



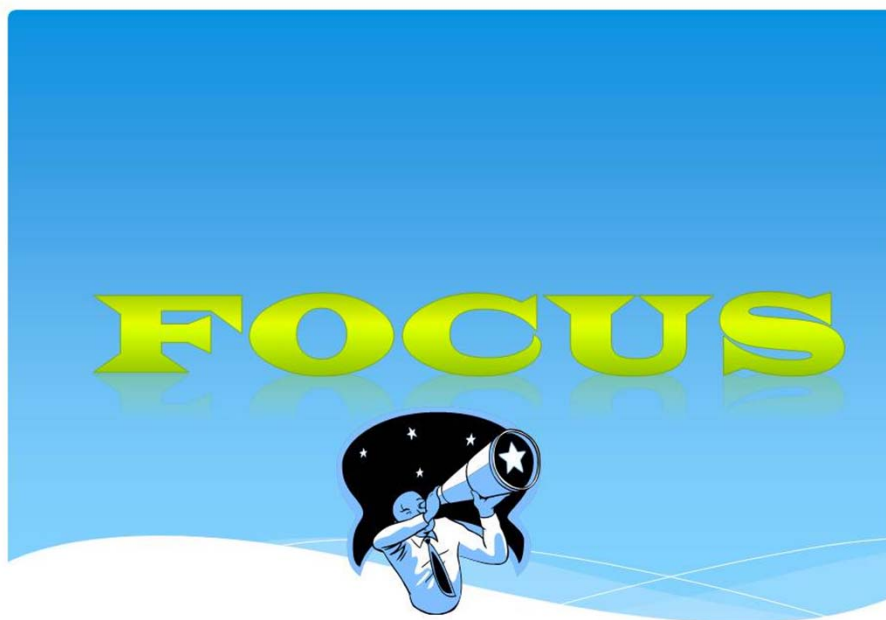
UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Second Quarter – Fiscal Year 2012

January 31, 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

"Careful planning helps us maintain a sense of perspective, purpose and ordered priorities."

-- Stephen Covey, Author and Speaker

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements



UNC CHARLOTTE

"The greater danger for most of us lies not in setting our aim too high and falling short, but in setting our aim too low and achieving our mark."

-- Michelangelo, Artist

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

THINK
OUR GOAL IS
CUSTOMER
SATISFACTION



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 – Continue to build PM program to cover all equipment.
 - 2 – Continue increasing predictive maintenance measures as funds permit.
 - 3 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.
 - 4 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
 - 5 – Hire UPA to clean up FO “dirty laundry”

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Lead
F. O.

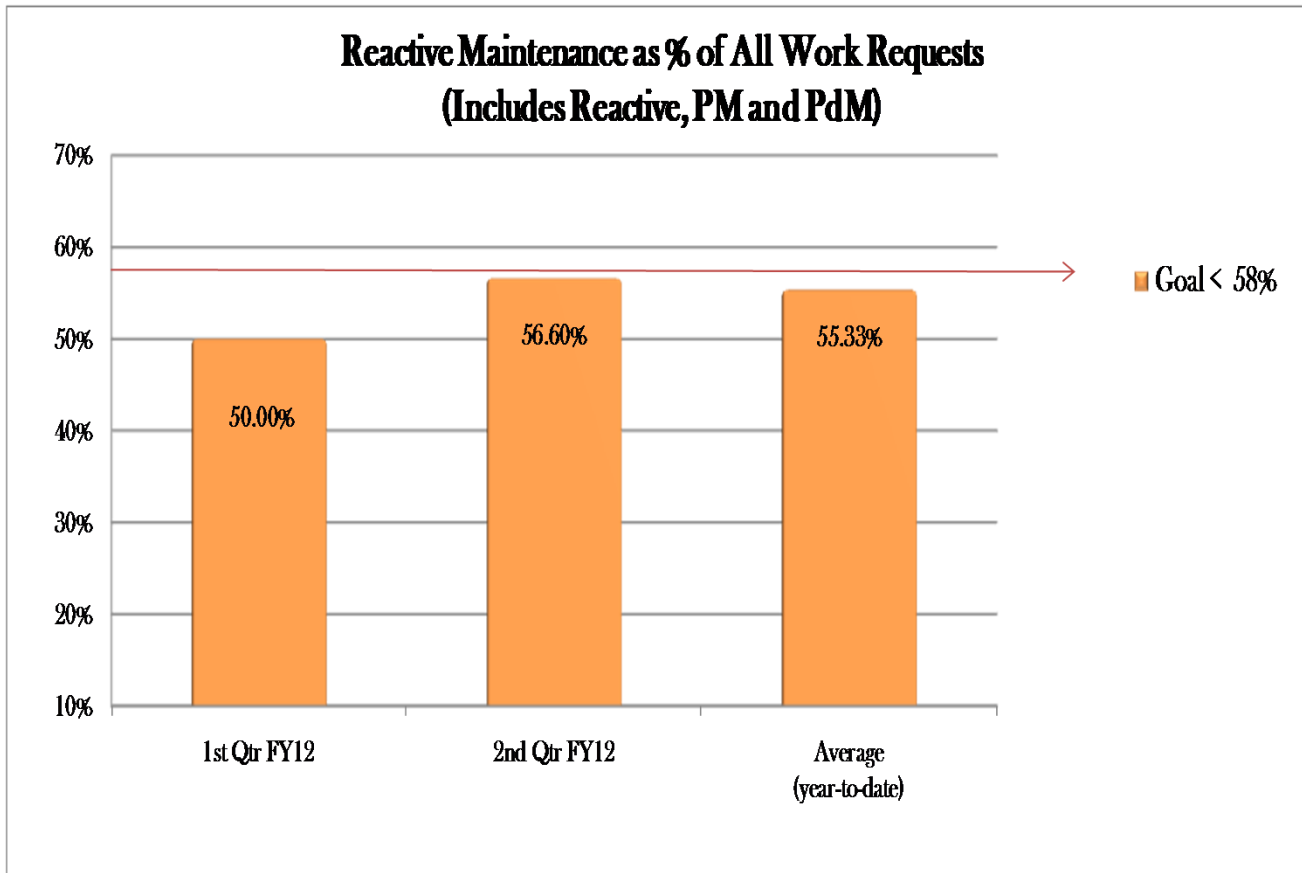
GOAL #1 – Improve maintenance and operations of the Campus

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 – Second Quarter FY 2012

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 719 quarterly average for the year

Balanced Scorecard Category: Internal Business Process

Archibus
Report
In error
Working w/FIS

STATUS

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

Lead
Housekeeping

GOAL #1 – Improve Maintenance and Operations of the Campus

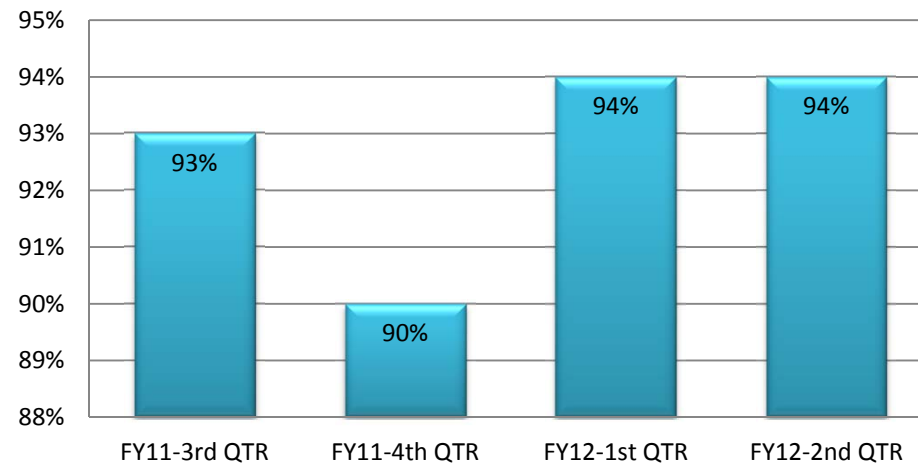
Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

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

Balanced Scorecard Category: Internal Business Process

APPA LEVELS

Percentage = 94%



STATUS

GOAL #1 – Improve Maintenance and Operations

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

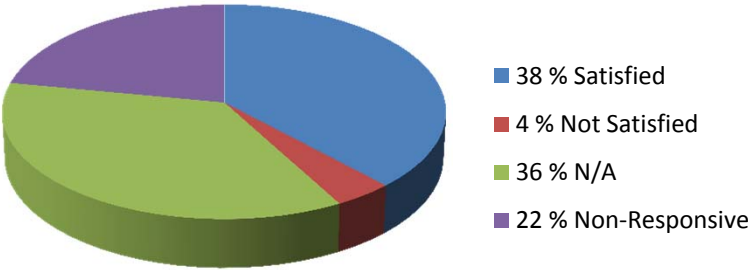
Lead
Housekeeping

ACTION PLAN

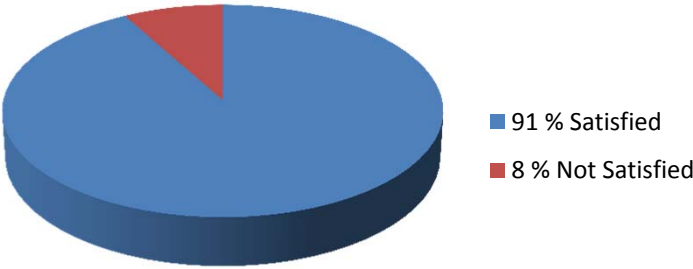
- Actions Planned
 - Continue quarterly self audits
 - Write RFP for external benchmark analysis
 - Establish subject matter expert training position for housekeeping

Housekeeping Work Request Customer Satisfaction

Percentages



Percentages



Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
F. O.

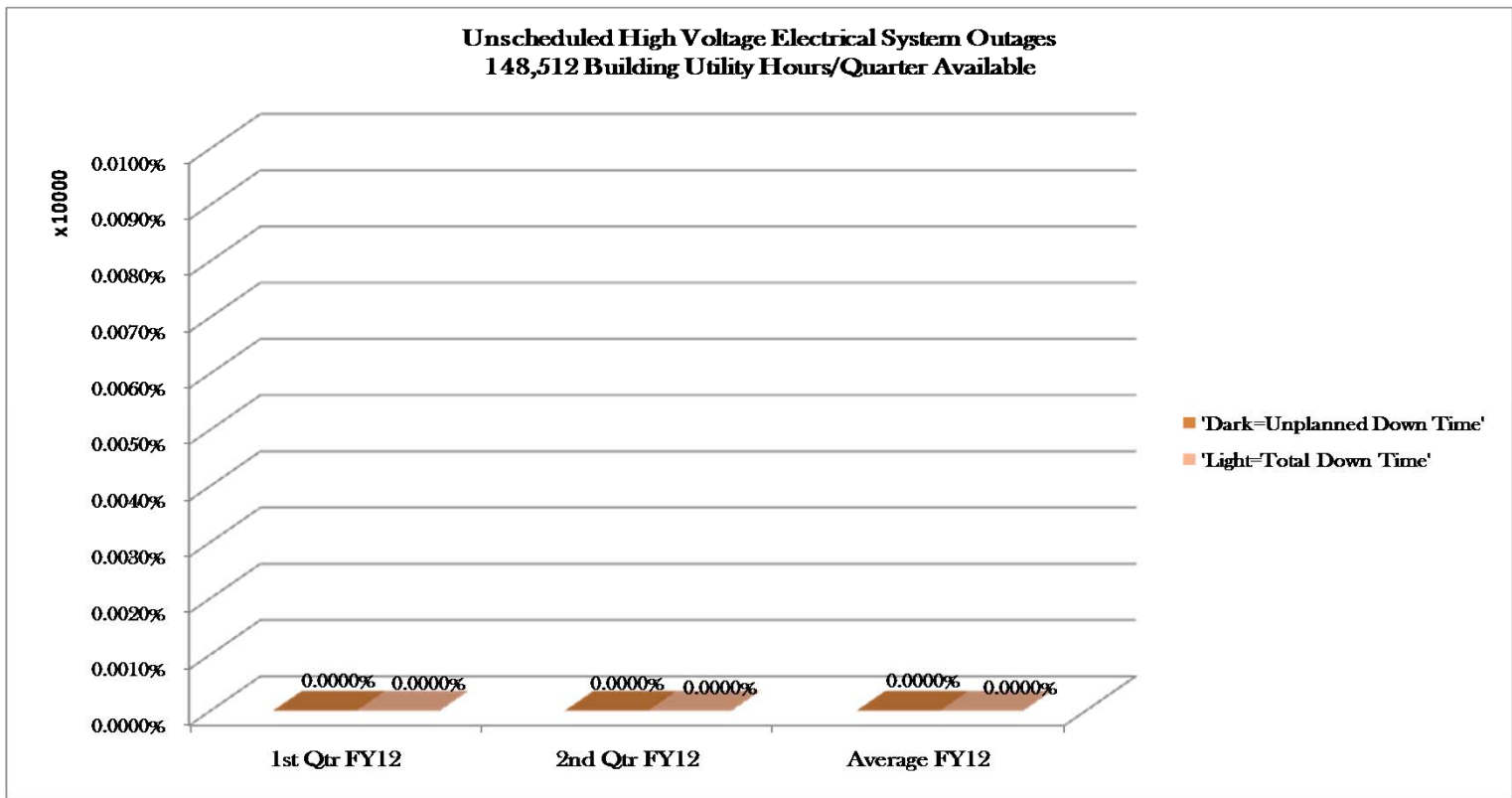
GOAL #1 – Improve maintenance and operations of the Campus

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: Internal Business Process



STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
F. O.

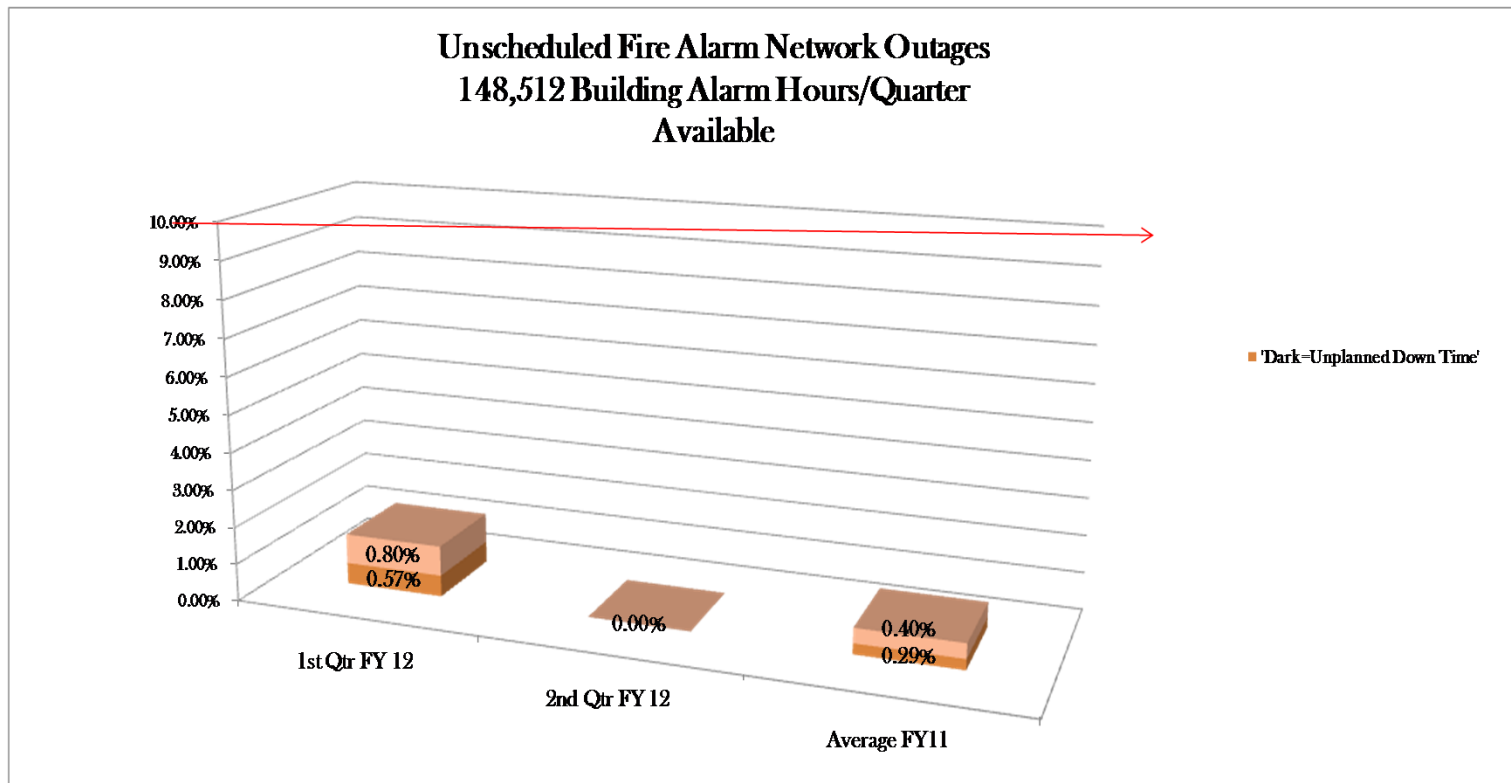
GOAL #1 – Improve maintenance and operations of the Campus

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: Internal Business Process



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
	Objective	2.2.2	85% of Estimates for in house construction within +/- 10% of Actual
	Objective	2.2.4	90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date
	Objective	2.2.6	Increase Project Volume by 10 projects per year - Project Counts by Phase

ACTION PLAN FOR IMPROVEMENT

- "Wildly Important Goal" - Handout guiding Customers through Design Services' project processes and Archibus - To be implemented within the next 90 days.**
- Complete Classroom Capacity and egress information by developing individual building standards - **This is an ongoing process driven by building and project needs.**
- Project schedules from Scope & Budget phase through, Design, Construction and Closeout - This will be fully implemented within the next 90 days.**
- 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..**
- Post construction schedules on website to increase awareness of project timelines - This is a longer than 90 day goal to implement.**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

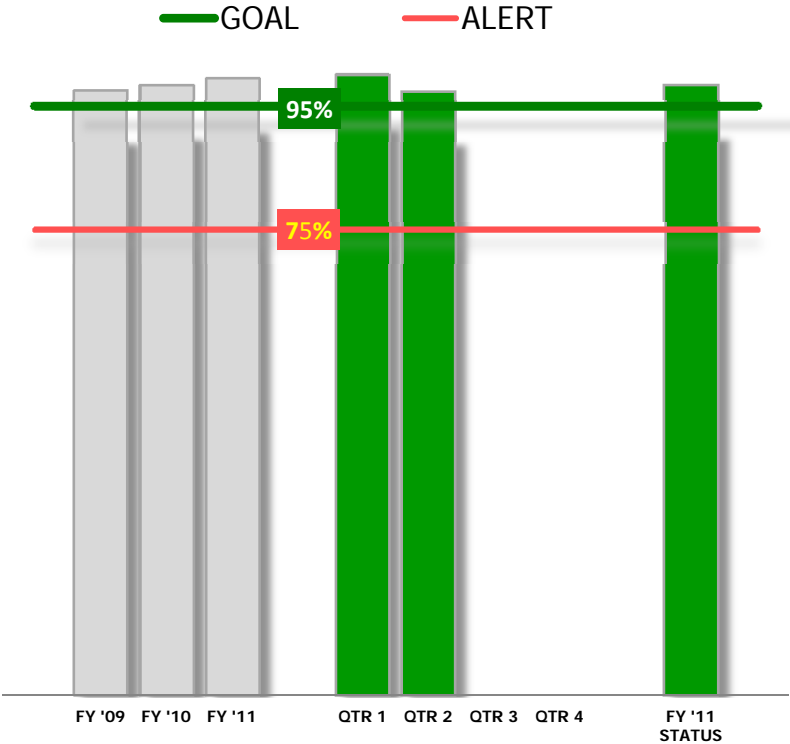
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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: Internal Business Process

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'09	115	112	3	97.4%
FY'10	173	170	3	98.3%
FY'11	300	298	2	99.3%
QTR 1	22	22	0	100.0%
QTR 2	37	36	1	97.3%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '12 STATUS	59	58	1	98.3%



GOAL 95.0%	STATUS 100.0%
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Facilities Management Strategic Planning Session – Second Quarter FY 2012

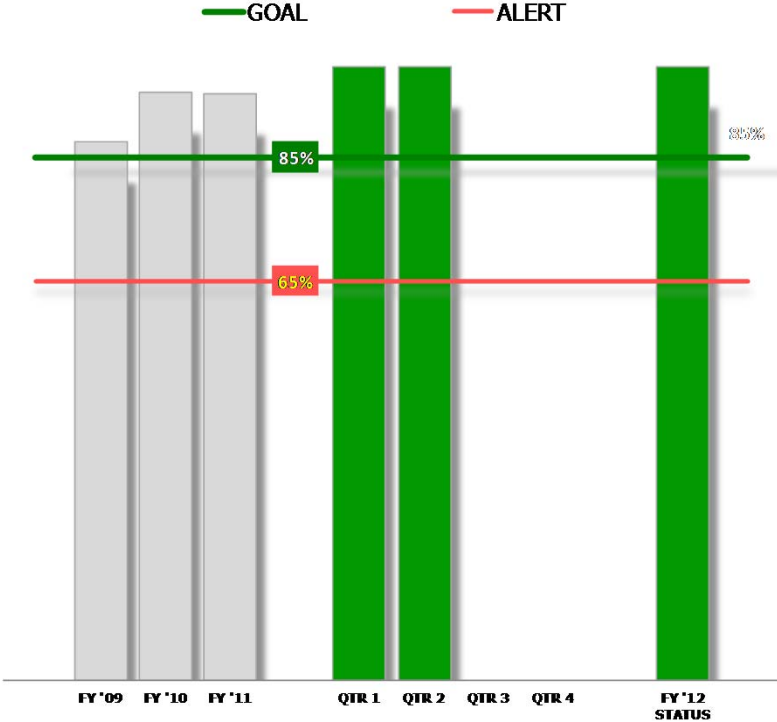
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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: Internal Business Process

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'09	115	101	14	87.8%
FY'10	255	244	11	95.7%
FY'11	297	284	13	95.6%
QTR 1	32	32	0	100.0%
QTR 2	46	46	0	100.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '12 STATUS	78	78	0	100.0%



GOAL
85.0%

STATUS
100.0%

Facilities Management Strategic Planning Session – Second Quarter FY 2012

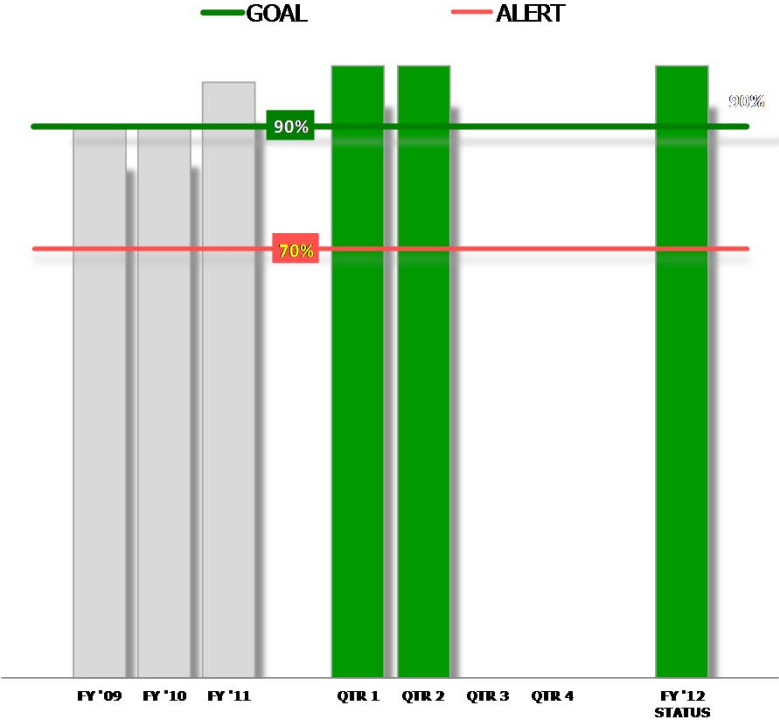
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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: Internal Business Process

90% 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'09	116	104	12	89.7%
FY'10	182	164	18	90.1%
FY'11	297	289	8	97.3%
QTR 1	32	32	0	100.0%
QTR 2	46	46	0	100.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '12 STATUS	78	78	0	100.0%



GOAL
90.0%

STATUS
100.0%

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead Design Services

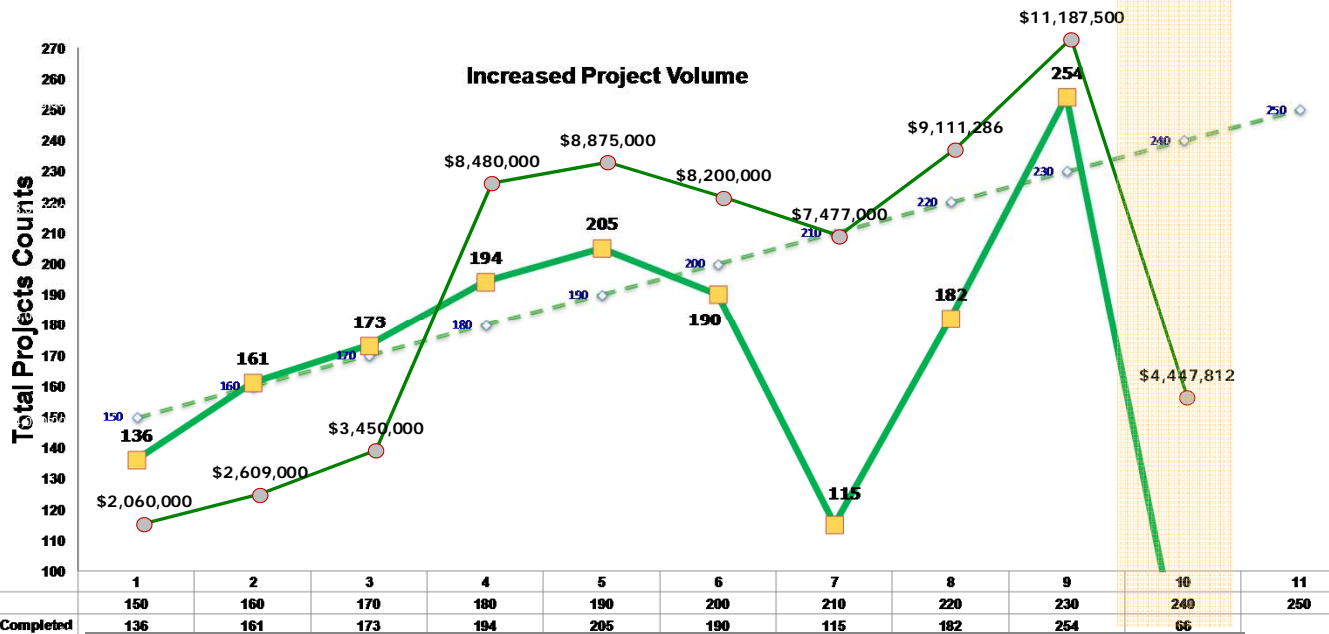
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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: Internal Business Process

Increase Project Volume by 10 Projects per year - Project Counts by Phase											
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
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	254	66	
Projects completed through 2nd. Quarter:							51	36	52	66	
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	\$11,187,500	\$4,447,812	



THIS IS A FISCAL YEAR GOAL - REVIEWED QUARTERLY

GOAL 100%

STATUS 27.5%

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead Capital

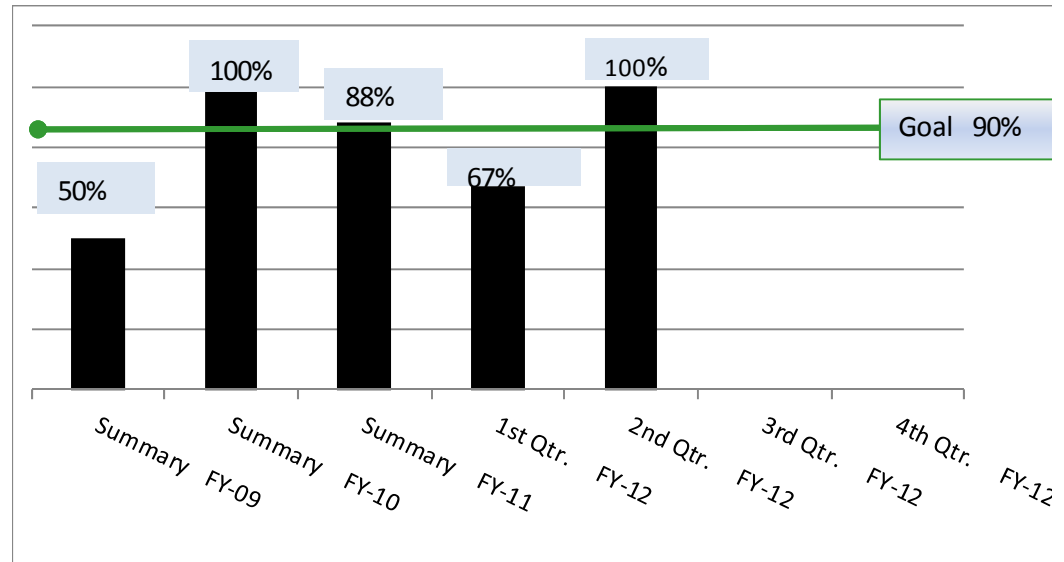
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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%
1st Qtr. FY-12	4	2	67%
2nd Qtr. FY-12	1	0	100%
3rd Qtr. FY-12	n/a	n/a	n/a
4th Qtr. FY-12	n/a	n/a	n/a



2nd Qtr. Objective is 100%
 Year to date is 71%

Status

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 Schedule

Lead
Capital

ACTION PLAN

- Actions Complete

- Actions Planned
 1. Keep schedules current & refer to them monthly
 2. Discuss schedule (baseline & current) with end users

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%

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

Lead
FBO

ACTION PLAN

- Website W.I.G.
 - Publish new web pages for Safety, Training, and Billing for both internal and external customers.
 - Discussion with FO Director regarding potential collaboration in some areas such as the website has occurred; Awaiting hire of Communications Officer position to continue development.
- 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. A small committee will be selected to assist in the mapping process.
- Develop plan with UNC Charlotte Urban Institute to administer the FY 12 Customer Satisfaction Survey.
 - Review current questions on the survey and seek input from Directors to ensure the survey asks the right questions.
 - Submit survey questions to AVC for review and final approval in late February 2012.
 - Schedule briefing with Directors and FM at large to review survey results once survey is completed. Compare Customer Satisfaction results from specific Employee Satisfaction Survey questions to the Customer survey.

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012



Annual objective

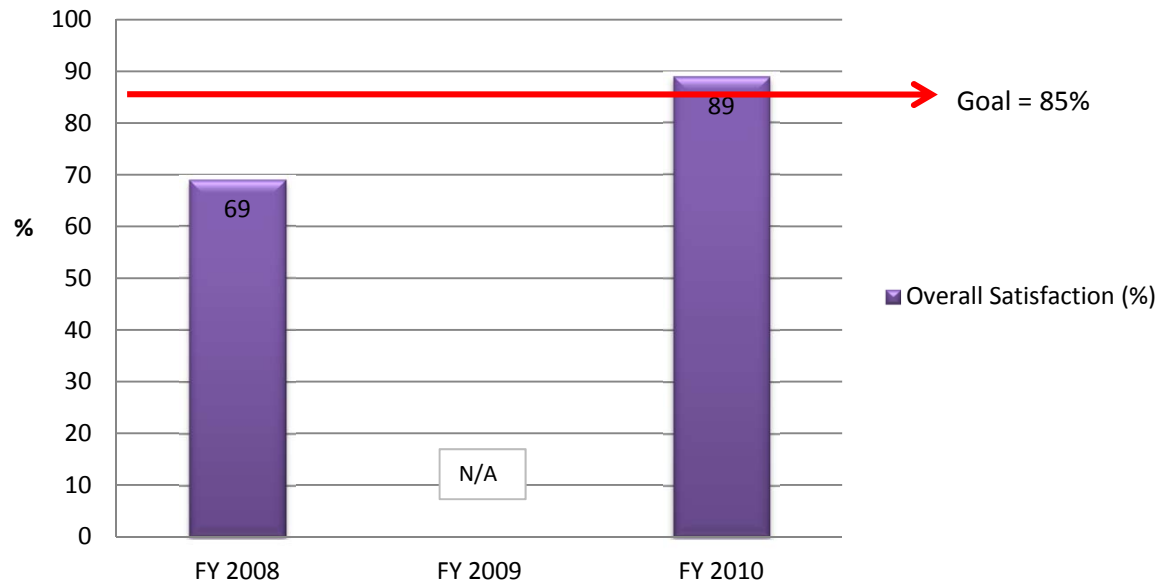
GOAL #4 – Perfect a Customer Focused Organization

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

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."

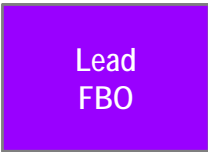
Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



STATUS

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012



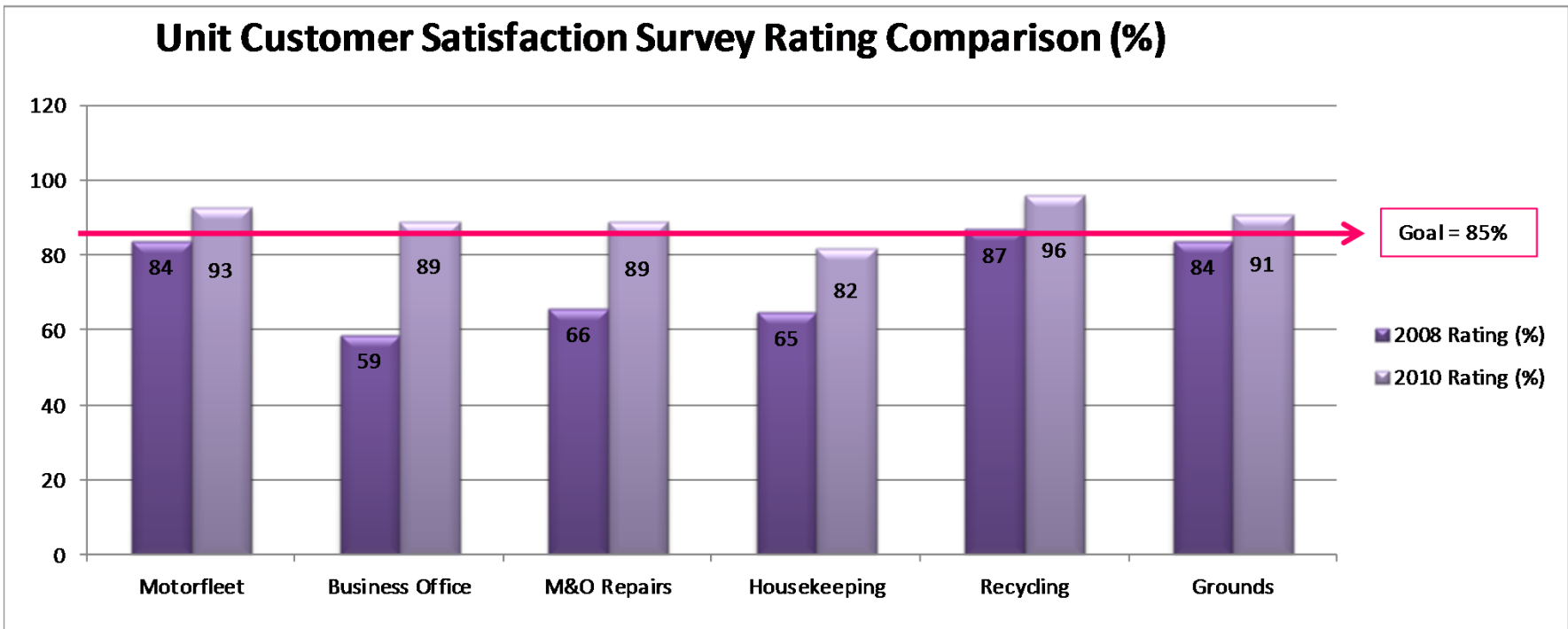
GOAL #4 – Perfect a Customer Focused Organization

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



STATUS

GOAL #4 – Perfect a Customer Focused Organization

Lead
F. O.

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

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 – Develop controls section and cross train with Zones.

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Lead
F. O.

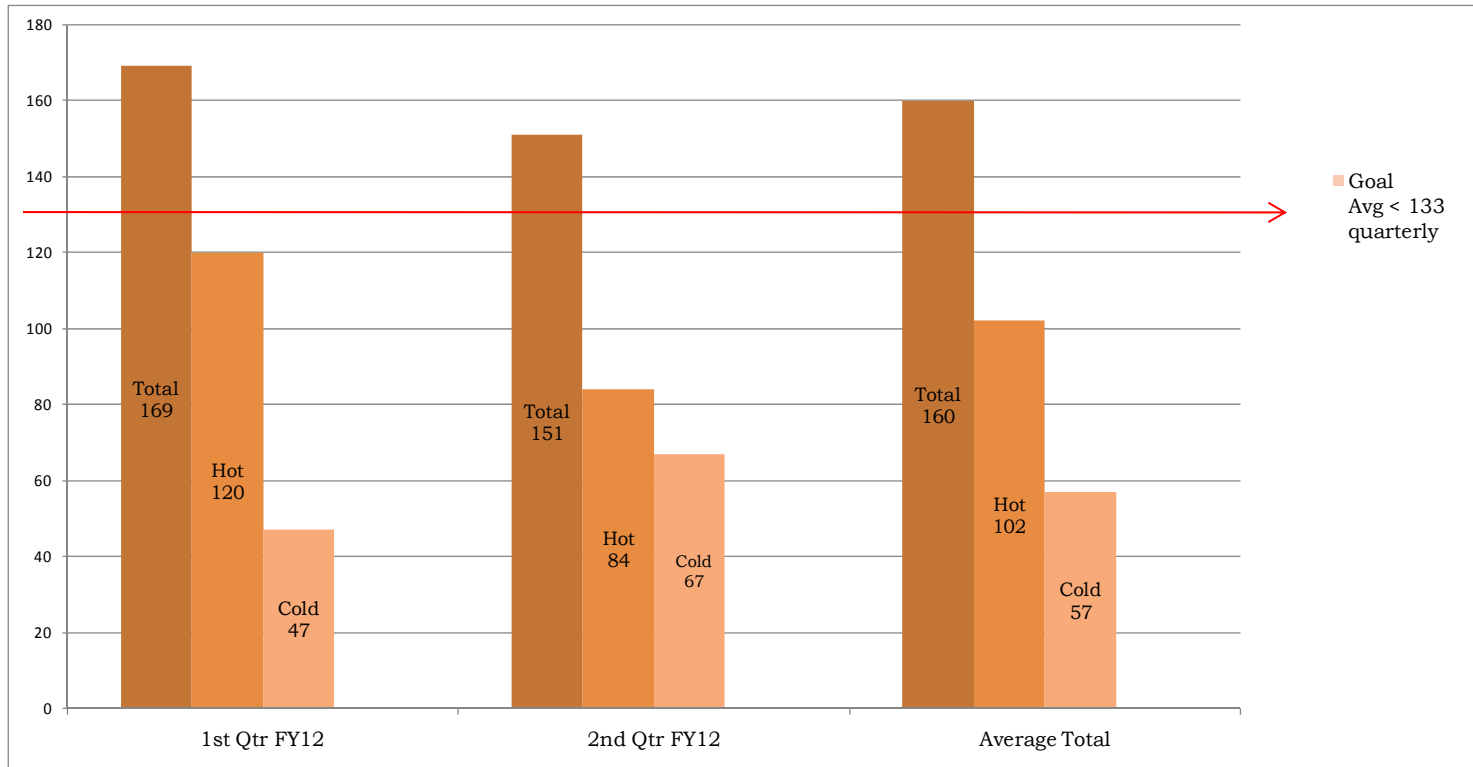
GOAL #4 – Perfect a Customer Focused Organization

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

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.

Facilities Management Strategic Planning Session – Second Quarter FY 2012

GOAL #4 – Perfect a Customer Focused Organization

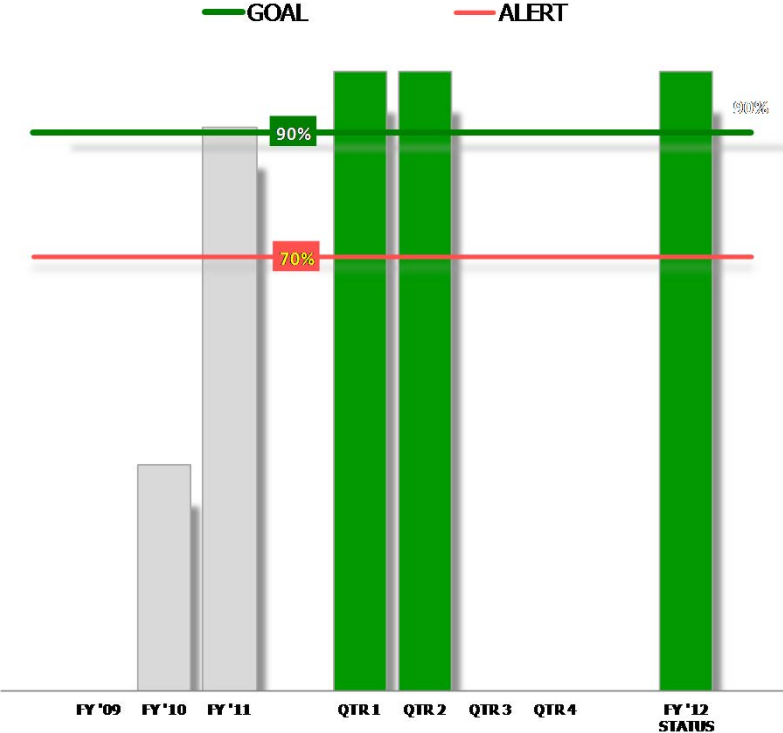
Strategy 4.1 Continually improve customer service/satisfaction
 Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

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

Balanced Scorecard Category: Customer Perspective

90% 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'09	0	0	0	0	0	0	0	0.0%
FY'10	30	18	5	0	6	1	0	36.7%
FY'11	33	24	6	2	0	1	0	90.9%
QTR 1	1	1	0	0	0	0	0	100.0%
QTR 2	3	2	1	0	0	0	0	100.0%
QTR 3	0	0	0	0	0	0	0	0.0%
QTR 4	0	0	0	0	0	0	0	0.0%
FY '12 STATUS	4	3	1	0	0	0	0	100.0%



GOAL
90.0%

STATUS
100.0%

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Capital

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.5 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary FY-09	2	1	0	100%
Summary FY-10	9	0	0	No Data
Summary FY-11	7	3	0	100%
1st Qtr. FY-12	2	1	0	100%
2nd Qtr. FY-12	0	0	0	No Data
3rd Qtr. FY-12	0	0	0	No Data
4th Qtr. FY-12	0	0	0	No Data



No data is a result of customer not answering questionnaire or questionnaire not being sent out for the quarter

Objective for 2nd Quarter has no data
 Year to date is 100%

Status

Facilities Management Strategic Planning Session – Second Quarter FY 2012

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.6 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the construction phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary FY-09	no data	0	0	0.0%
Summary FY-10	5	1	0	20.0%
Summary FY-11	5	1	0	100%
1st Qtr. FY-12	3	1	0	100%
2nd Qtr. FY-12	0	0	0	0.0%
3rd Qtr. FY-12	0	0	0	0.0%
4th Qtr. FY-12	0	0	0	0.0%



Objective for 2nd Quarter has no data
 Year to date is 100%



Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Facilities Management FY 2012 Balanced Scorecard

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Customer <i>To achieve our vision, how must we view & treat our customers?</i>	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%	55.33%				
		1.3.2	Decrease Work Request Cycle Time by 5%	<300 hrs	No data				
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	94%				
	Improve Process Reliability	1.5.3	Reduce Unscheduled HV outages by 10%	<=0.0069	0.000%				
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%	0.29%				
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	98.3%				
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	100.0%				
		2.2.3	Combined with 2.2.2						
		2.2.4	All IP construction meets BOD	90%	100.0%				
		2.2.5	Combined with 2.2.4						
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 250	27.5%	Annual	Annual	Annual	Annual
		3.4.1	90% Cap Construction Projects on Schedule	90%	71.0%				
	Enhance customer satisfaction	4.1.1	Improve: Overall satisfaction rating	85%	No data	Annual			
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%	No data	Annual			
		4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-10% or <133	160				
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	100.0%				
		4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	No data				
	4.1.6	Improve: Capital Projects rating (sat./very sat.) - constr	85%	No data					
	4.1.7	All measures positive on customer sat survey	<2% S Dis; <5% Dis or Neu	No data					



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

- Periodically review expenditure reports; Ensure that FM does not overspend its operating and supplemental budgets. Also, **work towards 75% spent by end of the third quarter, March 2012.**
- 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). Preliminary meetings have been scheduled to develop guidelines for Financial Statement reporting and Fixed Assets concerns.
- W.I.G.** Hire Grants/Procurement Specialist position (R. Jackson vacancy). All interviews have been completed. Hiring Committee – L. Snodgrass, A. Battle, S. Perez and D. Pierce. Recommendation made by February 3rd;
- Boost effort to locate external funding opportunities that align with FM's strategic vision, mission and goals;

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

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: mid month January 2012

ACCOUNT DESCRIPTION	2011-12 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 39,000	1%	\$ 12,885	\$ -	\$ 12,885	\$ 26,115	\$ 26,115 F
PERSONAL SERVICE CONTRACTS	\$ 105,750	3%	\$ 79,125	\$ 426	\$ 79,551	\$ 26,199	\$ 26,199 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 1,038,446	30%	\$ 462,834	\$ 184,183	\$ 647,016	\$ 391,430	\$ 391,430 F
OTHER ADMINISTRATIVE EXPENSES	\$ 101,500	3%	\$ 15,528	\$ 450	\$ 15,978	\$ 85,523	\$ 85,523 F
DOMESTIC TRAVEL/TRAINING	\$ 70,000	2%	\$ 29,218	\$ -	\$ 29,218	\$ 40,782	\$ 40,782 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 309,836	9%	\$ 152,375	\$ 119,808	\$ 272,183	\$ 37,654	\$ 37,654 F
OTHER PURCHASED SERVICES	\$ 234,150	7%	\$ 90,836	\$ 55,706	\$ 146,543	\$ 87,607	\$ 87,607 F
SUPPLIES	\$ 1,197,588	35%	\$ 512,819	\$ 148,383	\$ 661,202	\$ 536,386	\$ 536,386 F
EQUIPMENT/IT	\$ 221,554	7%	\$ 104,234	\$ 86,728	\$ 190,962	\$ 30,592	\$ 30,592 F
CAPITAL OUTLAY	\$ 14,400	0%	\$ 424	\$ -	\$ 424	\$ 13,976	\$ 13,976 F
FIXED CHARGES	\$ 35,350	1%	\$ 12,059	\$ -	\$ 12,059	\$ 23,291	\$ 23,291 F
RECYCLING	\$ 37,515	1%	\$ 23,124	\$ 161	\$ 23,285	\$ 14,230	\$ 14,230 F
FACILITIES MANAGEMENT Main Operating Funds	3,405,090		1,495,459.65	595,844.79	2,091,304.44	1,313,785.21	\$ 1,313,785

LENGTH OF TIME: 6.5 MONTHS	54.17%
Percentage of Actual Expenditures	44.49%
Percentage: Actuals + Pending Commitments	60.64%

STATUS

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

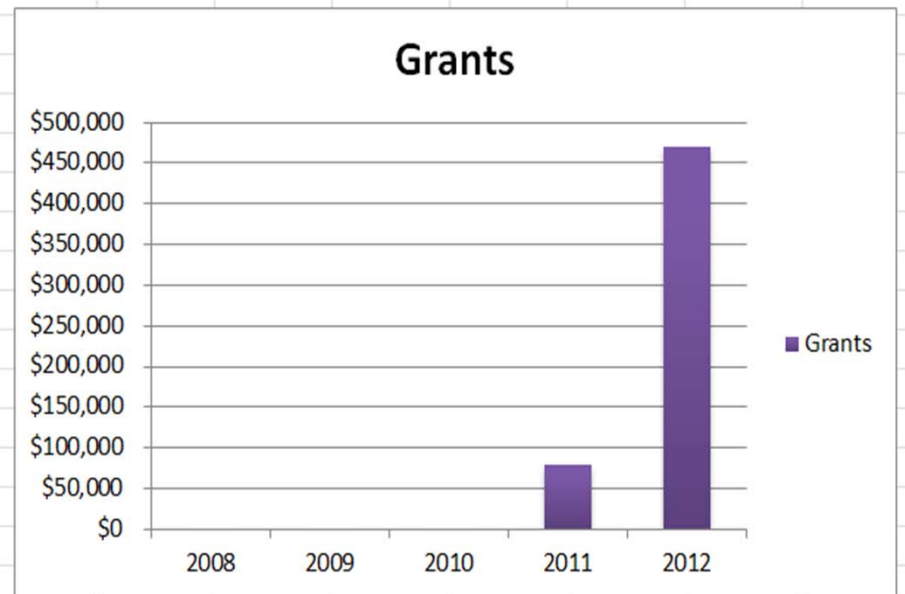
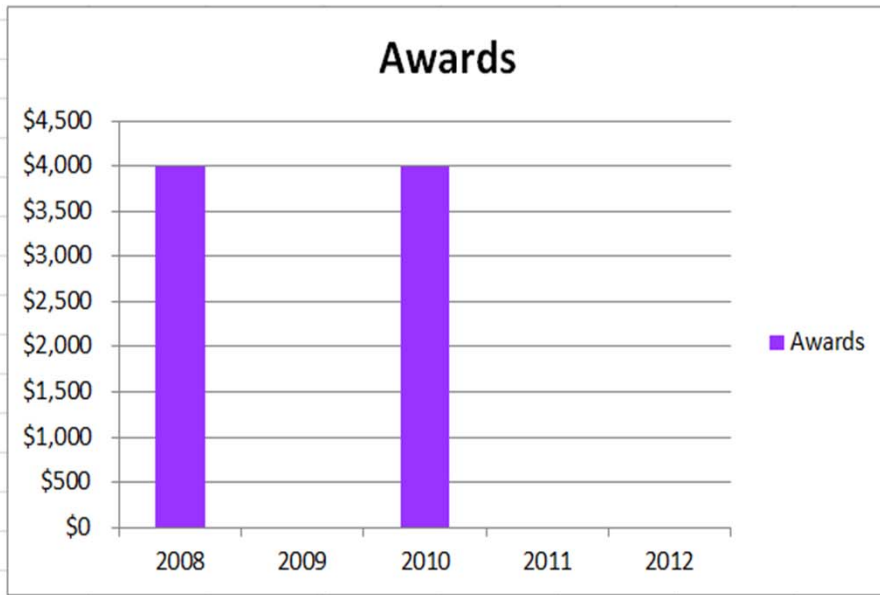
Lead
FBO

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

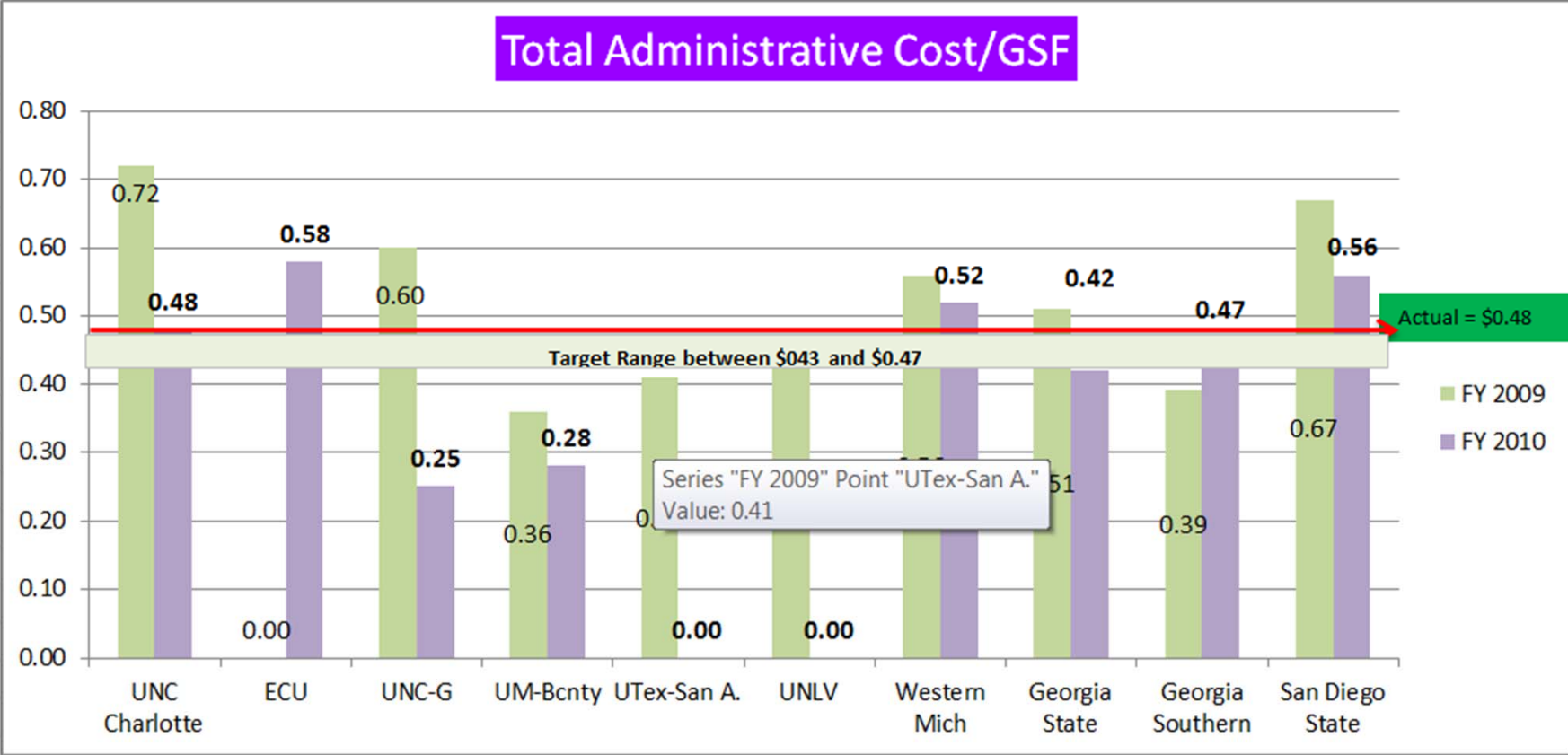
Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

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



STATUS -
HOLD

Lead
Housekeeping

GOAL #6 – Promote Good Stewardship

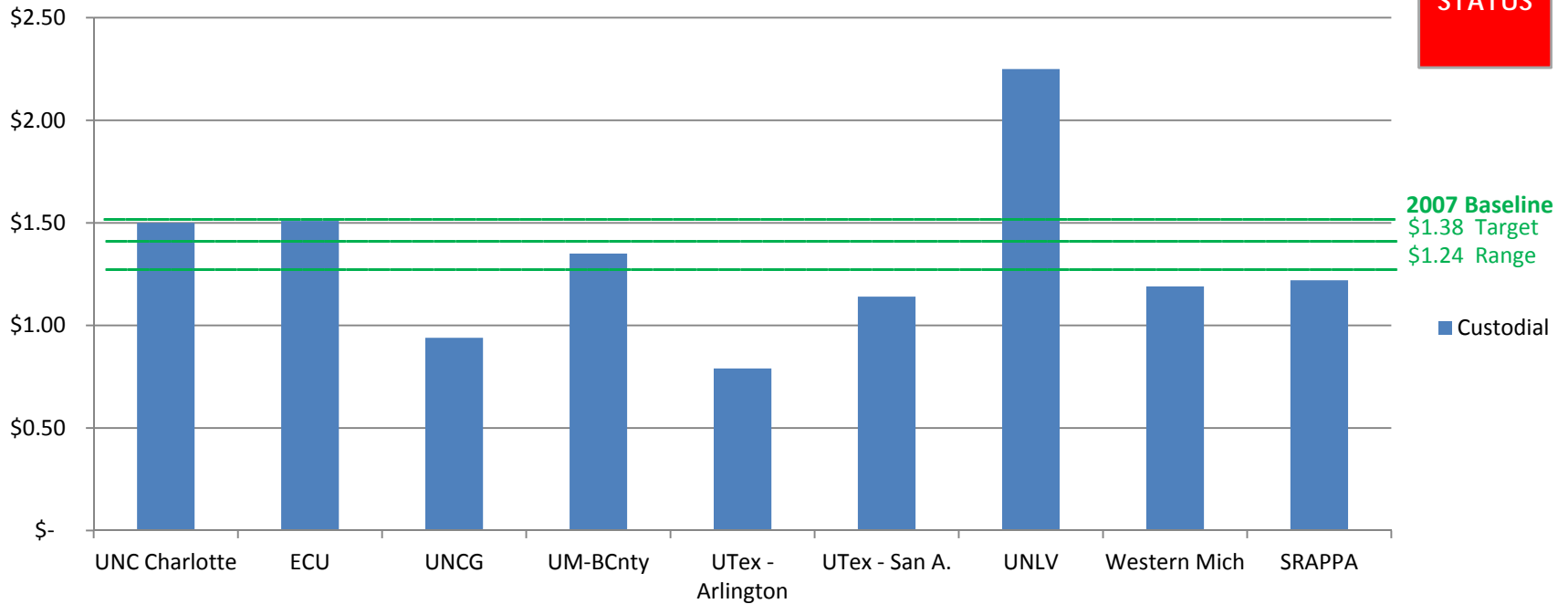
Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.4 Achieve Custodial Costs/GSF Plus or Minus 5% of the APPA Average for Peer Institutions
 (Internal UNC Peers = East Carolina, Greensboro)
 (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University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

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

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/GSF Comparison

STATUS



GOAL #6 – Promote Good Stewardship

Lead
Housekeeping

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.4	Achieve Custodial Costs/GSF 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 Planned**
 - In depth study of UNCC FM custodial costs/GSF
 - Further investigate why custodial cost per square foot is higher and cost per student lower.
 - Obtain custodial cost/student for our National Peer Institutions
 - Find out if our peers included non-academic spaces in their cost per sq. ft.
 - Begin study to determine possibility of reduction of staff due to budget constraints

GOAL #6 – Promote Good Stewardship

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%

Lead
F. O.

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 – Second Quarter FY 2012

Lead
F. O.

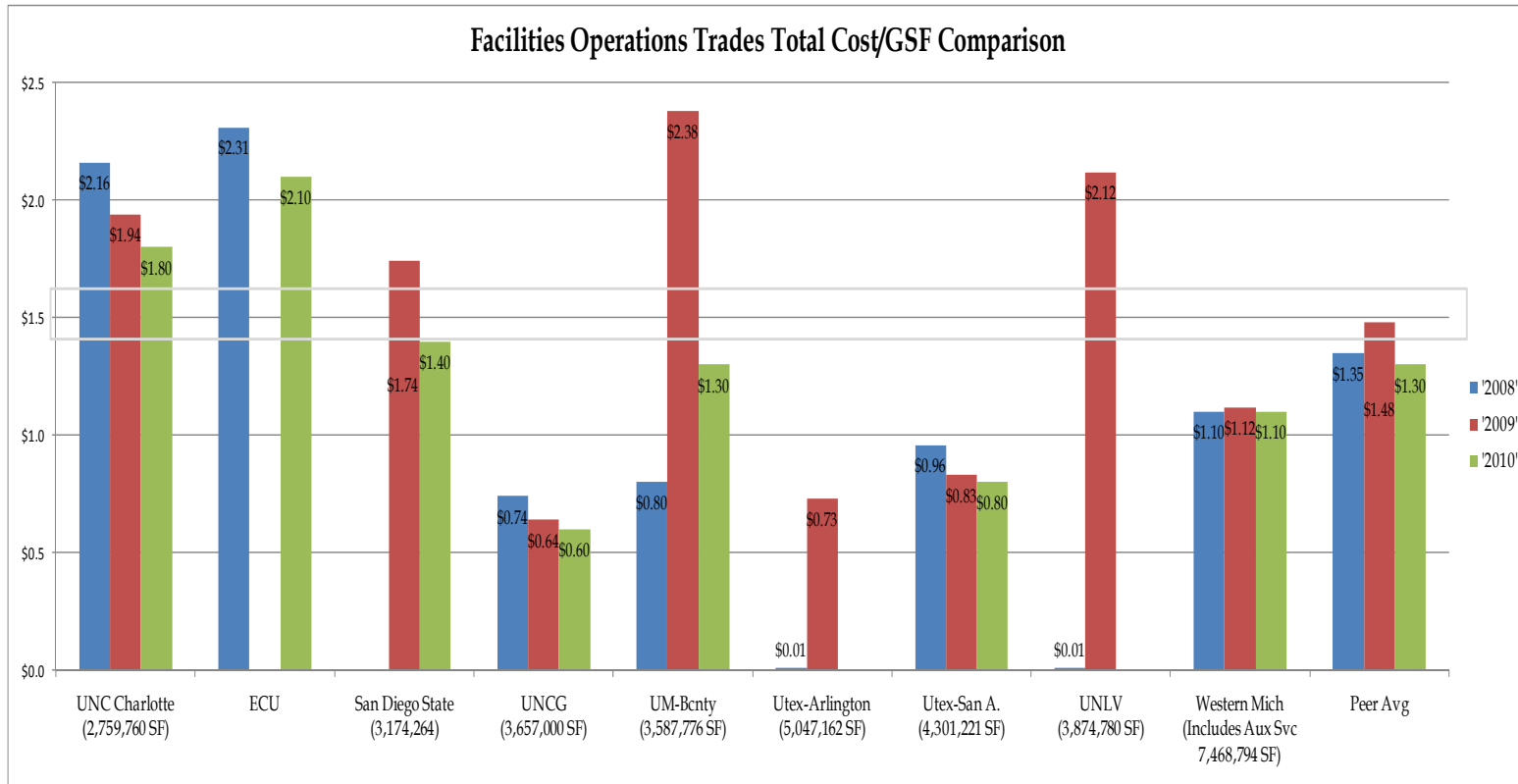
GOAL #6 – Promote Good Stewardship

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).



STATUS

Lead
F. O.

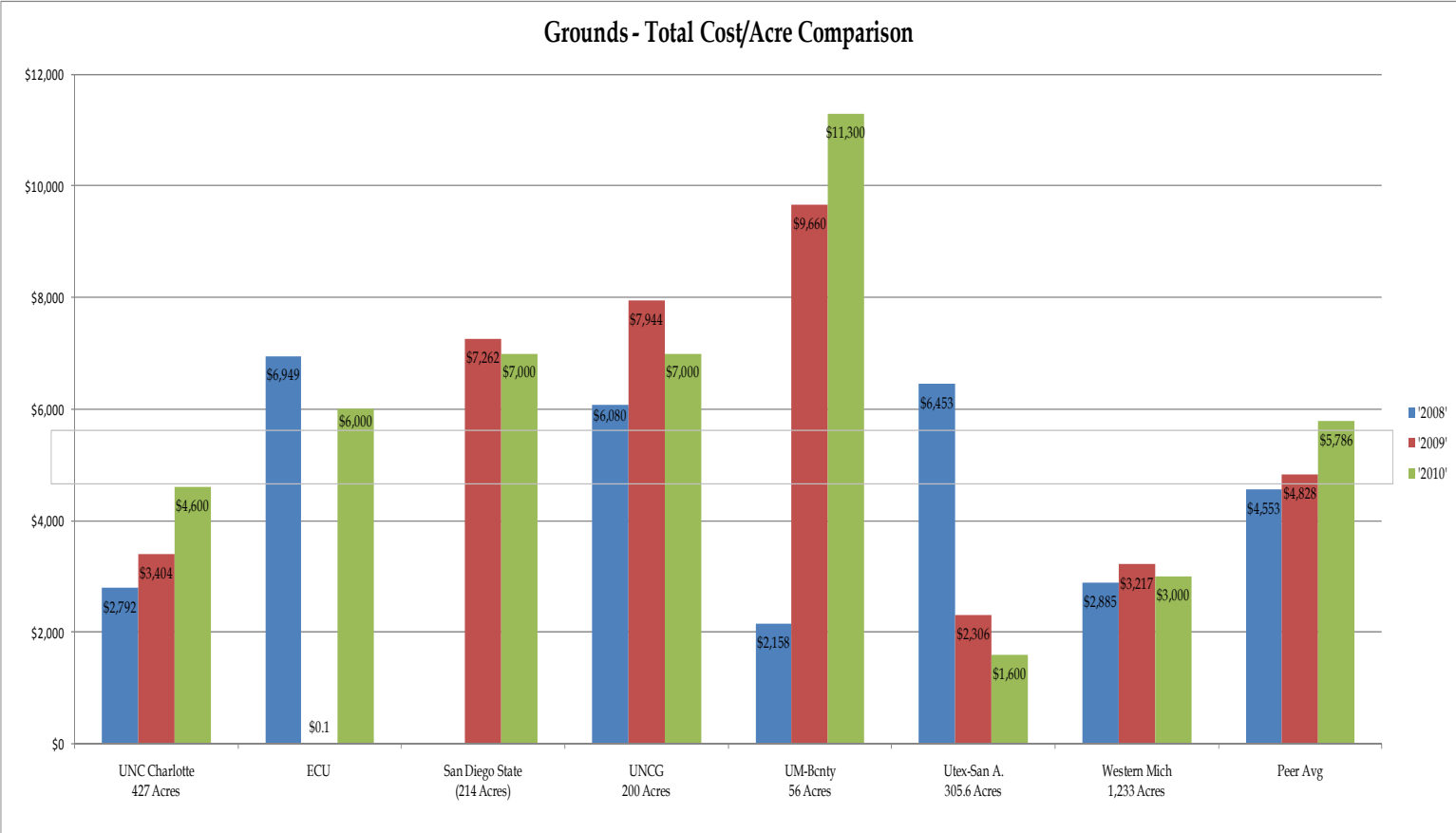
Facilities Management Strategic Planning Session – Second Quarter FY 2012

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 – Second Quarter FY 2012

Lead
F. O.

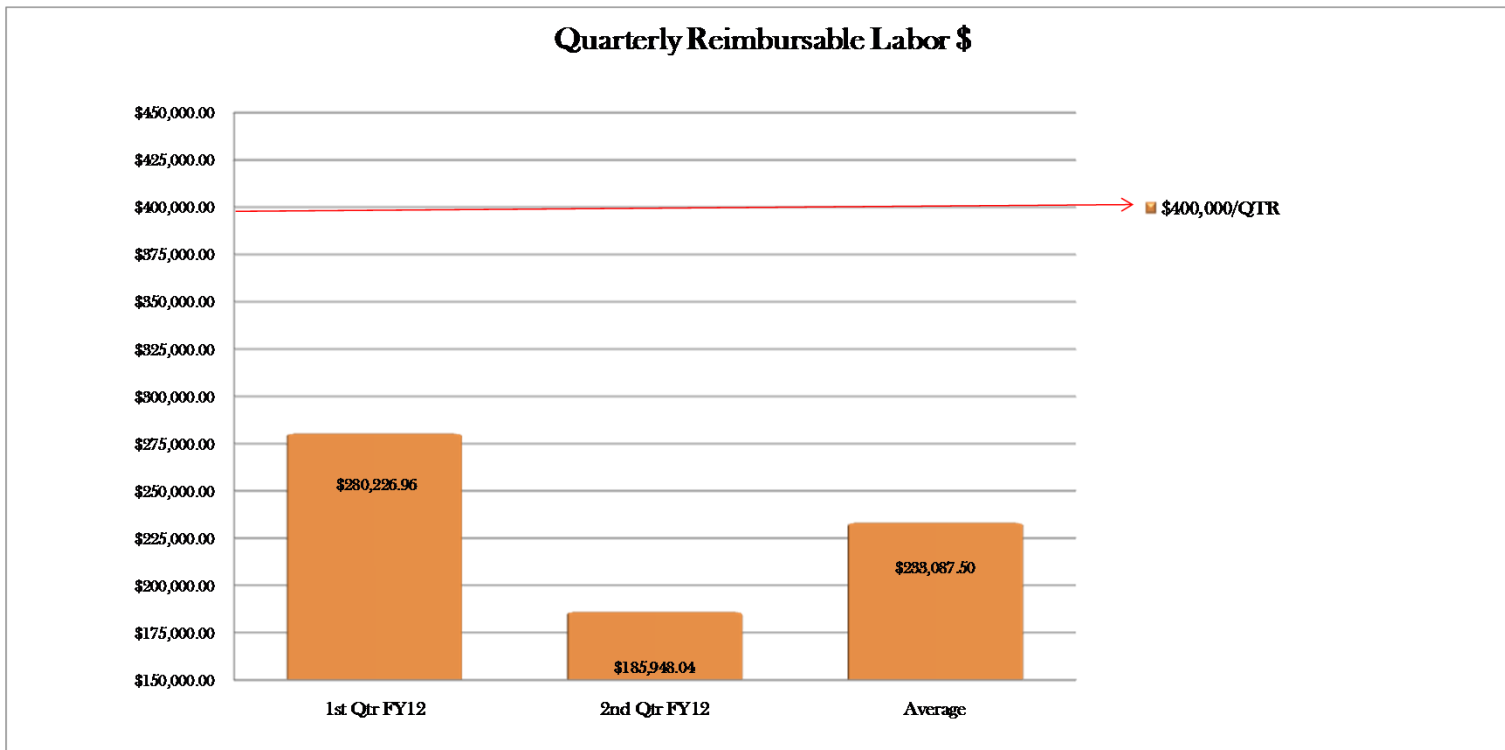
GOAL #6 – Promote Good Stewardship

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

Facilities Management Strategic Planning Session – First Quarter FY 2012



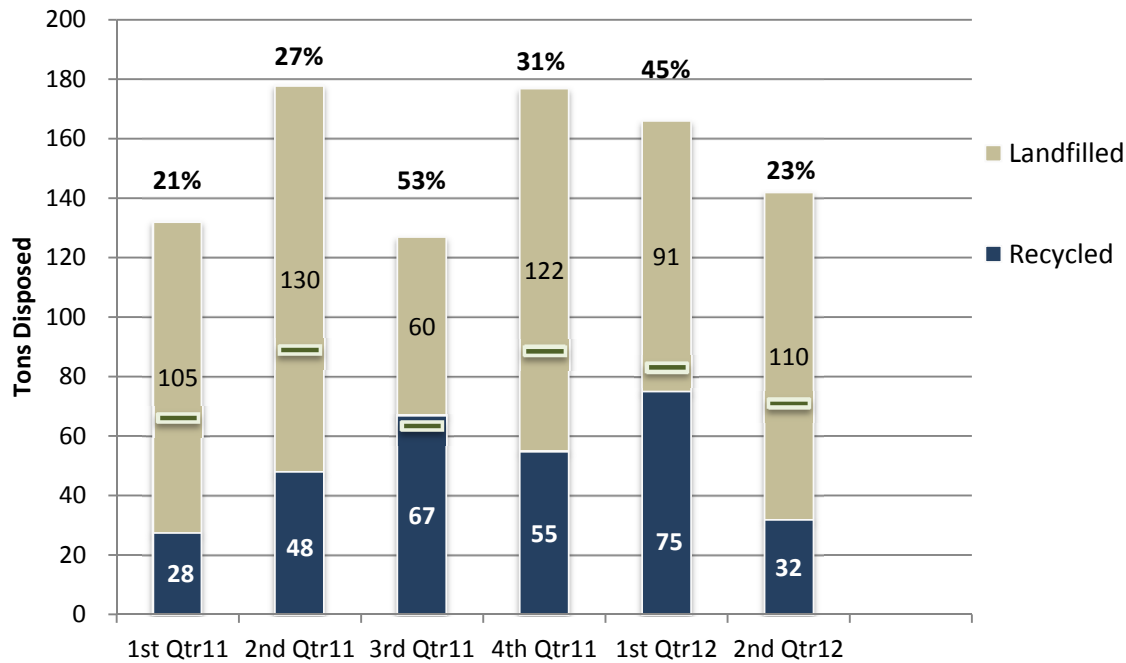
GOAL #6 – Promote Good Stewardship

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
 2nd Qtr FY12



GOAL #6 – Promote Good Stewardship



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

A horizontal rectangular header with a dark green, textured background. The words "ACTION PLAN" are written in white, bold, sans-serif font, centered within the rectangle.

- **Actions Planned**
 - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
 - Currently working with Residence Life and a mattress recycler. If we can make this arrangement work, this will keep a large amount of contamination out of our C&D bins.
 - 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.

Facilities Management Strategic Planning Session – First Quarter FY 2012



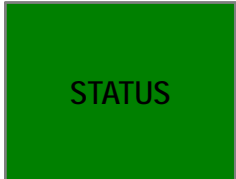
GOAL #6 – Promote Good Stewardship

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

Weights too varied to graph effectively.
Recycling rate is 85%+ on all Capital projects.





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/Formal Projects to 50% of Total C&D Waste

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ACTION PLAN

- Actions Planned
 - Continue monitoring projects and acting as resource for contractors.



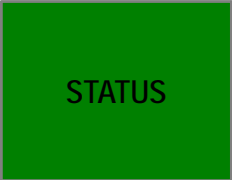
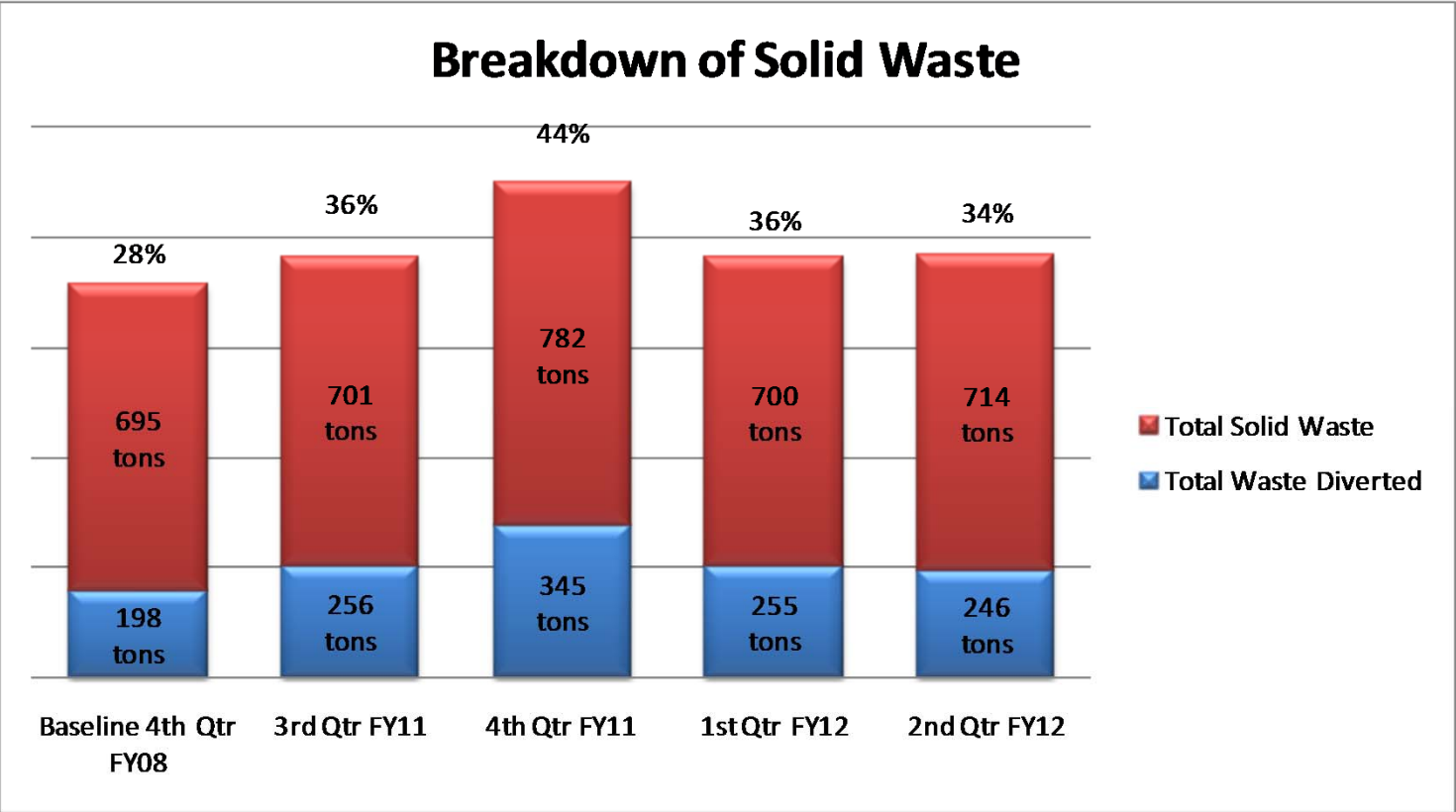
Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

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% (<=39.2%)

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 **6.2.3** Increase Percent of Solid Waste Recycled on Campus by 5% in five year (base year 2008)

ACTION PLAN

- **3rd Quarter Actions Planned**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Continue educational outreach and promotion - Campus Clean UP, EARTH DAY, attend and present at upcoming March conferences
 - Will choose vendor for trash and recycling bin
 - Hire 4 staff – replace Rhonda Renwick, replace position lost in 2010 and bring on 2 new positions for EPIC
 - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees
 - Designing Comprehensive Compost program for campus
 - Assist Brian Guns and NC APPA for the 2012 NC APPA conference

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

Lead
Capital

GOAL #6 – Promote Good Stewardship

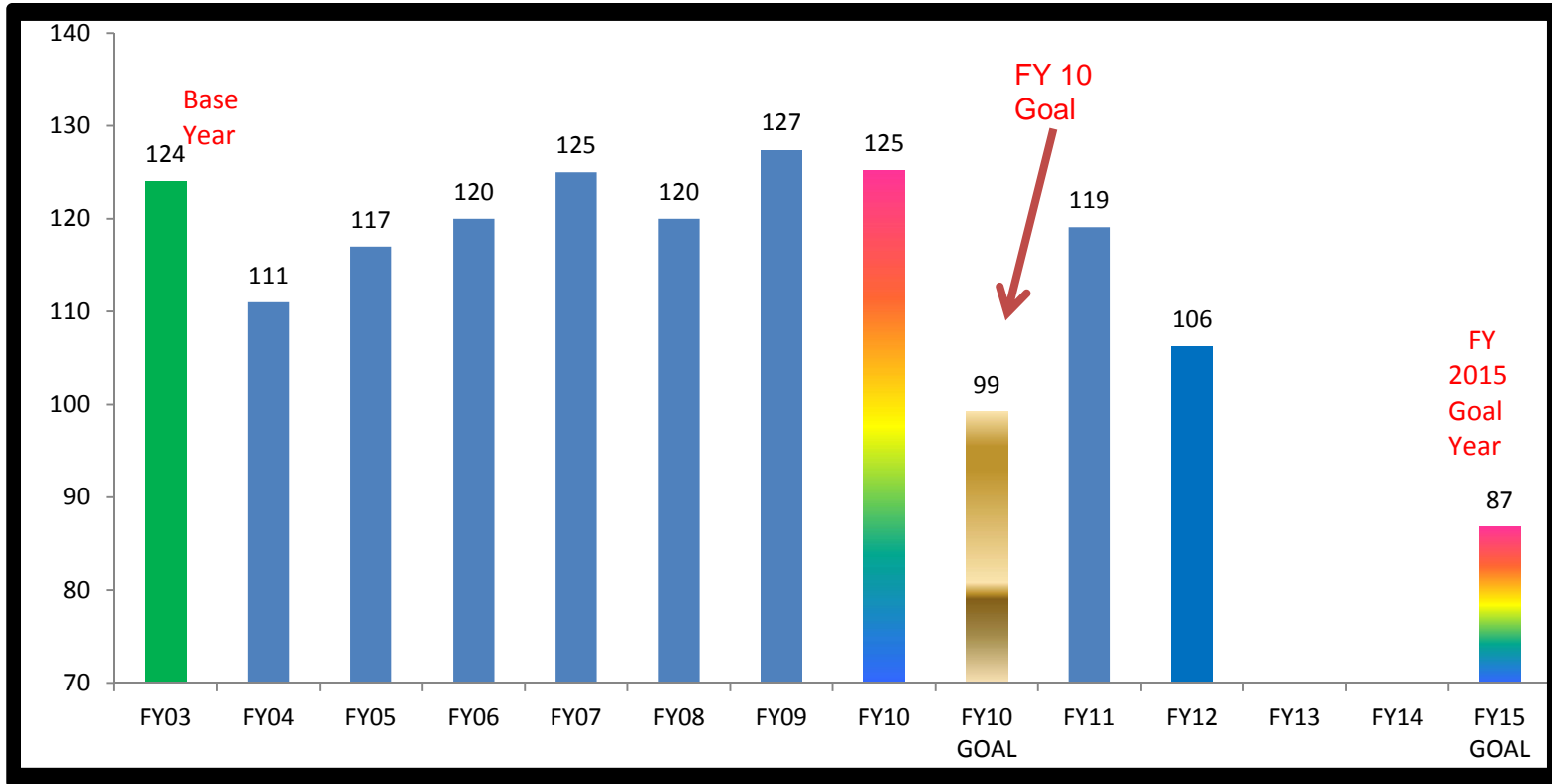
Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 30% by FY2015 (State Guideline)

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE
BTU/GSF/YEAR

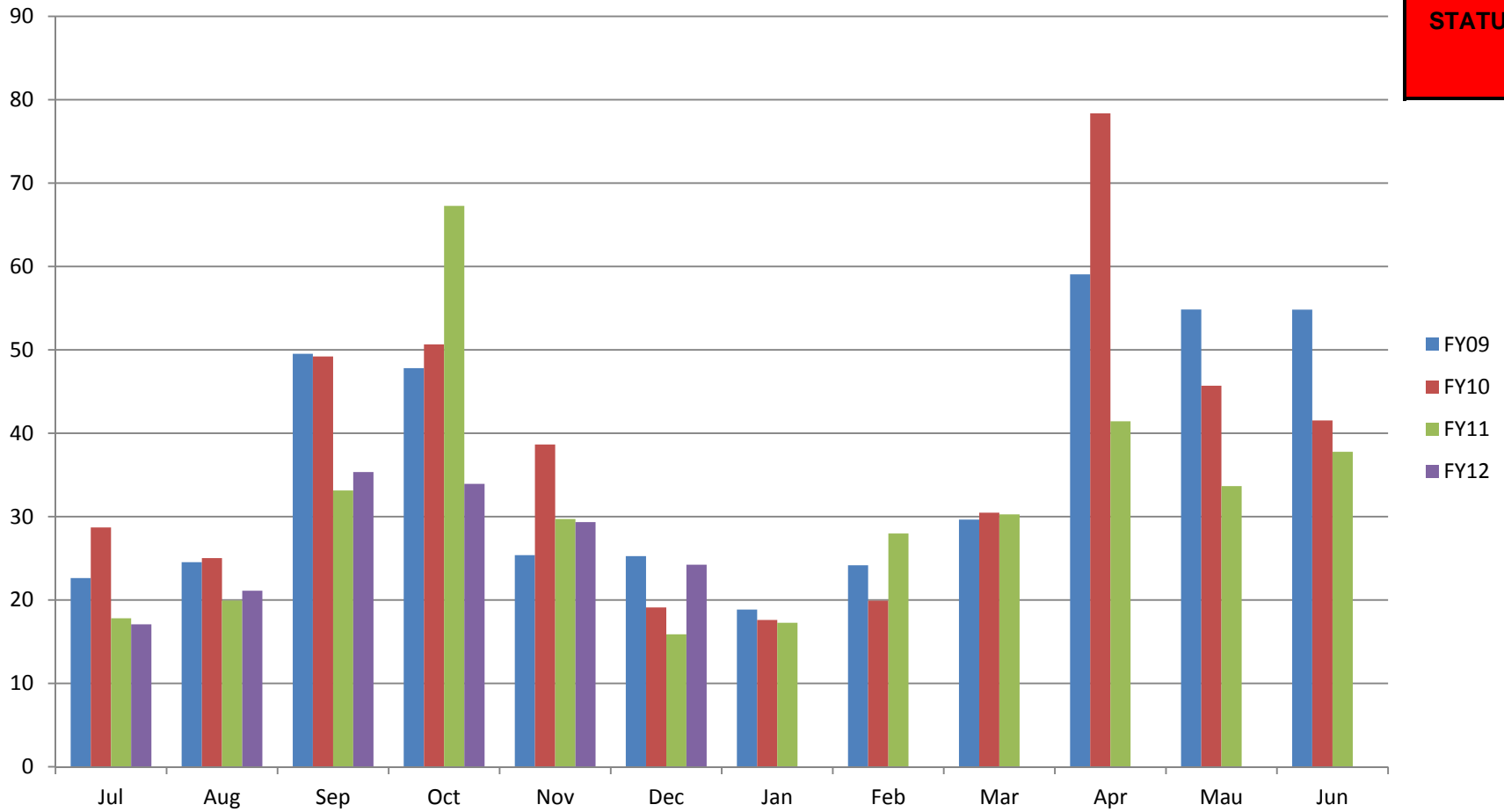


GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 30% of FY2015 (State Energy Guideline)

Lead Capital

STATUS

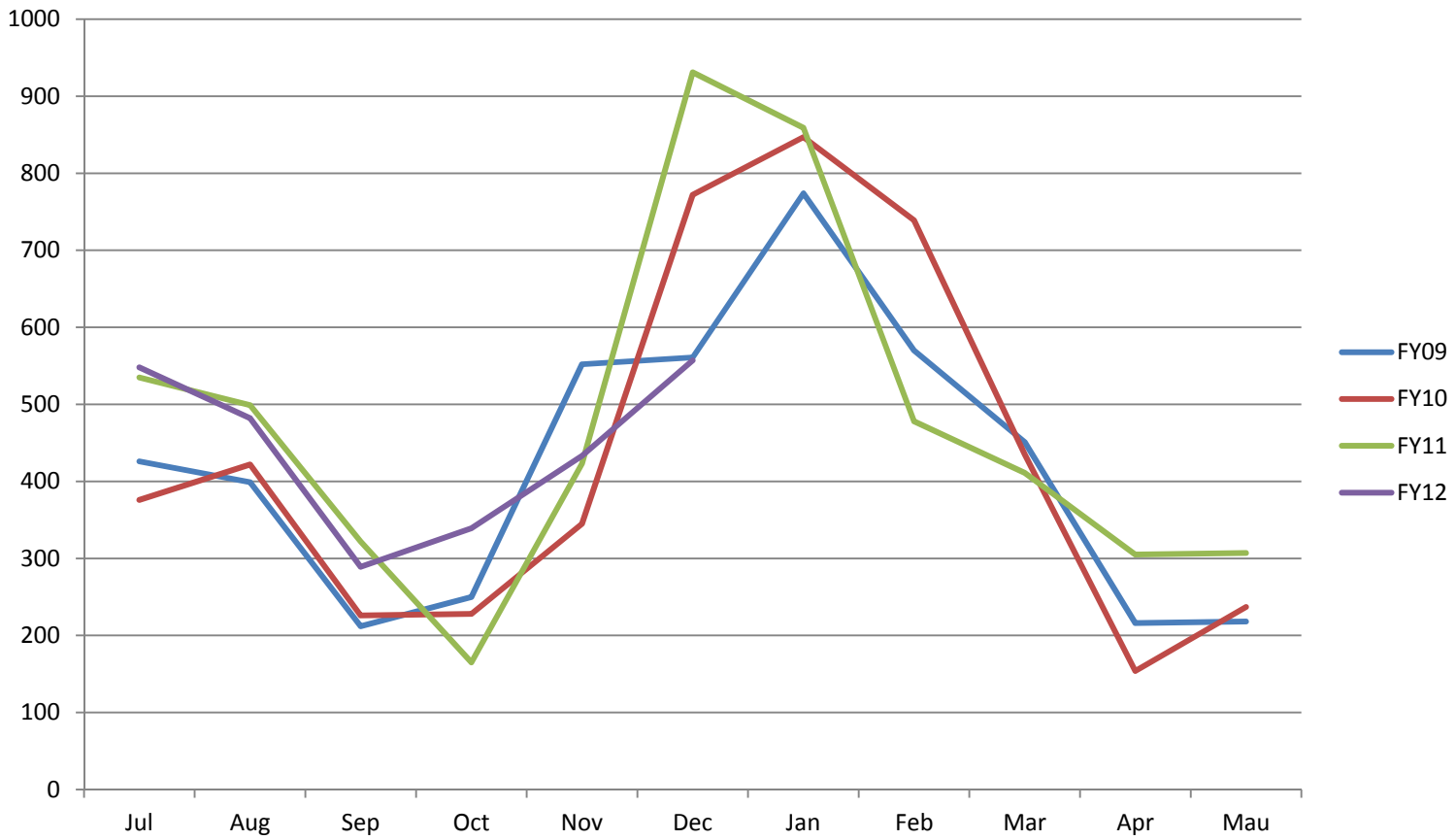


GOAL #6 – Promote Good Stewardship

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

Lead
Capital

STATUS



GOAL #6 – Promote Good Stewardship

Strategy **6.3** Conserve Natural Resources
Objective **6.3.1** Decrease Energy Usage by 30% of FY2015 (State Energy Guideline)

Lead
Capital

ACTION PLAN -ENERGY

STATUS

- **Actions Planned**
 - Complete Engineering and Zone coordination for energy operation.
 - Complete campus master plan for energy conservation.
 - Retro-commission Rowe

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - ESPC

STATUS

Energy Savings Performance Contract

- **Actions Planned**
 - Investment Grade Audit (IGA) submission to SCO
 - Finalize ECMs.

Facilities Management Strategic Planning Session – Second Quarter FY 2012

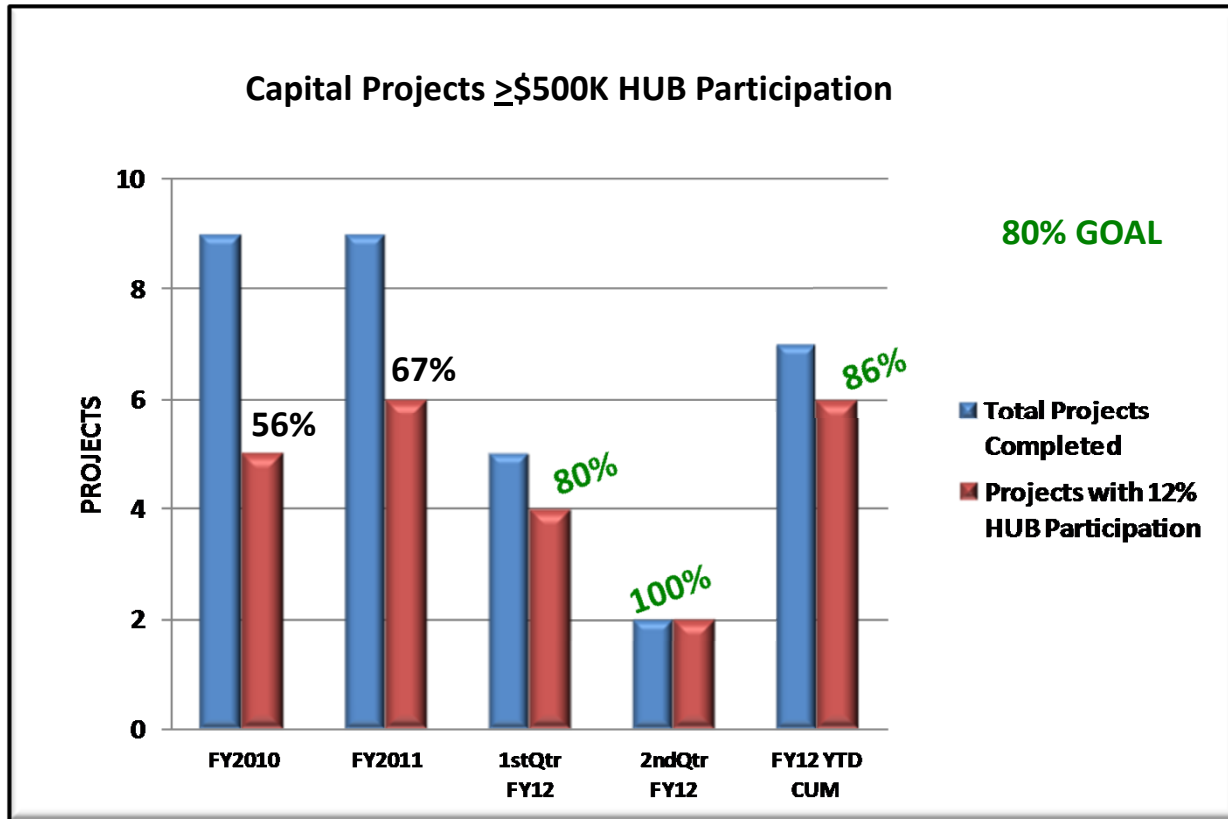
Lead
Capital

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



1stQtrFY12:

- Fire Sprinklers – Moore 18%
- Fire Sprinklers – Sanford 19%
- Parking Deck H – 6%*
- Prospector Renovation – 30%
- Residence Hall Phase 9 – 26%

2ndQtrFY12:

- Center City Classroom – 38.5%
- Motorsports II – 18.7%

STATUS

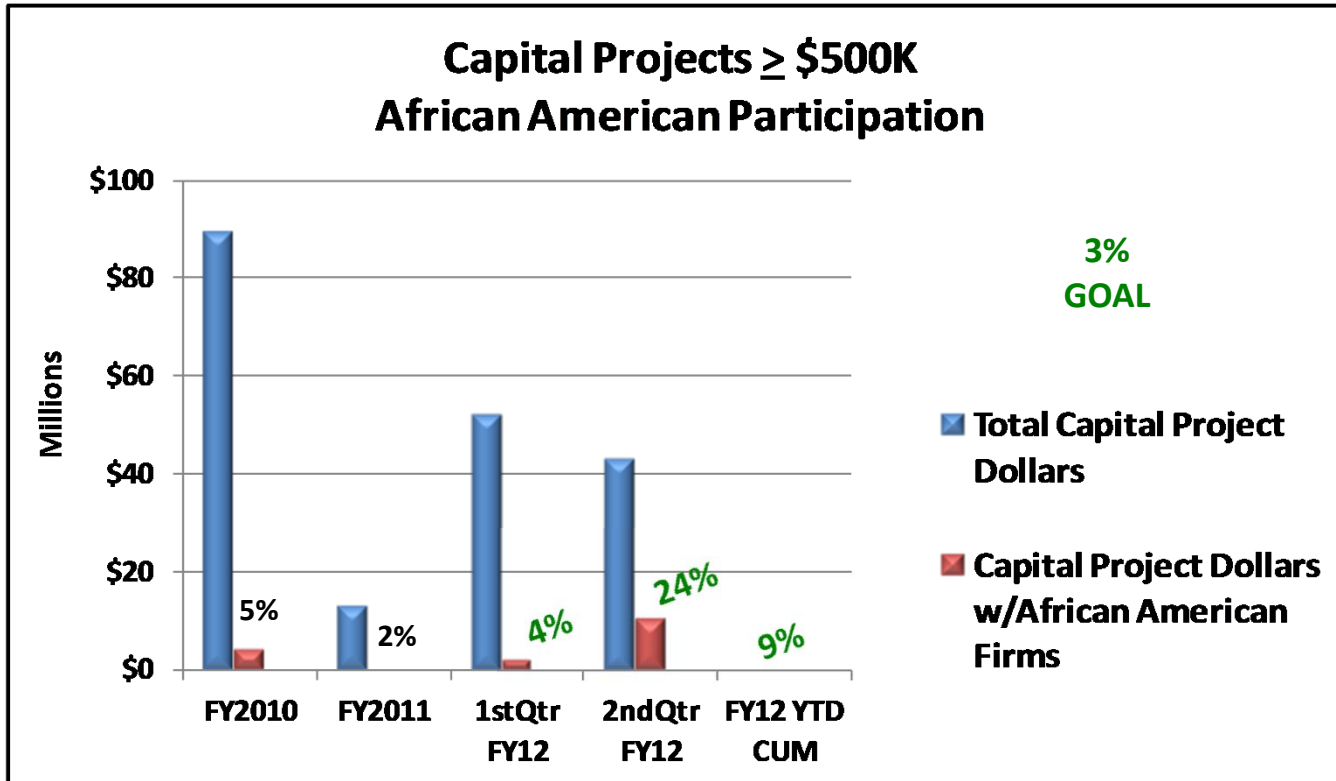
Facilities Management Strategic Planning Session – Second Quarter FY 2012

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



1stQtrFY12:
 Prospector Renovation – 17%
 Residence Hall Ph 9 – 3.2%

2ndQtrFY12:
 Center City Classroom – 26%

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2012

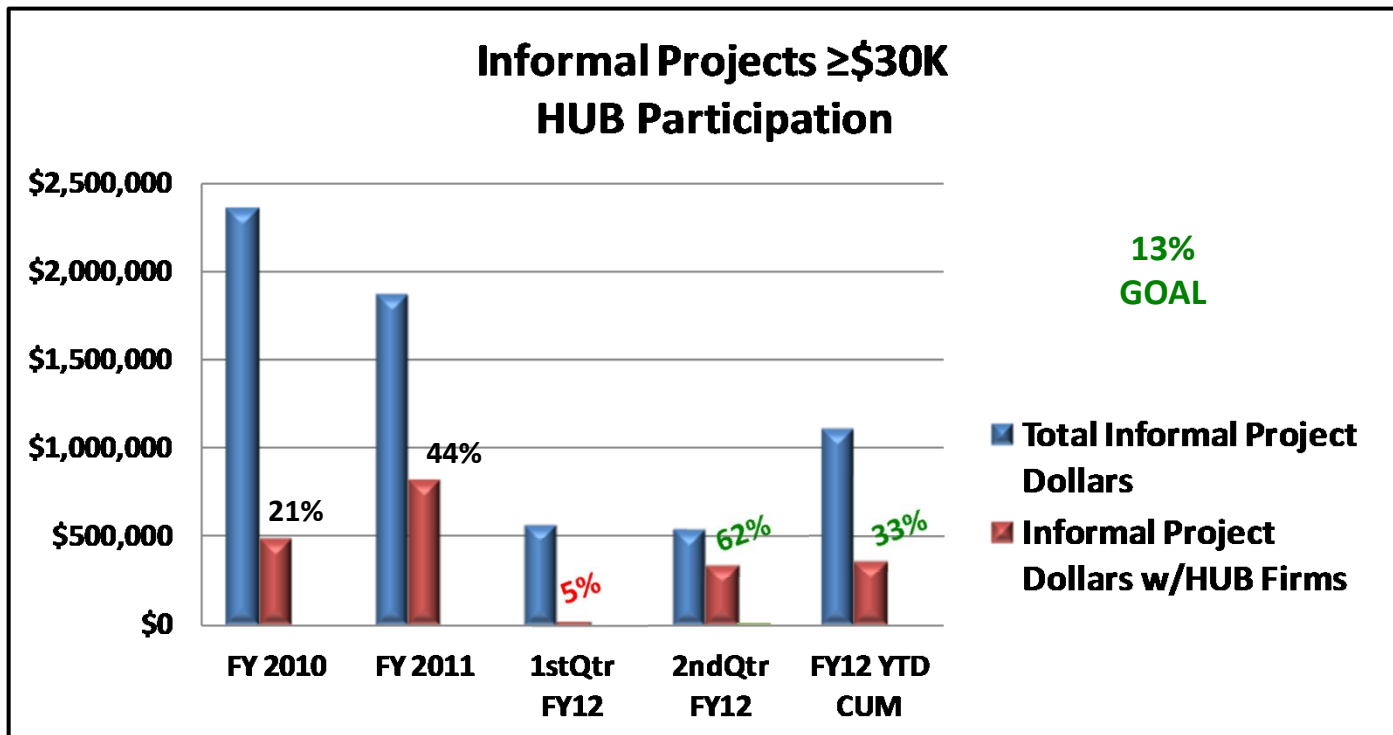
Lead
Capital

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



FY 2010:
 3.3% African American
 8% Hispanic American

FY 2011:
 29% African American

STATUS

GOAL #6 – Promote Good Stewardship

Strategy **6.5** Improve Historically Underutilized Business (HUB) Participation

Lead
Capital

ACTION PLANS FOR IMPROVEMENT

- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and “*Good Faith Effort*” documentation to ensure compliance. Hold CM firms accountable!

Continue –

- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms
- Program Compliance
- Education & Outreach

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 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.**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

GOAL # 6 – Promote Good Stewardship

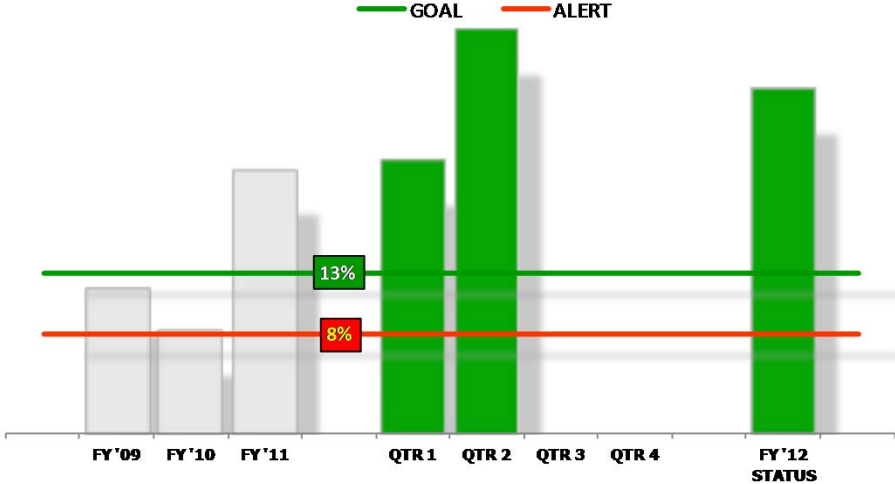
Strategy 6.5 Improve Historically Underutilized Business Participation
 Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Financial Perspective

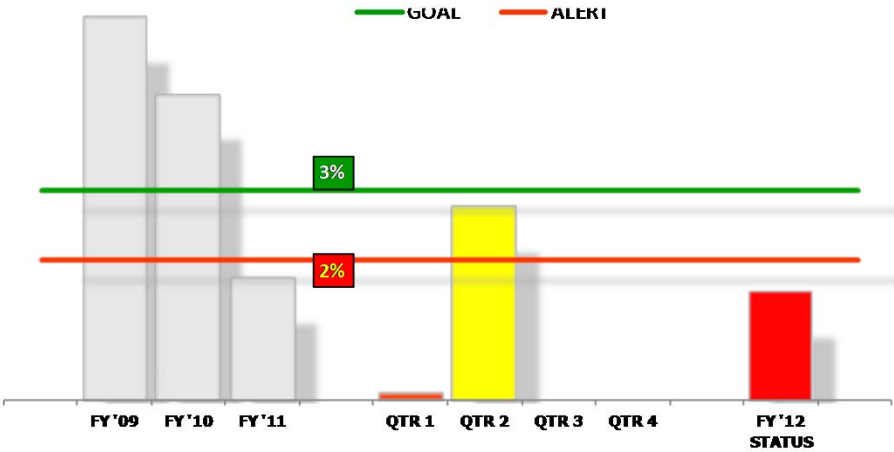
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 1,404,456	\$ 163,049	11.6%
FY '10	\$ 2,626,647	\$ 214,381	8.2%
FY '11	\$ 6,244,956	\$ 1,324,607	21.2%
QTR 1	\$ 798,506	\$ 175,620	22.0%
QTR 2	\$ 946,904	\$ 308,402	32.6%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '12 STATUS	\$ 1,745,410	\$ 484,022	27.7%



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	\$ 1,404,456	\$ 75,961	5.4%
FY '10	\$ 2,626,647	\$ 113,196	4.3%
FY '11	\$ 6,244,956	\$ 107,076	1.7%
QTR 1	\$ 798,506	\$ 700	0.1%
QTR 2	\$ 946,904	\$ 25,850	2.7%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '12 STATUS	\$ 1,745,410	\$ 26,550	1.5%





Balance Score Card

Facilities Management FY 2012 Balanced Scorecard

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Customer To acheive our vision, how must we view & treat our customers?	Work Request Process	1.3.1	Reactive Maintenance work requests	<=8%	55.32%				
		1.3.2	Reactive Work Request Cycle Time by 5%	<=3 hrs	No data				
	Housekeeping Processes	1.4.1	Achieve OPI level of 98% of buildings	95%	94%				
	Improve Process Reliability	1.5.3	Reduce Unscheduled HV outages by 10%	<=0.0069	0.000%				
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%	0.29%				
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	98.3%				
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	100.0%				
		2.2.3	Combined with 2.2.2						
		2.2.4	All IP construction meets BOD	90%	100.0%				
		2.2.5	Combined with 2.2.4						
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 250	27.5%	Annual	Annual	Annual	Annual
		3.4.1	90% Cap Construction Projects on Schedule	90%	71.0%				
	Enhance customer satisfaction	4.1.1	Improve: Overall satisfaction rating	85%	No data	Annual			
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%	No data	Annual			
		4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-10% or <133	160				
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	100.0%				
		4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	No data				
	4.1.6	Improve: Capital Projects rating (sat./very sat.) - constr	85%	No data					
	4.1.7	All measures positive on customer sat survey	<2% S Dis; <5% Dis or Neu	No data					
Financial To financially sustain our mission what	Manage Budget	6.1.1	Balanced Budget @ End of Year	100%		Annual FY 11			Annual FY 12
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%	\$450K	Annual FY 11			Annual FY 12
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5%"					
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"					
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5%"					
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"					
		6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	\$233,088				
Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	23%					
	6.2.2	C&D Recvcline Capital Proiects	50%	85%					



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).

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
F. O.

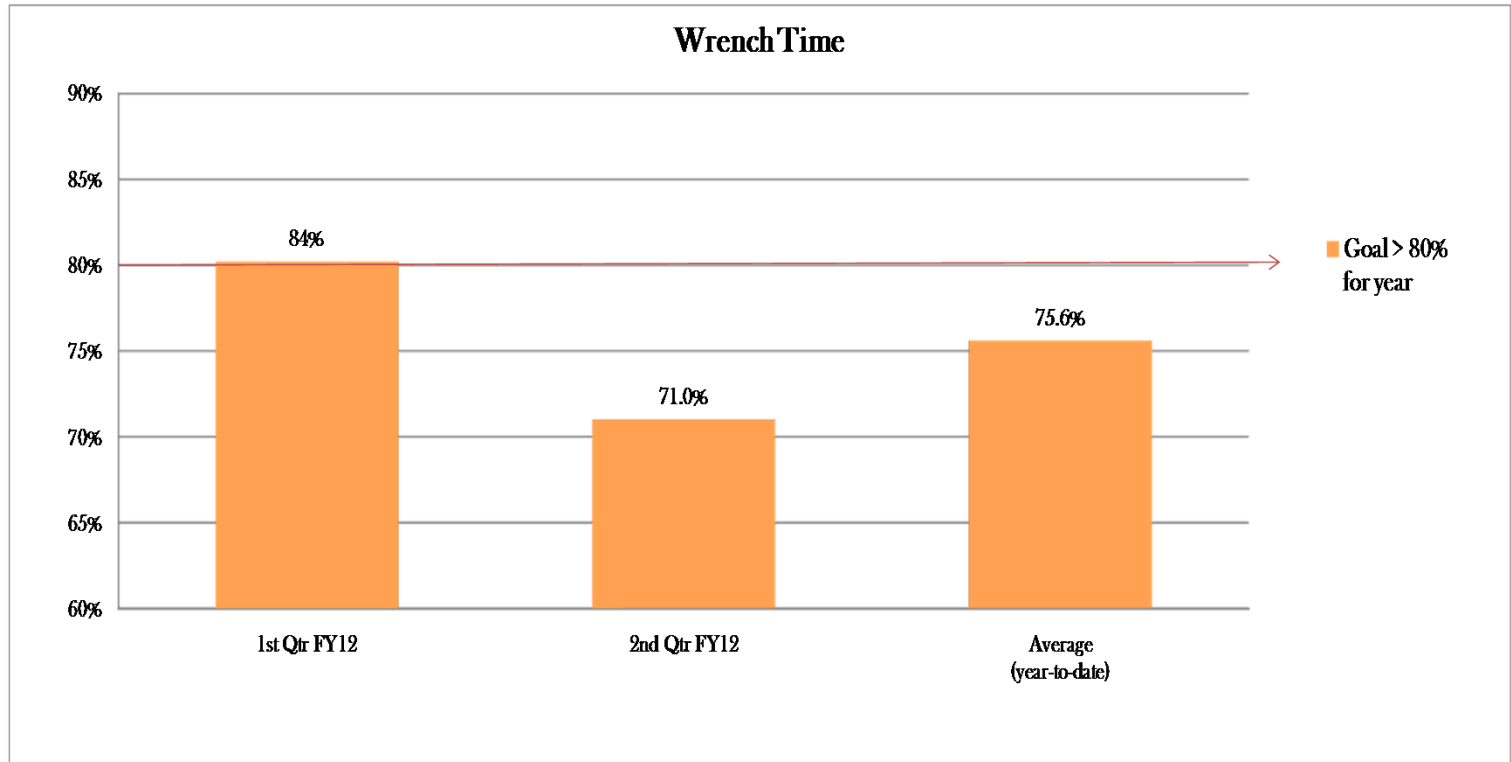
GOAL #1 – Improve maintenance and operations of the Campus

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). Stock sales \$’s were increased by 37%
 - 2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
 - 3 – Monitor and reduce Req to PO processing time (decreased 48% to 8.58 hrs)
 - 4 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
F. O.

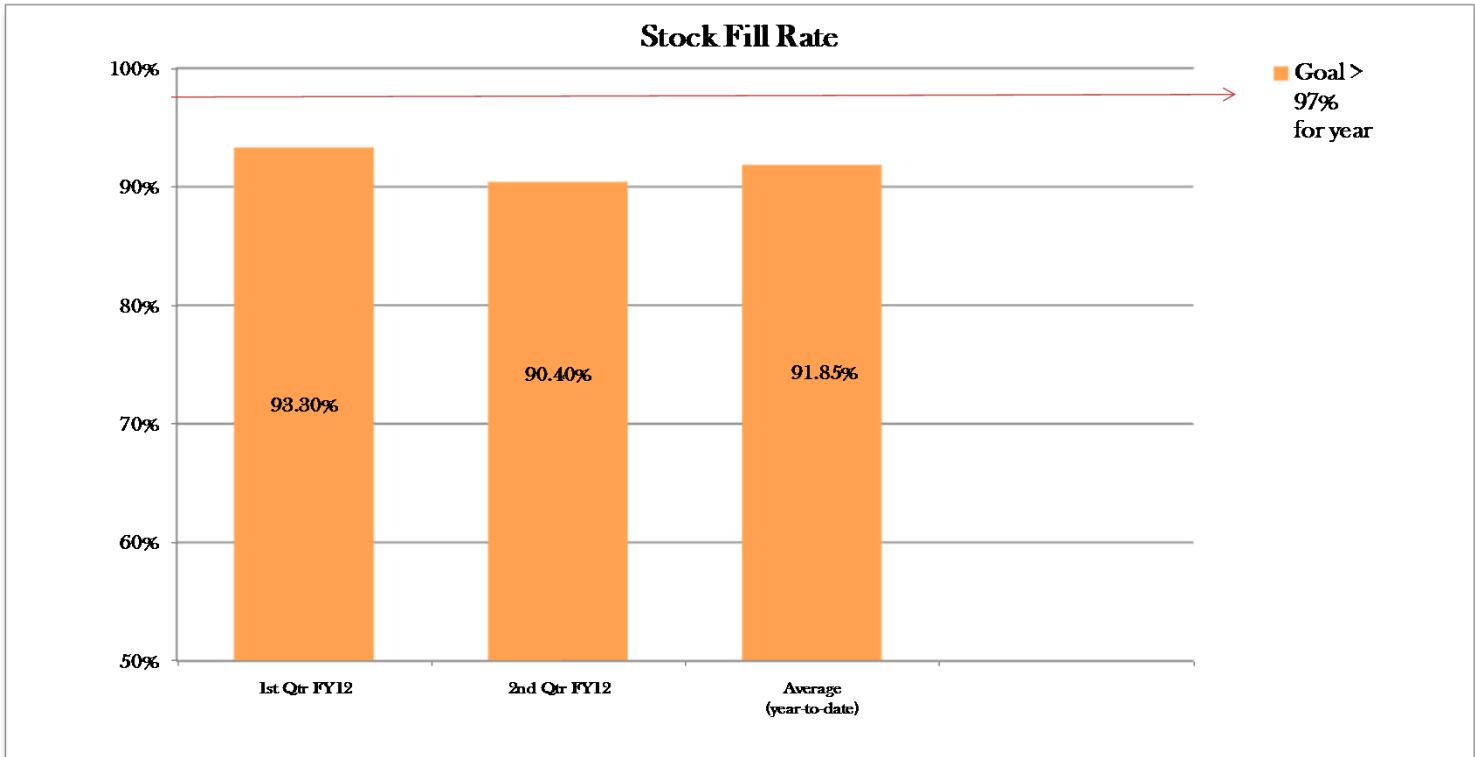
GOAL #1 – Improve maintenance and operations of the Campus

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 – Second Quarter FY 2012

Lead
F. O.

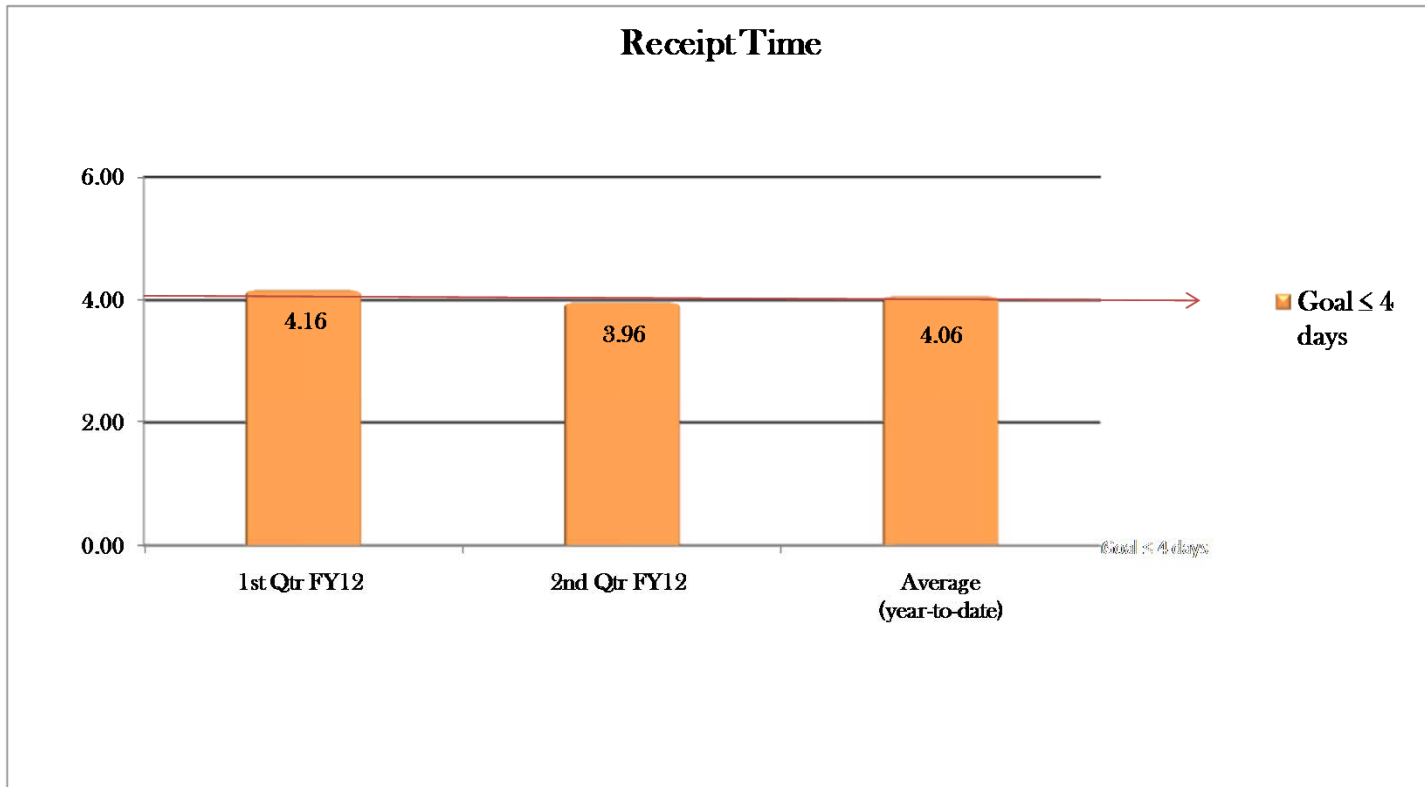
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.2 Improve Logistics Efficiency
Objective: 1.2.2 Reduce Average Non-stock Requisition to Receipt Time to 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. 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.
 - 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 to bring the new buildings online with the network.

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
F. O.

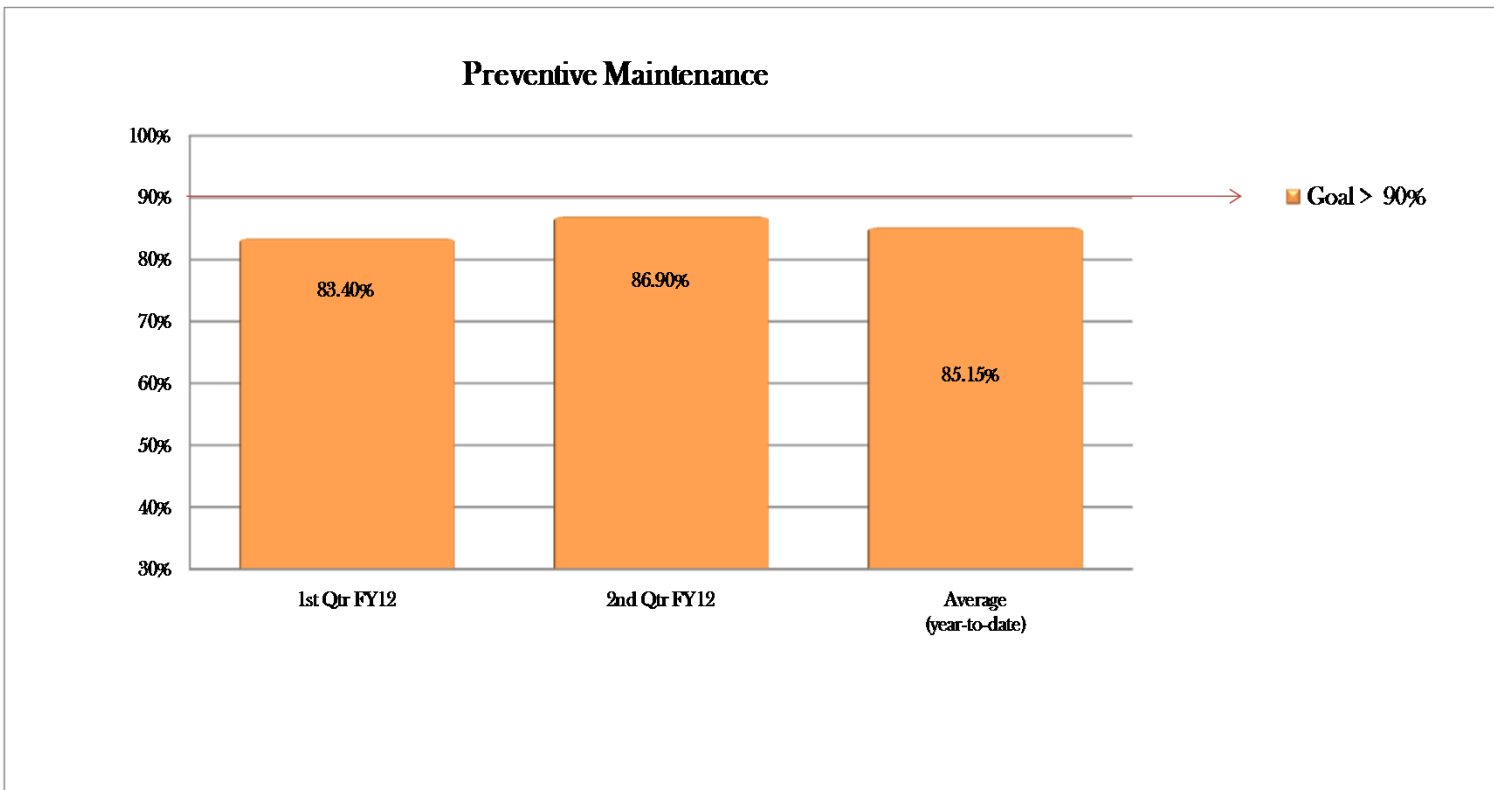
GOAL #1 – Improve maintenance and operations of the Campus

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 – Second Quarter FY 2012

Lead
F. O.

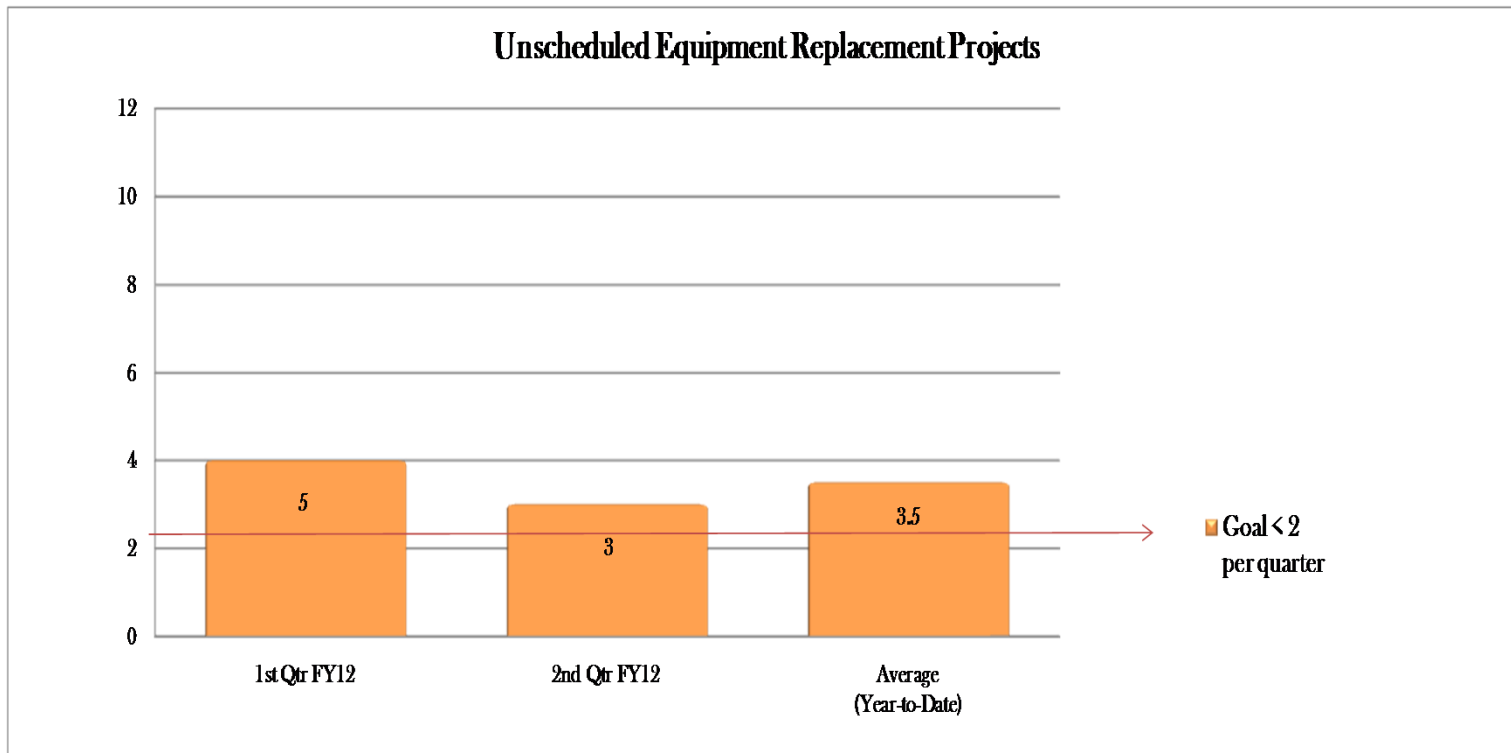
GOAL #1 – Improve maintenance and operations of the Campus

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

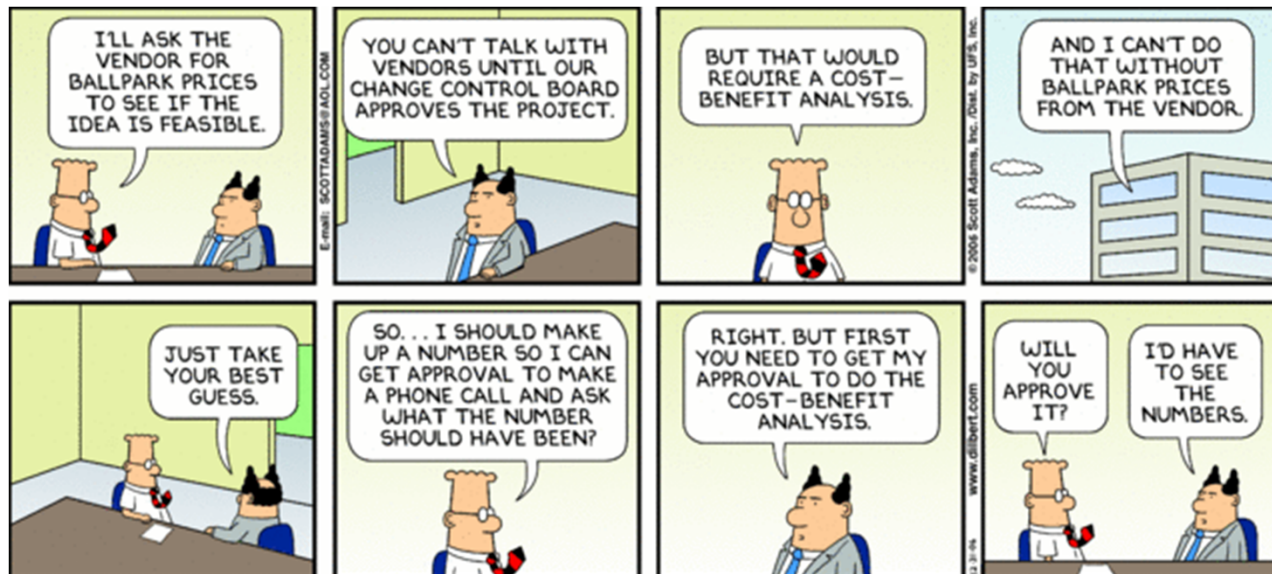
Balanced Scorecard Category: Internal Business Process



STATUS

FM 5YP Prioritized Projects – FY12

1. Capital Renewal/Deferred Maintenance (CRDM) Phase 2
2. Enterprise Data Assistant (EDA) Recycling Project
3. Enterprise Data Assistant (EDA) FO-WR Project
4. ARCHIBUS Web Central Space Audit – Drawing Updates
5. ARCHIBUS - Equipment and PM Management
6. BAS Critical Alarms – Phase One
7. ARCHIBUS Key Management – Phase Two
8. Capital Funds Phase Two – On **HOLD**
9. Motor Fleet
10. Parking
11. SAC Billing
12. Facilities Condition Assessment Program (FCAP2)



Facilities Management Strategic Planning Session – Second Quarter FY 2012

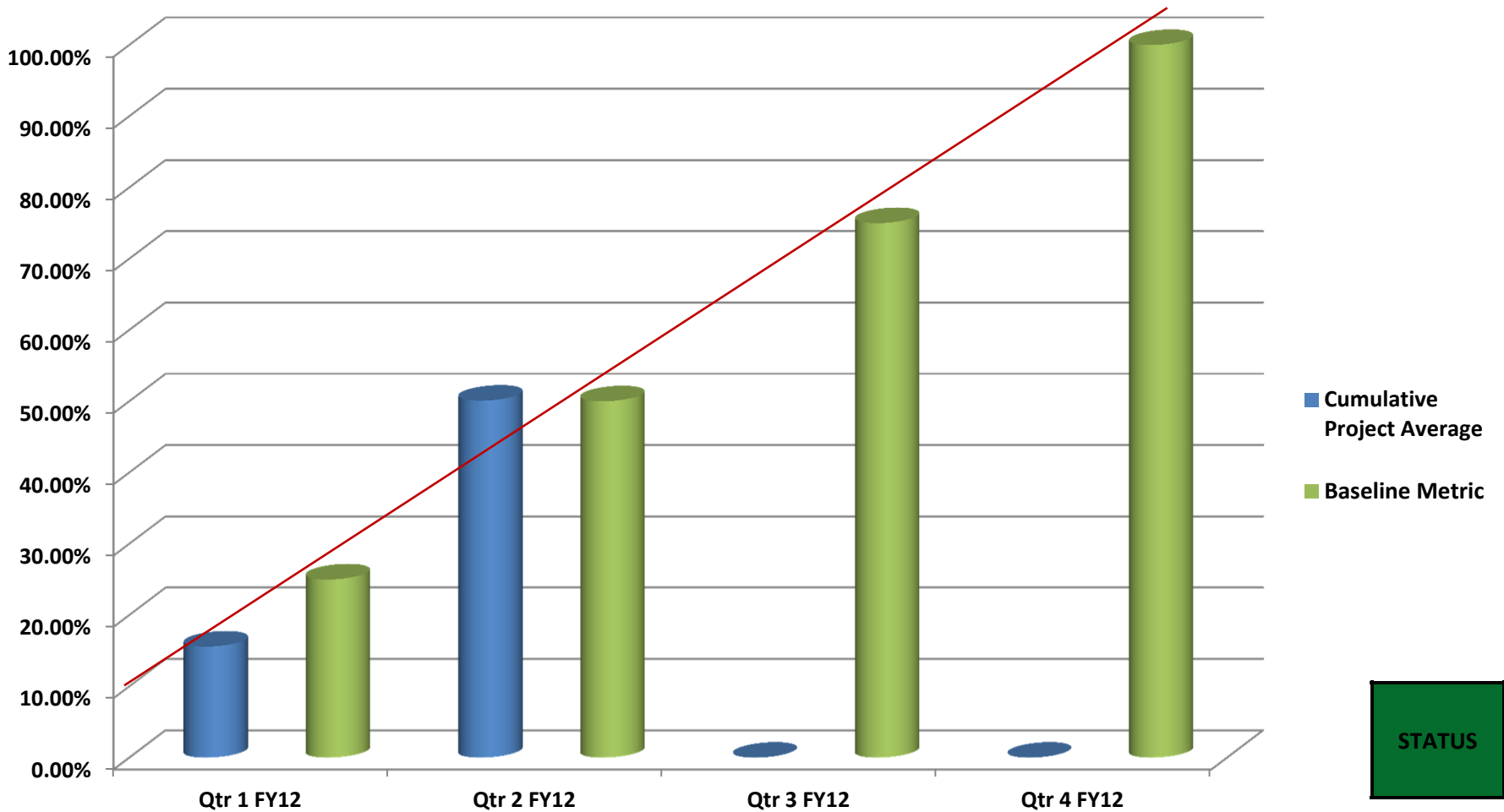
Lead
FIS

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



Facilities Management Strategic Planning Session – Second Quarter FY 2012

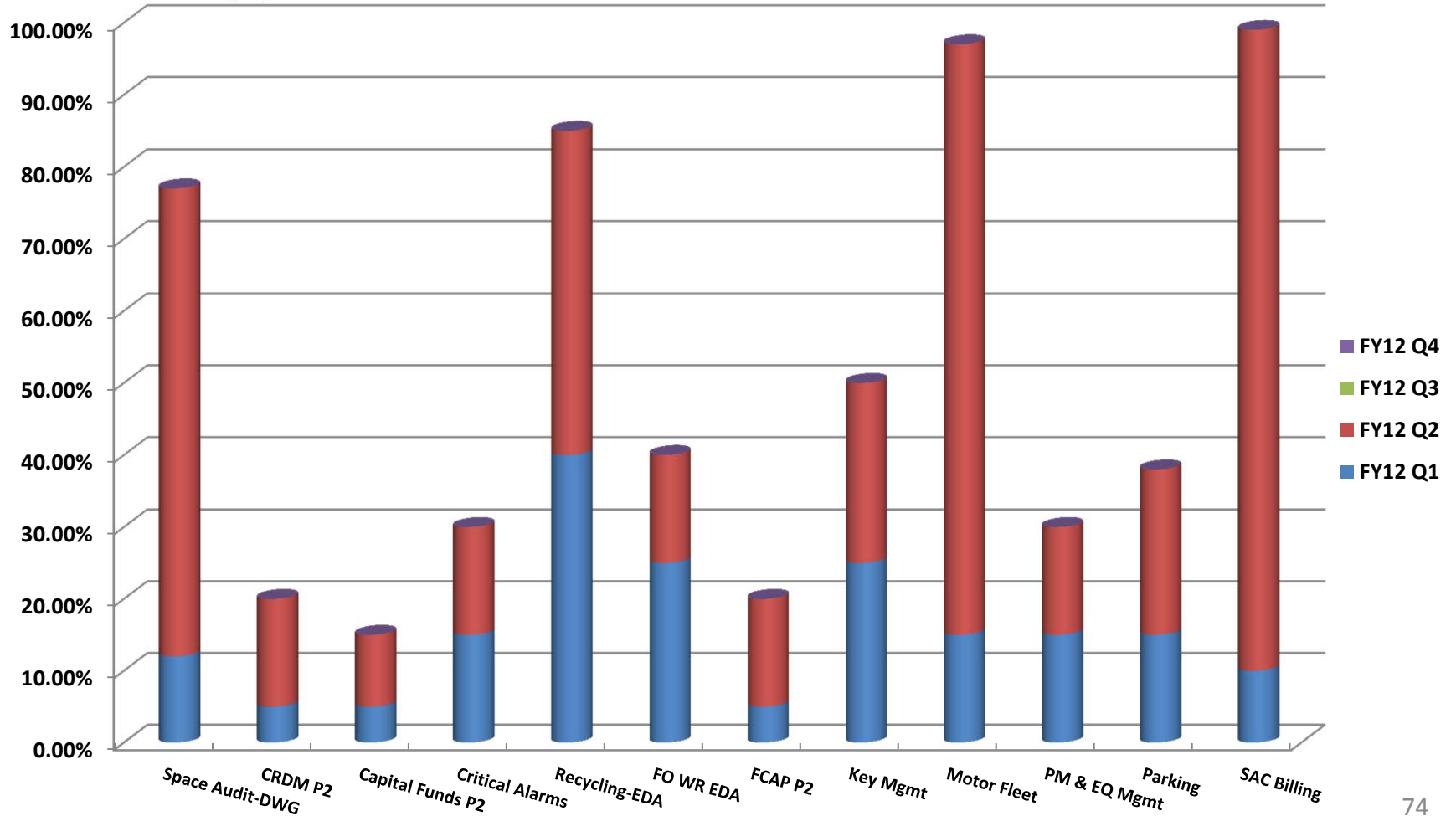
Lead
FIS

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

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 Planned:

1. Enterprise Data Assistant (EDA) FO-WR Project – Startup new pilot using updated program based on approved business rule changes.
2. ARCHIBUS Equipment and PM Management – Begin equipment data updates to match new data set standards. Complete development for user testing.
3. BAS Critical Alarms – Complete development for Periscope and ARCHIBUS and conduct testing w/ Bio.
4. ARCHIBUS Key Management Phase Two – Perform pilot with EPIC building.
5. Facilities Condition Assessment Program (FCAP2) – Finalize schedule, Collect requirements and obtain approval for development to begin.

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Architectural
Planning

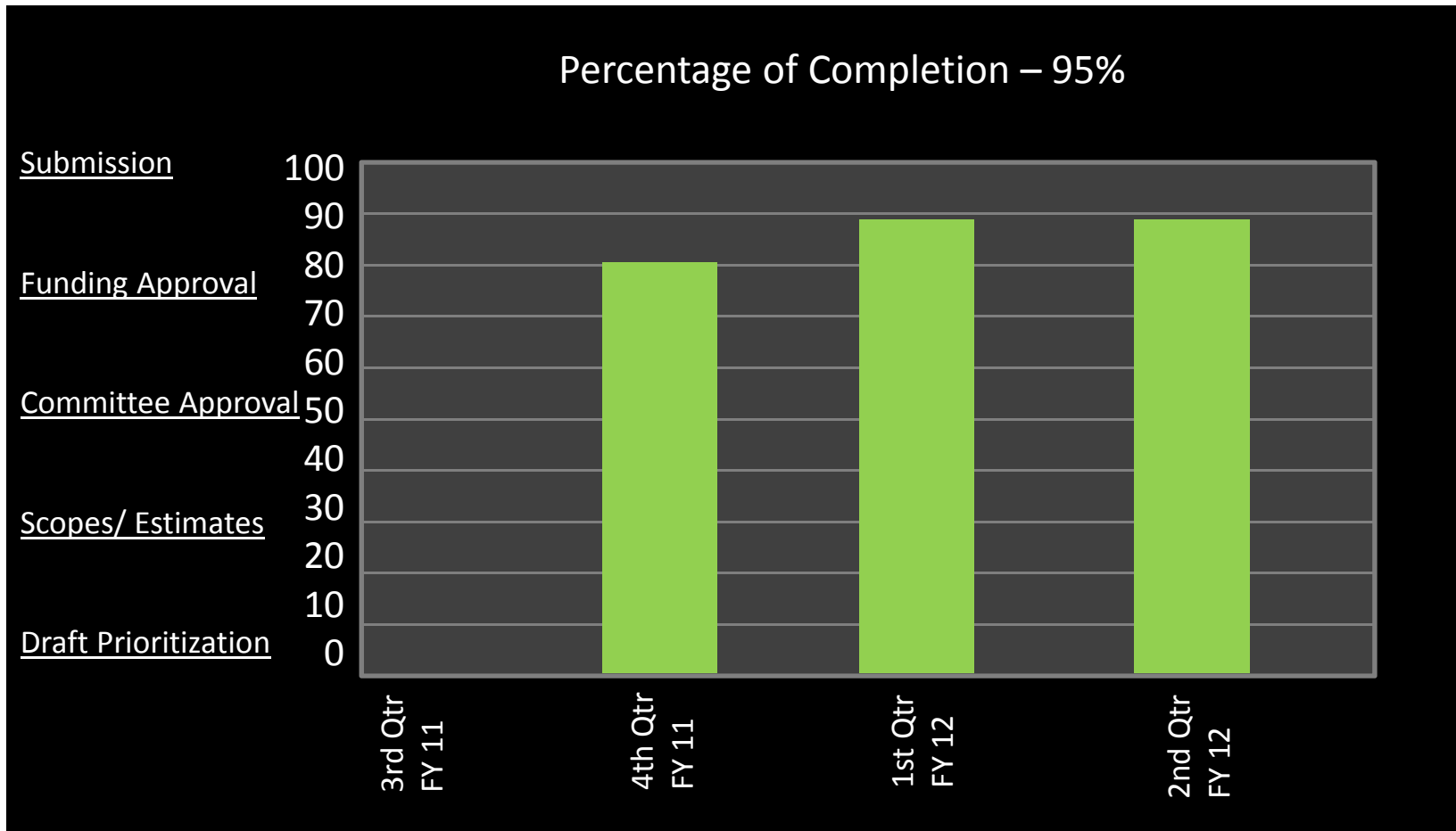
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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



Status

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)**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Architectural
Planning

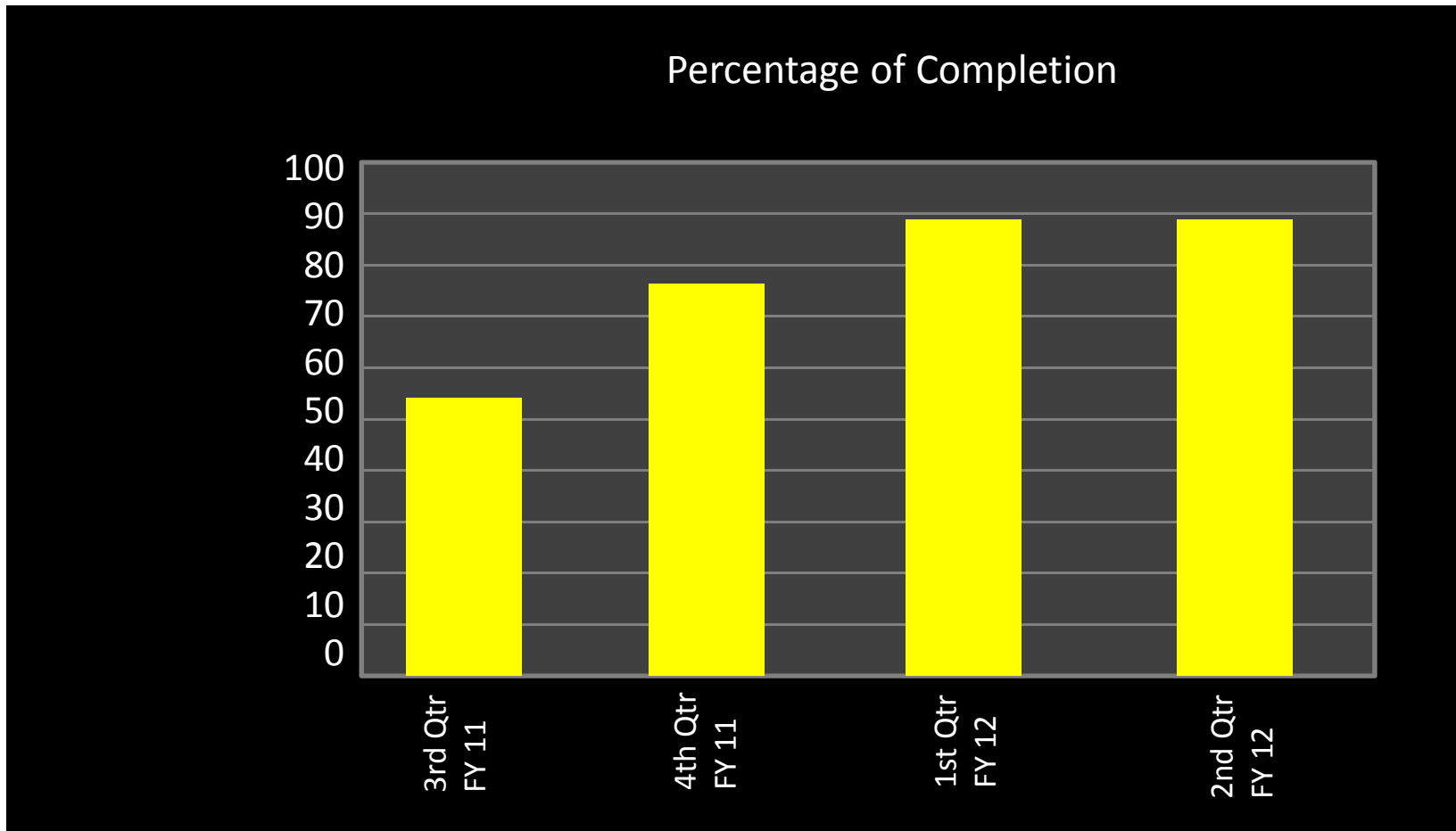
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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



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.

Lead
Architectural
Planning

ACTION PLAN

- **Actions Planned:**
 - **SA Audit to begin in January**
 - **Contact Athletics re: audit**
 - **Spot inspections/ checks continue**
 - **Continue updating drawings**
 - **Continue coordination with Steve Coppola.**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Architectural
Planning

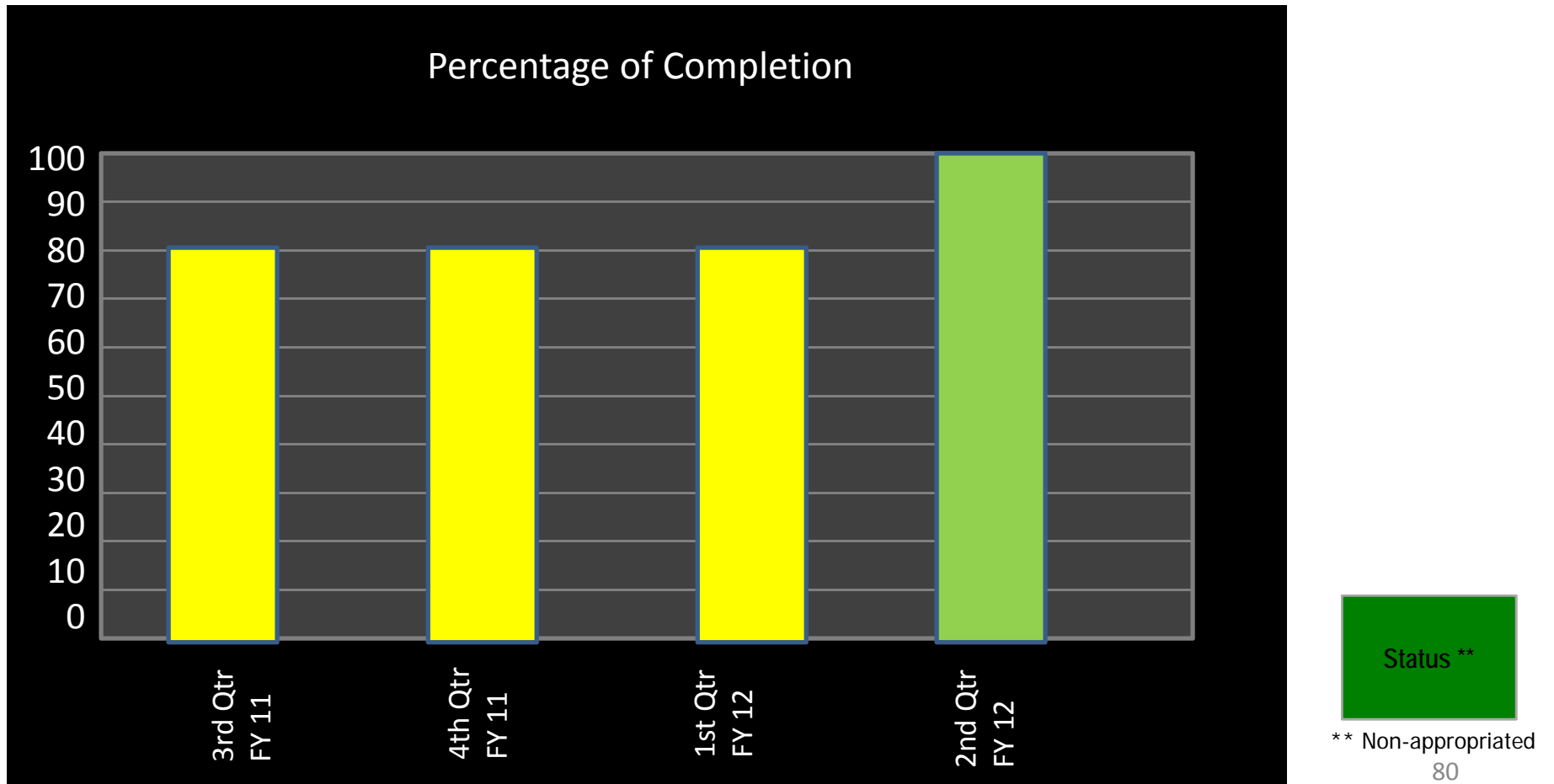
GOAL #3 – Deliver New Facilities that Support the University's Mission

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



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, 2011

Lead
Architectural
Planning

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:**
 - **Atkins Library:**
 - Awaiting further info from Library Staff.
 - Looking for a solution to the Broadcast Services space issue.
 - **Obtain guidance on direction of CID in order to determine new set of needs.**
 - **Begin work on CID projects for hand-off to Capital.**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead Capital

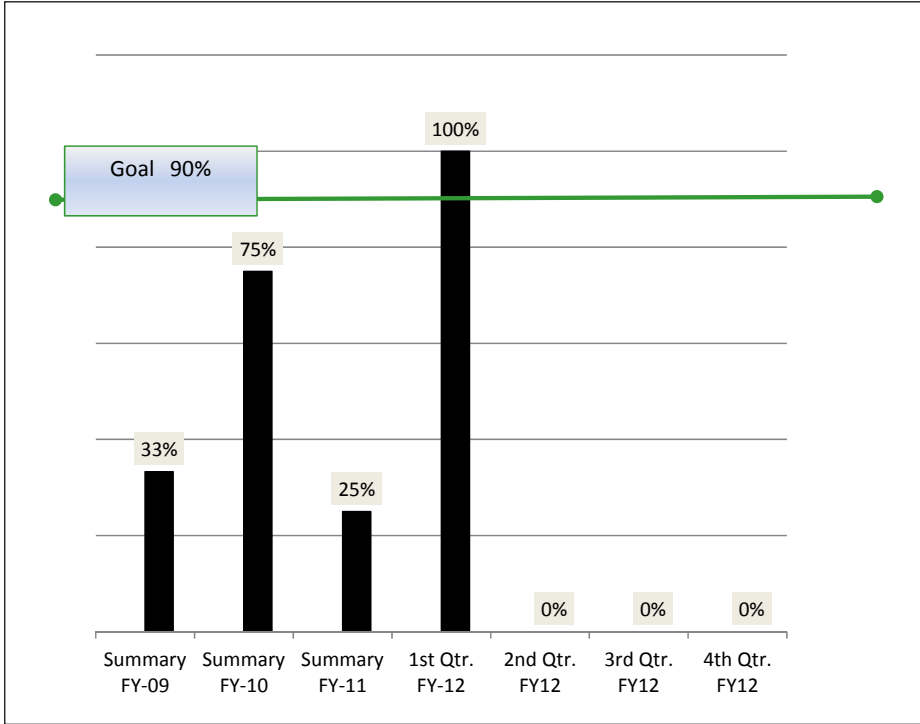
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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

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%
1st Qtr. FY-12	2	2	0	100%
2nd Qtr. FY-12	3	n/a	n/a	n/a
3rd Qtr. FY-12	n/a	n/a	n/a	n/a
4th Qtr. FY-12	n/a	n/a	n/a	n/a



Objective for 2nd Quarter is n/a%
 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 **3.3.1** 90% of designers under contract within 120 days of Project posting in CAPSTAT

ACTION PLAN

- 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.

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Capital

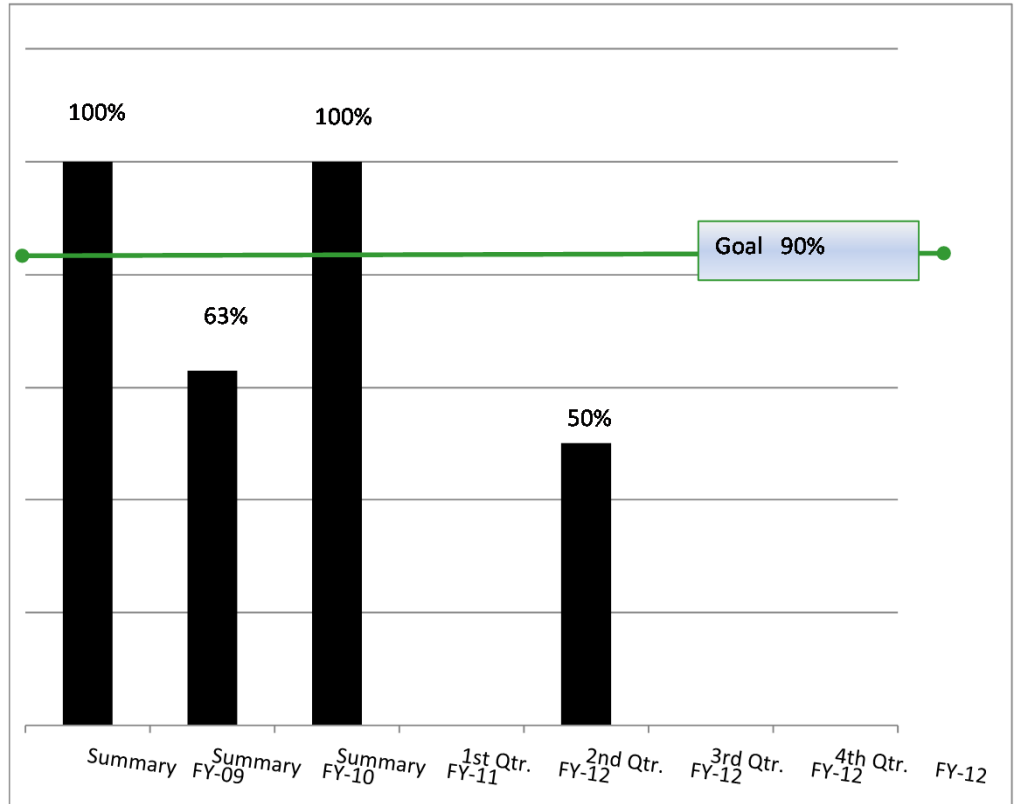
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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%
1st Qtr. FY-12	0	0	n/a
2nd Qtr. FY-12	1	1	50%
3rd Qtr. FY-12	n/a	n/a	n/a
4th Qtr. FY-12	n/a	n/a	n/a



Objective for 2nd Quarter is 50%
Year to date is 50%

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
 - 1.
- 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 – Second Quarter FY 2012

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: Internal Business Process

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%	1
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%	n/a
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%	n/a
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%	n/a
Res. Hall Ph XII	\$3,400,667			0.0%	0.0%	n/a
Res. Hall Moore & Sanford	\$503,000	\$435,000	\$441,015	-13.5%	1.4%	1
Res. Hall Scott	\$265,817	\$210,000	\$210,000	-21.0%	0.0%	1

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

Objective is 90%

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

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

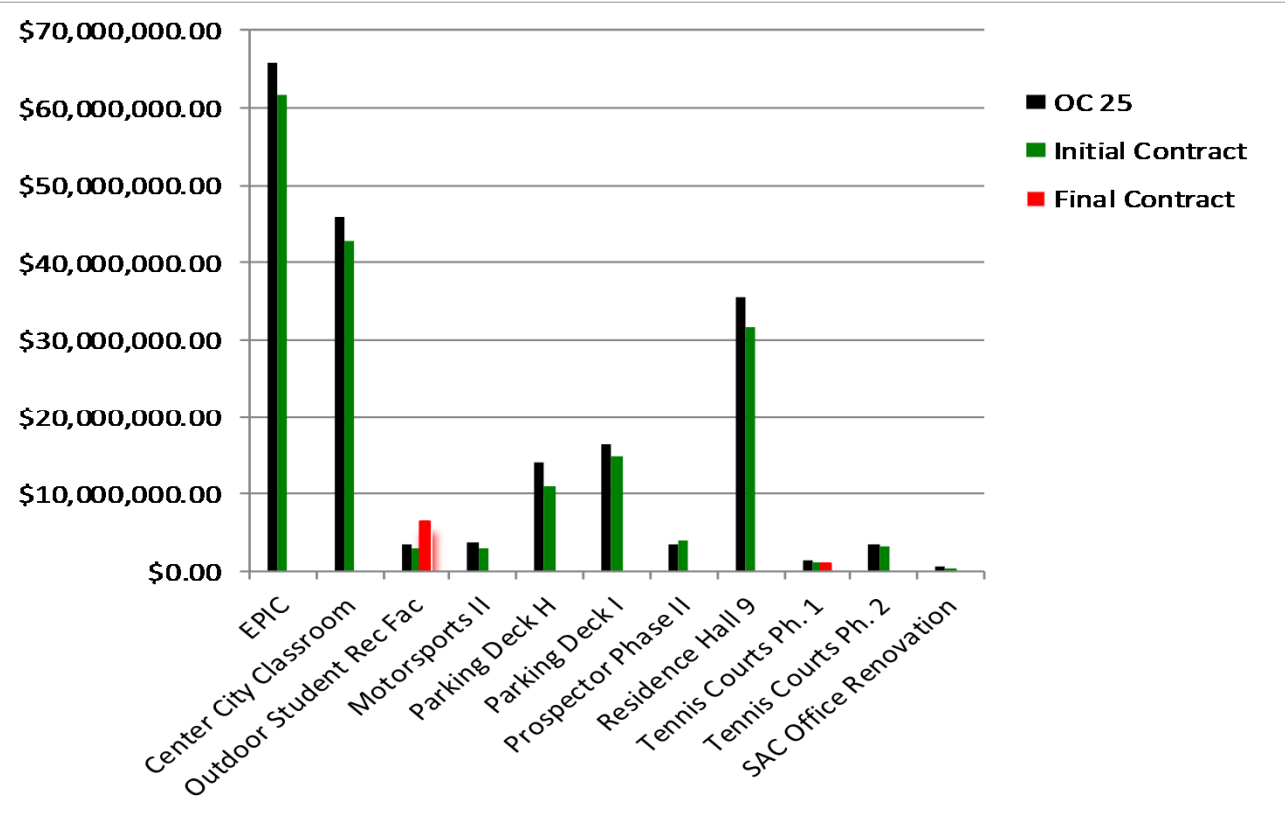
Facilities Management Strategic Planning Session – Second Quarter FY 2012

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



Status

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

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% (contingency)

Lead
Capital

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 – Second Quarter FY 2012

Lead
Architectural
Planning

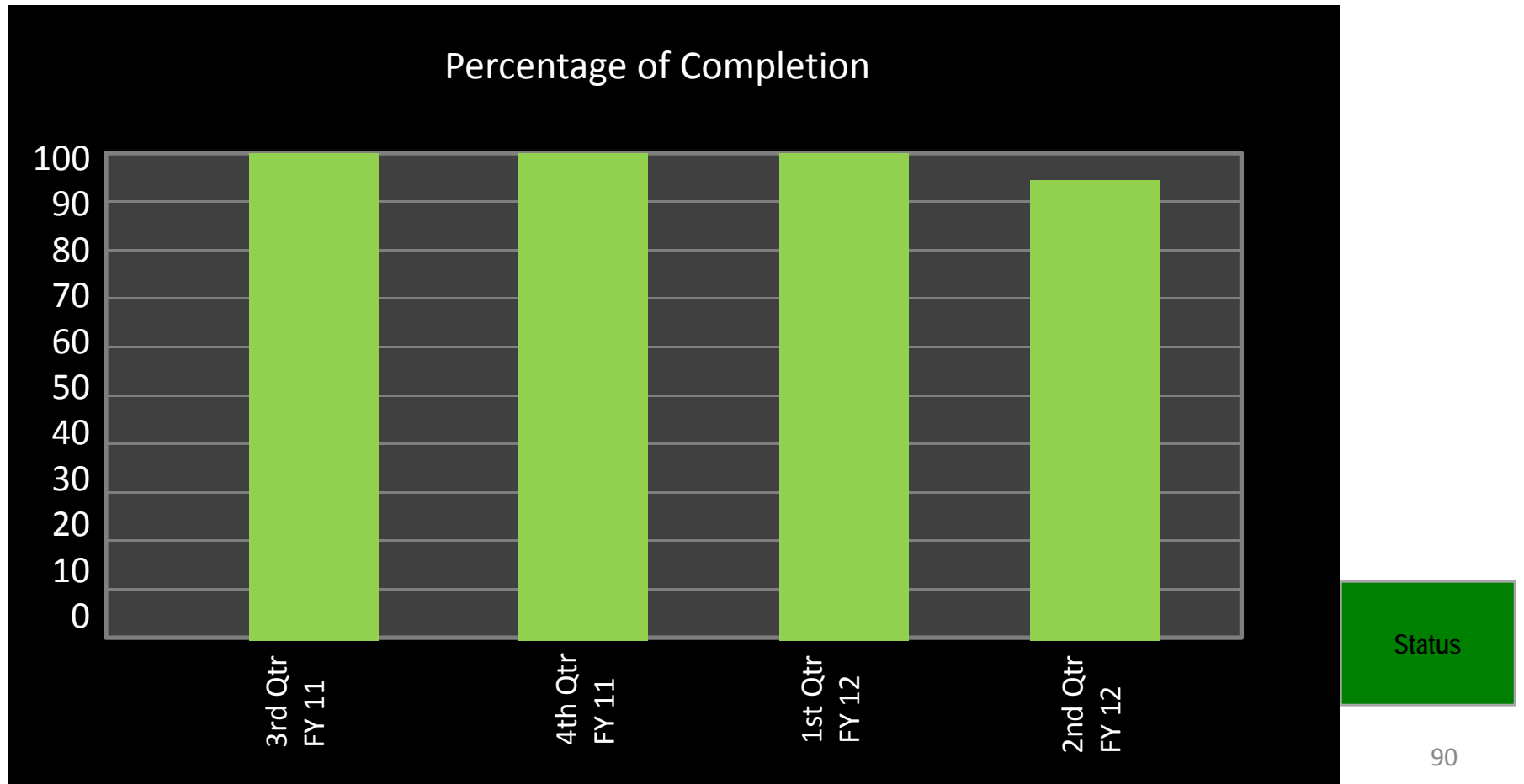
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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 3.5: 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.**

Facilities Management Strategic Planning Session – Second Quarter FY 2012

Lead
Architectural
Planning

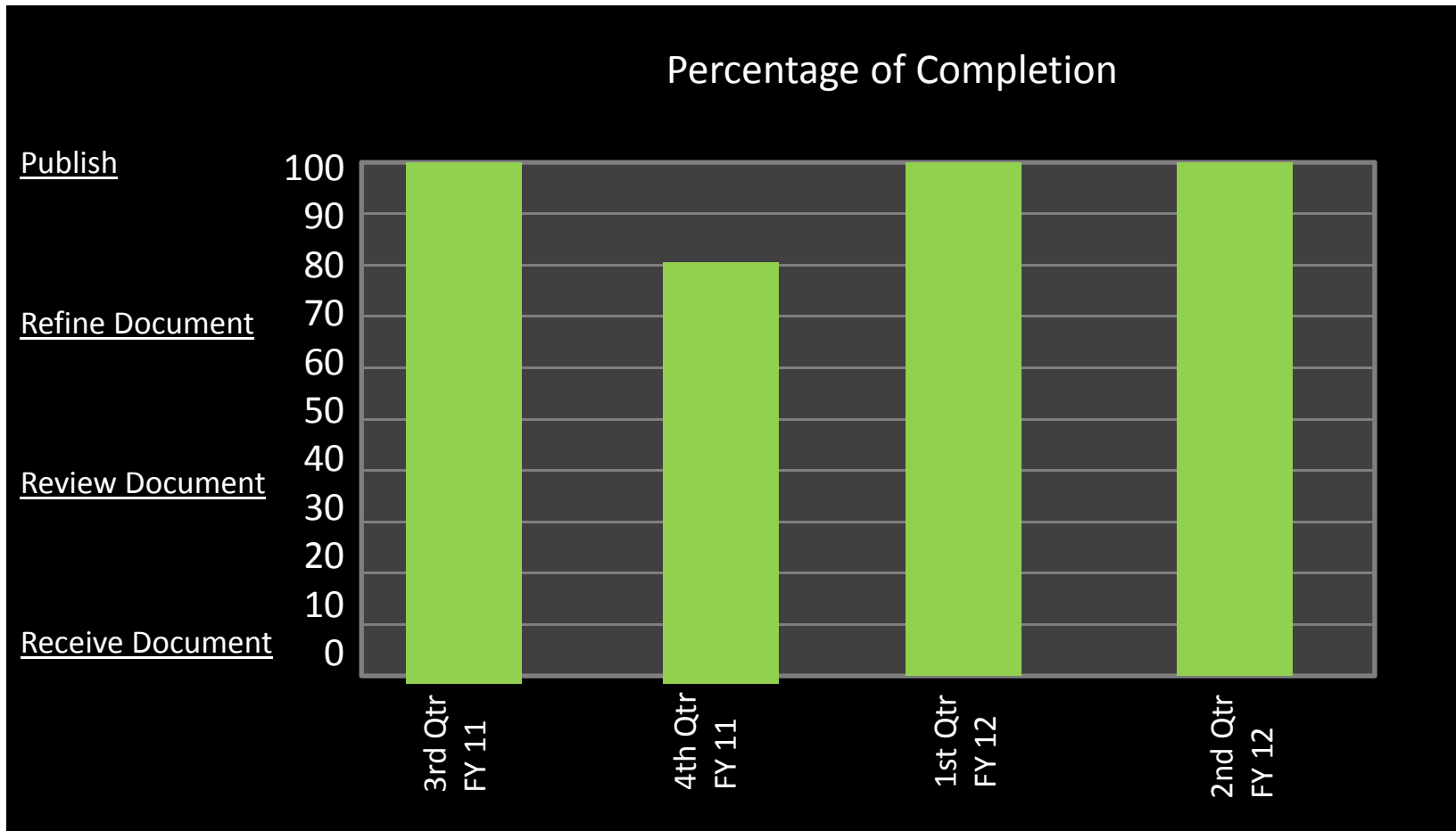
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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



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.

Lead
Architectural
Planning

ACTION PLAN

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



Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

Facilities Management FY 2012 Balanced Scorecard

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Internal Processes <i>To satisfy and delight our customers, which operational processes must we excel in?</i>	Labor Availability	1.1.1	Increase Wrench Time	>80%	75.60%	Green	Yellow		
	Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	91.85%	Red	Red		
	Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	4.06	Green	Green		
	Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	85.15%	Yellow	Red		
		1.5.2	Reduce Unscheduled equipment repl projects by 15%	<2	3.50%	Red	Red		
	Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%			Green		
		2.3.1	80% of Existing Projects Documented and Input into the CRDM by _____	80%	90%		Green		
	Master/Project Planning Process	3.1.1	100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.	100%	90%	Yellow	Yellow		
		3.2.1	100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by end of FY12	100%	100%	Yellow	Green		
	Capital Project Administration	3.3.1	Designers Under Contract w/in 120 days of Posting in CAPSTAT	90% w/in 120	n/a	Green	Green		
		3.3.2	90% of Designs Complete by Scheduled Comp. Date	90%	50%		Red		
		3.3.3	90% of Designs w/in Design Budgeted Fee	90%	90%		Green		
		3.4.1	90% of Capital construction Projects Completed on Time	90%	no data				
		3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%			Yellow		
	3.5.1	80% of Infrastructure Projects Integrated into Capital Construction Project Scopes	80%	95%	Green	Green			
	3.6.1	80% of Revisions Integrated into the Design and Construction Manual.	80%	100%	Green	Green			



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

- Experiencing delays across the board in processing due to Campus HR’s new HRMM (People Admin) implementation; To assist, in some cases, we have temporarily been doing actual keying of paperwork for Supervisors, Managers, and Directors (new positions). We have also had individual meetings to help explain the process. Campus HR has also scheduled meetings to go through the process. As more guidance on process is obtained from Campus HR, we plan to pass this on.
- 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 – 2nd Quarter FY 2012

Lead
FBO

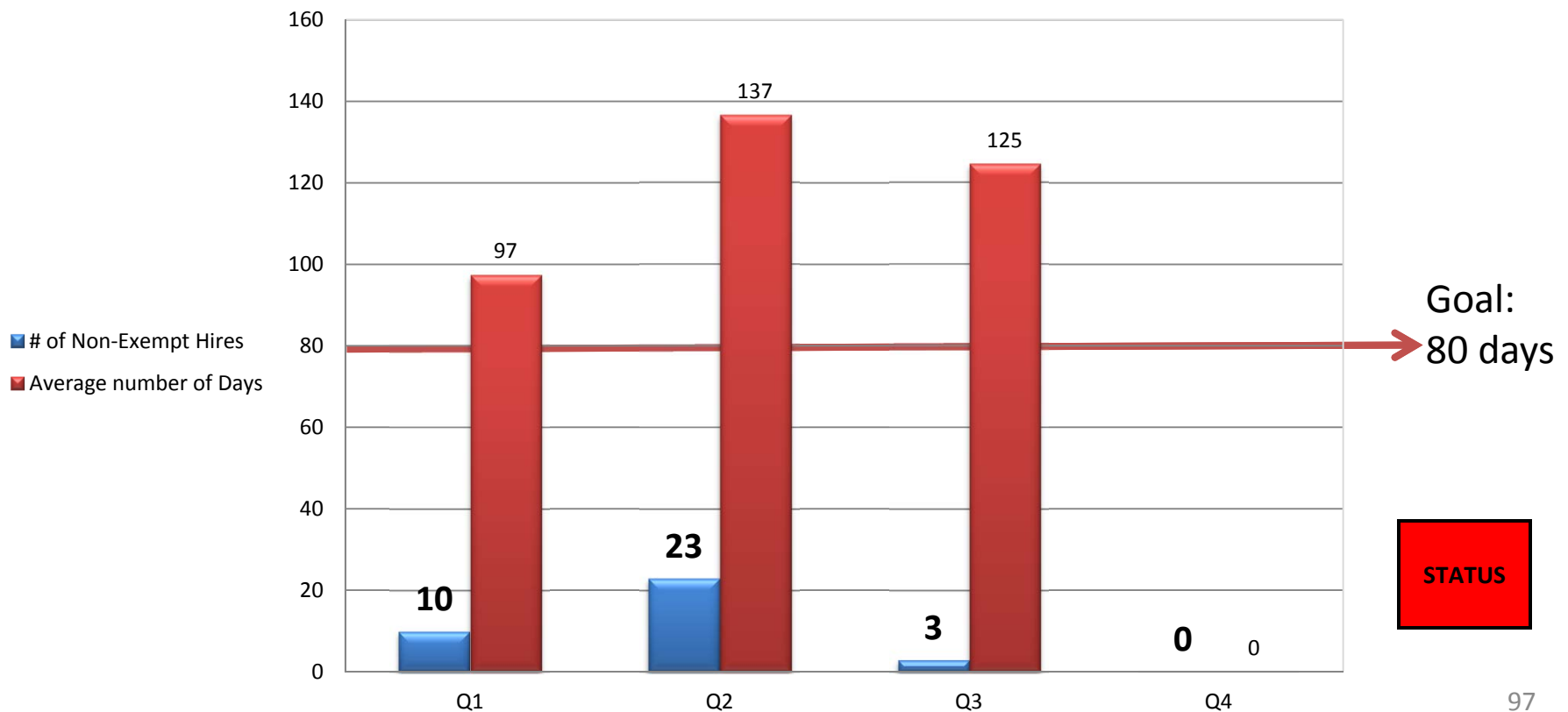
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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 – 2nd Quarter FY 2012

Lead
FBO

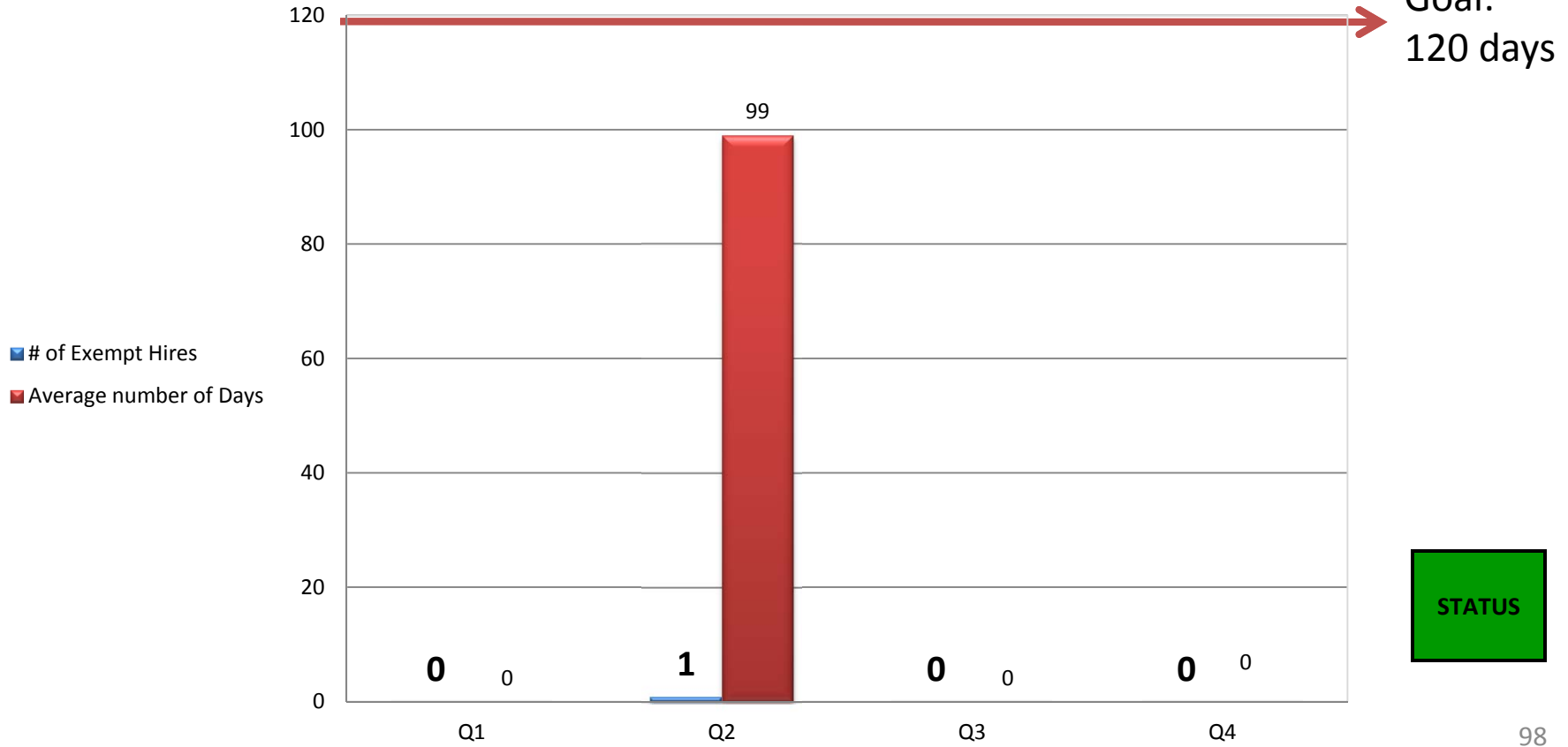
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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



Facilities Management Strategic Planning Session - 2nd Quarter FY 2012

Lead
FBO

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

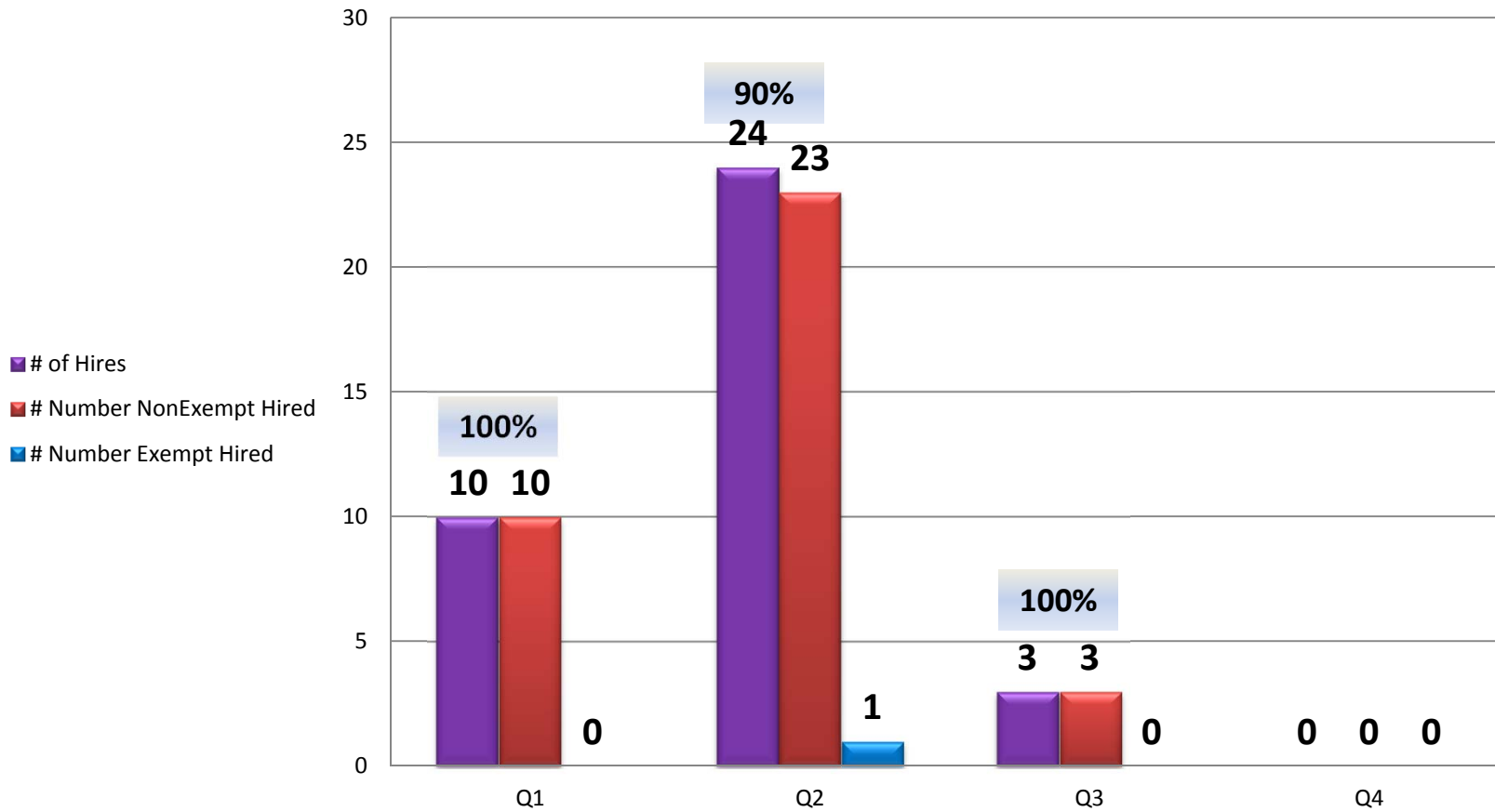
(22%)

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 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



STATUS

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

Lead
FBO

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

- Worked with UNC Charlotte Continuing Ed to create Leadership Training Program for supervisors, managers and directors. Successfully completion will result in a certificate of graduation and CEU credits. 1st series on Communication Strategies began week of January 23rd.
- Continue matrix development – HVAC underway
- Monitor progress of Supervisor Safety Training Talks series
- Develop compliance training and mission specific training metrics
- Develop plan for new Lunch and Learn Series – draft complete
- W.I.G.** – Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas.

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

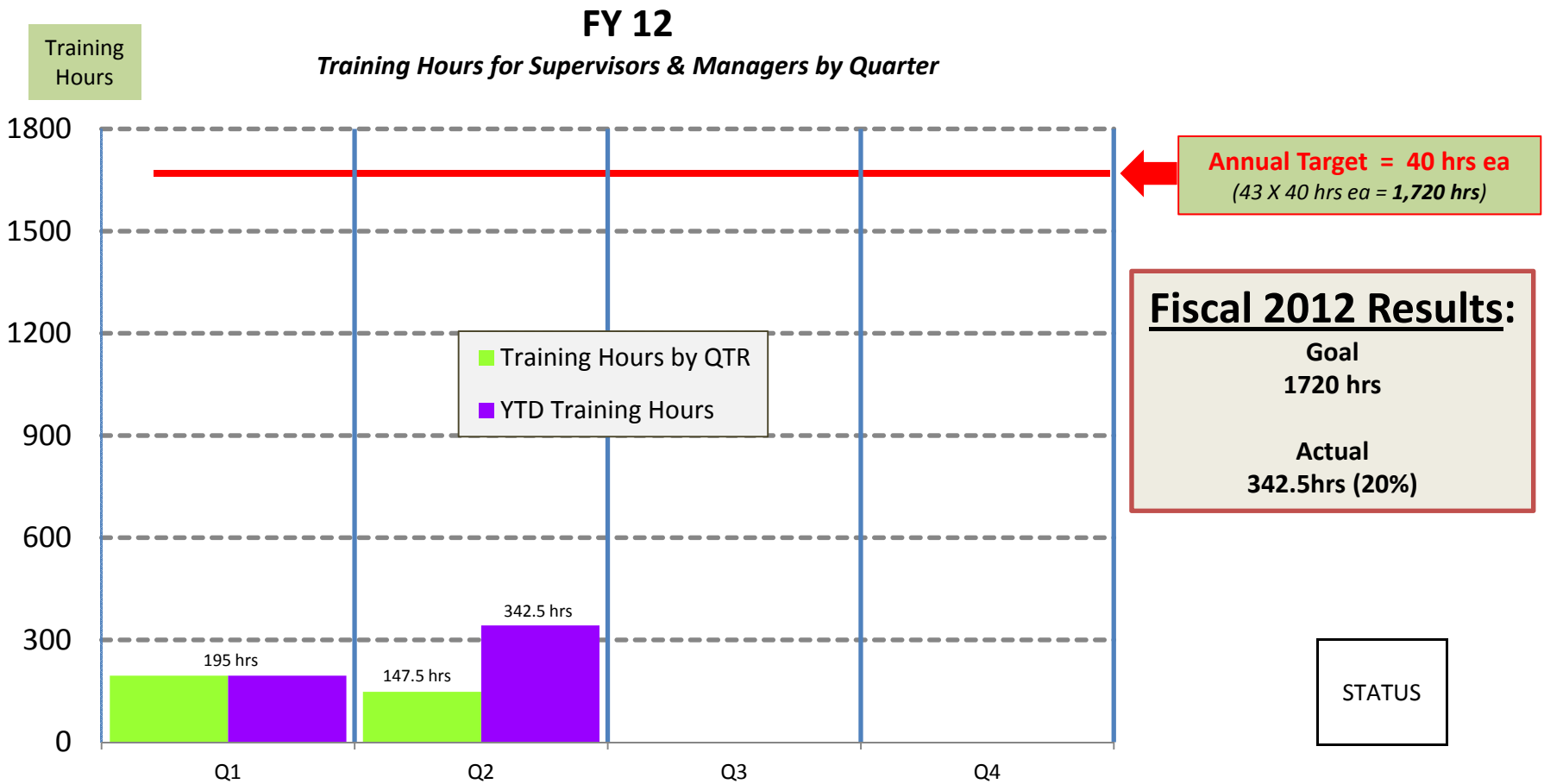
Lead
FBO

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



Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

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.

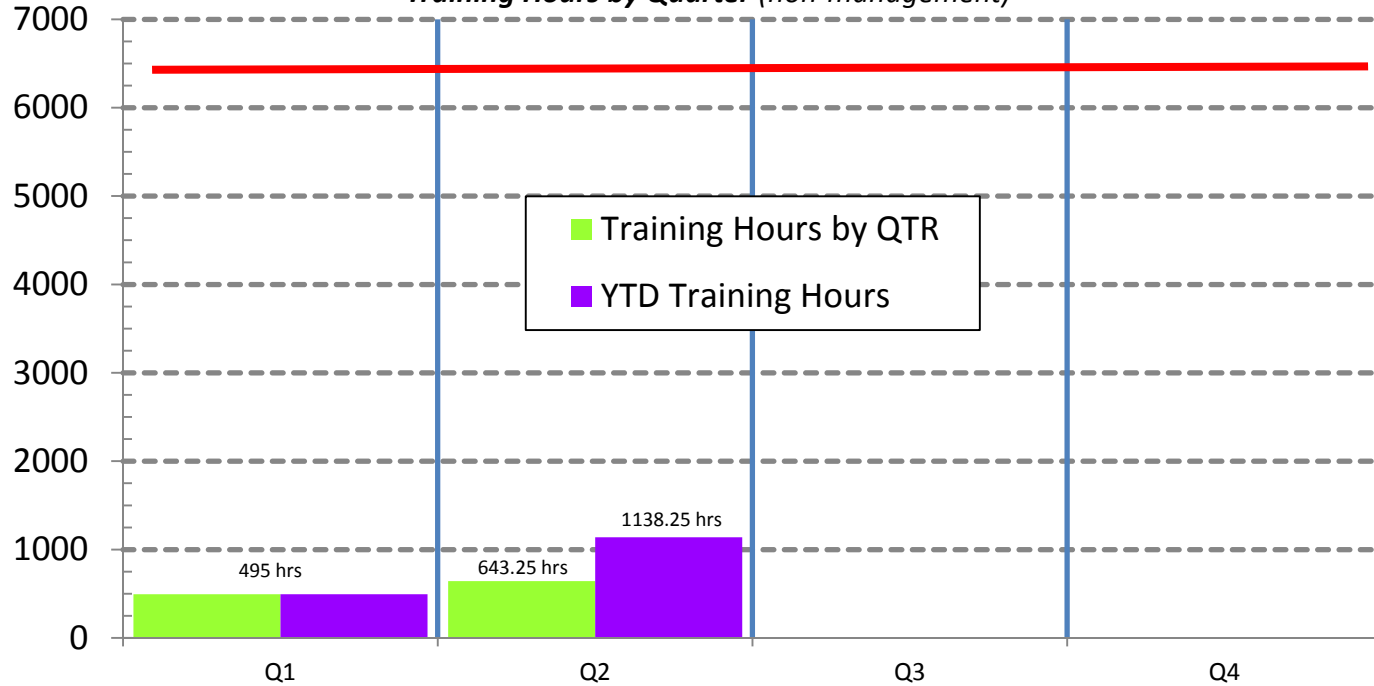
Measure: Average hours of training provided to or obtained by front line employees

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

Training
Hours

FY 12

Training Hours by Quarter (non-management)



Annual Target - 20 hrs ea
(323 employees x 20 hrs ea
= 6,460 hrs total)

Fiscal 2012 Results:
Goal
6,460 hrs
Actual
1138.25hrs (17.5%)

STATUS

FY12 YTD Training Hours/Percentages

Unit/Zone	Hours	% YTD	Unit/Zone	Hours	% YTD
Housekeeping	382.5	24%	Design	17	11%
Business Office	142.5	130%	C/O	21	105%
Recycling	124.5	73%	Capital	19	7%
Real Estate/Land Use	117	185%	FIS	11.5	13%
Zone 2	111	79%	Steam plant	4	4%
AVC	92.25	307%	Zone 1	4	2%
Planning	91.5	183%	Zone 3 (CCB)	4	13%
Lock shop	88	126%	Zone 5 (B. Frias)	4	2%
Zone 7	80	99%	High Voltage & Alarms	0	
Automotive	68	97%	Zone 6	0	
Facilities Operations	50	63%			
Grounds	46	10%			
Zone 4 (D. Smith)	31	18%			

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

- W.I.G.** – Develop Succession Plan – This is currently on hold and will require significant effort and time to develop.

- Awaiting survey final report from Urban Institute. It is scheduled to be completed February 2012 (3rd Qtr).

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

Lead
FBO

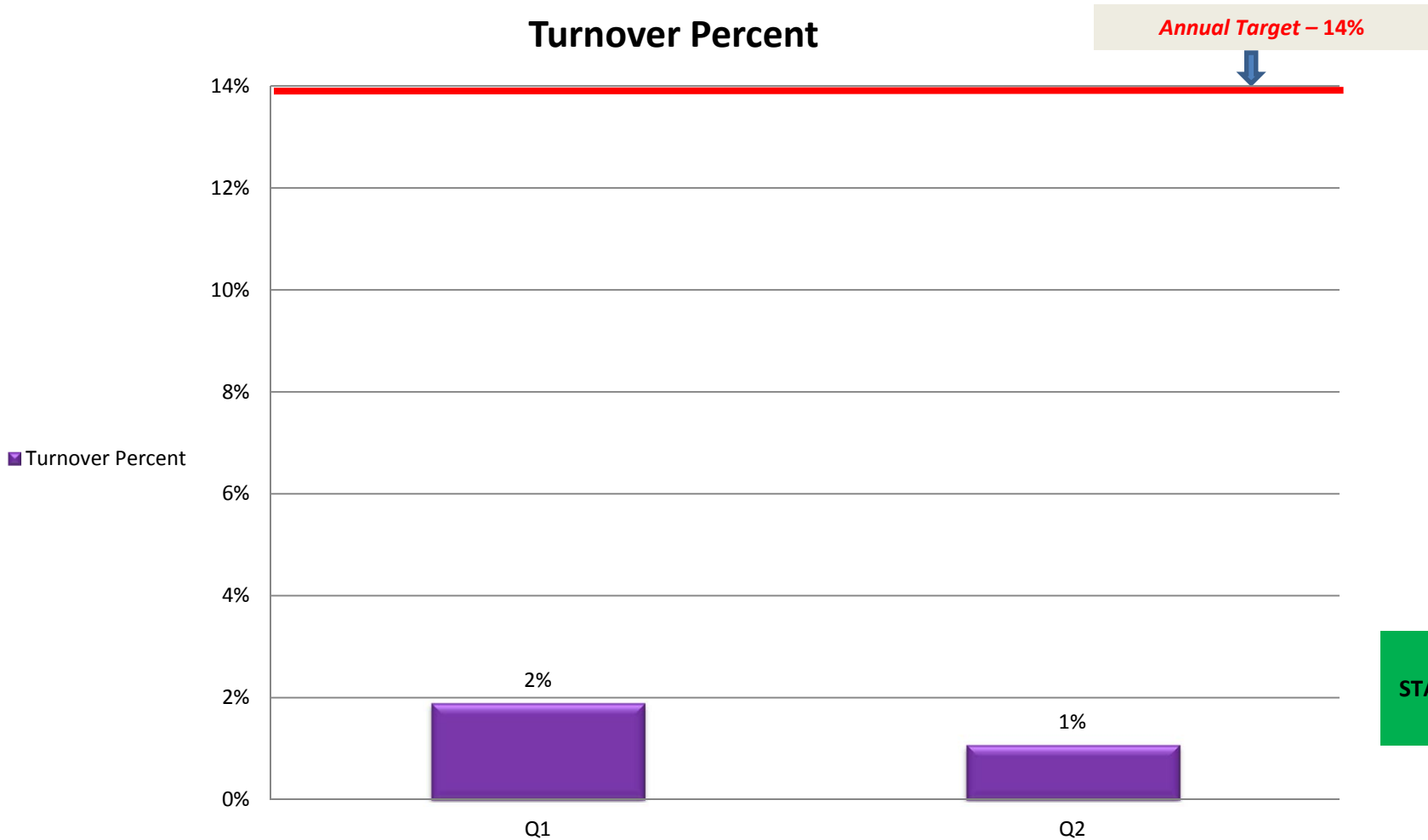
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Turnover Percent



STATUS

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

Lead
FBO

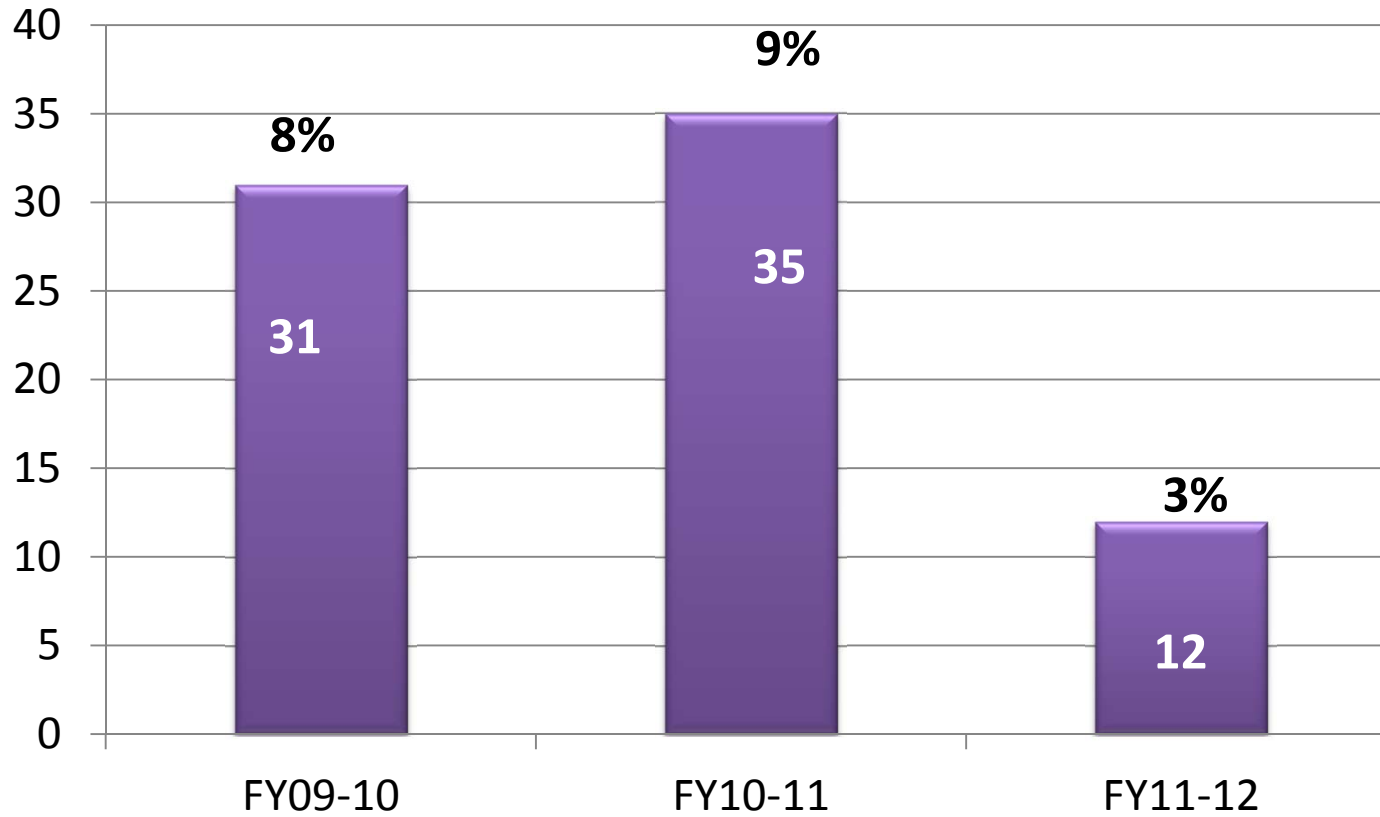
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Turnover Rates – Historical Data



■ Departures

STATUS

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012

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

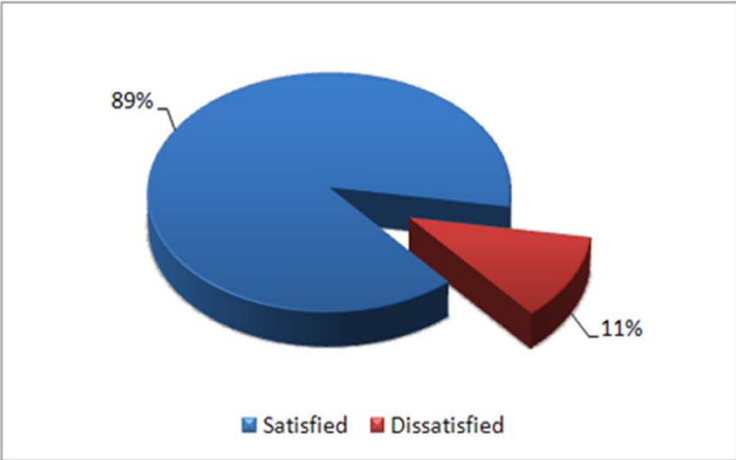
Strategy 5.3 Improve Employee Satisfaction
 Objective 5.3.2 Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

Measure: Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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

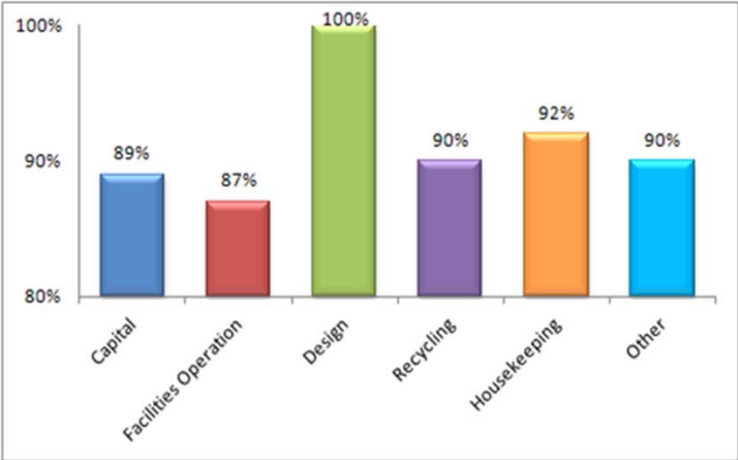
Overall Satisfaction

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%)



Balance Score Card

DISCUSSION

LEARNING & GROWTH PERSPECTIVE

Facilities Management FY 2012 Balanced Scorecard

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Learning & Growth <i>How will we sustain our ability to change and improve?</i>	Develop high-quality staff	5.1.1	Reduce Vacancy Time Calendar Days	80 days/120 days	137 / 99	 	 		
	Develop high-quality staff	5.1.2	Targeted Selection/Recruitment Training	100%	90%	 	 		
		5.2.1	Supervisor (all levels of supervision) Training Hours	1720 hrs	342.5	Annual			
		5.2.2	Staff (non supervisory) Training Hours	6460 hrs	1738.25	Annual			
	Retain high quality staff	5.3.1	Reduce Annual Turnover Rate	<14%	1.0%	 	 		
	Develop positive culture	5.3.2	Overall Annual Employee satisfaction (No survey in 2010)	85%	89%	Annual			
	Improve Employee Safety	6.4.1	Reduce Accidents by 10% annually (CY) - goal 15 or less	<15	24		Calendar Year		

Group Discussion

