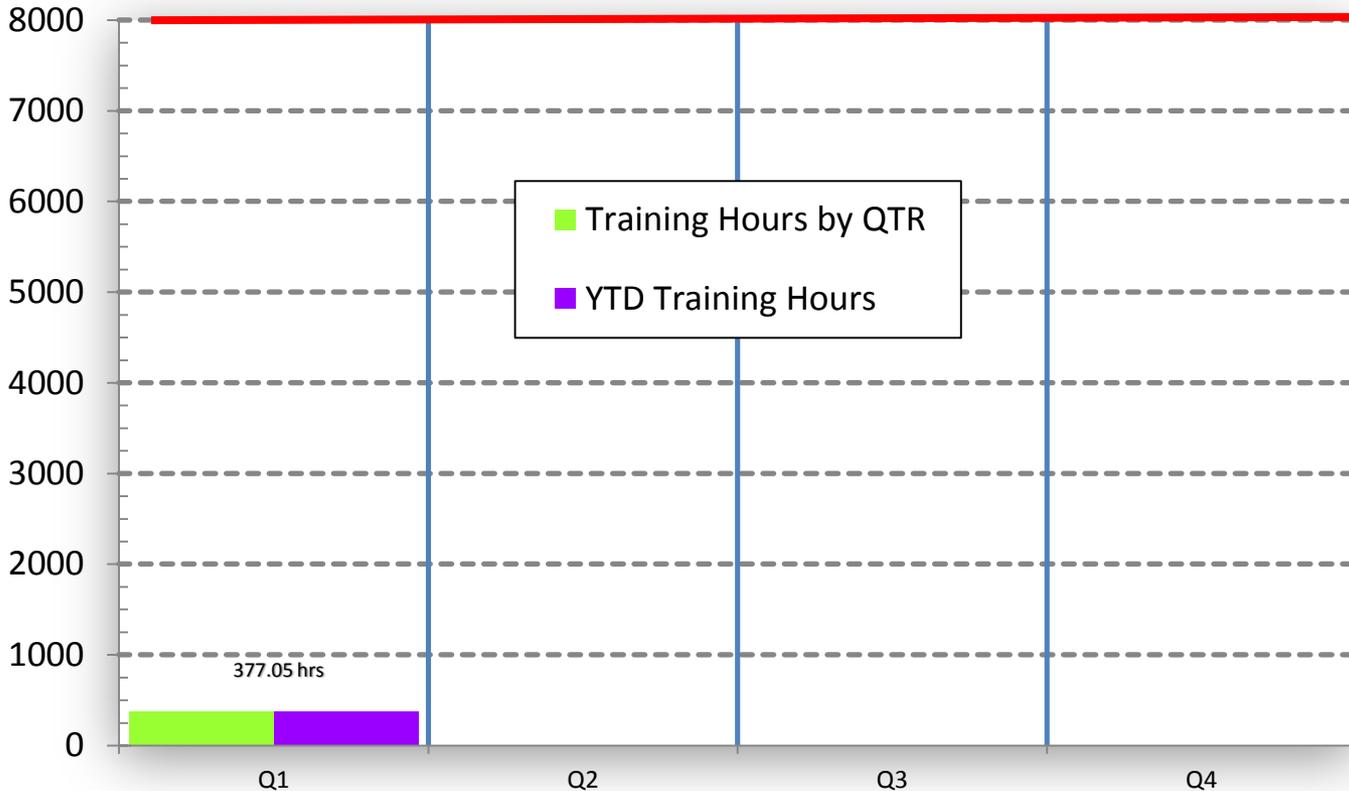
Measure: Average hours of training provided to or obtained by front line employees

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 2013 Results:
 Goal
 8,000 hrs
 Actual YTD
 377.05 hrs (4.71%)

STATUS

FY13 YTD Training Hours - Percentage of Target

Unit/Zone	YTD- 1 st Quarter
Auto	33%
Business Environmental Services	19%
Capital Projects	10%
Central Operation	0%
Design Services	3%
Facilities Business Office	22%
Facilities Information Systems	19%
Facilities Operations Admin	29%
Grounds	10%
High Voltage & Fire Alarms	8%
Lock Shop	39%
Planning (Architect & Real Estate)	24%
Recycling	33%

Unit/Zone	YTD – 1 st Quarter
Steam Plant	0%
Zone 1	23%
Zone 2	26%
Zone 3	0%
Zone 4	28%
Zone 5	17%
Zone 6	17%
Zone 7	49%

* Building Environmental Services & Recycling combined = 21%

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

- Development of problem statements which represent the top five challenges for FM under review by Leadership Team; Current focus is TRUST. (Still Underway)
- Working with CPCC to determine feasibility of a Co-op program within FM (Trades). Met in September to review program requirements.
- Development of a FM Learning Library which can house “quick hit” training resources for employees. Draft proposal to be presented to AVC-FM in December 2012.
- Revamp Employee Satisfaction Survey Consult with UI review best practices
- Investigate another “tier” in the Leadership Academy to keep “sharpening the saw”.
- Production of NEO video.

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

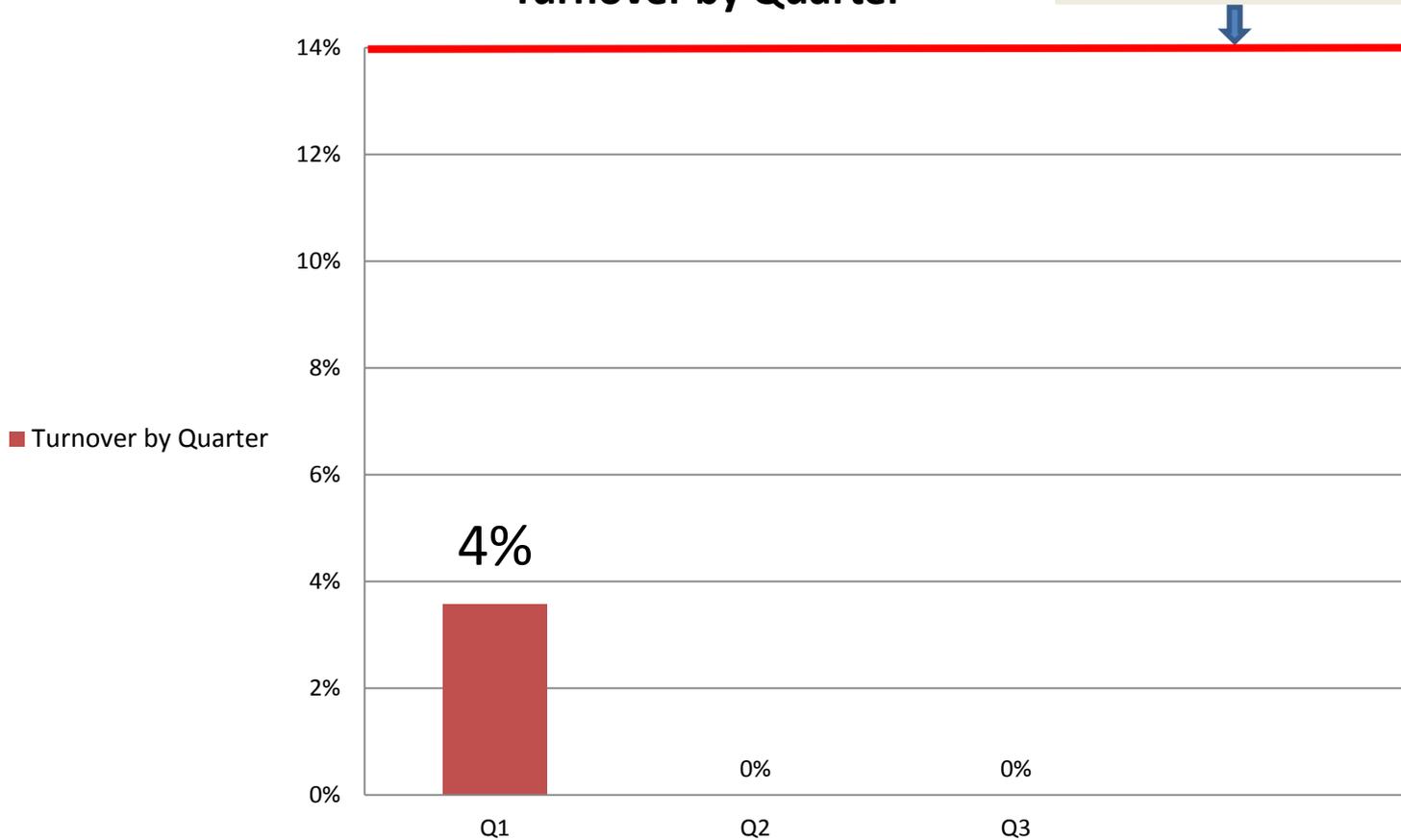
Strategy 5.3 Retain a Quality Workforce
Objective 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

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

Turnover by Quarter

Annual Target < 14%



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2013

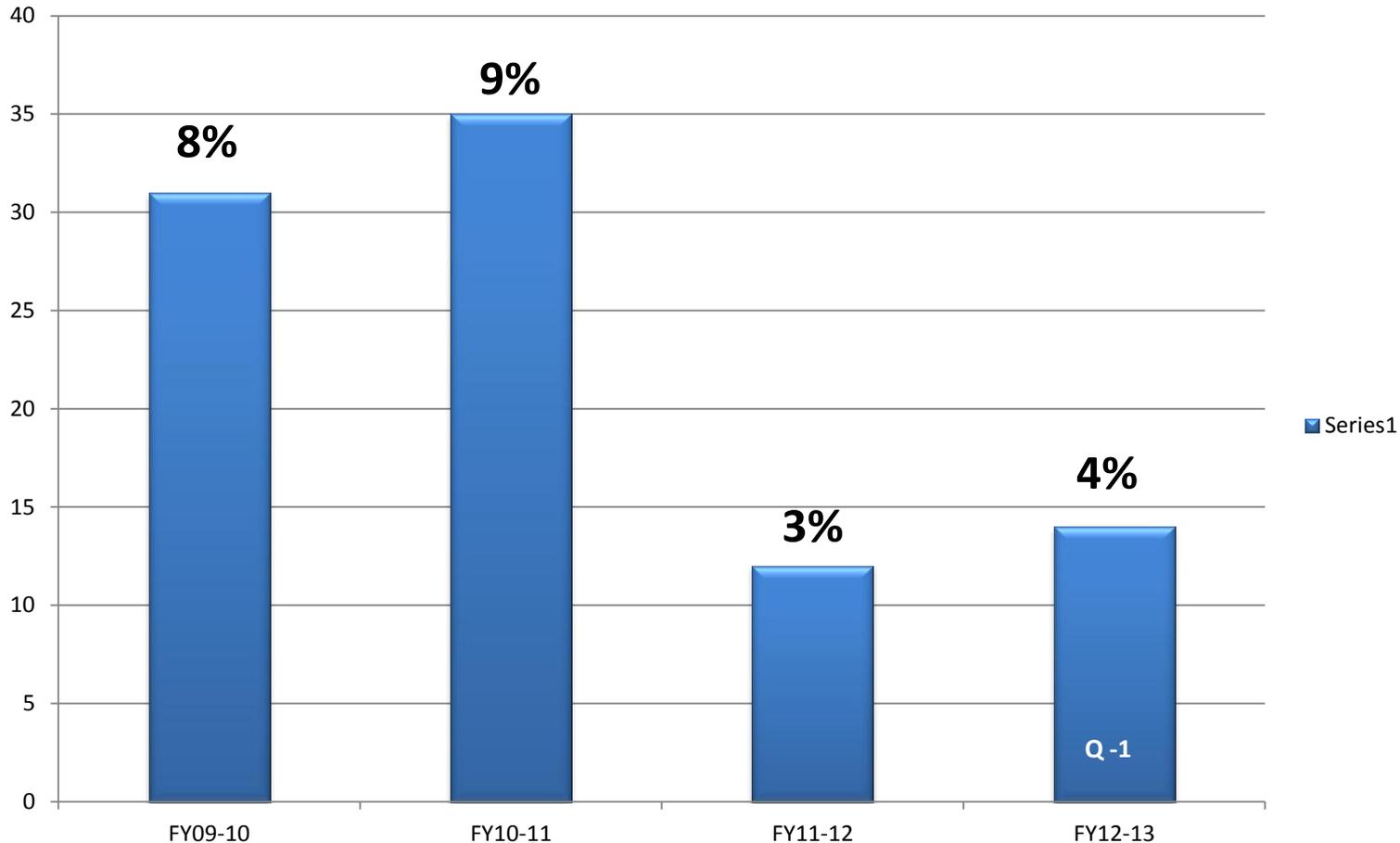
Lead
FBO

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



STATUS

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

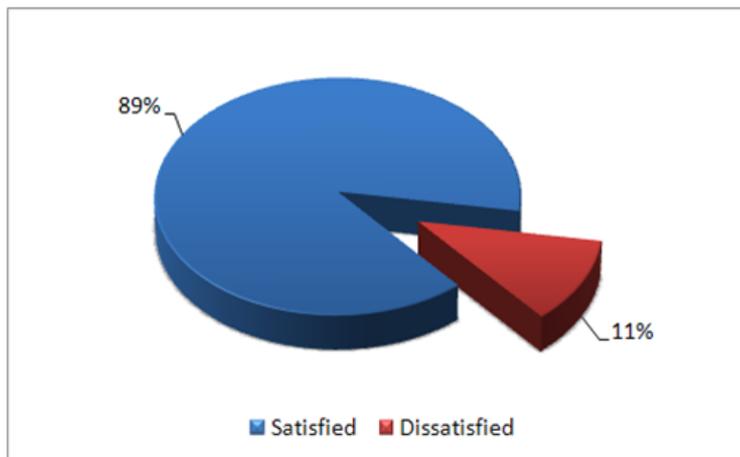
Strategy 5.3 Improve Employee Satisfaction
Objective 5.3.2 Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

Measure: Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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

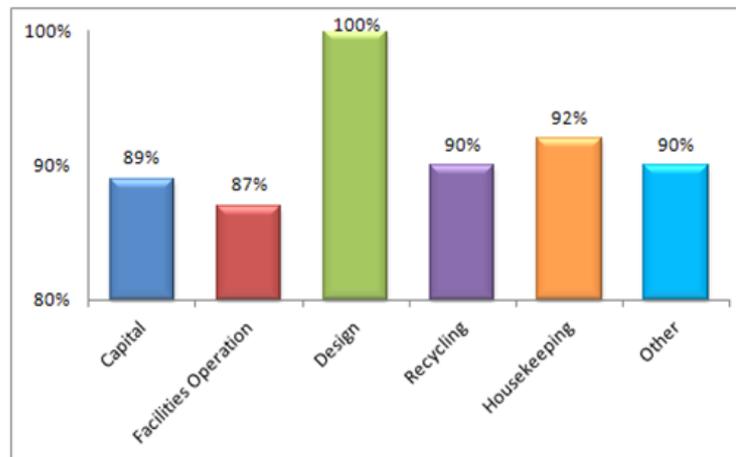
Overall Satisfaction

Overall, how satisfied are you working in the Facilities Management Department (2011)



Average = 4.48

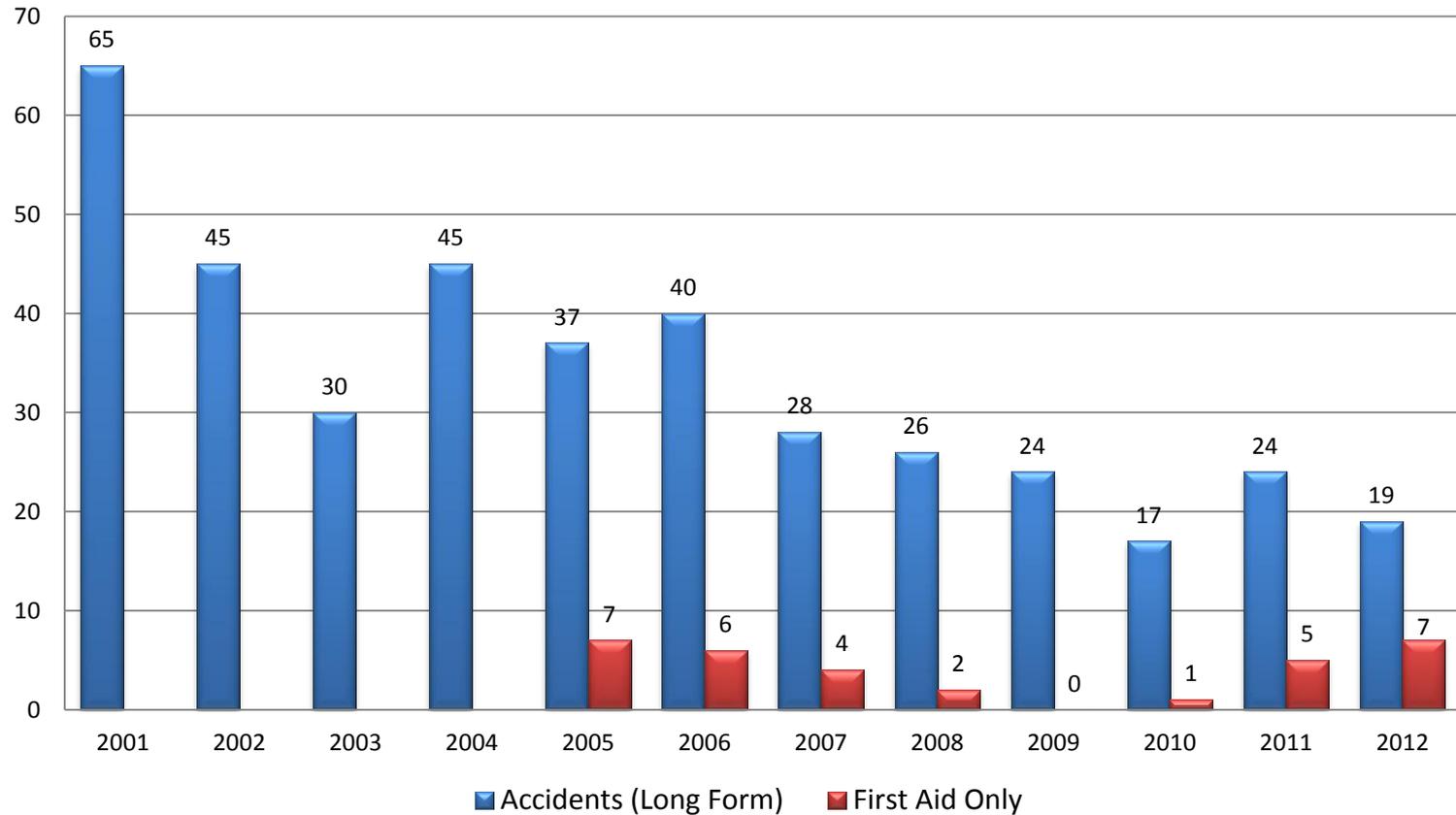
By Department (2011)



89% of all respondents expressed satisfaction with working in Facilities Management, matching the total from the 2009 survey. When examining the current data by department, the lowest levels of satisfaction come from Facilities Operations (87%) and Capital Projects (89%)

SAFETY TRENDS

Accident Reports
January – December 2012



2012 - 2013

**Safety Isn't Expensive...
It's Priceless**

Joseph Loder

GRAINGER
FOR THE ONES WHO GET IT DONE