



Facilities Management Quarterly Strategic Planning Session

**First Quarter – Fiscal Year 2015
July - September 2014**

APPA Award for Excellence
UNC Charlotte
WVU
AGENDA

Strategic Planning Metrics and Actions Plans

Special Presentation: Energy Consumption

Employee Satisfaction Survey Action Plans

Look Ahead

...Creating a Campus of Distinction

APPALERS



UNC CHARLOTTE

Facilities Management

Strategic Planning Session

**First Quarter – Fiscal Year 2015
July - September 2014**

AGENDA

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

...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

Continuously Improve
Operations of Campus

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Maintain “Wrench” Time at 70%

ACTION PLAN

- Actions Planned
 - 1 – December 2014; Daily assignment, coordinating and monitoring of work effort
 - 2 – December 2014; assignment of lead technician in absence of supervisor
 - 3 – All levels of leadership “Manage by Walking around”

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

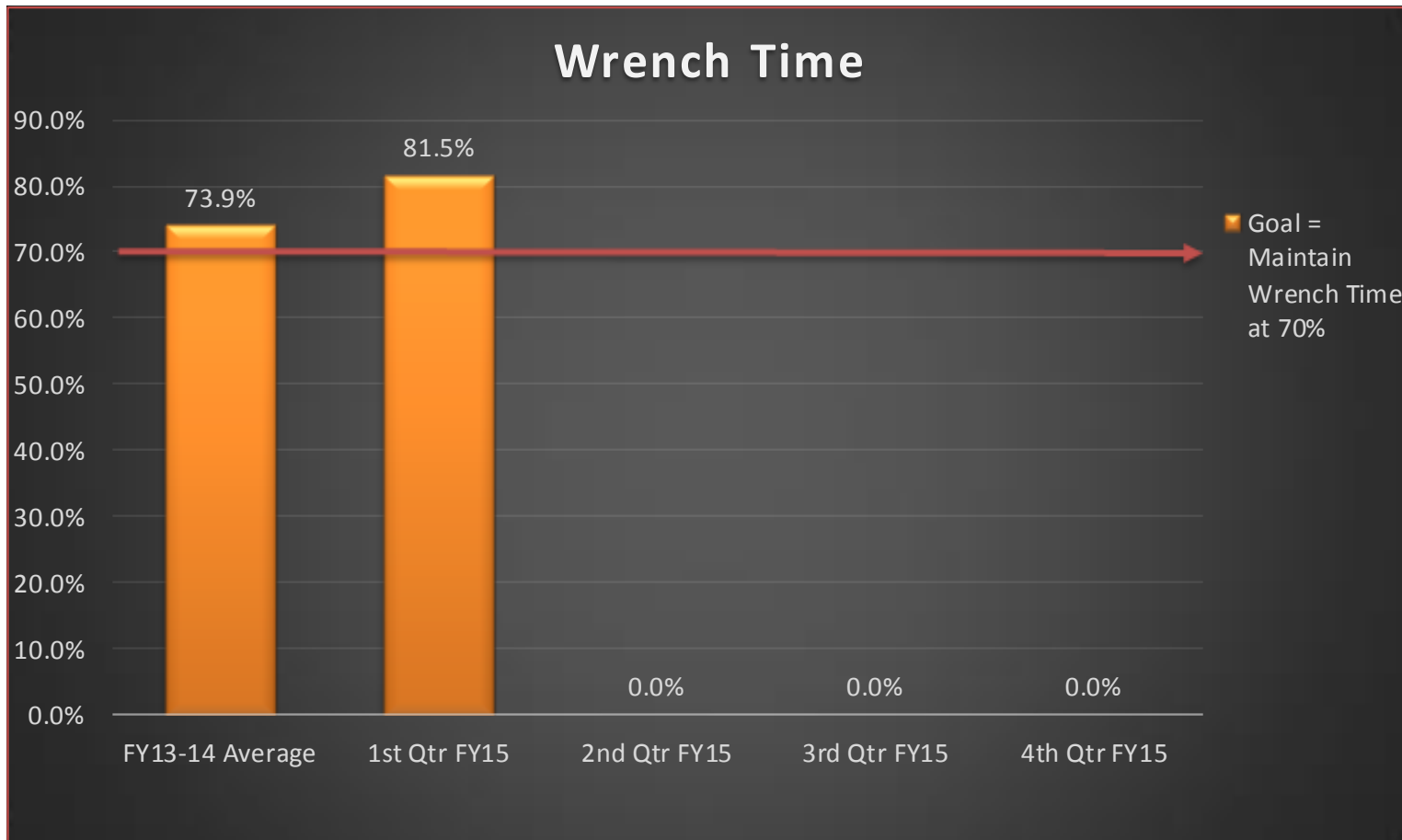
Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

ACTION PLAN

- Actions Planned

- 1 – Weekly review of 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 – Send out daily email reminders for approvers (Supervisors, Admins and Managers)
- 4 - Monitor the req to PO processing time and discuss weekly.

Actions Completed:

- Promote the use of SDI Punch-out; conduct lunch and learn July 2014.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

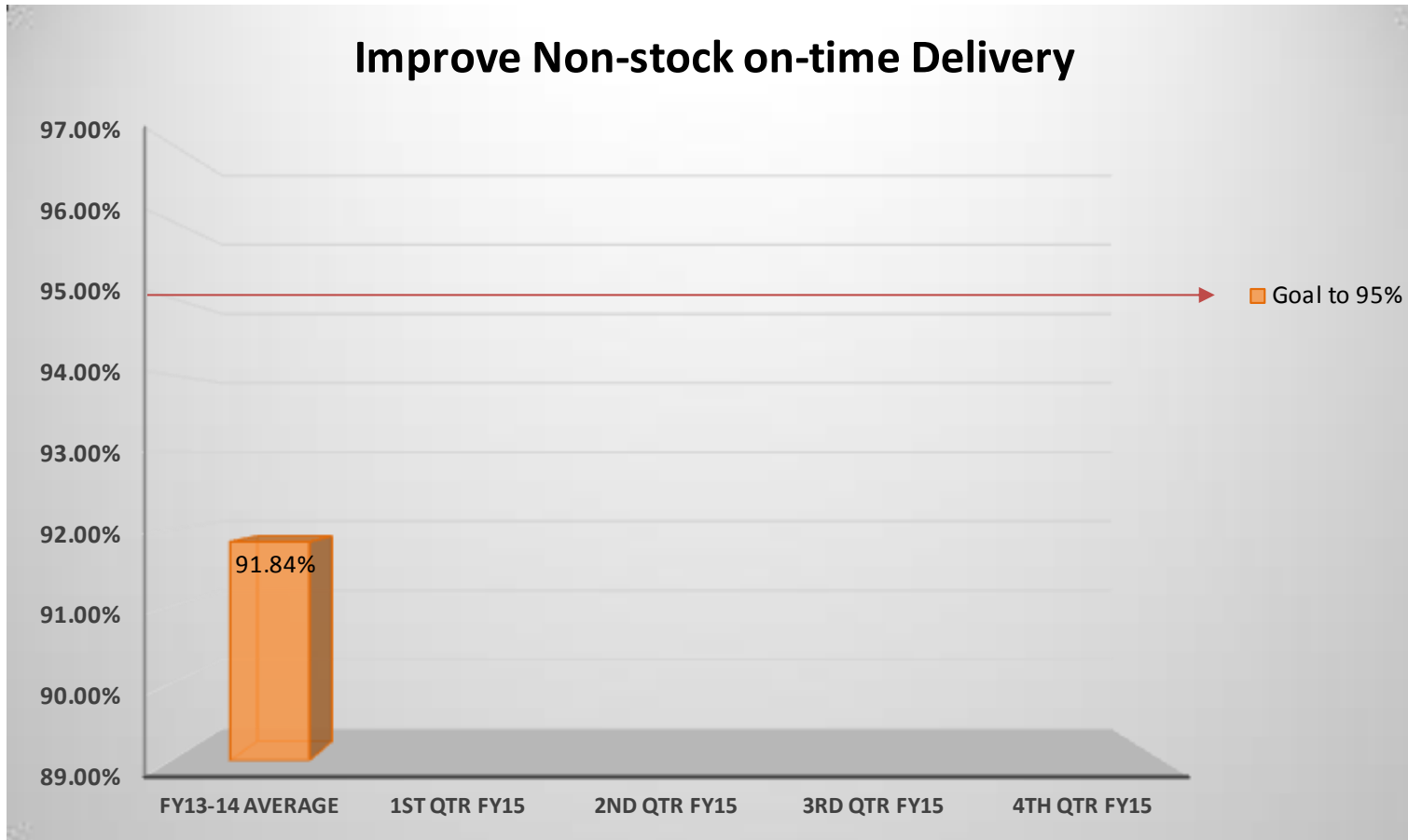
Objective: 1.2: Improve Logistics Efficiency

Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

Measure: Percent of non-stock orders received on or before delivery due date (SDI Key Performance Indicator (KPI))

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

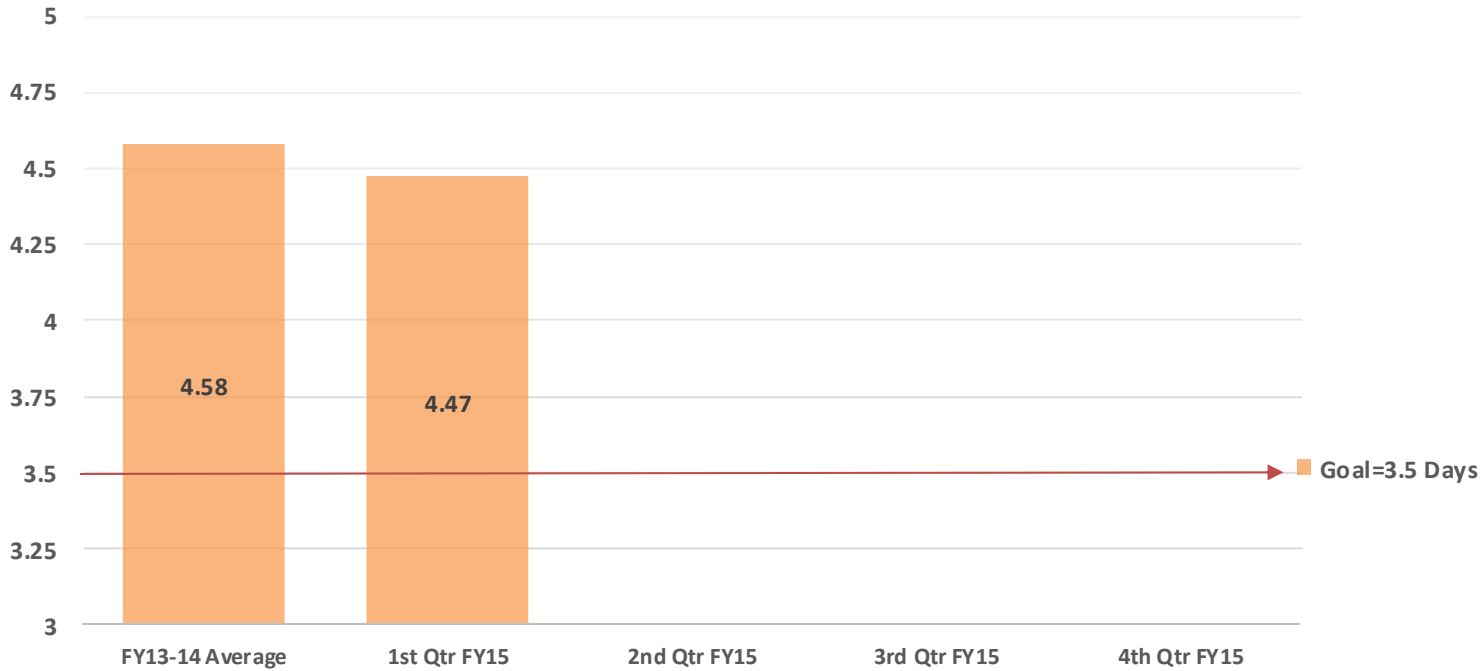
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

REDUCE AVERAGE NON-STOCK REQUISITION TO RECEIPT TIME



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

ACTION PLAN

- Actions Planned

- 1 – Review of recurring services and scheduled services currently being completed using PM work request – Aug 2014
- 2 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
- 3 – Weekly meeting with UPA and Managers to monitor 14 day report.
- 4 - Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

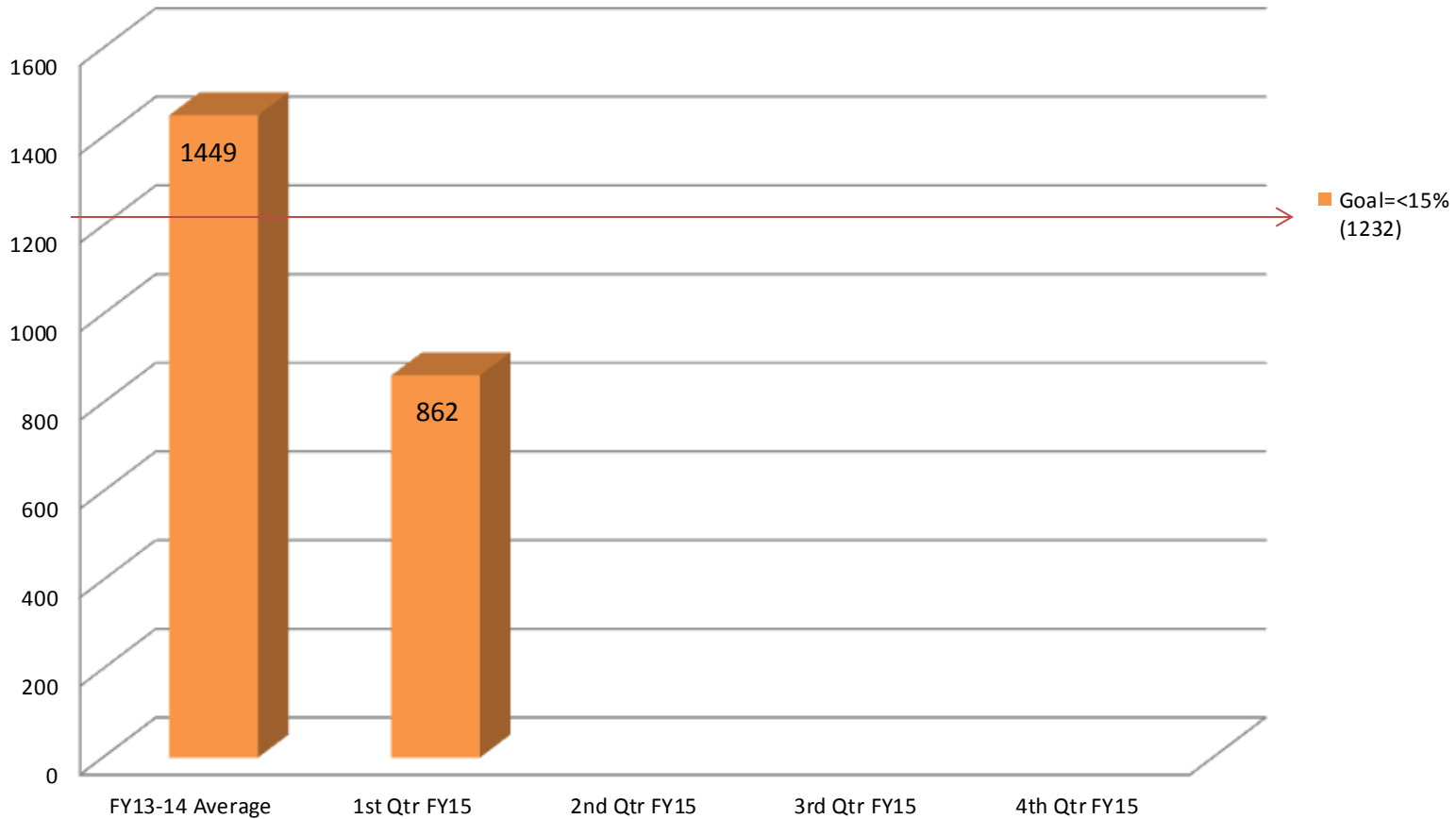
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

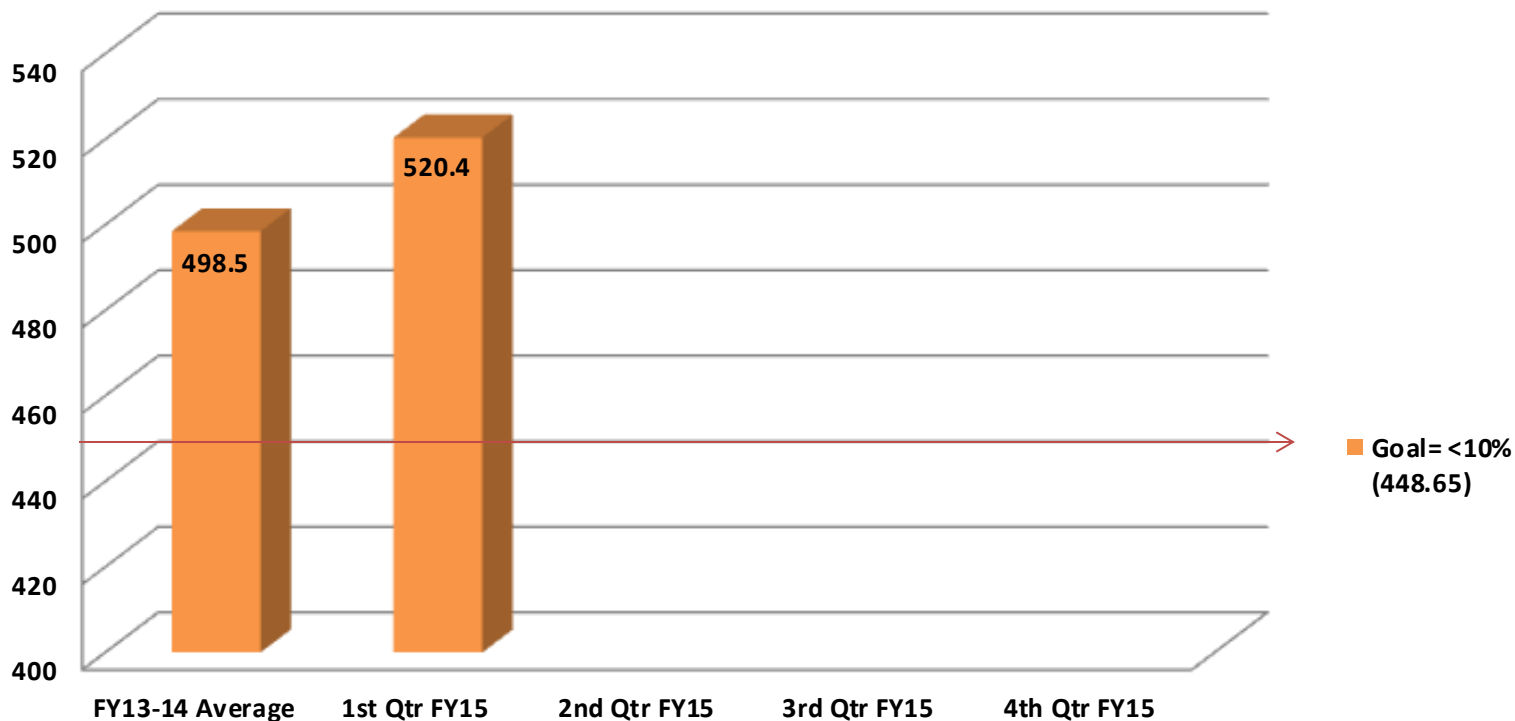
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STATUS

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

ACTION PLAN

- Actions Planned

- 1 – Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.
- 3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
- 4 – Identify and prioritize equipment conditions and needs for replacement.
- 5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
- 6 – Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

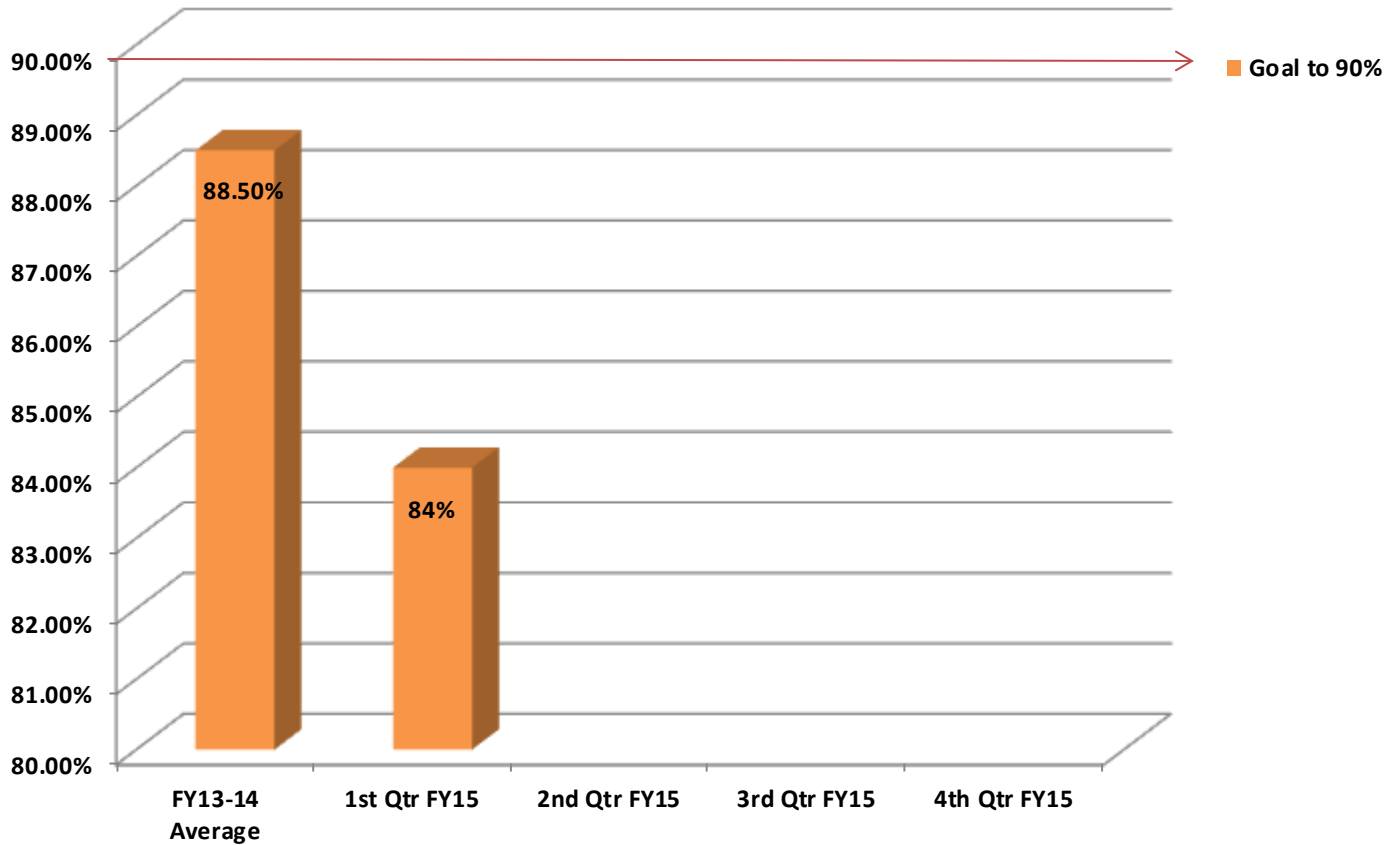
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

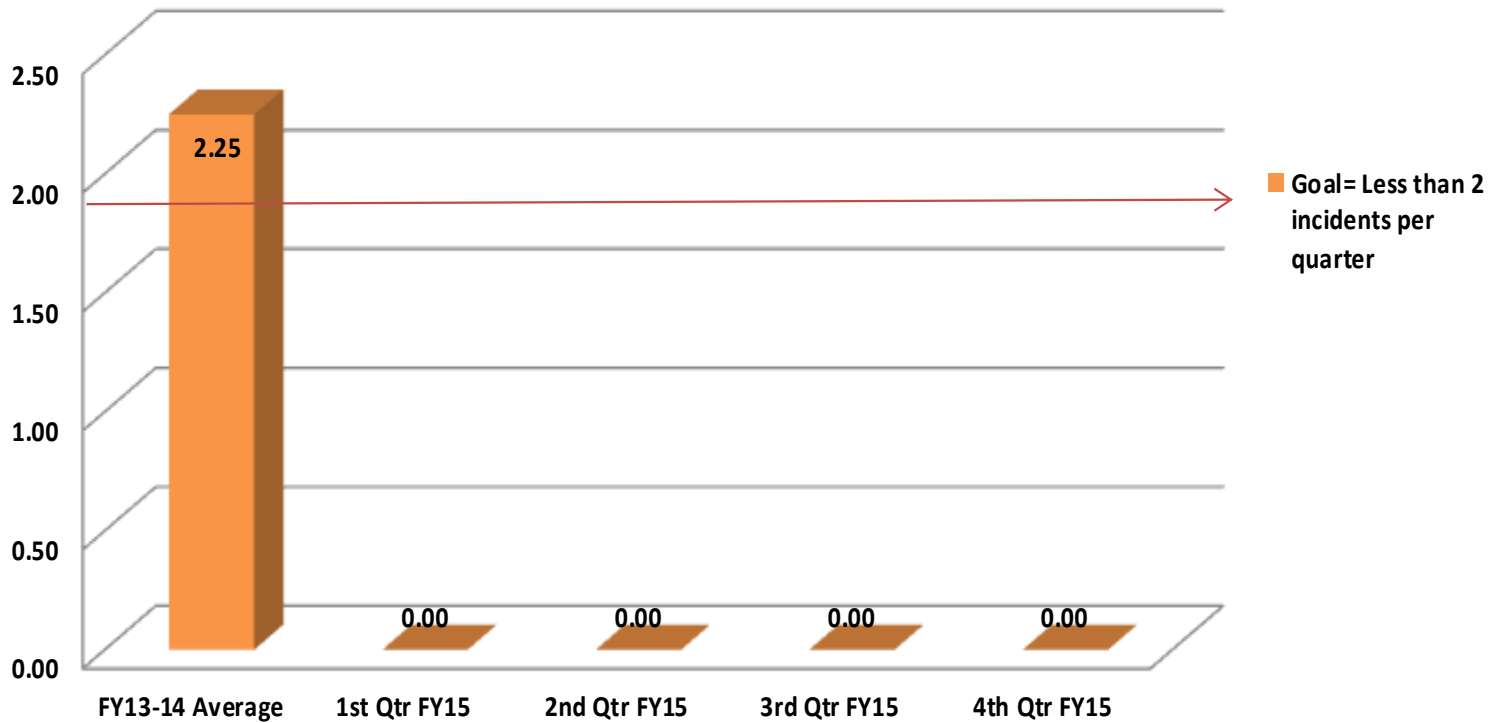
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

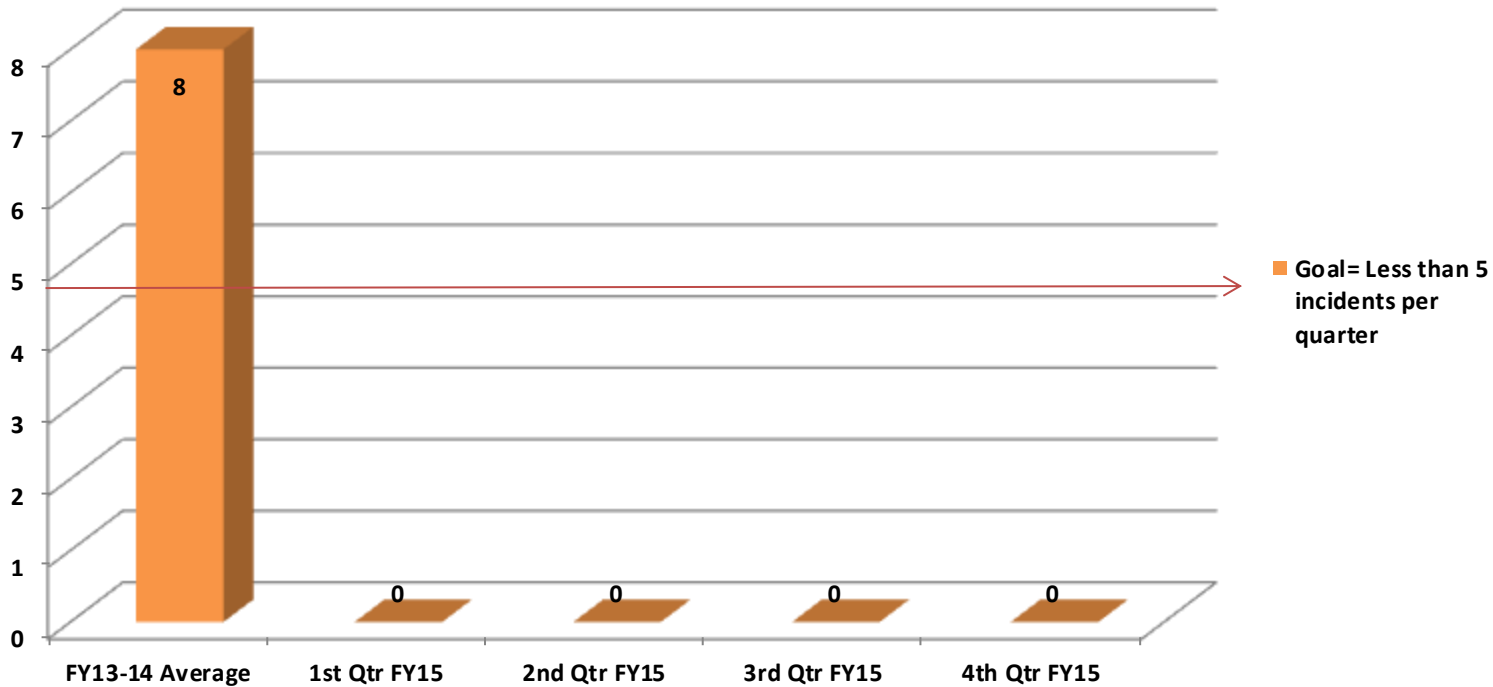
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Measure: Number of Occurrences ; Electric, Water, Sewer, HVAC, (Roofs, Lots, Decks, Roads measured separately).

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

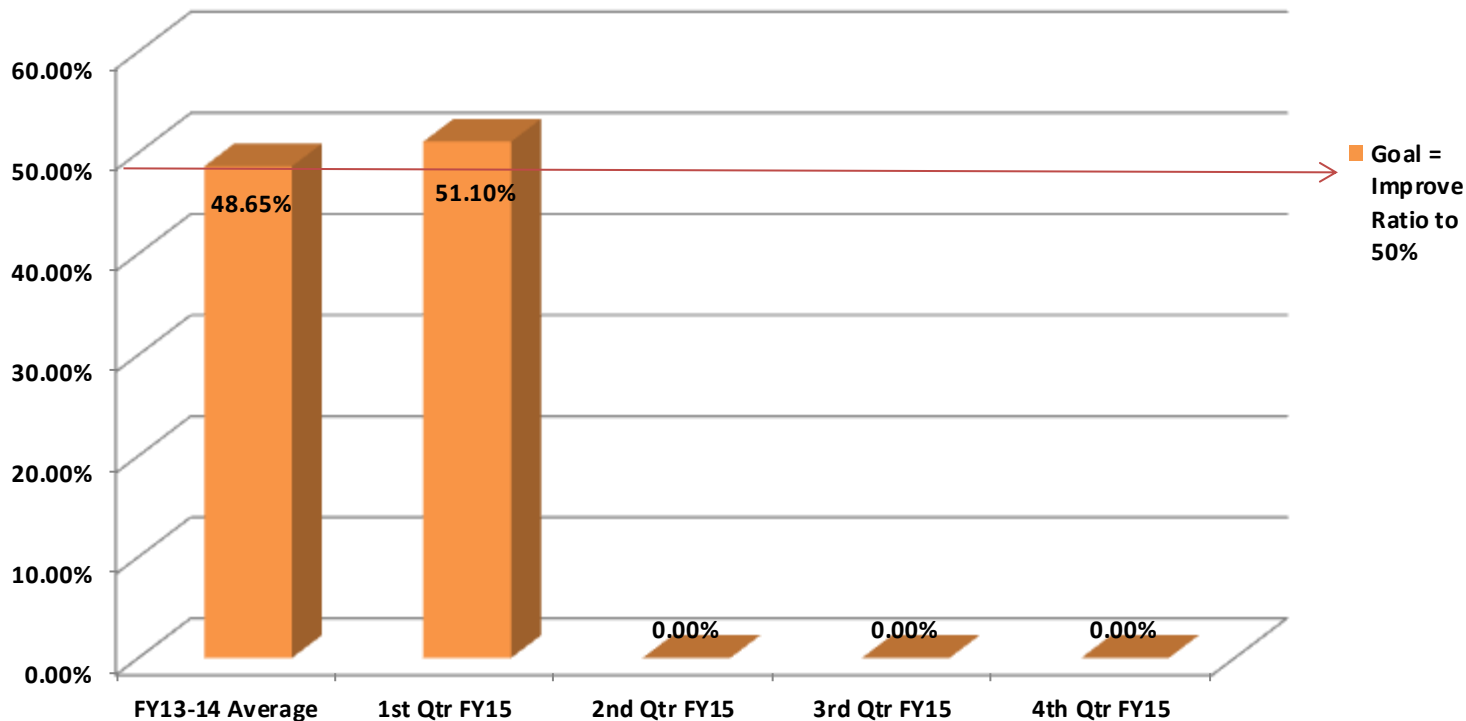
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

Measure: Percentage (Number of completed reactive work requests divided by total number of completed work requests including PM and Predictive work requests) (APPA Benchmark)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Ratio of Preventive/Predictive Work Requests



GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes
Tactic 1.4.1: Achieve APPA Level 2 in 98% of Buildings

Lead
BES

ACTION PLAN

- Actions Completed
 - Attended Janitor University (10/6/14 – 10/10/14)
 - attended by: Althea Cook, Vanessa Dodd, Katherine Humphries, and Joe Scollo
 - Monthly PM Tracking Process Created (10/16/14)
 - Utilized for supervisors to track cleanliness levels, share with managers, and go over with entire team

- Actions Planned
 - Conduct (OS1) Pilot in Friday building (end of FY14-FY15)
 - Training
 - Work Loading Class (TBD)
 - Continue Re-engineering implementation planning meetings thru (3/1/15)
 - Review and continue quarterly self audits (11/30/14)

Facilities Management Strategic Planning Session – First Quarter FY 2015

Lead
BES

GOAL #1 – Continuously Improve Maintenance and Operations of the Campus

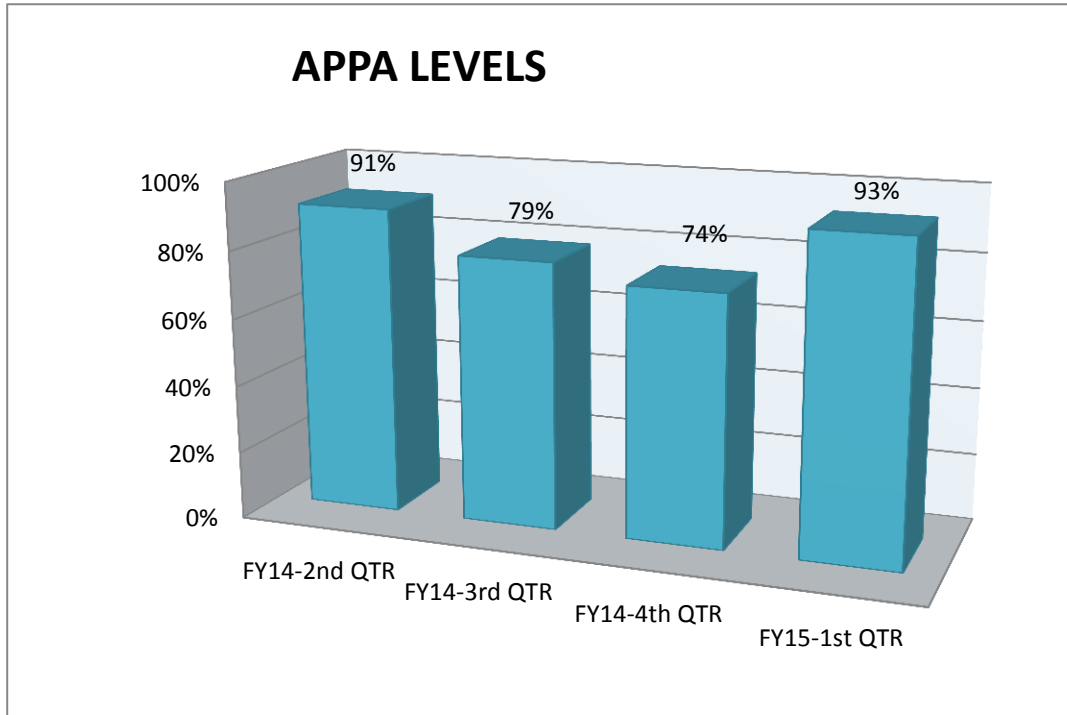
Objective: 1.4: Improve BES Processes

Tactic 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)

Lead: Building Environmental Services

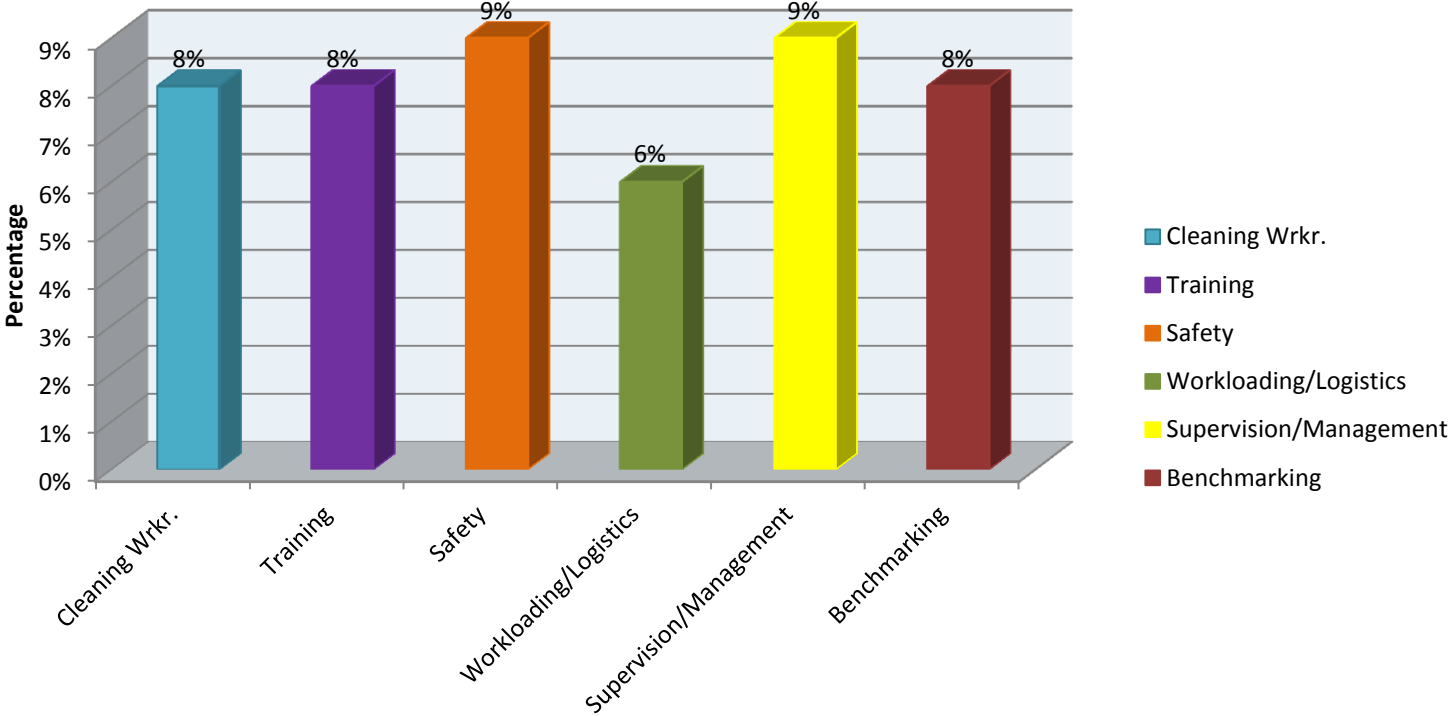
Balanced Scorecard Category: Customer Perspective

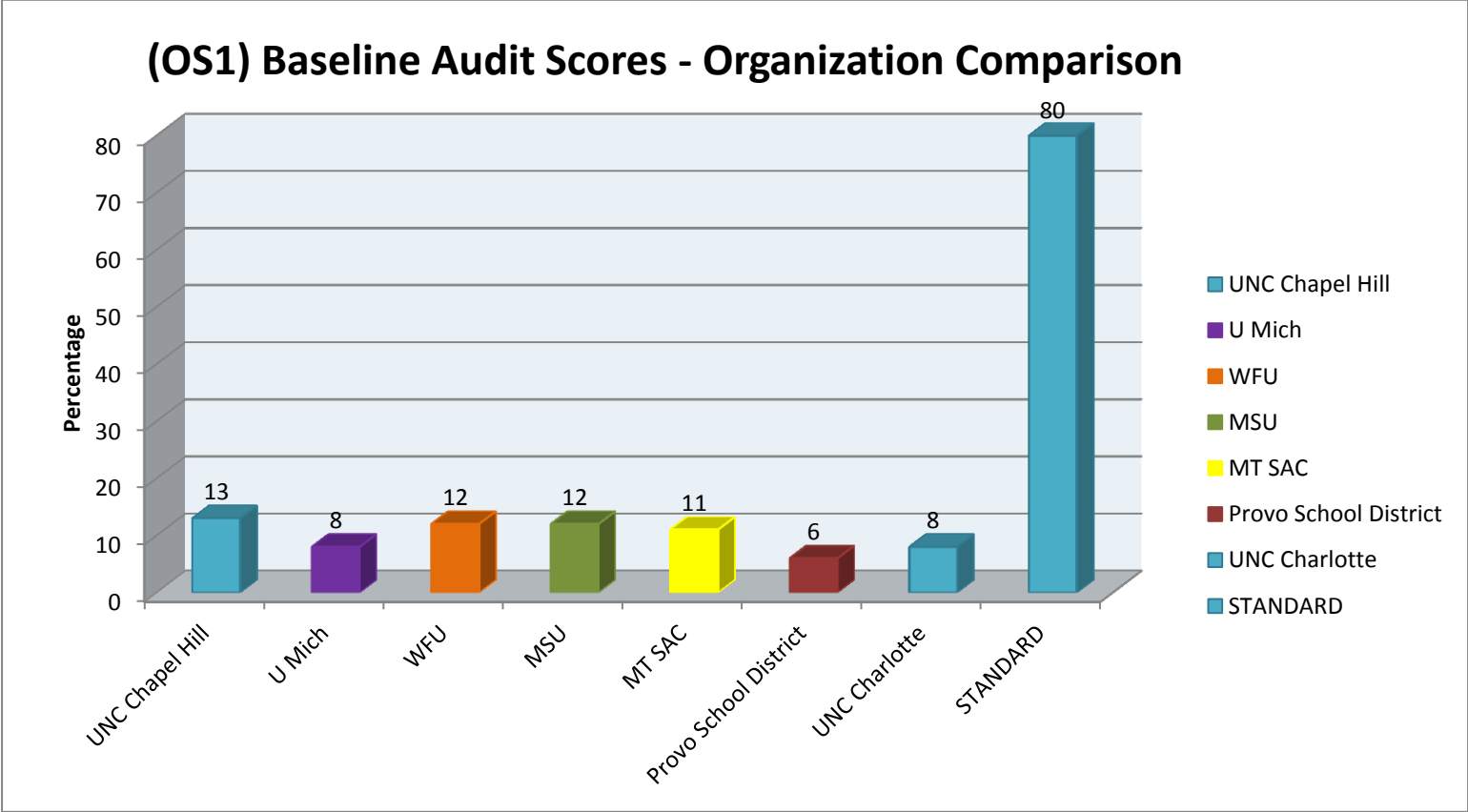


Percentage = 93%

STATUS

(OS1) Baseline Audit Scores - Job Category







UNC CHARLOTTE

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



FM Prioritized Projects – FY15

1. **Campus Map** – **Roll over from FY14**; Estimated Completion Jun 2015
2. **Access and Key Management** – **Roll over from FY14**; Estimated Completion Feb 2014
3. **Space Audit, Approvals and Occupancy** – Estimated Completion May 2015
4. **BES ReOrg** – Estimated Completion Nov 2014
5. **ARCHIBUS 21.2 Upgrade** – Estimated Completion Jan 2015
6. **Capital Projects Requests and BANNER Integration** - Estimated Completion Apr 2014
7. **CRDM Parent Child** – Estimated Completion Jun 2015
8. **BAS Niagara 3.8 Upgrade** – Estimated Completion Jun 2015
9. **ImageNOW (Archive drawings)** – **Roll over from FY14**; Estimated Completion Feb 2015
10. **FO Craftsperson Timesheet/Whiteboard/Split Fund PM** – Estimated Completion Jan 2015
11. **Project Billing Console** – Estimated Completion Mar 2015
12. **Design Services Phase 2 Requests** – Estimated Completion Date Jun 2015
13. **BES EDA Asset Mgmt** - **Roll over from FY14**; Estimated Completion Dec 2014
14. **WO Hot /Utility Form** – **Roll over from FY14**; Estimated Completion Dec 2014
15. **ARCHIBUS Mobile Proof of Concept** – Estimated Completion Feb 2015
16. **Mobile Equipment Survey** – Estimated Completion Mar 2015
17. **Mobile Space Inventory** - Estimated Completion Apr 2015
18. **Mobile Map Utilities Field Units** - Estimated Completion Jun 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Lead
FIS

ACTION PLAN

Actions Planned:

1. Complete testing and roll out of new FO Utility Form by Dec 1, 2014.
2. Complete walkthrough testing/training with all BES Supervisors on Mobile Asset Module; roll out for first Equipment Audit by Dec 2014.
3. Hire vacant Mobile Technology position by Dec 2014.
4. Transition over the new BES Re-Org System Changes by Dec 2014 including WO routing and new BES Zone updates.
5. Conduct user testing and feedback for Beginner WR Customer online training for Go Live by Dec 2014.
6. Complete architecture by mid-Nov 2014 and finish Beta Testing for Campus Map by Jan 2015.
7. Complete architecture testing for Access/Key Management by mid-Nov 2014.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Lead
FIS

ACTION PLAN

Actions Completed:

1. Finalized FM Surveys and Went Live with Survey Reports for Design Services Aug 2014.
2. Completed Hot Work Permit form and rolled out new views Aug 2014.
3. Completed Phase 1 and 2 Development of ARCHIBUS Moodle Training.

Lead
FIS

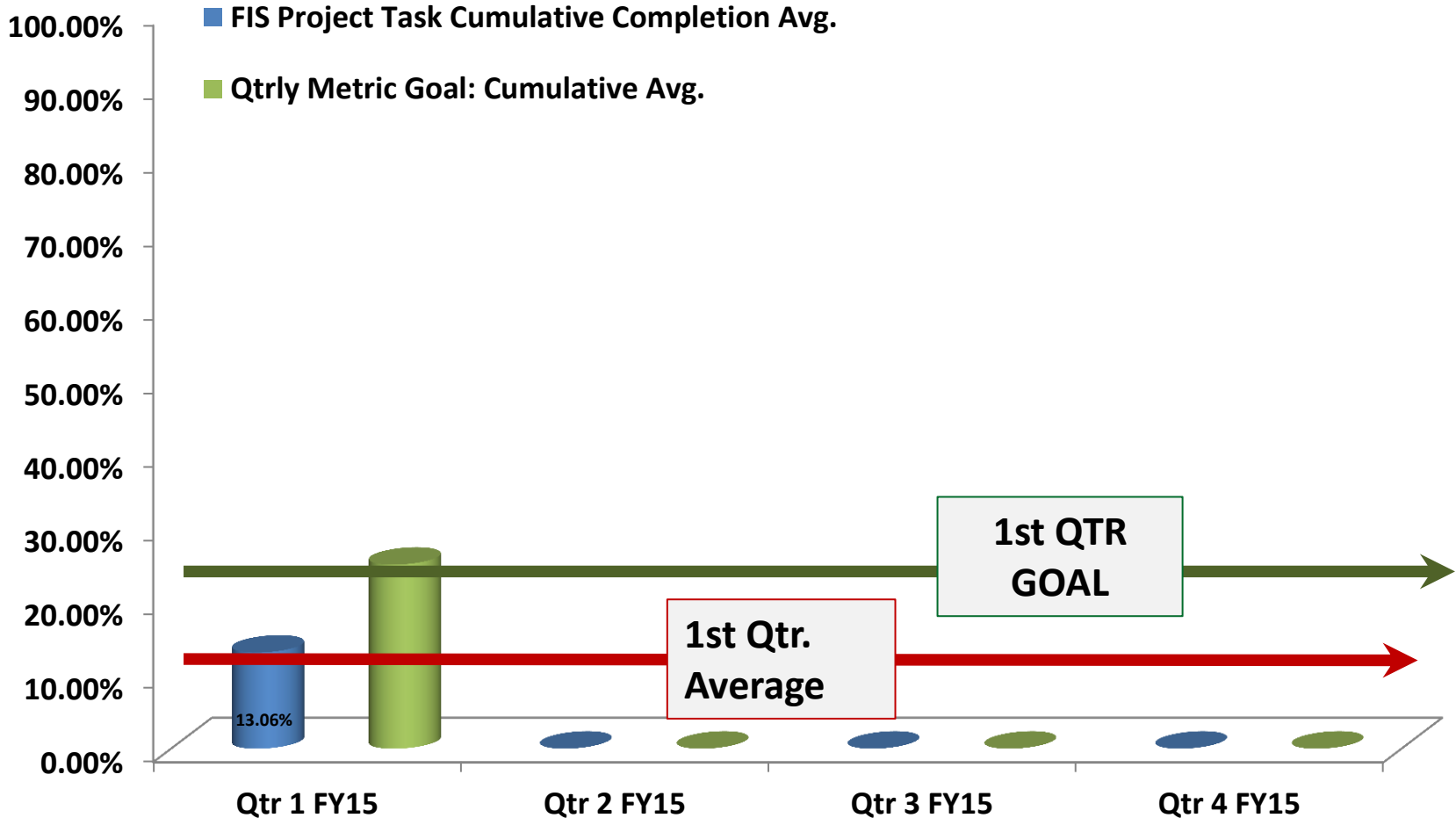
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

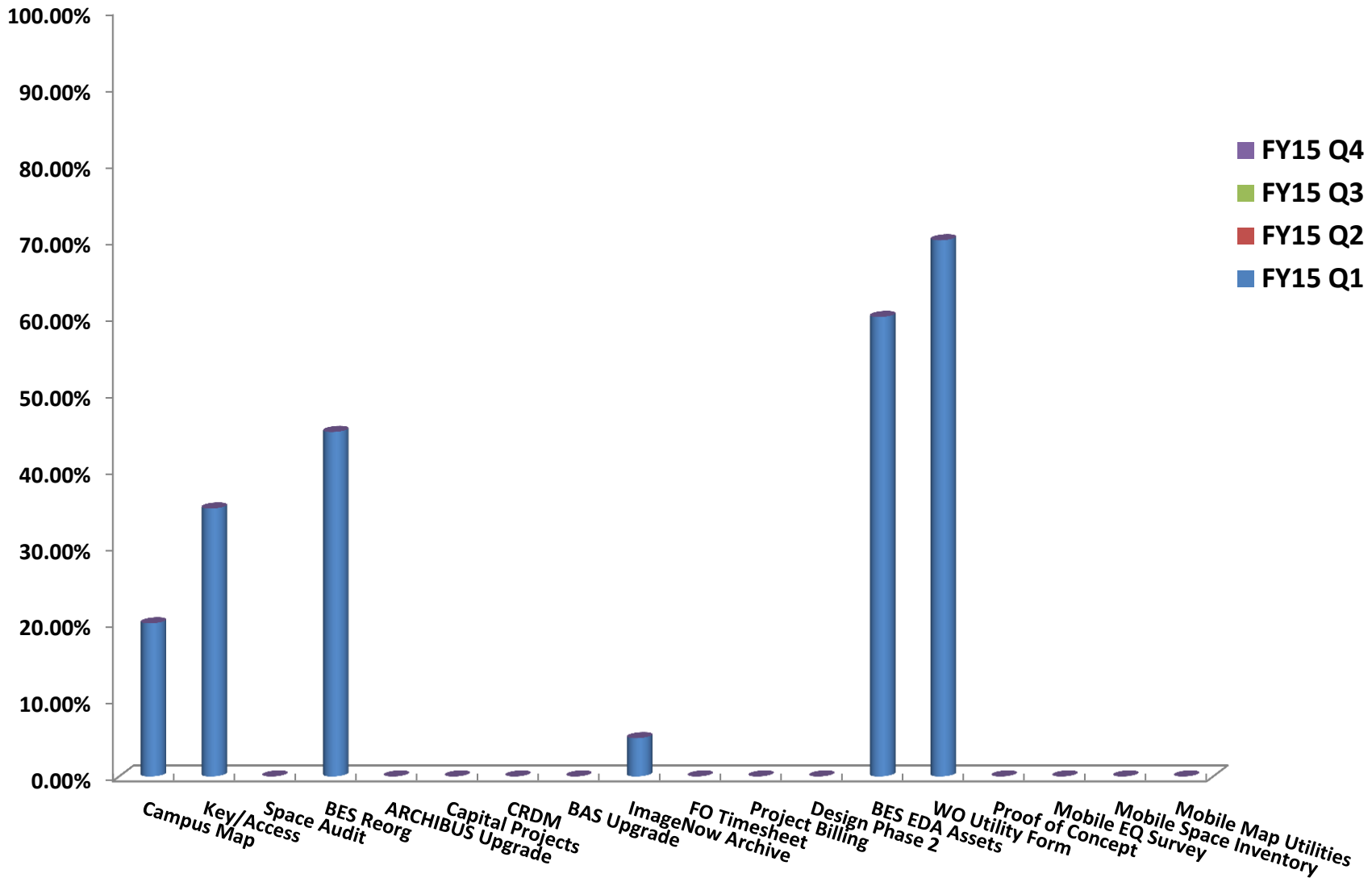
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Measure: Percent Completion of Five-Year Technology Projects
Project Status Completion Percentage

Lead FIS

Balanced Scorecard Category: Internal Business Processes



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1:	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure:	Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)
Tactic 2.2.2:	Review Project Capacity - Goal 250 projects per year.
Measure:	Number of Projects Completed (Annual Goal)

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:

- Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4*
- Convert Excel Purchase Requisition (PR) to Archibus PR.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4*
- Updates to Estimating Workbook to improve Contingency and Fee calculations.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4*

Customer Orientation for Design Services Processes and Archibus Design Services Project Management:

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
✓ *Timeline: FY15 QTR 2 - FY15 QTR 4*
- Project Priority List to include new column designating “true” Project Customer.
✓ *Timeline: Success – It works.*

Archibus - Design Services Customer Survey:

- Customer responses via Lime-Survey – Success to date. FIS performing ARCHIBUS testing.
✓ *Timeline: Success – It works.*

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.

Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL
95.0%

STATUS
94.4%

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

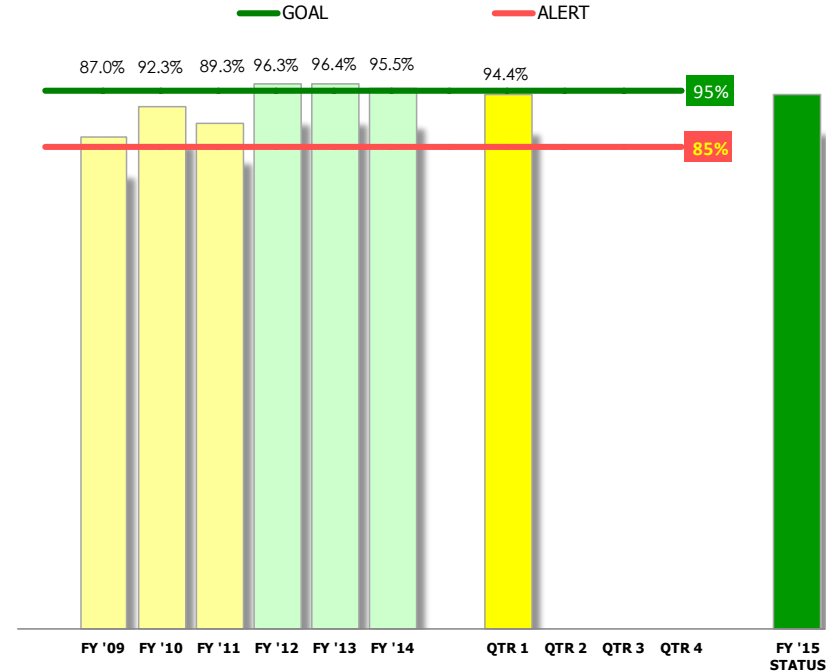
Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

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

QUARTERLY REVIEW

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
FY '14	221	211	10	95.5%
QTR 1	18	17	1	94.4%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '15 STATUS	18	17	1	94.4%



Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL 100%	STATUS 88.4%
---------------------	------------------------

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

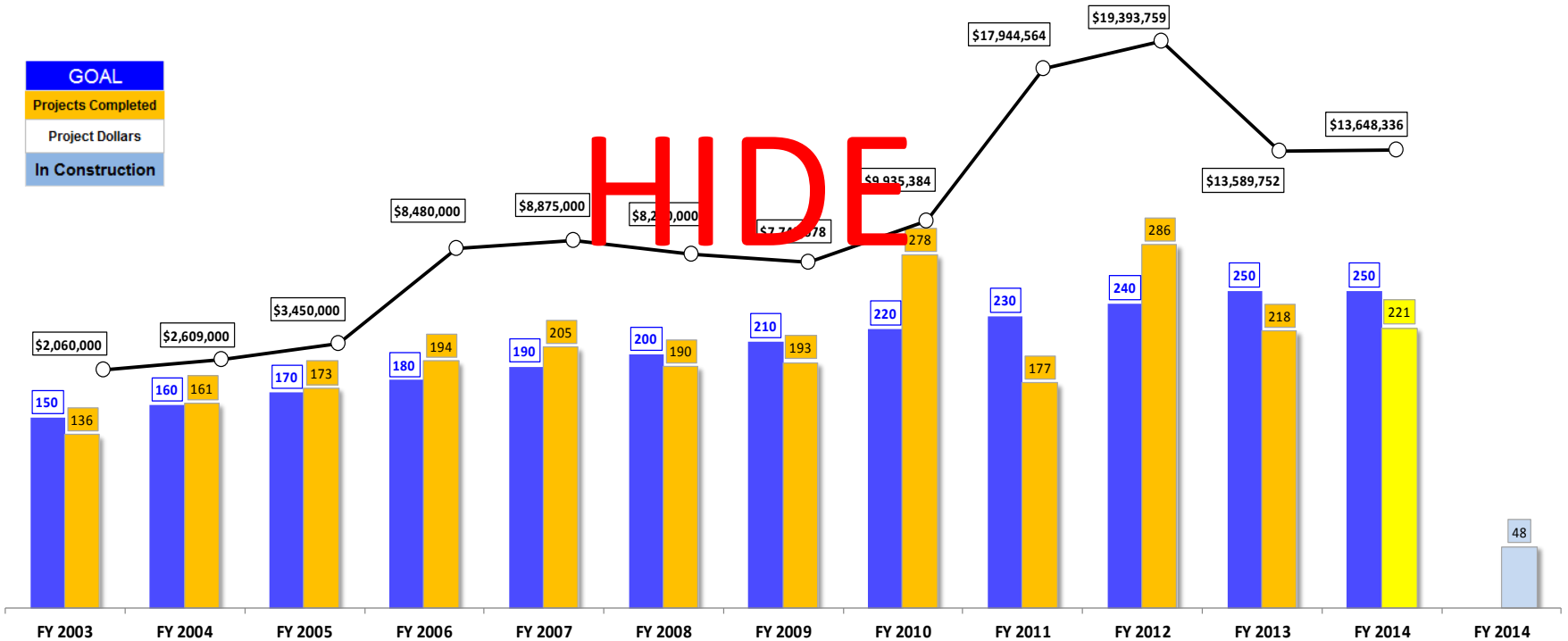
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.2: Increase Project Capacity by 10 projects per year

Measure: Number of Projects Completed

Increase Project Volume by 5-10 Projects Per Year

FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2014
150	160	170	180	190	200	210	220	230	240	250	250	In Construction
136	161	173	194	205	190	193	278	177	286	218	221	48
\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,745,678	\$9,935,384	\$17,944,564	\$19,393,759	\$13,589,752	\$13,648,336	\$3,886,720



Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - Recommendation NLT July 2015

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Complete CRDM update including revision of Second Section of SOP by December 2014**
 - **Complete Phase 2, CRDM, for FCI capability (FIS) by December 2014**
 - **Determine O/A FCI of buildings (Live data available with FCAP updates ongoing) by January 2015**
 - **Conduct campus customer meeting in January 2015**
 - **Conduct Committee review meetings in January & May 2015**
 - **Recommend a plan/ prioritize projects to improve FCI by 5% by July 2015.**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

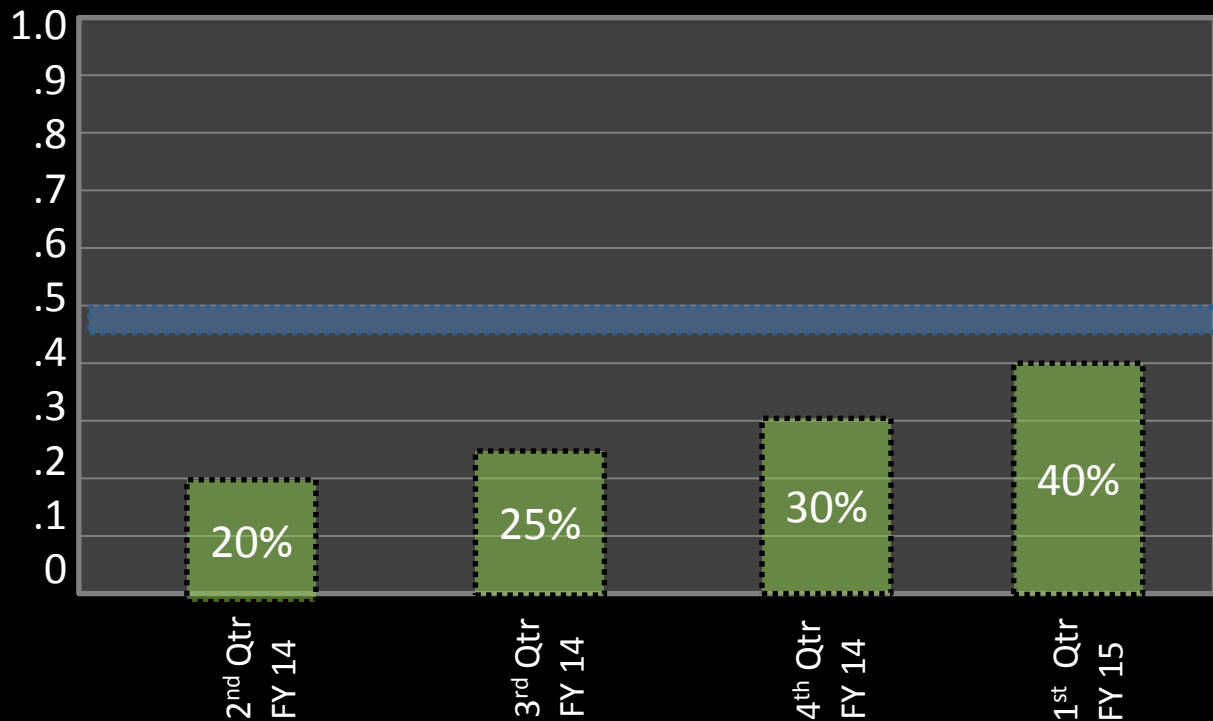
Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - Recommendation **NLT July 2015.**

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of July 15.**

Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Compose comparative analysis of actual spaces vs UNC Charlotte Approved Standard by January 2015**
 - **Complete space allocations/ inventory by room category in Archibus (Ongoing)**
 - **Compare inventory to standard and report % difference by January 2015**
 - **Work with FIS to generate report by room use (NLT December 2014)**
 - **Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard by end of July 2015.**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

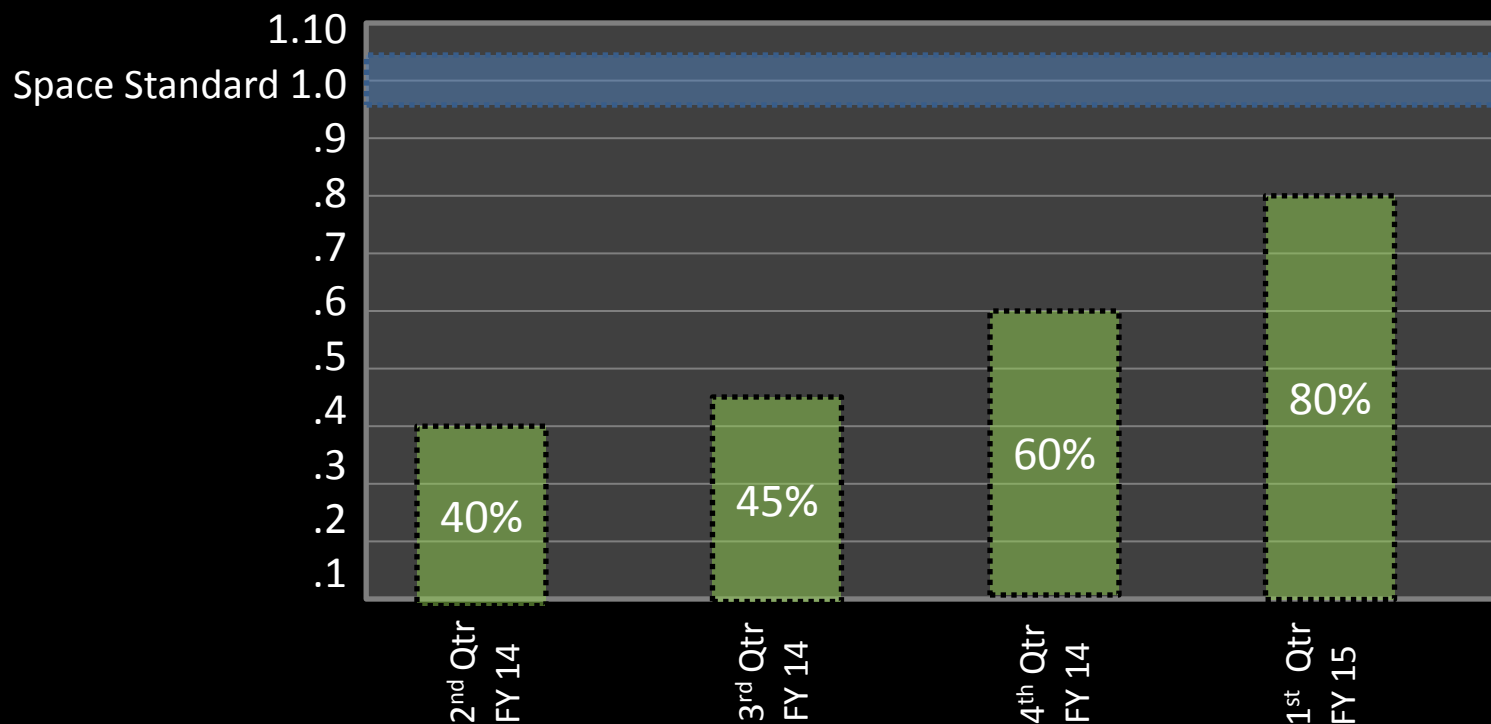
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of July 15.**

Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

Tactic 2.5.1: Develop Lifecycle cost analysis and funding process for capital projects (Action Plan only)

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Sustain current process of completing Operating Budget sheets for new projects (Ongoing)**
 - **Support Capital, when required, with further study related to funding (e.g. HRL, Cone, RDH, Health and Wellness Center, etc. work) (Ongoing)**

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.5	Improve the Capital Planning and Design Process
Tactic	2.5.2	90% of designers under contract within 120 days of the Project posting in CAPSTAT
	2.5.3	90% of Designs complete by the scheduled completion date
	2.5.4	90% of designs complete within design budgeted fee

ACTION PLAN

Actions Completed

- CID 2—Colvard Renovations Assessment started
- CID 2—East Village Infrastructure Assessment started
- CID 2—Elevator Upgrades designer advertisement
- CID 2—Academic Complex designer advertisement

Actions Planned

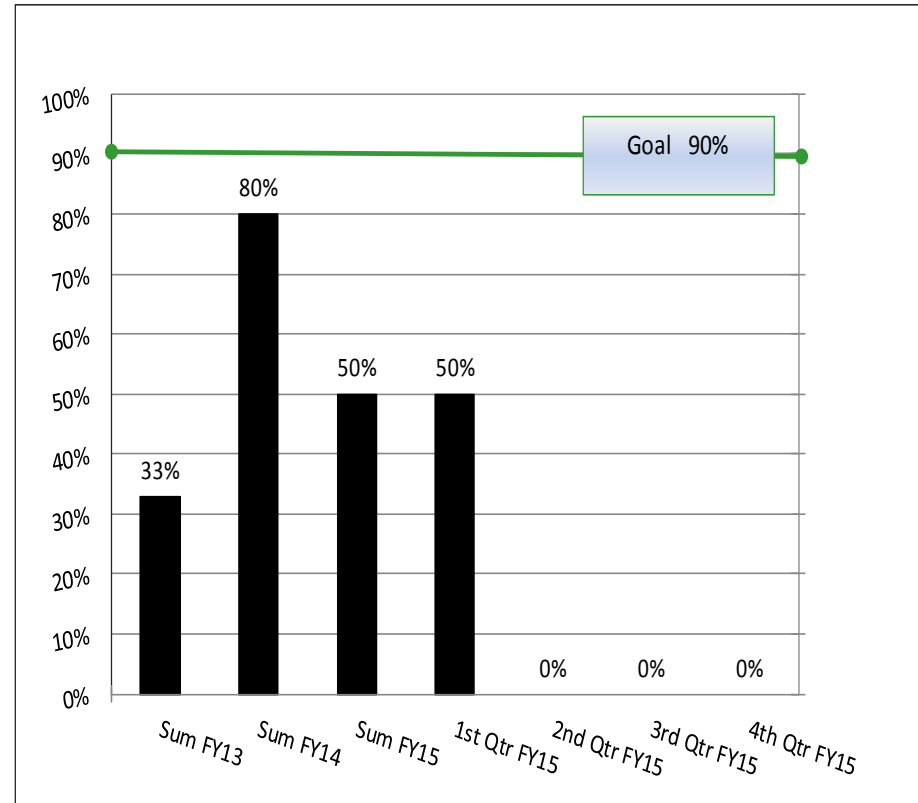
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules –
 - PMs to update the BL schedules when design agreements are received reflecting the contractual dates for each project phase.(design, bidding, construction).
 - PMs to communicate at project design meetings these design phase critical dates.
 - PMs must carry project datasheets with the accurate baselines dates to every project meeting.
- PMs print project budget / financial sheets. Have them on hand for all design meetings. PMs must know their project authorization, current source of funding, available balances.
- Develop a standardized design meeting agenda and make budget, contingency, scope creep, and design production schedule required topics for updating the project team.
- Report monthly to AVC FM status of changes relating to designer fees, scope creep, schedule misses, etc..
- Protect contingency limit uses for unforeseen conditions, inflation

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.2 90% of designers under contract within 120 days of the 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 w/in 120 days	Designer not under contract w/in 120 days	% Designers under contract w/in
Summary FY-13	14	3	6	33%
Summary FY-14	7	4	1	80%
Summary FY-15	1	1	1	50%
1st Qtr. FY-15	1	1	1	50%
2nd Qtr. FY-15	0	0	0	n/a
3rd Qtr. FY-15	0	0	0	n/a
4th Qtr. FY-15	0	0	0	n/a



Tactic Measurement for 1st Quarter is 50%

Facilities Management Strategic Planning Session – First Quarter FY 2015

**Lead
Capital**

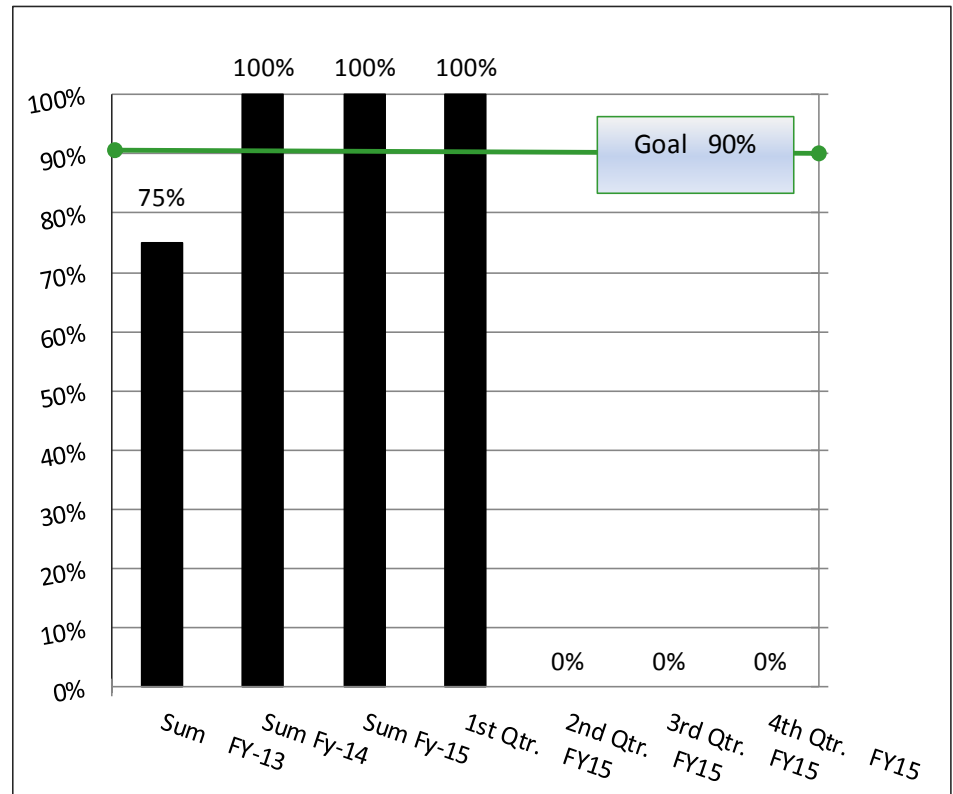
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.3 90% of designs complete by the scheduled completion date

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	#not completed by scheduled time	% Designs complete by completion time
Summary FY-13	3	1	75%
Summary FY-14	8	0	100%
Summary FY-15	1	0	100%
1st Qtr. FY-15	1	0	100%
2nd Qtr. FY-15	n/a	n/a	n/a
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 1st Quarter is 100%

Status

Facilities Management Strategic Planning Session – First Quarter FY 2015

**Lead
Capital**

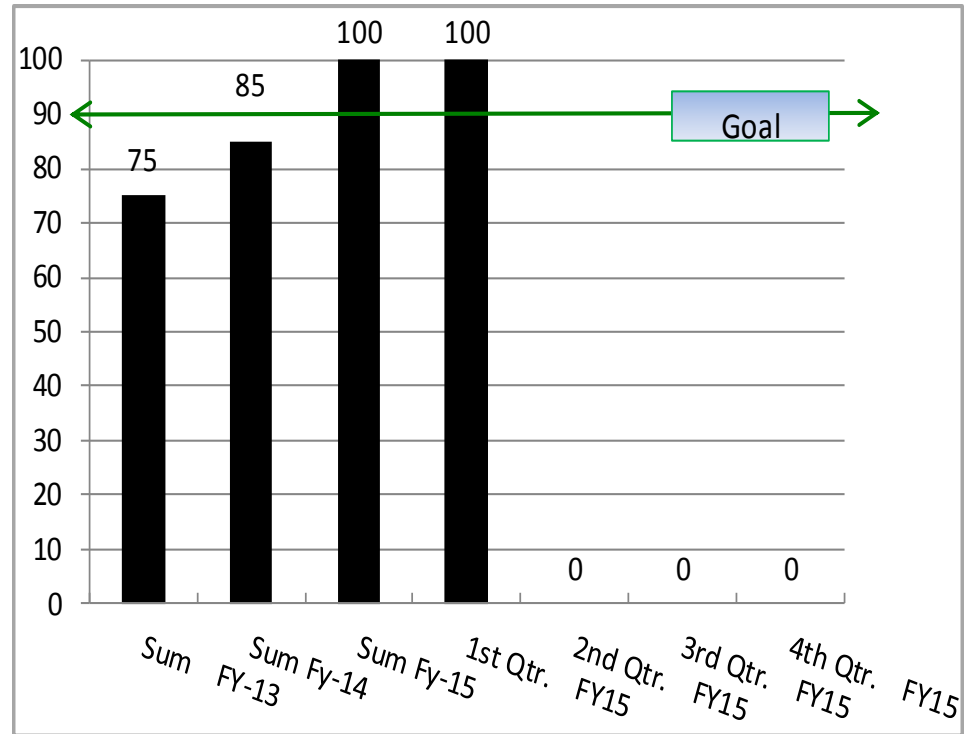
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.4 90% of designs complete within design budgeted fee

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

Balanced Scorecard Category: Internal Processes

STRATEGIC REVIEW by Fiscal Year (July-June)	# of designs with original budgeted fee	# designs complete not within budget	% Designs not complete w/in budgeted fee
Summary FY-13	3	1	75%
Summary FY-14	6	1	85%
Summary FY-15	1	0	100%
1st Qtr. FY-15	1	0	100%
2nd Qtr. FY-15	n/a	n/a	n/a
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 1st Quarter is 100%

Status

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.6	Improve the Capital Construction Process
Tactic	2.6.1	90% of capital construction Projects completed on time
	2.6.2	95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

ACTION PLAN

Actions Complete

- RH Phase 14 SLUR
- RH Phase 14

Actions Planned

- CMs keep baseline schedules current & refer to them regularly, focus on design and construction end dates.
- PMs & CMs discuss schedule (baseline & current) with end users, designers & contractors
 - Use 3rd party construction scheduling consultant to evaluate contractor's schedules
 - CMs dedicate a portion of each weekly construction meeting to compare 5-day look ahead with current construction schedule to make sure the two are in sync
- Inform designers and contractors of each other's contractual schedule dates
- PMs & CMs maintain & print project budgets & account reports monthly (have at all project meetings)
- PMs share budgets with AVC and end users.
- Hold contingency for unforeseen conditions, project requirements, inflation, etc.
 - CMs schedule & facilitate systematic construction site visits with end users and FM staff
 - CMs communicate status of project contingency, change orders, etc.
- Manage construction scope creep
 - PMs use alternatives during bidding process to identify basis project needs.
 - PMs & CMs refer to advance planning document/SD/DD deliverables when assessing a change item request.
- Select qualified/experienced construction management teams
 - Field staff resumes need to identify similar projects (size, scale, complexity) experience and roles member played.
 - CMR Staffing proposals must clearly identify personnel with specific role and percentage of time to be assigned to our project (TBD is not acceptable).
-

Facilities Management Strategic Planning Session – First Quarter FY 2015

Lead Capital

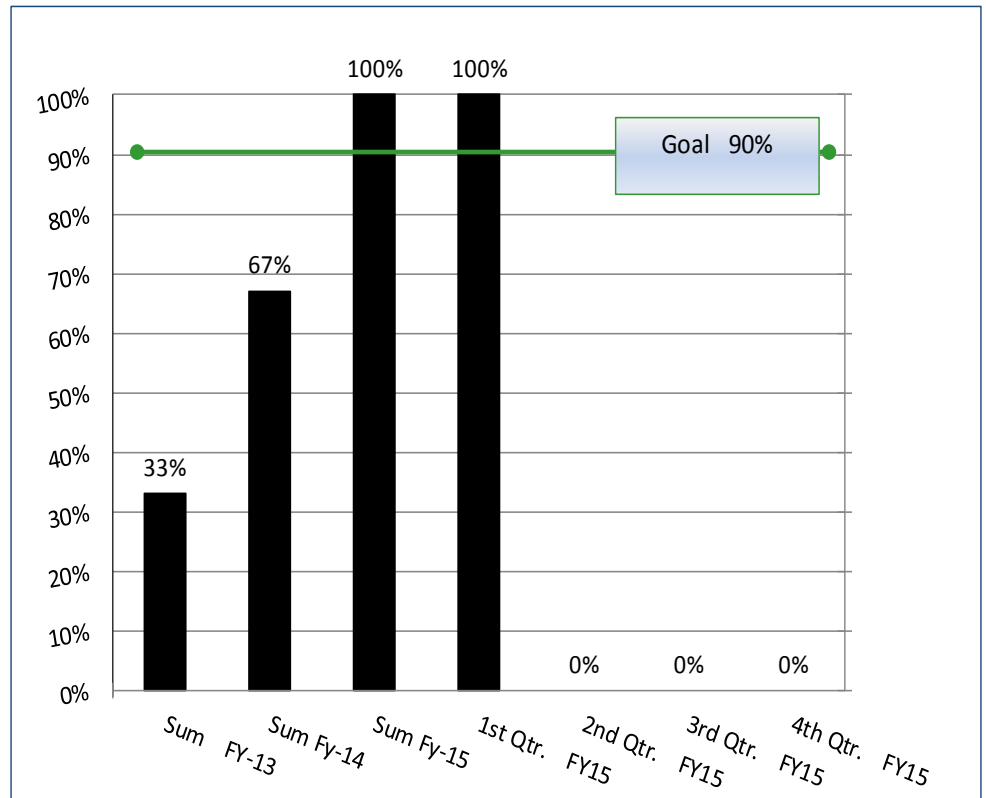
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.1 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-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	2	0	100%
1st Qtr. FY-15	2	0	100%
2nd Qtr. FY-15	n/a	n/a	n/a
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 1st Quarter is 100%

Status

Facilities Management Strategic Planning Session – First Quarter FY 2015

Lead
Capital

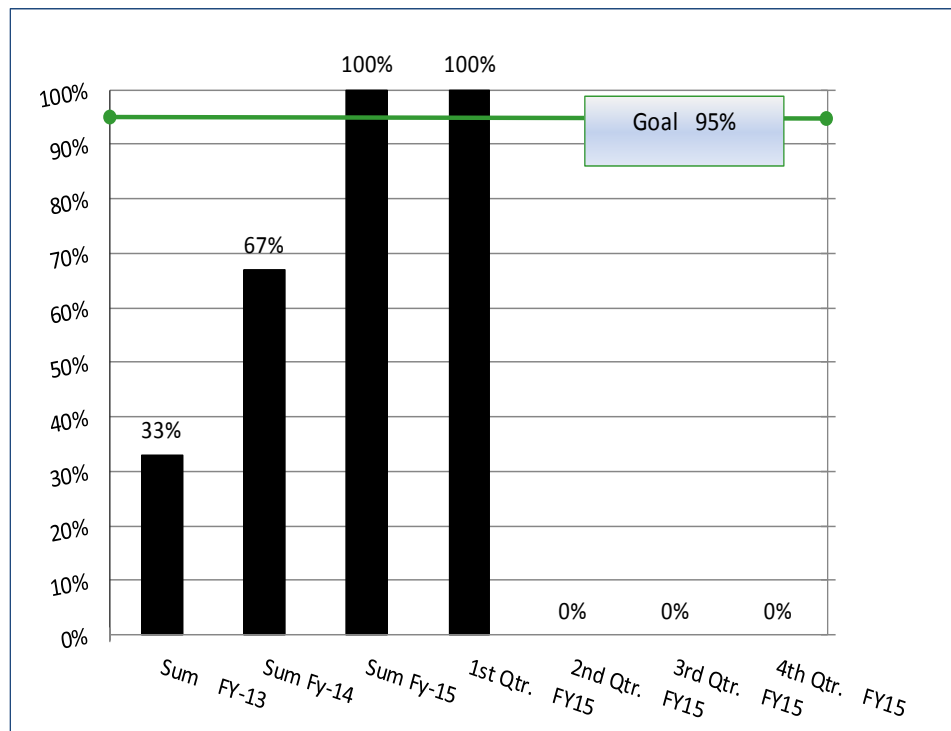
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.2 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

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	2	0	100%
1st Qtr. FY-15	2	2	100%
2nd Qtr. FY-15	n/a	n/a	n/a
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 1st Quarter is 100%

Status



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 #3

Foster a Customer Focused Organization



GOAL #3 Foster a Customer Focused Organization

Objective 3.1:

Continuously improve customer service/satisfaction

Tactic 3.1.1:

Achieve overall customer satisfaction of 90% for FM services.

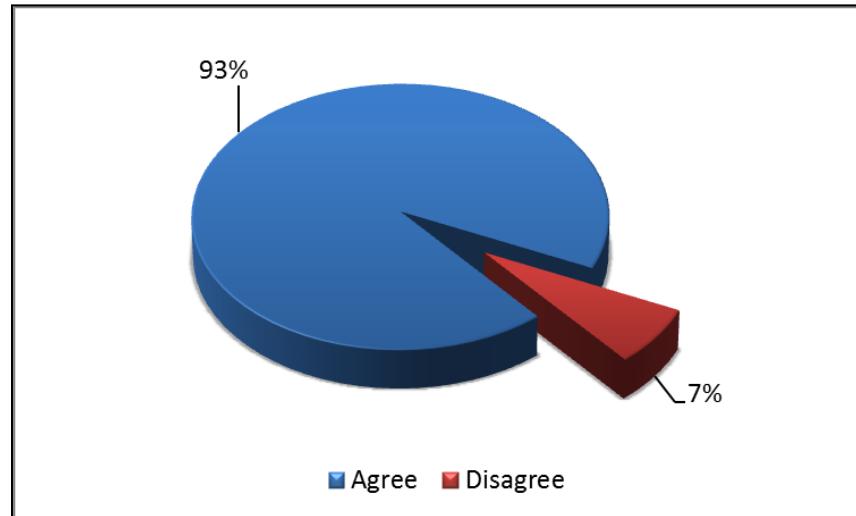
Measure:

Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with <the service> I received from Facilities Management”

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

2014 Survey Overall Satisfaction: 93%



ACTION PLAN

Customer Survey

- Reports delivered to Directors - Oct. 2014
- Directors develop actionable items to report at Strategic Planning Meeting. – **Winter 2014**

STATUS

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

ACTION PLAN

- **Actions Planned**

- 1 – Stay engaged with performance of ESCO contract; keep customers informed; walk the buildings and work with the Energy Manager to keep customers informed; communicate daily.
- 2 – Support Capital to get buildings commissioned and retro commissioned.
- 3 – Work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.

Actions Completed:

- Implemented daily monitoring of temperatures using BAS and field verification. Continue to develop controls section and cross train with Zones.
- Work with other FM team members to establish a communication plan for temperature related building issues; communicate this plan no later than 1 August 2014 and update as needed.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

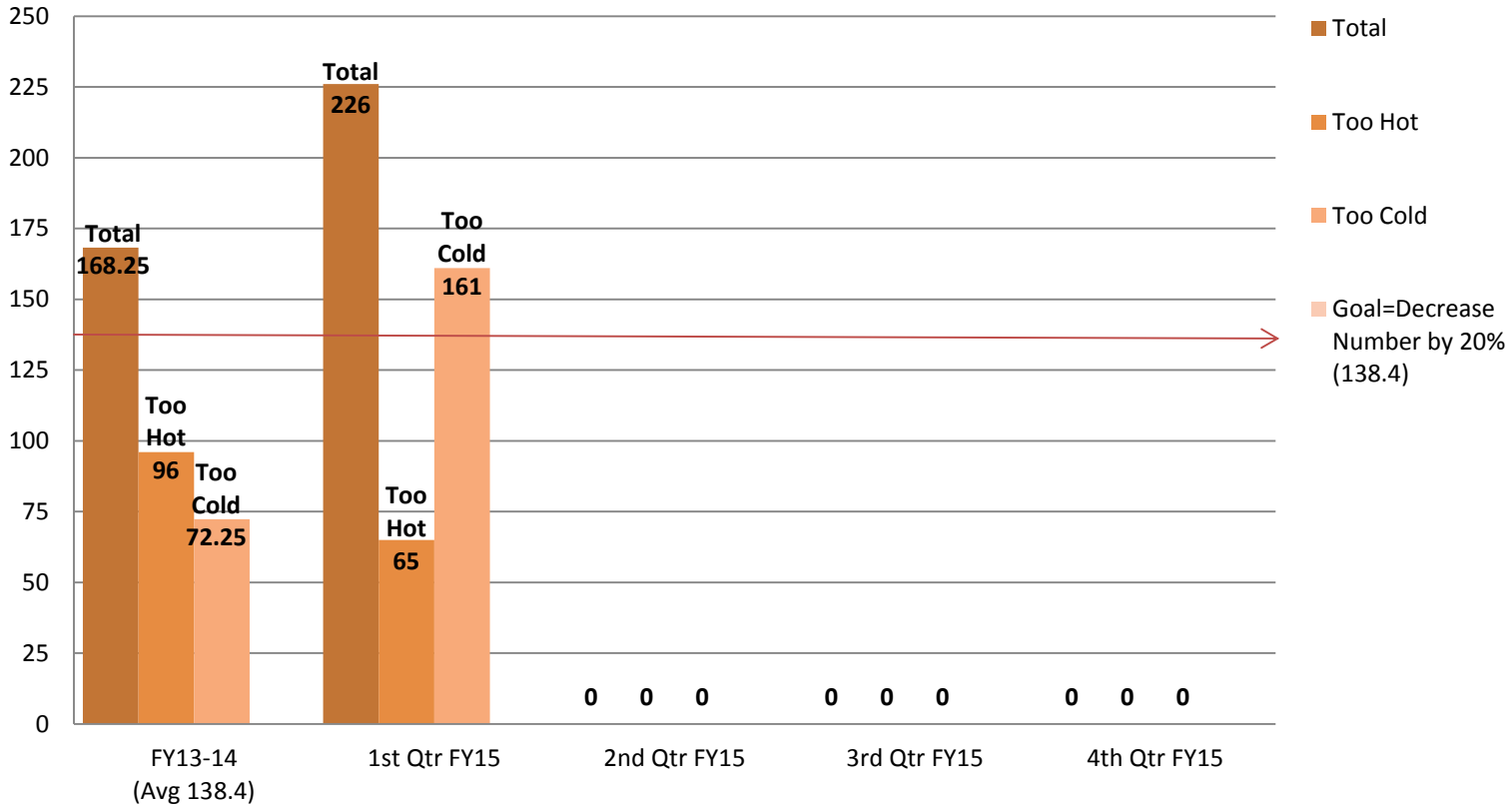
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL 90.0%	STATUS 100.0%	Lead Design Services
----------------------	-------------------------	--------------------------------

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied

Measure: Results from Project Related Customer Surveys

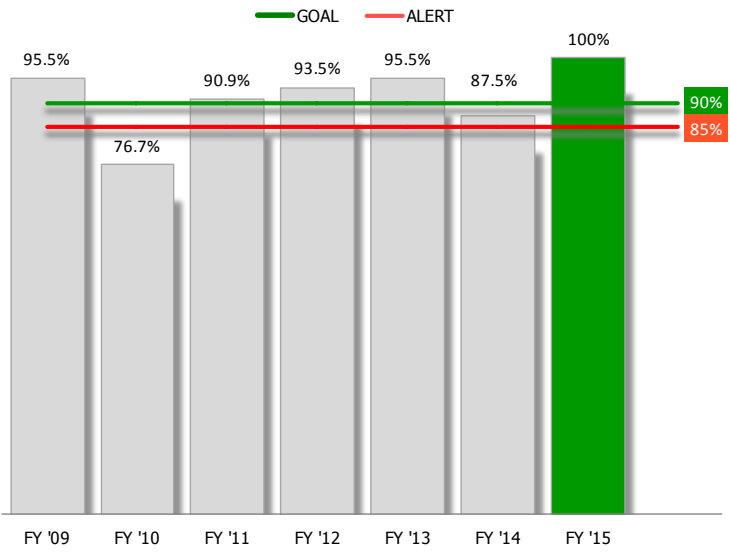
Lead: Design Services

Balanced Scorecard Category: Internal Business Process

90% of Informal Project Customers More than Satisfied or Satisfied with services received

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY '09	22	22	18	3	0	95.5%
FY '10	30	30	18	5	0	76.7%
FY '11	33	33	24	6	2	90.9%
FY '12	31	31	27	2	0	93.5%
FY '13	22	22	18	3	0	95.5%
FY '14	24	24	18	3	0	87.5%
FY '15	29	5	5	0	0	100%

GOAL: 90.0%
STATUS: 100.0%



Customers Comments:

The project manager was extremely helpful in getting our questions answered and keeping us informed.

The project went well and I was happy with the communication during the projects. There were a few minor punch list items at the conclusion of the project that we corrected very quickly.

The project coordinator followed up with the contractors on several small issues and the changes were made very quickly and accurately.

Very pleased with the communication with Design and Renovations. Coordination between everyone was satisfactory, and start to completion timeline was fast and addressed our needs. I wish all projects could go so smoothly. Thanks.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

Measure: Percent satisfied or very satisfied on Archibus email Work Order Survey Results (to be updated)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



Facilities Operations Quarterly Customer Survey

Dear Valued Customer,
Facilities Operations strives to improve our overall customer service. As one of our valued customers, please help us evaluate our performance in meeting your expectations. We are counting on your feedback. This survey should take only a few minutes.
Thank you for helping us continually improve.
Facilities Operations

E-mail: [?]

On behalf of Facilities Operations, thank you for participating in this survey! Please contact our Customer Service Center at 704-687-0562 for any questions and/or feedback.

Facilities Operations Quarterly Customer Survey

1) How satisfied are you with the time it takes for Facilities Operations staff to respond to your issue?
 Very Satisfied
 Satisfied
 Dissatisfied
 Very Dissatisfied

2) How satisfied were you with the resolution of your issue or concern?
 Very Satisfied
 Satisfied
 Dissatisfied
 Very Dissatisfied


3) Was there follow-up? (If no, please explain.)
 Yes
 No

4) How satisfied were you with our staff's courteousness and professionalism?
 Very Satisfied
 Satisfied
 Dissatisfied
 Very Dissatisfied

5) How satisfied were you with your overall experience?
 Very Satisfied
 Satisfied
 Dissatisfied
 Very Dissatisfied

6) Please provide any other helpful comments.

STATUS

 [Email my response to me](#)

GOAL #3 Foster a Customer Focused Organization

Objective xxx: Continuously improve customer service/satisfaction
Tactic xxx: (Proposed Change) Build brand awareness
Measure: (Proposed Change) Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Publicity/Public Relations:

- **FY 2014:** 82 documented mass-view FM news items in varying media channels.

- **1st Q, FY 2015:** 12 documented mass-view FM news items in varying media channels.
 - **Analytics examples**
 - *APPA Award* 1,100 + views on University YouTube site within 1st week; 369 “likes,” 210 “shares” on University FB page
 - *Zero Waste Returns To Gridiron* 400+ unique page views on University Homepage Spotlight
 - *LYNX Light Rail* 1,000+ views on Inside UNC Charlotte (multiple channel drivers) 1st week
 - *Phillips Rd. Realignment* 25 “likes,” 3 “shares” on University FB page
 - **Campus Construction Reports – 2**
 - **Campus-Wide Notifications – Daily, usually**

- **2nd Q, FY 2015:** More publicity, *Live Wire* show Oct. 30 **Through June 30, 2015**

GOAL #3 Foster a Customer Focused Organization

Objective xxx: Continuously improve customer service/satisfaction
Tactic xxx: Proposed: **Build brand awareness**
Measure: (Proposed Change) Action Plan Only

Lead: Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Communication Initiatives (interrelated):

- Launch 2nd Customer Environmental Scan **Fall 2014**
 - Share results with Directors **Winter 2014/2015**
- External Marketing Campaign: “Creating A Campus of Distinction”
 - Signage launch – **Fall 2014**
 - Solicit feedback/input from Directors and Employees – **Winter 2014/2015**
 - Execute campaign tactics (testimonials, LCD signage, website, etc.) – **Late Winter/Early Spring 2014/2015**
- SOP review, development **Winter 2014/2015**
- Update and remarket Customer Handbook, digital and print – **Late Fall/Early Winter 2014**
- Website Update (2nd iteration) and QA - **Winter 2014/2015**
 - Requested temporary or permanent position to assist with communications efforts;
 - **QA other customer-facing technology – As needed thru June 30, 2015**
 - **ARCHIBUS automated customer surveys (may use Survey Share for Ops)**
 - **CRDM page**
- Forming FM Communication Group. Selecting members now. – **Winter 2014/2015**

Objective xxx: Continuously improve customer service/satisfaction
Tactic xxx: Proposed: Build Brand Awareness
Measure: (Proposed Change) Action Plan Only

Lead: Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Internal Communication: Through June 30, 2015, unless otherwise noted

- Communications workshop added to FM Leadership Academy. Operations Writing Workshops completed
- Expand FM audience and subject materials – **Fall/Winter2014**
- **Intranet – Spring 2015**

Special Projects: Through June 30, 2015, unless otherwise noted

- **Sustainability Magazine Launch Fall 2014**
 - Final editing & proof phase
 - Will be reviewed by Phil Jones, Phil Dubois and Beth Hardin, prior to launch
- **Editing/Writing FM award submissions:** COAA, Campus Tree USA, APPA Innovative Practices
- **Presentation assistance:** SCUP Conference video
- **Traffic communications initiatives with U. Communications:** Quarterly e-newsletter, articles, announcements, etc.
- **Communication Plans:** BES key announcements, FIS new campus map
- **Surveys:** Design Services, Operations, FIS new campus map user test
- **Personnel:** New position request submitted through FY 15 budget process



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 #4

Recruit, Develop, and Retain
Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt

Vacancy time of no longer than 120 calendar days - Exempt

Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

- Increase the pool of qualified applicants by ensuring minimum/preferred qualifications on all job postings contain reference to computer skills, excellent/effective skills in written, verbal and interpersonal communications; English language comprehension skills and skills that demonstrate the applicant’s ability effectively to work/interact with others - **As appropriate through June 30, 2015**
- Ensure a qualified diverse applicant pool by continuous research and development of resources and mediums in which to advertise position vacancies – **As appropriate through June 30, 2015**
- Ensure efficient turnaround time in filling position vacancies by maintaining consistent communications with hiring supervisors regarding hiring actions in HRMS - **As appropriate through June 30, 2015**
- Ensure FM maintains all currently-budgeted positions by providing consistent communications and reporting of position vacancies to not reach the 6-month abolishment threshold - **As appropriate through June 30, 2015**
- Ongoing monitoring of separation data ensures accurate reporting on employee turnover during the 24-month probationary period implemented August, 2013 - **August 22, 2015**
- Ensure less turnaround time with Main HR in processing recruitment actions by assisting hiring supervisors with establishing appropriate selection criteria and ensuring non-selection rationale meets Main HR guidelines - **As appropriate through June 30, 2015**

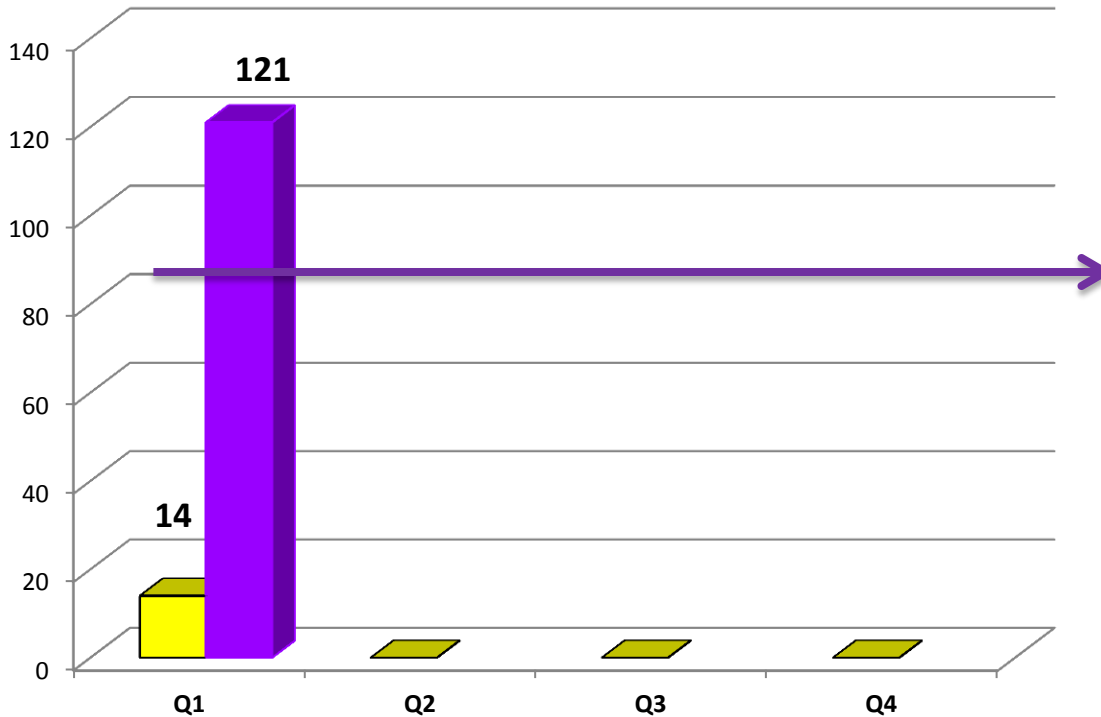
Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Non-Exempt Vacancies FY 2015



Target = 80 days or less
Actual = 121 days

■ # of Non-Exempt Hires
■ Average Number of Days

STATUS

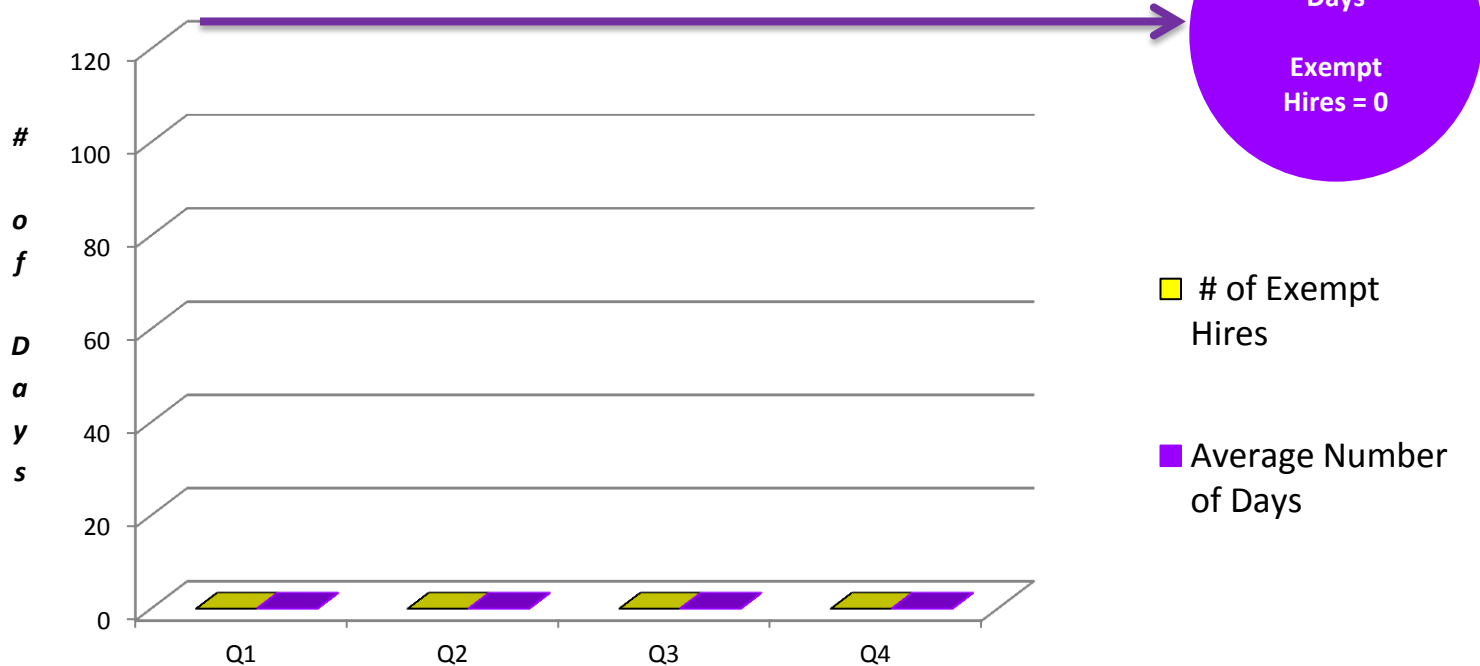
Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

**Average Number of Days to Fill
Exempt (Salaried) Positions 1st Quarter FY 2015**



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2015
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure:

Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

Recruitment AND Retention thru 06/30/15

- Retention is just as important**
 - We take many steps in recruitment. It's important as careful interviewing and reference checking practices help eliminate many problem performers from being hired in the first place.
 - Need to take steps in retention to keep the qualified employees that we took so many steps to hire.
- Culture of engagement**
 - Increase employee awareness regarding (their) access to our HRMS (PeopleAdmin) – Started July, 2014 and ongoing
 - Position Description
 - Work Plan
 - Performance Evaluation
- Professional Development**
 - It is the supervisor's responsibility to provide the training and development opportunities employees need to be successful in their jobs.
- Current position description**
 - An accurate position description, classification and salary are crucial to effective management.
 - All new hires, transferred employees, promotions receive an updated position description.
- Mentioning**
 - Good relations with employees prevent many disciplinary situations from beginning or worsening.

Employee Relations thru 06/30/15

- Discipline**
 - Closely tied to performance management process.
 - Not an independent event - part of a larger process.
 - Difficult to argue that an employee should be dismissed for performance when he/she has three years of "outstanding performance management ratings on file"
- Documentation**
 - Roadmap that shows how us how we got to a certain stage in the discipline process.
 - Why document...
 - Selective and unreliable memory
 - Grievance or lawsuit
 - If you didn't document it, then it didn't happen!**
- Meet with FM Departments and identify training needs in the area of Employee Relations – **December, 2014**
 - SPA Employee Grievance Policy - effective 5/1/2014
 - The 3 causes for disciplinary action
 - Unsatisfactory job performance
 - Unacceptable personal conduct
 - Grossly inefficient performance
 - Steps in the progressive discipline process
 - Required/Appropriate documentation in the disciplinary process
- Complete individual training sessions specific to departmental needs – **June 30, 2015**

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

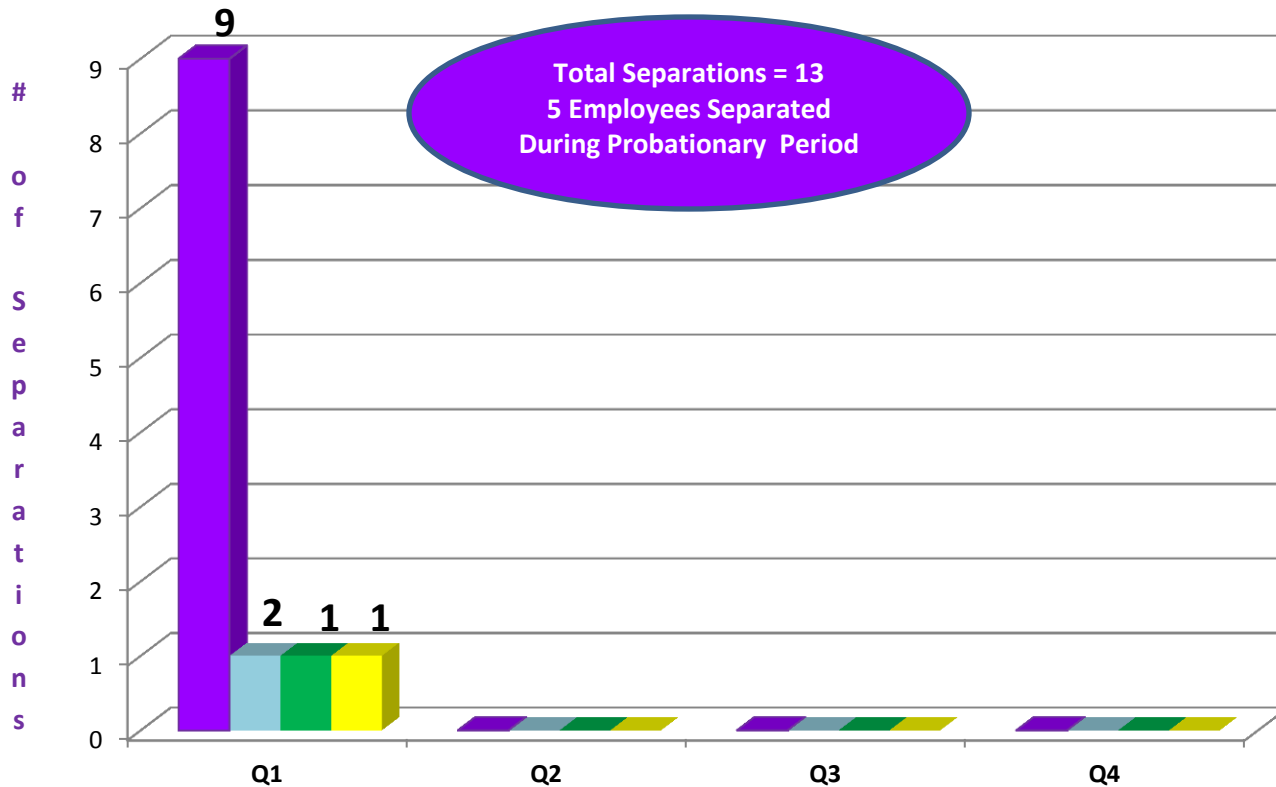
Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

**Employee's Separated During 1st Quarter
FY 2015**

Target = <5%
Actual = 1.3% Employees
Separated during
Probationary Period



- RESIGNATIONS
- INVOLUNTARY
- RETIREMENT
- DEATH

STATUS



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

- Objective 4.2:** **Improve Workforce Development**
Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year
Tactic 4.2.2: Increase Employee Training to 20 hours/year

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process, Learning and Growth

FM ACADEMY

ACTION PLAN

Action Item	Planned/Completed
<u>Technical</u>	
– EPA 608 Refrigerant Certifications (F/O)	Sep 2014
– HVAC Matrix Development	Oct 2014
– Computer Training for Recycling (<i>ITS Partnership</i>)	Oct 2014
– Computer Training for BES (<i>ITS Partnership</i>)	(TBD)
– Boiler Operation, Maintenance & Safety (F/O - onsite)	Jan 2015
– Hands On Electrical Troubleshooting (F/O - onsite)	Feb 2015
– Trouble Shooting Mechanical Drives Systems & Rotating Equipment	Mar 2015
– Work Order Process Improvement & Mapping	(TBD)
<u>Safety Awareness</u>	
– Supervisor Safety Talks	Monthly
– CPR/1 st Aid Training (<i>Innovative Solutions</i>)	Dec 2014
<u>Leadership</u>	
– Documentation & Disciplinary Process	Spring 2015
– Leadership Communication Workshop	Oct/Nov 2014
– Targeted Selection Training (<i>External consultant</i>)	Dec 2014
– Cultural Awareness/Inclusion Program	TBD
– NEO redesign	June 2015
<u>Externally Driven Initiatives</u>	
– Kronos implementation/training (<i>Financial services</i>)	Dec 2014
– People Admin version 7.35 upgrade/training (<i>Campus HR</i>)	Jan 2015



GOAL #4 Recruit, Develop and Retain Quality Employees

- Objective 4.2:** **Improve Workforce Development**
- Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year
- Tactic 4.2.2:** Increase Employee Training to 20 hours/year

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN

- Met with directors (Fake, Gilbert, Brillante, Fessler) to discuss staff learning & development needs for FY 15. – Sept 2014
- Continue regular attendance at F/O staff meetings for timely information exchange on training, licensure, etc. - Biweekly
- Meet with BES/R Education Coordinator to discuss upcoming plans, new strategies, etc. - Monthly
- Developing relationship with consultant Joanna Roop on future training opportunities. Requesting list of potential course deliverables. - Fall 2014
- FM-HR continuing to develop FM Academy **“Lending Library”** to provide learning resources for FM employees.
 - Developing check-out procedures – Dec. 2014

Learning & Development (1 st Qtr - 2015)	Hours Completed
Technical	43
Leadership	0
Professional Development	271
Safety Awareness	299
Administrative	59



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

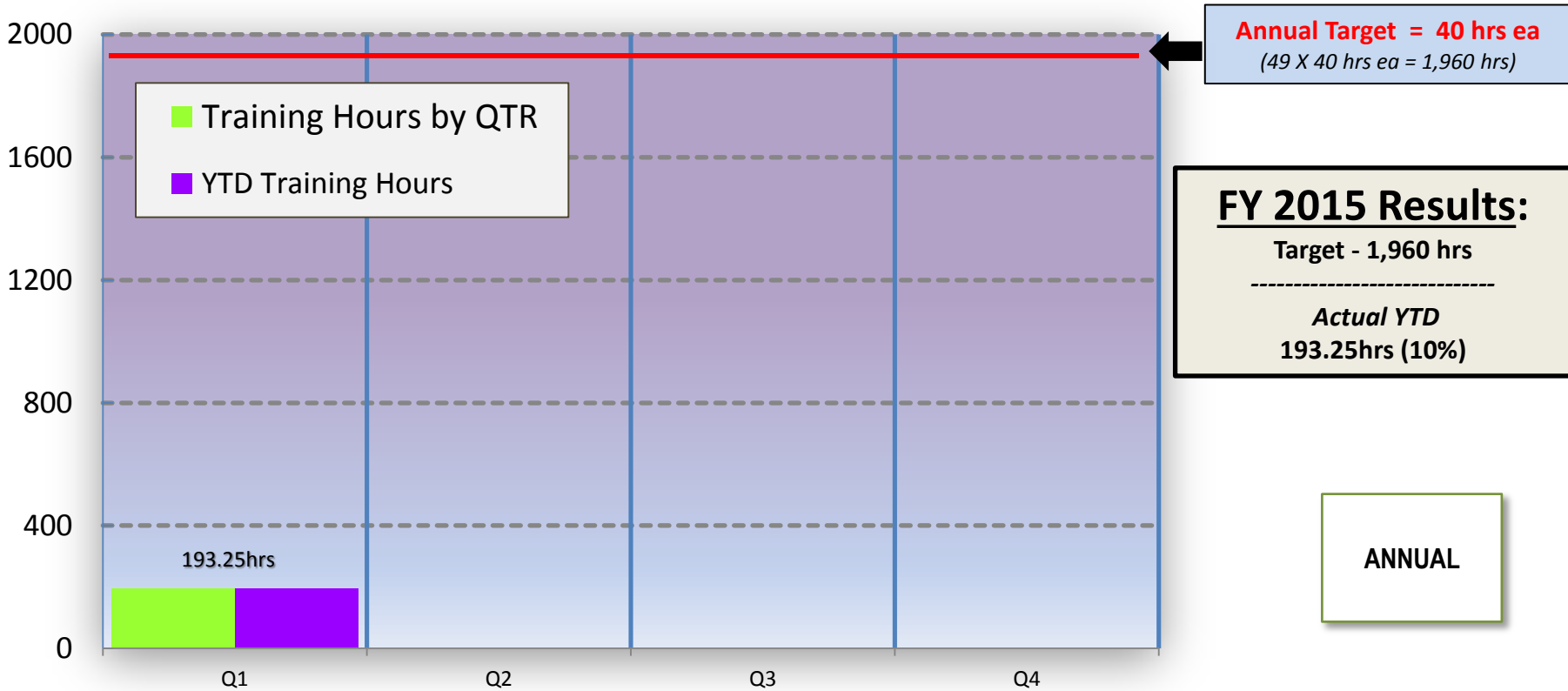
Objective 4.2: Improve Workforce Development
Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year
Measure: Average Hours of Training completed by Supervisors and Managers

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 15

Training Hours for Supervisors & Managers by Quarter





Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

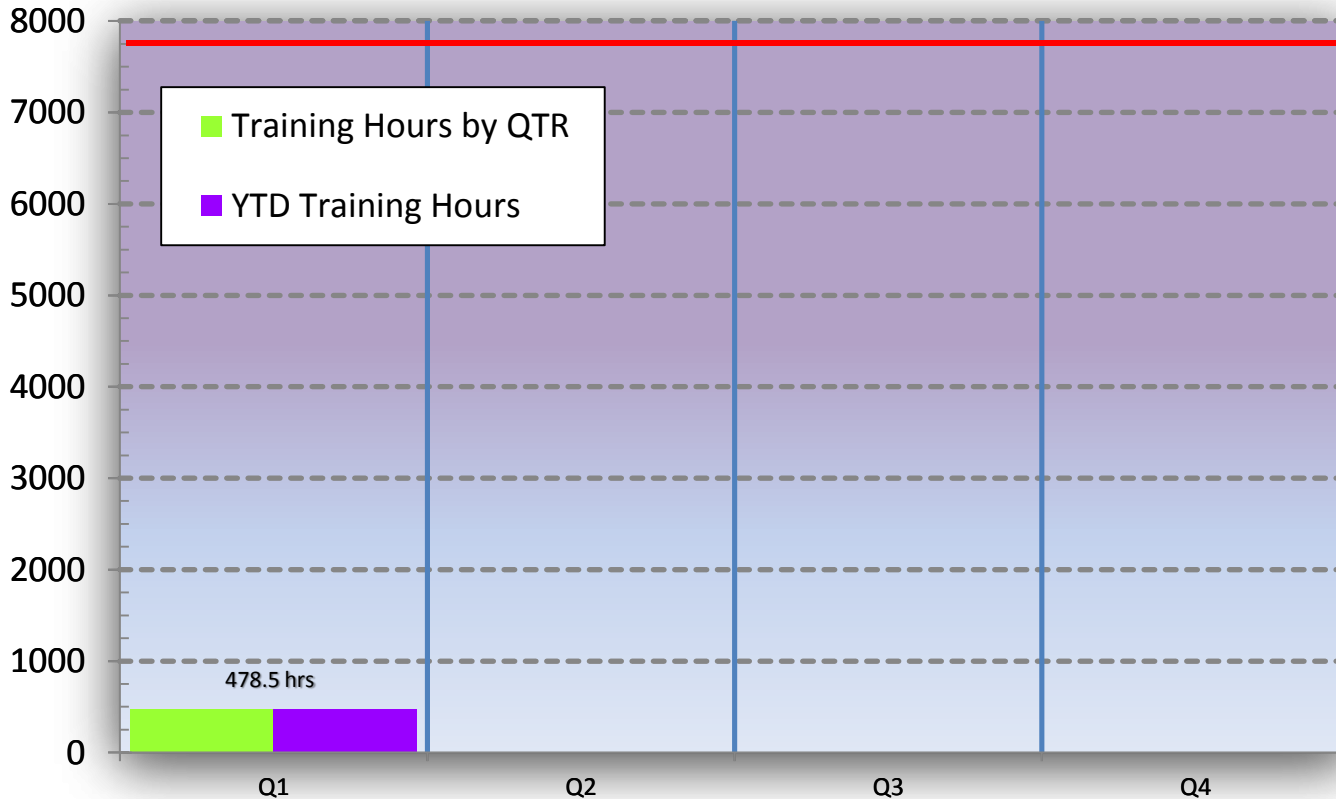
Objective 4.2: Improve Workforce Development
Tactic 4.2.2: Increase Employee Training to **20 hours/year**
Measure: Average Hours of Training completed by front line employees

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process. Learning and Growth

Training
Hours

FY 15

Training Hours for front line employees by Quarter



Annual Target - 20 hrs ea
 (388 x 20 hrs ea = 7,760 hrs)

Fiscal 2015 Results:
 Annual Target- 7,760 hrs

 Actual YTD
 478.5 hrs (6.2 %)

ANNUAL

GOAL #4 Recruit, Develop and Retain Quality Employees

- Objective 4.3:** **Create and Maintain a Quality Work Environment**
Tactic 4.3.1: 90% of Employees satisfied or very satisfied working in FM
Tactic 4.3.2: 87% of Employees satisfied or very satisfied in each unit of FM

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Survey Results and Data Review:

- Directors developing actionable items based on survey feedback for report out - **Fall 2014**;
- Demographic data provided by HR – every two weeks;
- Requested SPSS software for use in data analysis; - Software installed **Sept 2014**.
- Frequencies and crosstabulations of the data have been performed and shared with AVC-FM; will be shared with leadership- **Fall 2014**

Survey Logistics:

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – **Winter 2014**
 - Discuss potential of creating a survey focus group consisting of one employee from each of the major depts. to provide feedback on the questions as currently presented – i.e., are the questions clearly phrased for understanding, are we asking the right questions, etc. – October 2014
 - If feasible and if approved by AVC, identify members for the focus group and start process – January 2015
- Next survey to be administered in October/November 2015.

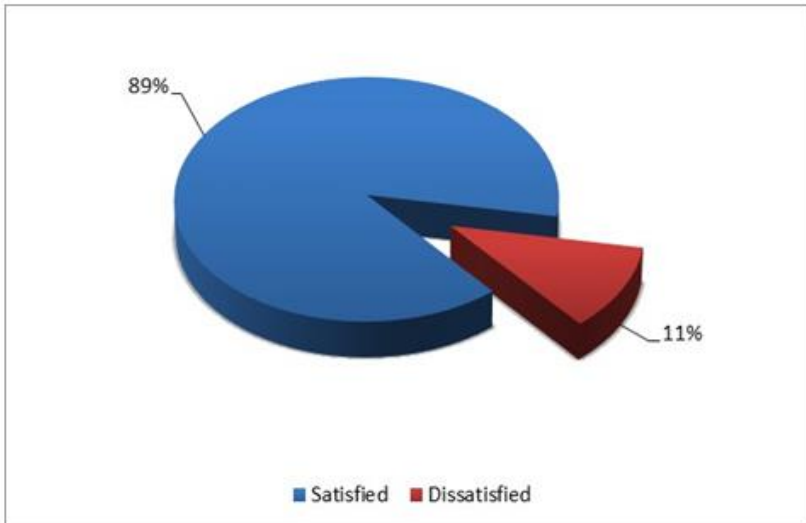
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment
Tactic 4.3.1: 90% of Employees satisfied or very satisfied working in FM
Measure: Annual Employee Work Climate Survey

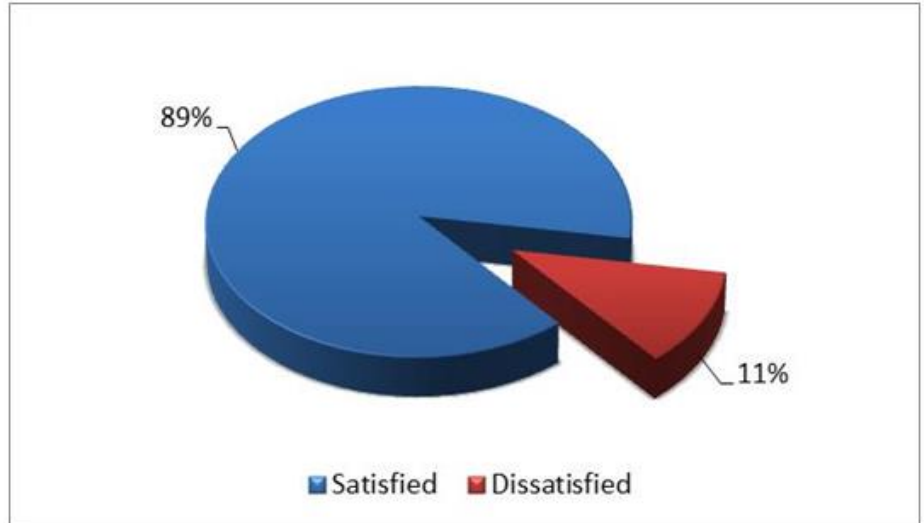
Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

FY 2014 Annual Satisfaction: 89%

Overall how satisfied are you working in the Facilities Management Department? (2013)



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

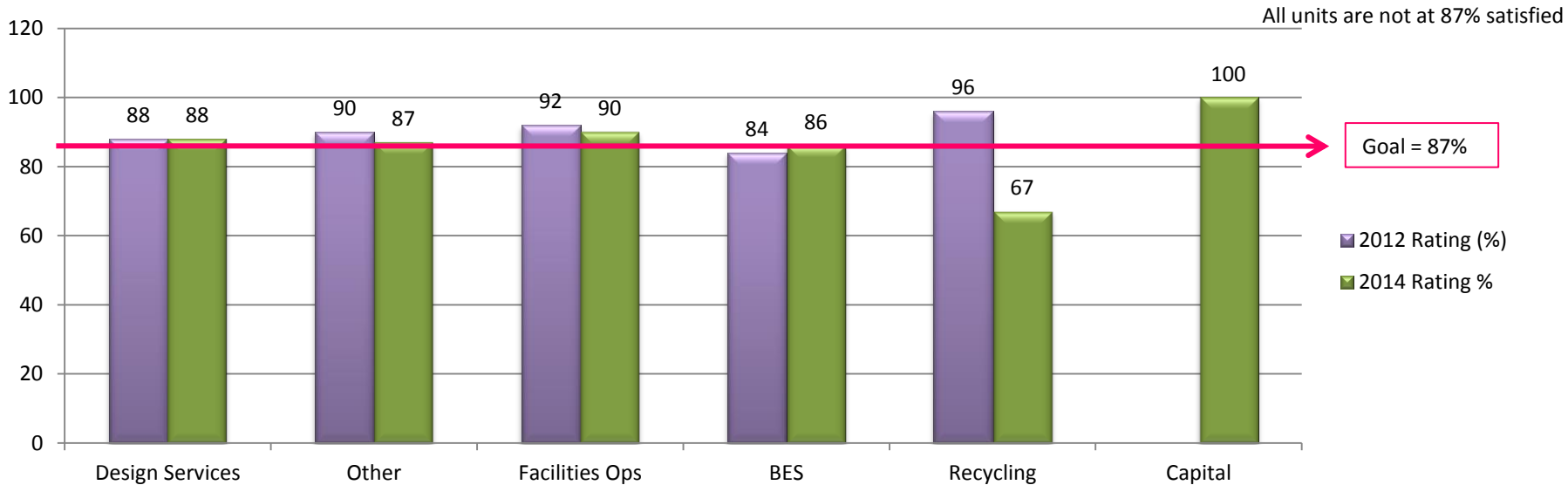


GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment
Tactic 4.3.2: 87% of Employees satisfied or very satisfied in each unit of FM
Measure: Annual Employee Work Climate Survey

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

Unit Customer Satisfaction Survey FY Rating Comparison (%)



Unit	2014 Rating	Extremely Satisfied	Very Satisfied	Satisfied
Design Services	88	0	44	44
Other	87	0	56	31
Facilities Ops	90	16	35	39
BES	86	16	33	40
Recycling	67	17	25	25
Capital	100	25	63	12

STATUS



Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

- Objective 4.4:** **Improve Employee Safety**
Tactic 4.4.1: Reduce the number of reportable accidents by 20%
Tactic 4.4.2: 98% of Mandatory Compliance Training completed annually

Lead: FM Wide
Balanced Scorecard Category: Innovation and Learning Perspective

FM ACADEMY

ACTION PLAN

Action Item	Target Date
<ul style="list-style-type: none"> • Ongoing safety related activities to foster continuous awareness <ul style="list-style-type: none"> • Supervisor Safety Talks • FM Safety Fair • Safety Slogan Contest, <i>New Slogan 7/2014 – “<u>Start Safe, Work Safe, Finish Safe</u>”</i> • CPR/1st Aid training 	<p>Ongoing monthly</p> <p>May 2015</p> <p>July 2015</p> <p>Jan 2015</p>
<ul style="list-style-type: none"> • Accident/Incident YTD (calendar year) <ul style="list-style-type: none"> • Accidents - 9 • Minor incidents - 1 	<p>2014 year end</p> <p>2014 year end</p>
<ul style="list-style-type: none"> • Compliance training (OSHA) <ul style="list-style-type: none"> • FM-HR, Risk Mgmt. and EHS to meet to discuss requirements • Process Review Project <ol style="list-style-type: none"> 1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc. 2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD • All training records sent to FM-HR Staff Dev. Specialist 	<p>Oct 2015</p> <p>Ongoing</p> <p>Ongoing</p>



Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

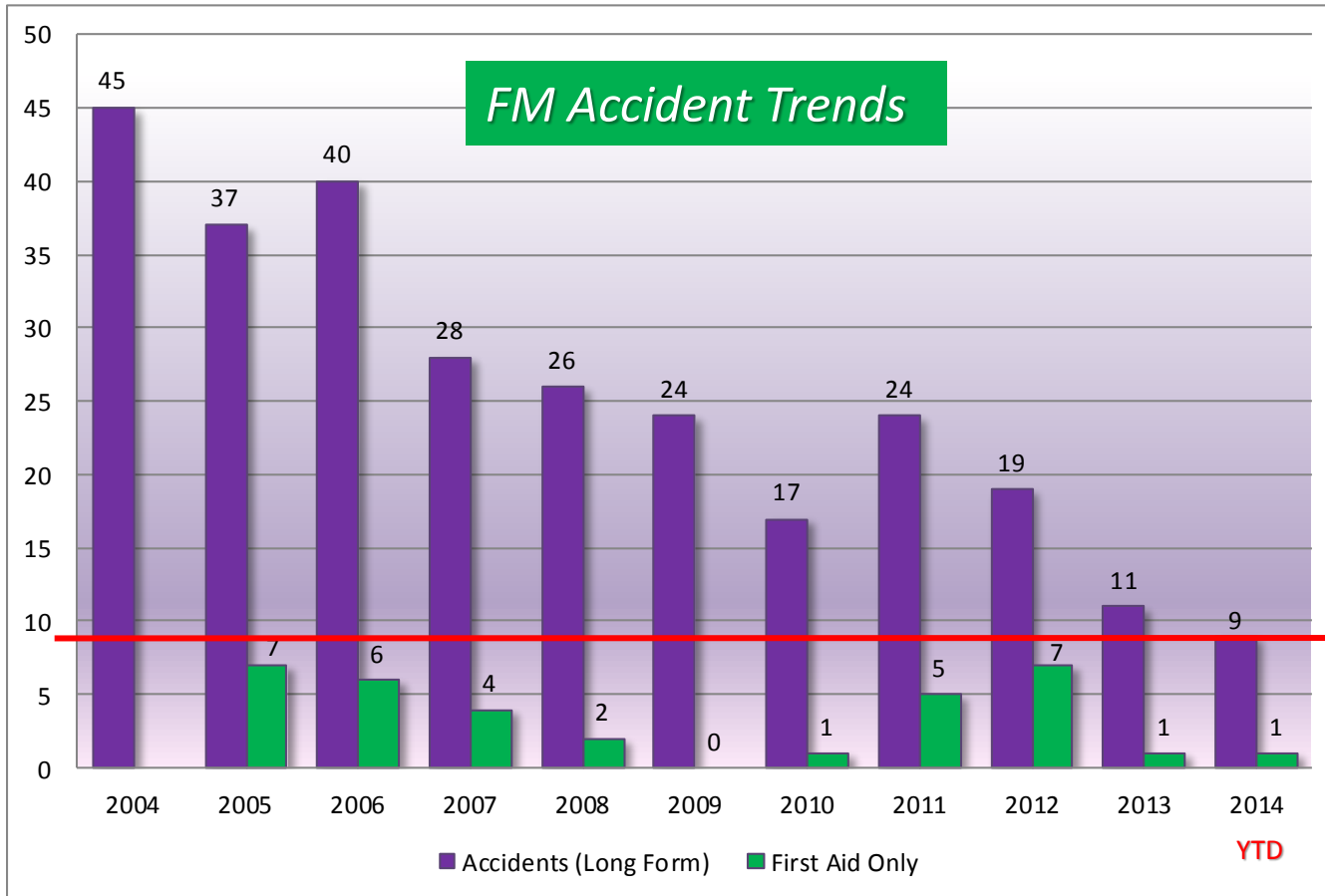
Objective 4.4: Improve Employee Safety

Tactic 4.4.1: Reduce the number of reportable accidents by 20%

Measure: Number of Reportable Accidents (Measured by Calendar Year)

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective



Last year = 11 accidents
Target 20% Reduction = 9
Current = 9 accidents

Target
≤ 9

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: **Improve Employee Safety**
Tactic 4.4.2: 98% of Mandatory Compliance Training completed annually
Measure: Percent of employees completing mandatory compliance training

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Reduce the number of reportable accidents by 20% - Improve Safety Awareness

- Supervisor Safety Talks (SST) - monthly
- Annual FM Safety Fair - Annually, Spring 2015
- Annual FM Safety Slogan Contest. *“Start Safe – Work Safe – Finish Safe”*

Compliance Training

- Periodic meetings with EH&S to review needs, processes, etc. – next meeting scheduled Oct. 22, 2014;
- Identified need to perform process mapping on current OSHA training with FO Leaders; Tentatively planned for Winter 2014
- Research training providers/vendors to help fill training gaps, as needed

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Action Item	Target Date
<ul style="list-style-type: none">Continued development of FM Academy<ul style="list-style-type: none">Marketing Strategy & Website DevelopmentContent DevelopmentVendor Selection and Delivery	<p>Dec 2014</p> <p>Ongoing</p> <p>As Needed/As Funded</p>
<ul style="list-style-type: none">HVAC Matrix Development – meetings ongoing	<p>Oct 2014</p>



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 #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

- Objective 5.1:** **Promote Fiscal Responsibility**
Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Finance/Budget:

- Labor Services analysis began July 2014 to determine and address areas of concern:
 - Reviewed IDI process for possible improvement; New financial report to be developed for improved tracking of payments associated with contracts – October 2014
 - Gaps in contract process identified – to be discussed with FO Director – October/November 2014;
 - Continue periodic review of ARCHIBUS work orders (NR vs R) – July 1, 2014 - June 30, 2015;
- Ensure that all finance responsibilities (FM appropriated and non-appropriated budgets, operating reserve templates, student fee submittals, APPA Survey, etc.) are completed on time – various deadlines

Supplemental Grant/Award Funding:

- NC State Energy Office Grant for Electric Stations; Awaiting expenditure plan – October 2014.
- Campus Tree USA Designation/Award Submittal; Due Dec. 31, 2014
- FBO developing award submittal for innovative/effective practices – Due Nov. 30, 2014
- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2015;

GOAL #5 Promote Good Stewardship

- Objective 5.1:** **Promote Fiscal Responsibility**
Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Cost Accounting:

- Devise strategy to improve cost accounting measures within all areas of Facilities Management – Fall 2014
 - Improve org code usage – July 2014 and July 2015, on-going when possible
 - Improve account code usage - July 1, 2014 – June 1, 2015
 - Understanding the impact of personnel decisions on budget – on-going through-out FY.
 - Create a budget revision process – completed July 1, 2014
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - **1st of each month;**
- Develop a process with paper trail to ensure that employees are appropriately aligned within their unit org codes - **Fall 2014**
- Requested an entry-level accountant position for FY 15 to assist in this area – **July 2014;**
- Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no upfront oversight by FBO (i.e., ARCHIBUS NR work orders); increase monitoring efforts **July 1, 2014 thru June 30, 2015** close out.

GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.3:

Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Measure:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

FY 14 APPA Survey:

- Data collection currently underway; Data received from FO, Capital, Budget Office; Data entry progress at 40%;
- Survey draft submitted to AVC for review – November 30th;
- Survey submitted to APPA – December 15, 2014.



GOAL #5 Promote Good Stewardship

Objective 5.1: **Promote Fiscal Responsibility**
Tactic 5.1.1: 100% of financial accounts within budget
Measure: Main Operating Fund Variance Report

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ON HOLD – AWAITING FINAL BUDGET



GOAL #5 Promote Good Stewardship

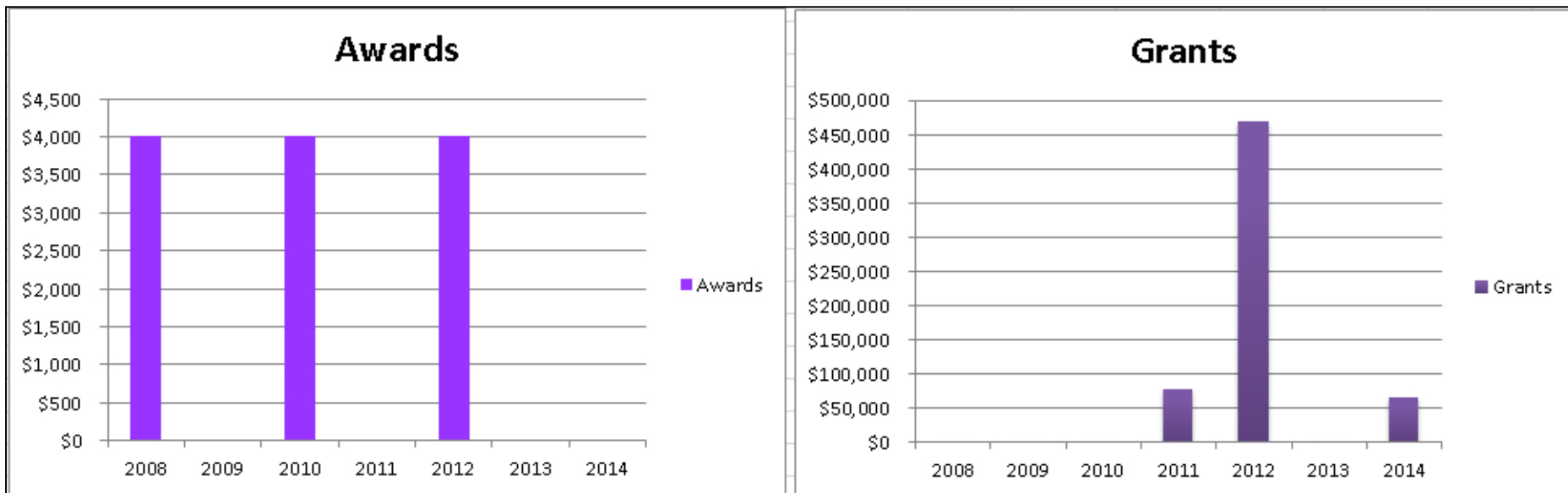
Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually

Measure: Percent increase in supplemental funding

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



GOAL #5 Promote Good Stewardship

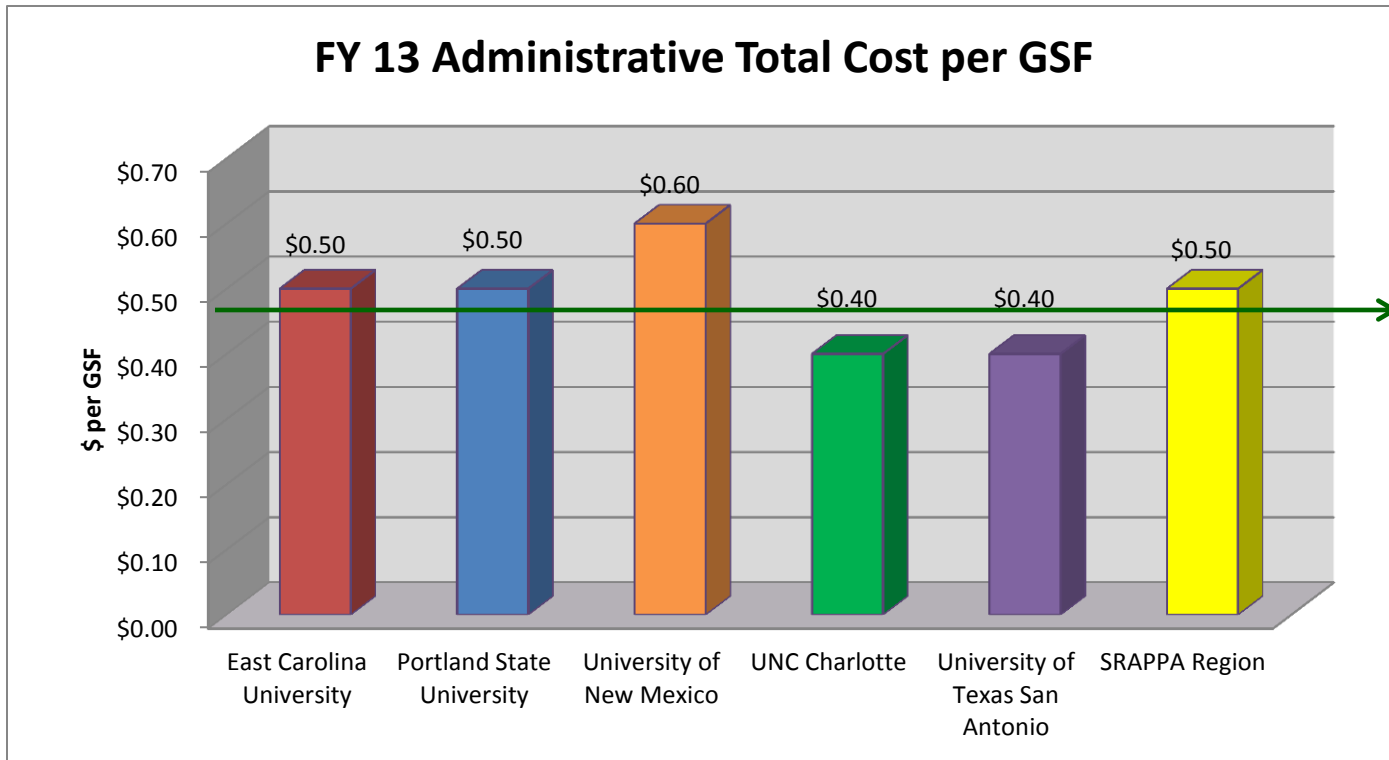
Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3: Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



ANNUAL

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Assess additional actions list for achieving STARS Silver; by 12/14.**
 - **Quarterly update of implementation plan for earning further credits based on feasibility: 10/14, 1/15, 4/15.**
 - **Achieve bronze rating by end of FY 15.**

STATUS

GOAL #5 – Promote Good Stewardship

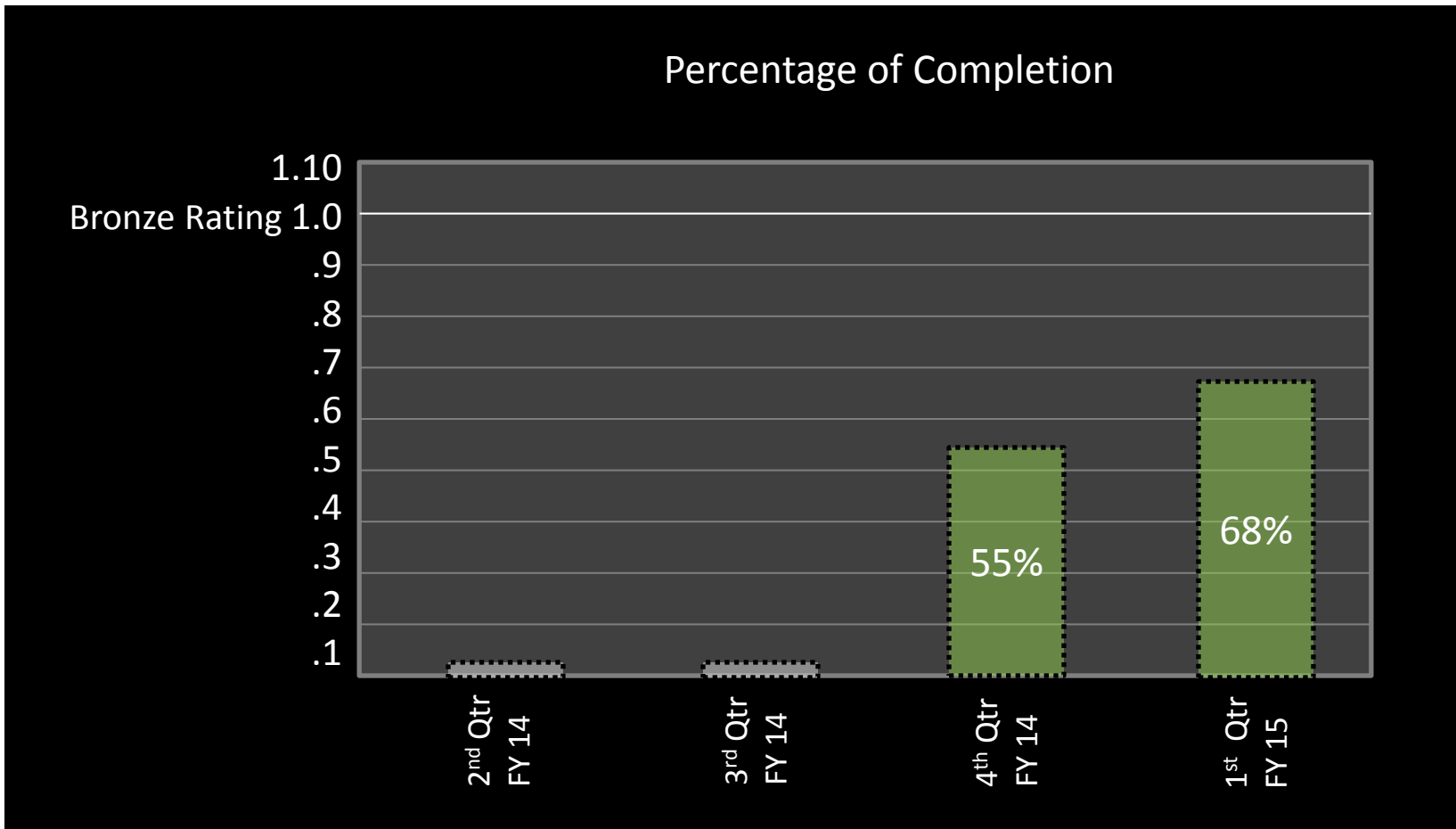
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Assess use of identified best practices (from Sustainability and Climate Action Plans, completed in May), including timeline and probable costs for additional implementation, by October 2014.**
 - **Draft annual plan and budget by January 2015 to achieve implementation of 60% of identified best practices.**
 - **Demonstrate 60% of best practices implemented by October 2015.**

STATUS

GOAL #5 – Promote Good Stewardship

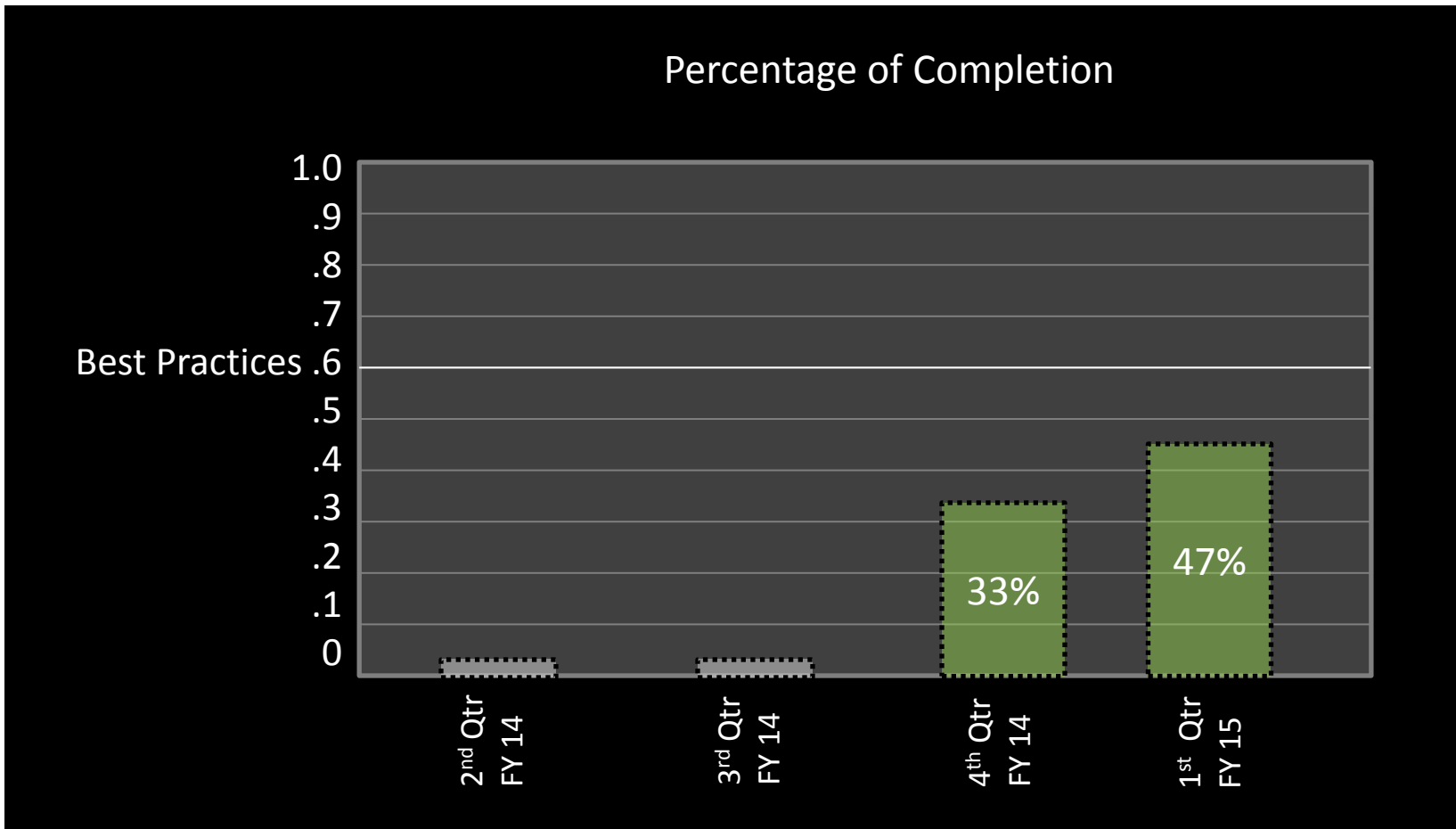
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

Tactic: 5.1.5: Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions

Tactic: 5.1.6: Achieve total Landscape cost/acre \pm 5% of APPA Average for Peer Institutions

Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

ACTION PLAN

- Actions Planned

- 1 – Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not To Charge) by 28 November 2014.
- 2 – Identify opportunities to expand reimbursable work in an effort to support labor services funds 25 November 2014
- 3 – Realign the labor services positions to ensure maximum utilization of resources by 28 November 2014.
- 4 – Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
- 5 – Monthly review of Labor Services accounts with FBO to identify gaps and improve processes.

Actions Completed:

- Identify opportunities to expand reimbursable work in an effort to support labor services funds 25 November 2014

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

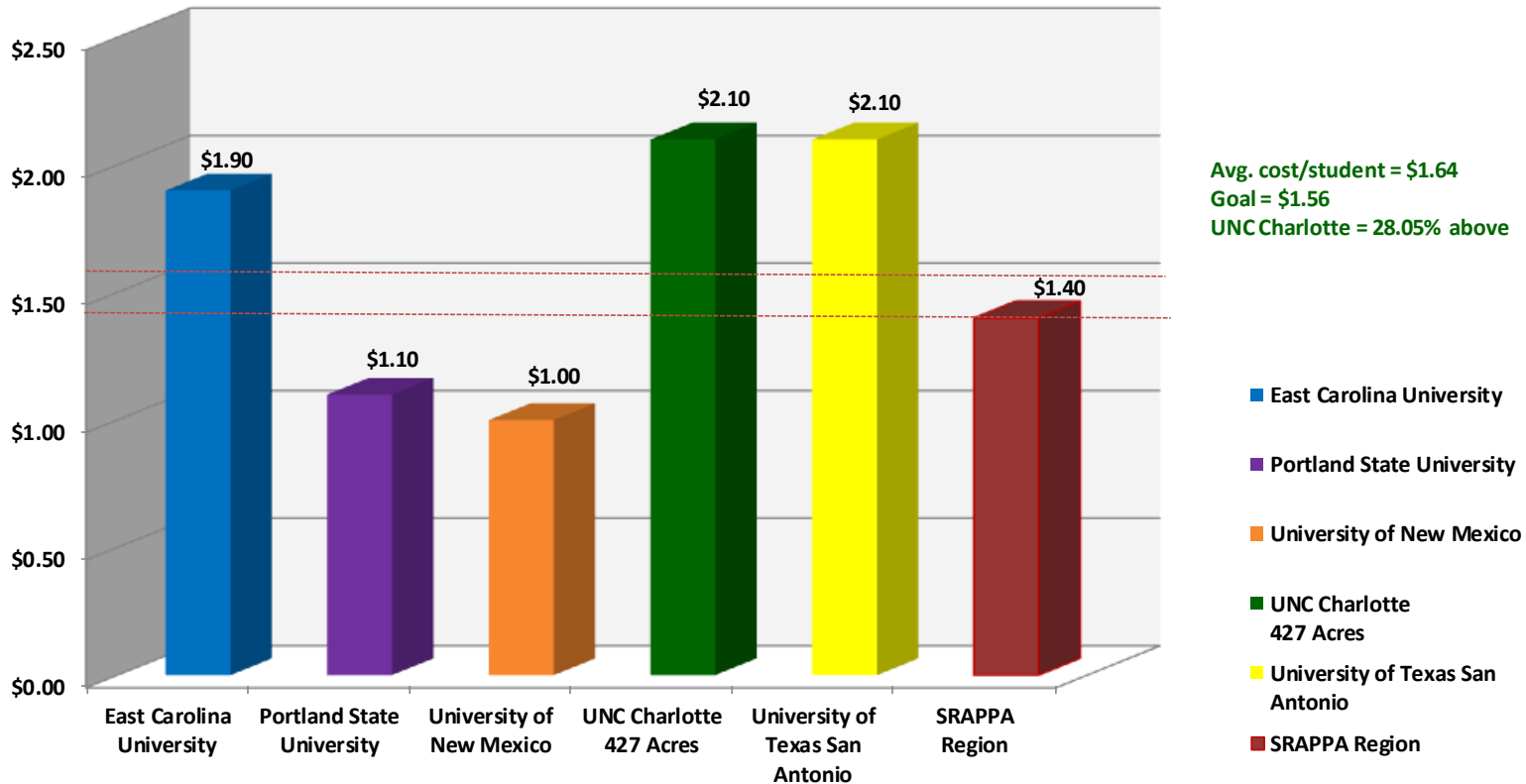
Tactic: 5.1.5: Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Maintenance Total per GSF



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

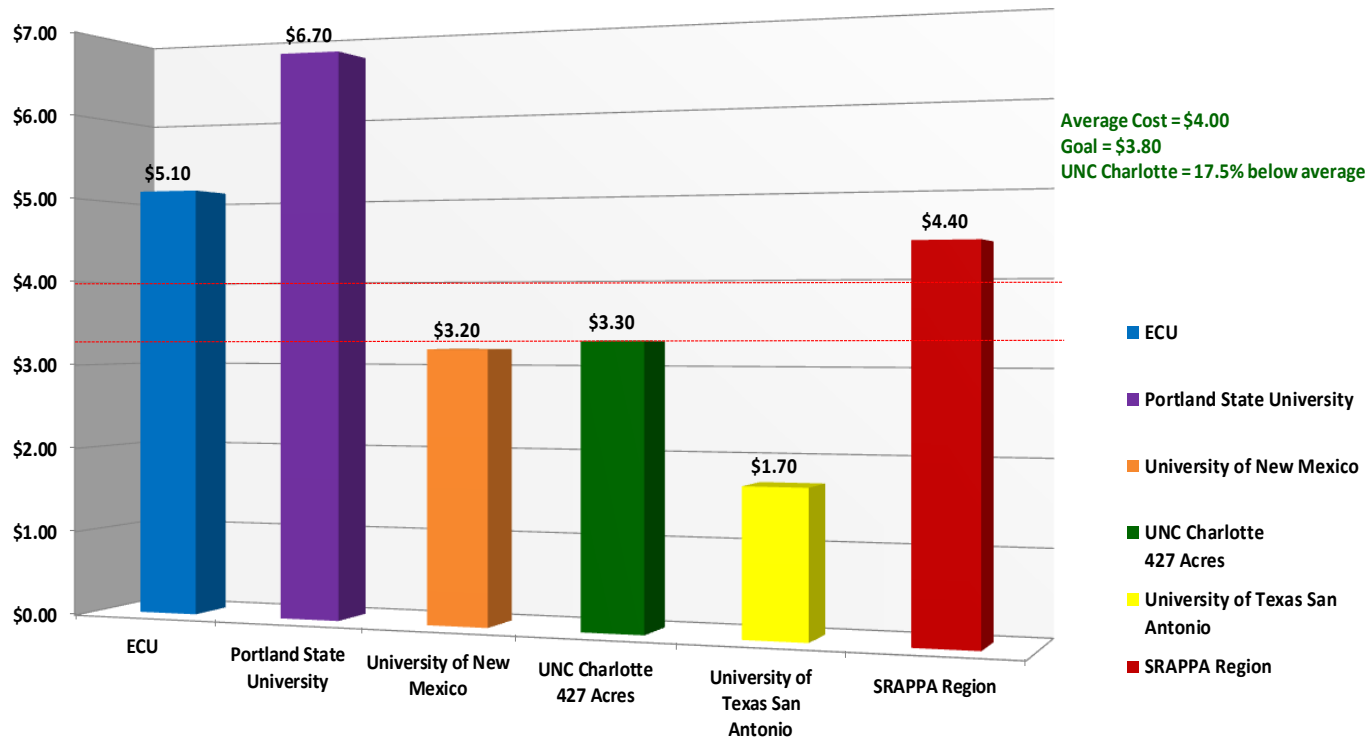
Tactic: 5.1.6: Achieve total Landscape cost/acre \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Grounds - Total Cost per Acre



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

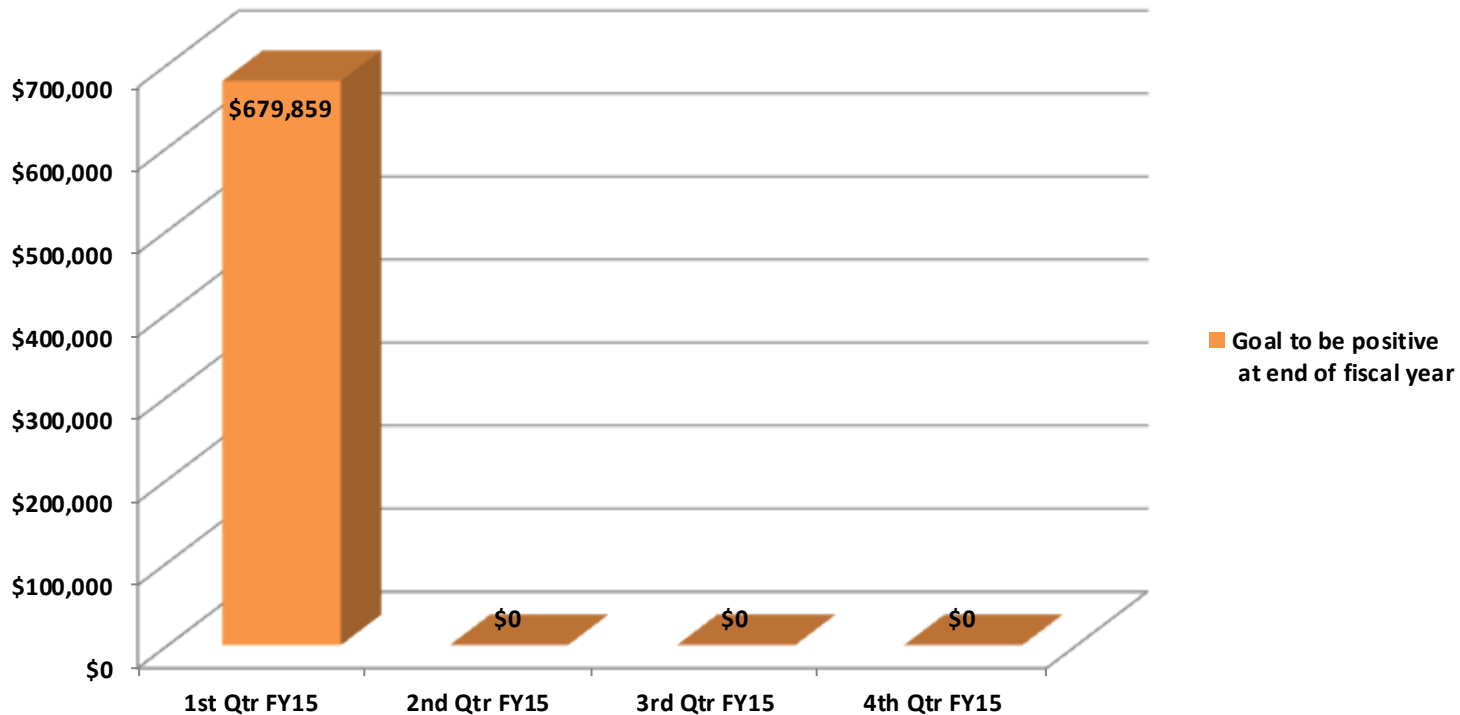
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at end of Fiscal Year



STATUS

GOAL #5 – Promote Good Stewardship

Objective	5.2	Develop a Sustainable Campus
Objective	5.2.2	Increase Percent of Solid Waste diversion on Campus to 45% by 2018

Lead
Recycling

ACTION PLAN

• Waste Reduction and Recycling

Actions Complete

TOTAL recycling for quarter 38% (all totals are not in) , 40% for last year

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
- Coordinated MOVE IN – 13,672 pounds of cardboard and Styrofoam
- Started composting program at Center City Building
- Coordinated Campus Clean UP and Tree Banding – October 22
- Coordinating 2nd season Piloting Zero Waste Football program
- computer training October 8-9 with Jennifer Toth covering Outlook, Microsoft Office, Campus website, etc.
- INTERIM Reviews complete
- Interviews completed and recommendation sent to HR position #9944
- Achieved 98% customer satisfaction

2nd Quarter Actions Planned

- Replace Recycling Coordinator
- Second Zero Waste Football season August - November
- Start composting program at South Dining when it opens
- 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream

Facilities Management Strategic Planning Session – First Quarter FY 2015



Objective 5.2: Develop a Sustainable Campus

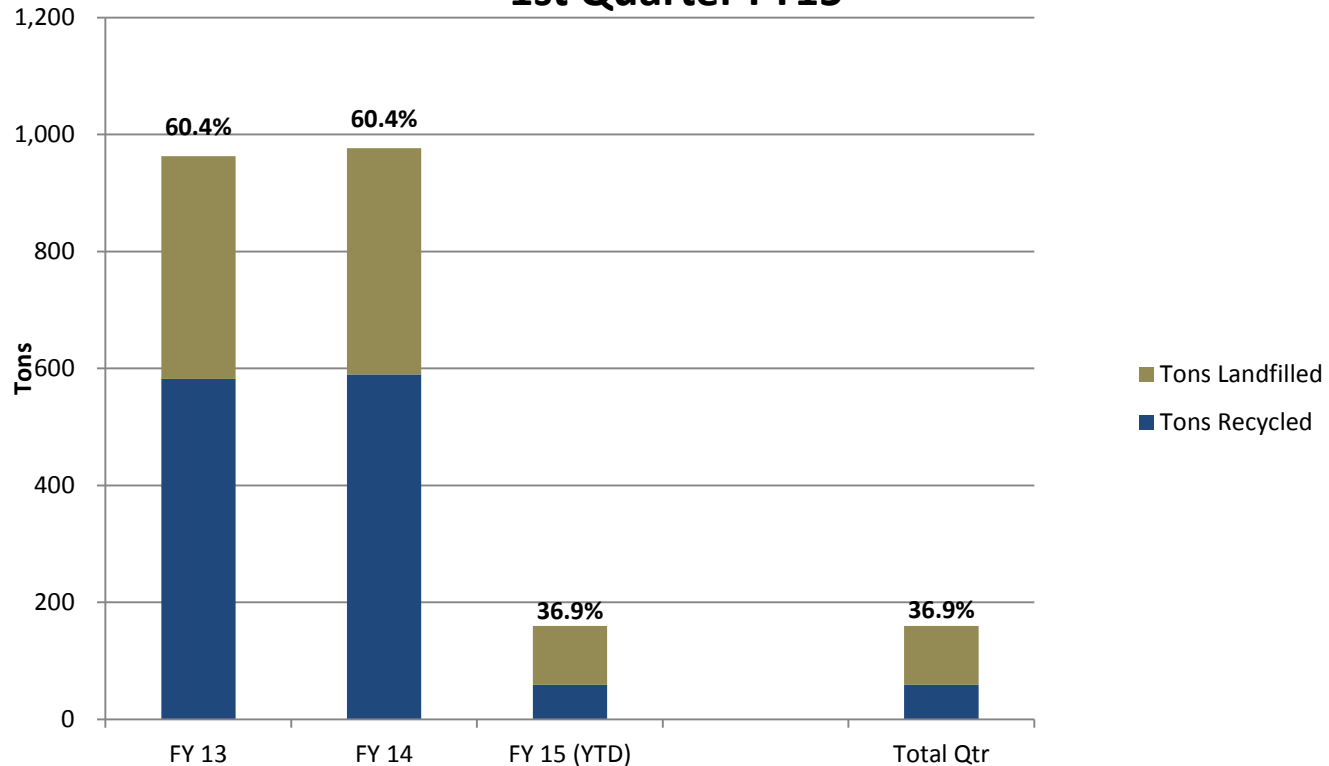
Tactic 5.2.1

Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

Measure: Pounds of C & D Waste Recycled divided by Total Pounds of C & D Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion 1st Quarter FY15



Facilities Management Strategic Planning Session – Fourth Quarter FY 2014



Tactic 5.2.2

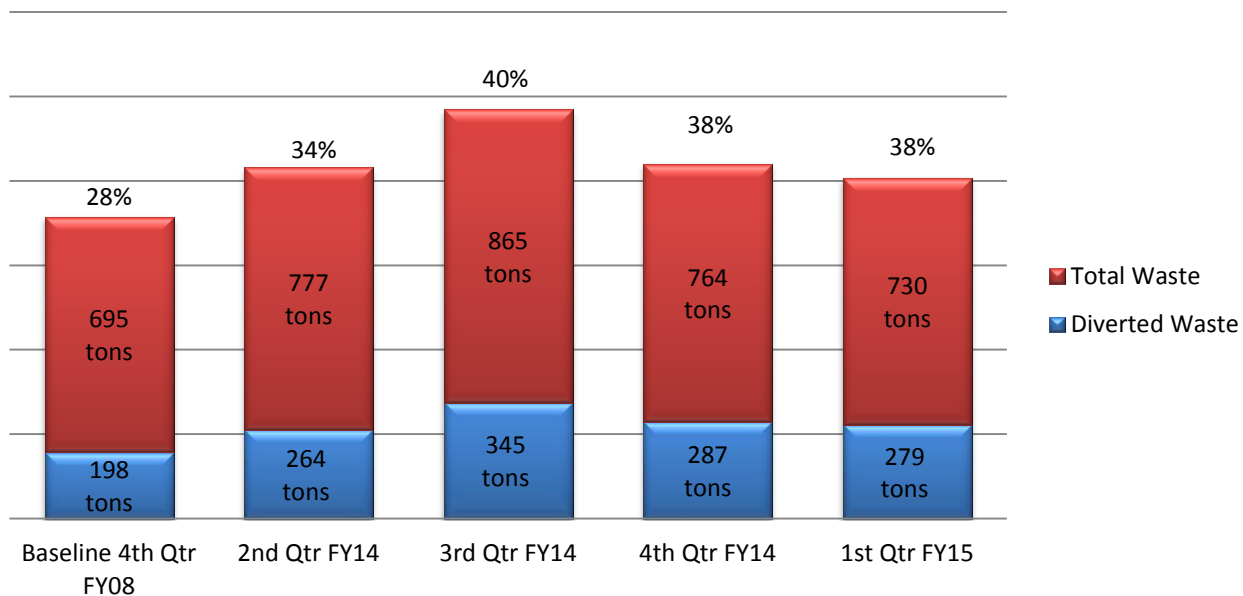
Increase Percent of Solid Waste Diversion on Campus to 45%

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste



GOAL #5 – Promote Good Stewardship

Objective	5.3	Conserve Natural Resources
Tactics	5.3.1	Decrease Energy Usage 30% by FY2015

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Performance Contract wrapping up
 - Will reduce campus consumption by another 4%
- System Wide Lighting Performance Contract - scheduled to go into construction Nov 2014
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
 - Street light replacements fixtures have been finalized project to be complete by April.
 - Pedestrian Lights to be replaced as funds become available – start with campus core.

Lead
Capital

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage by 30% by FY2015

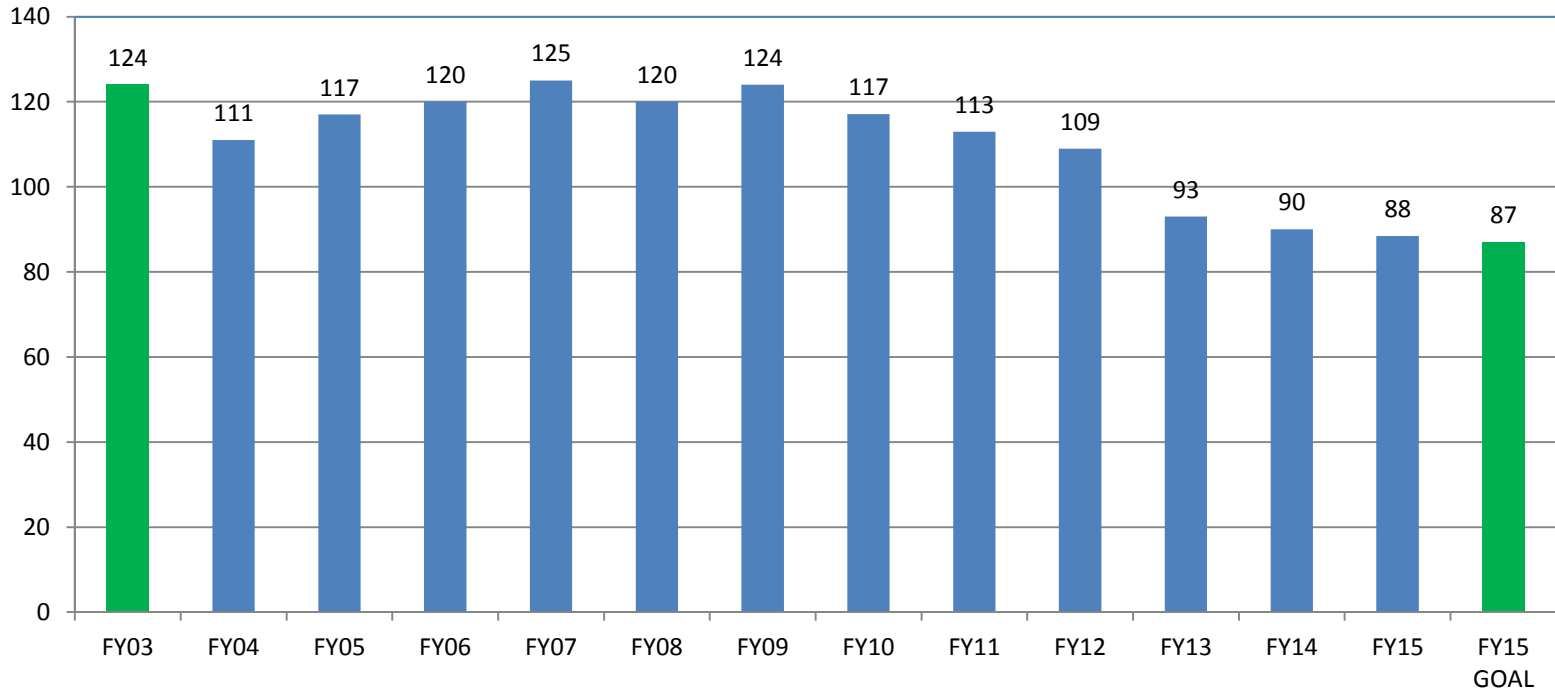
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 28%
Mandated Reduction 30%
BY FY 15

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



Facilities Management Strategic Planning Session – 1st QTR FY 2015

Lead
Capital

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.2 Decrease Water Usage by 20% by FY2010

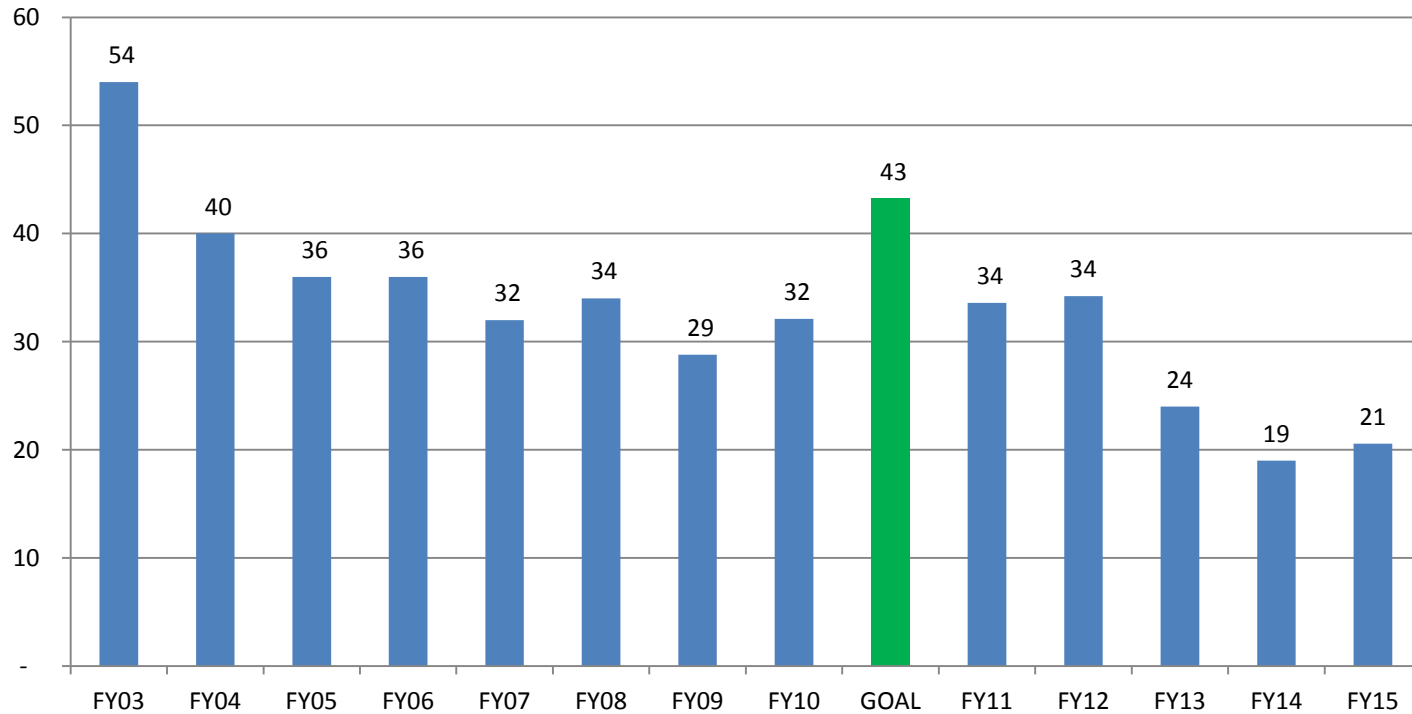
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF



Special Presentation

Energy Consumption

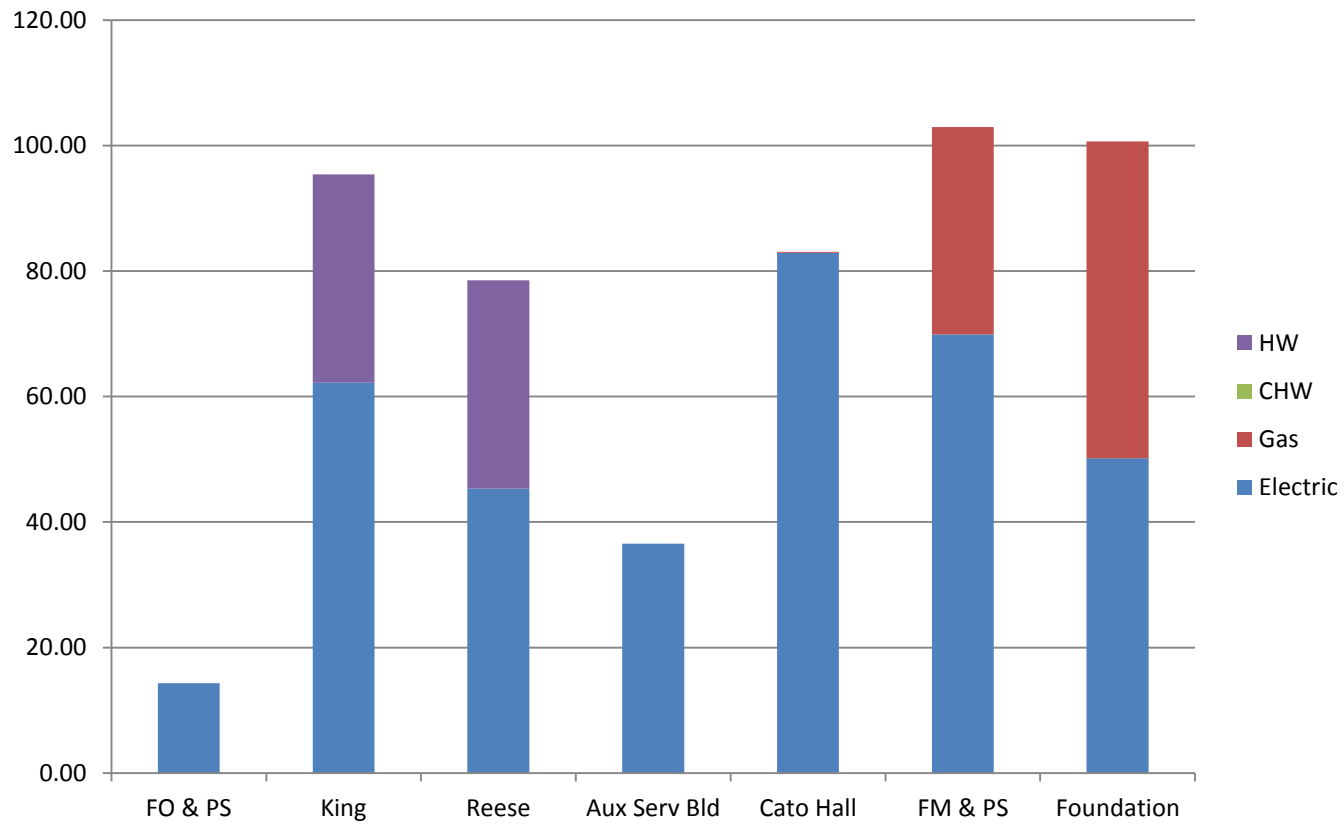
Tony Schallert, Energy Manager



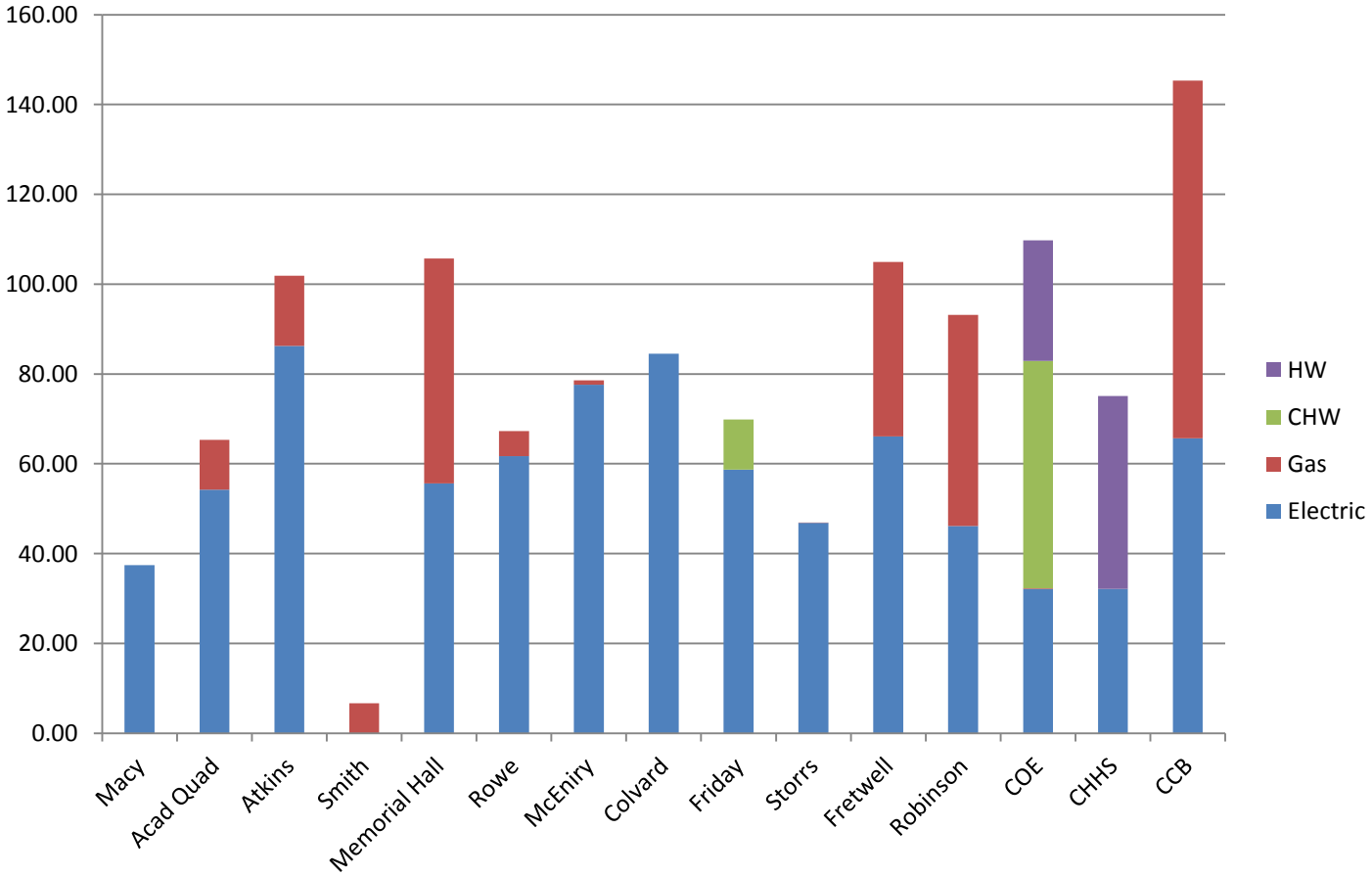
Metering

- **Utility Meters**
 - Duke 16
 - Gas 67
 - Water 7
- **Campus Owned Meters (Mtrs/BAS)**
 - Electric 123/78
 - Water 138/37
 - BTU 30/30

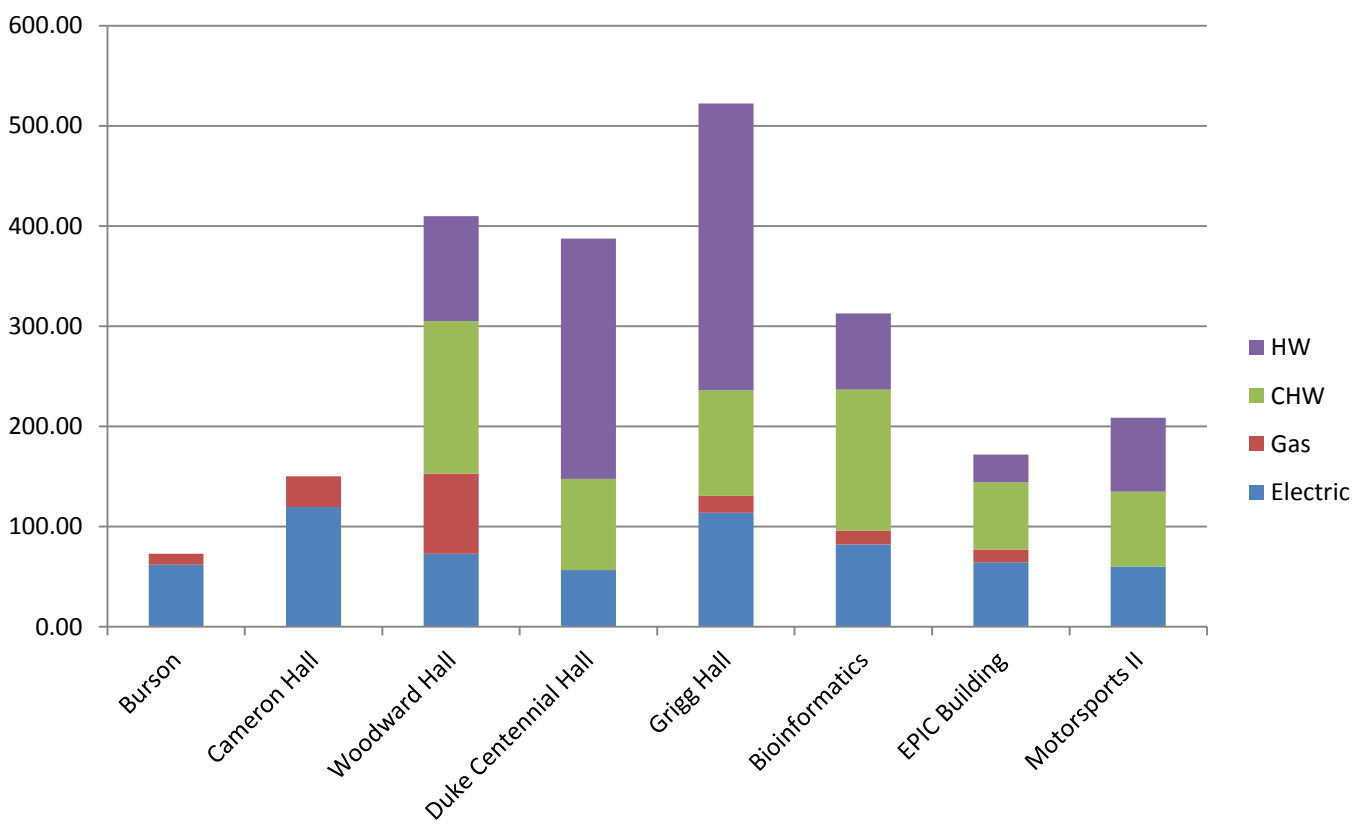
Administrative



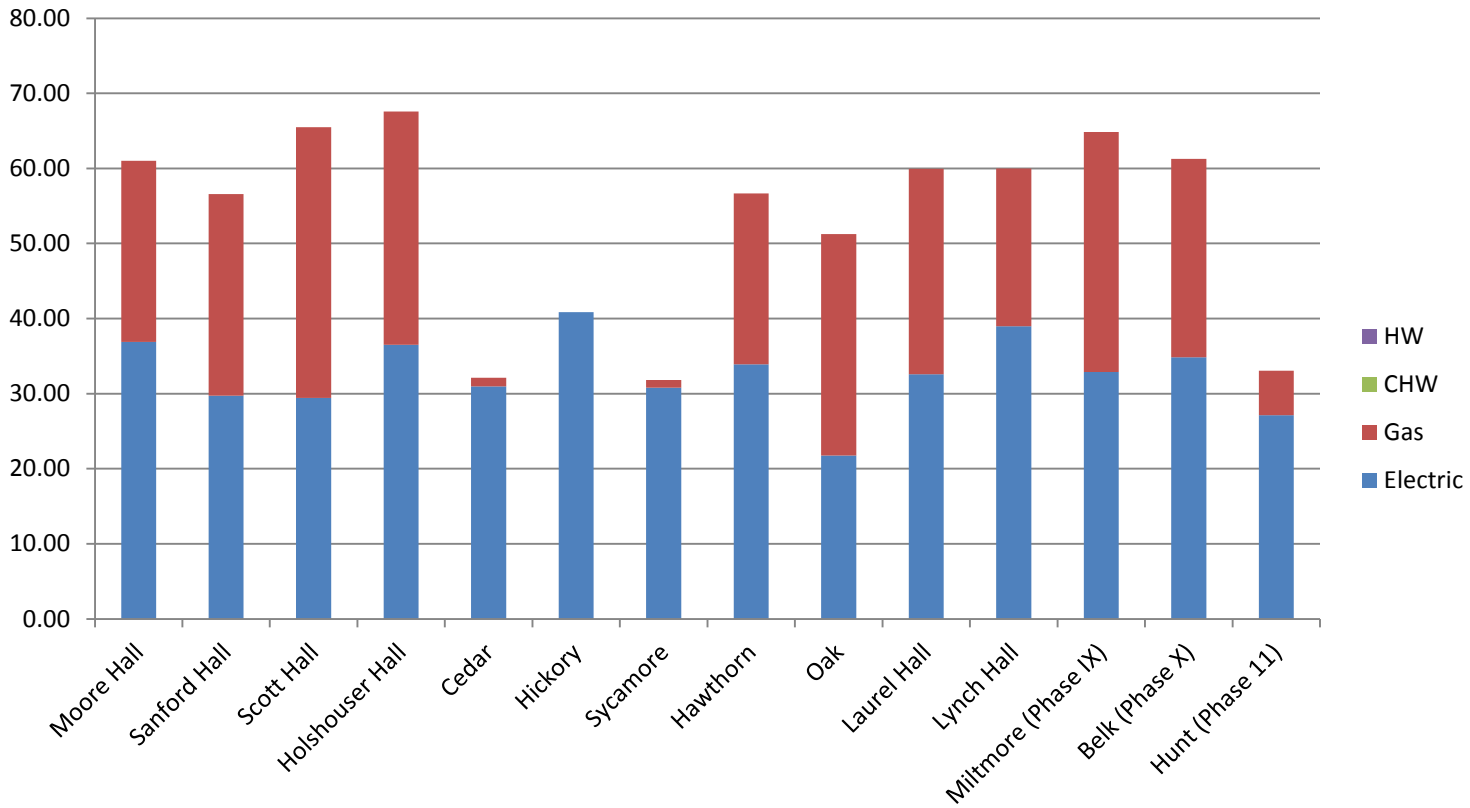
Academic



Research



Residence Halls



GOAL #5 – Promote Good Stewardship

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects

Tactic 5.4.2: 5% African American Participation on Capital Projects

Lead
Capital

ACTION PLAN

- Participate in events promoting utilization of HUB firms
 - Charlotte MED Week Events – “*Meet the Buyers and “Meet the Primes”* Trade Fairs – completed
 - NC MWBE Coordinators’ Network Professional Development Conference – November 13-14, 2014
- Establish/emphasize project specific HUB participation goals for single prime projects
 - Music Annex Building – 15% goal / 19.14% achieved
 - Football Complex Sports Lighting – 10% goal established
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded
- Work with internal/external groups to identify qualified contractors

GOAL #5 – Promote Good Stewardship

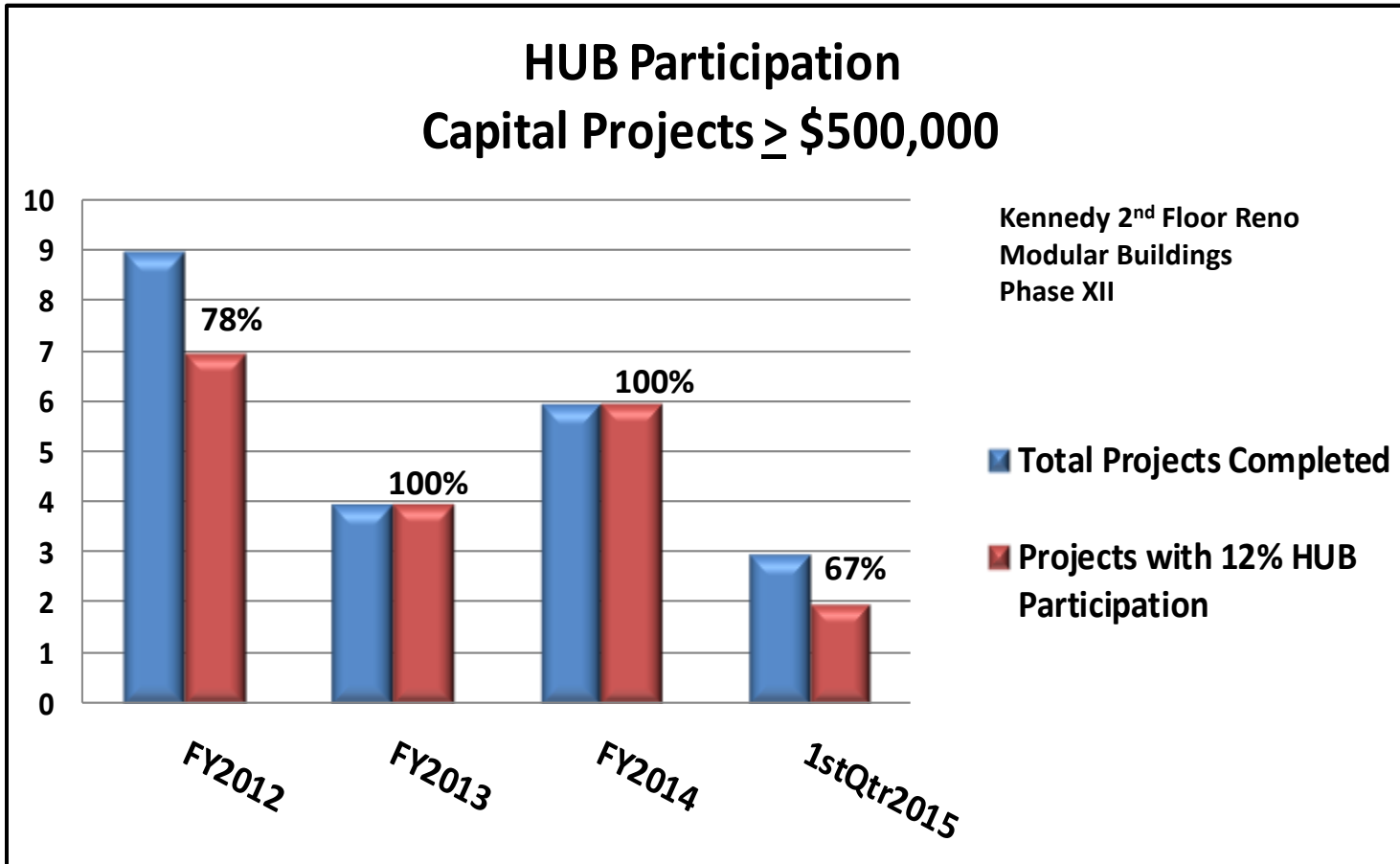
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

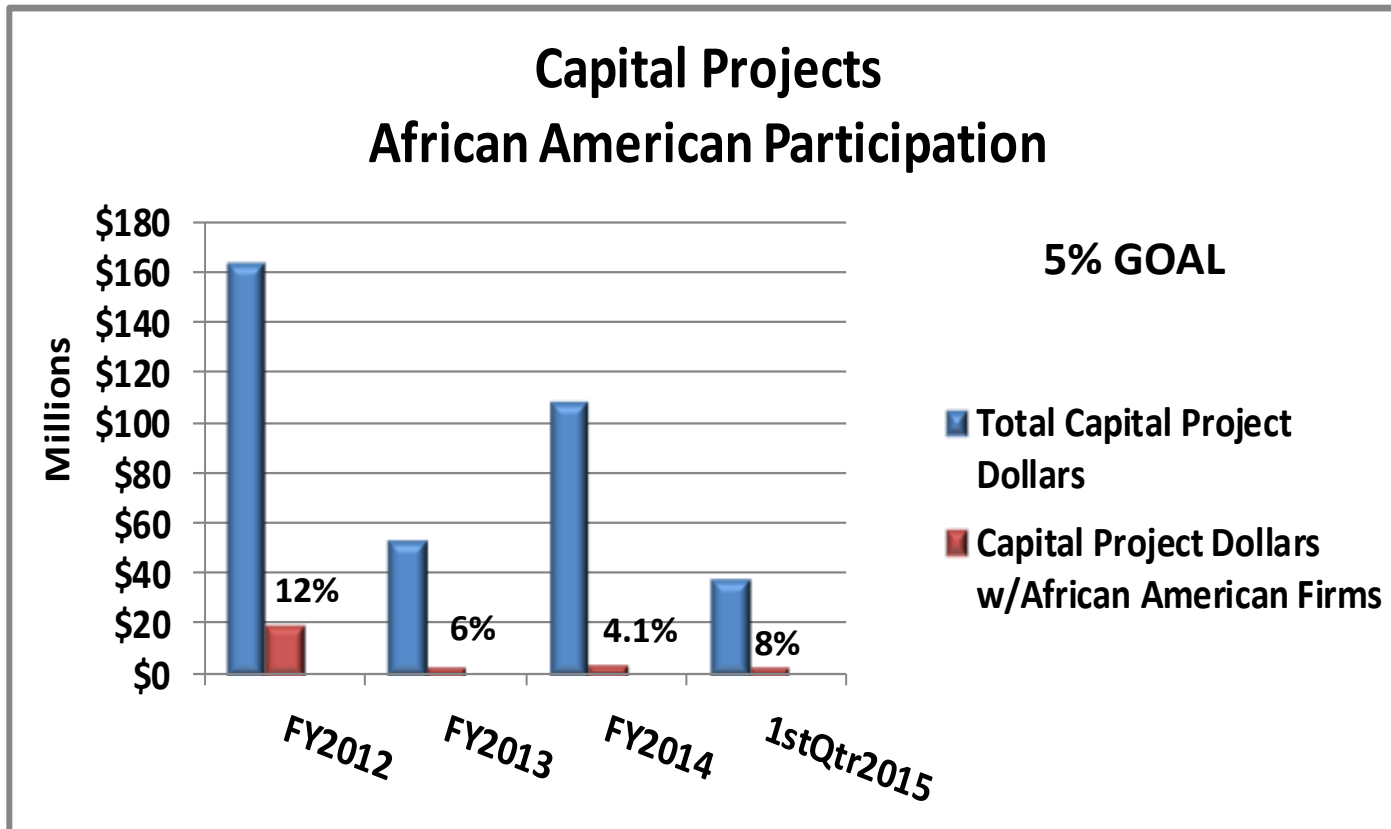
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

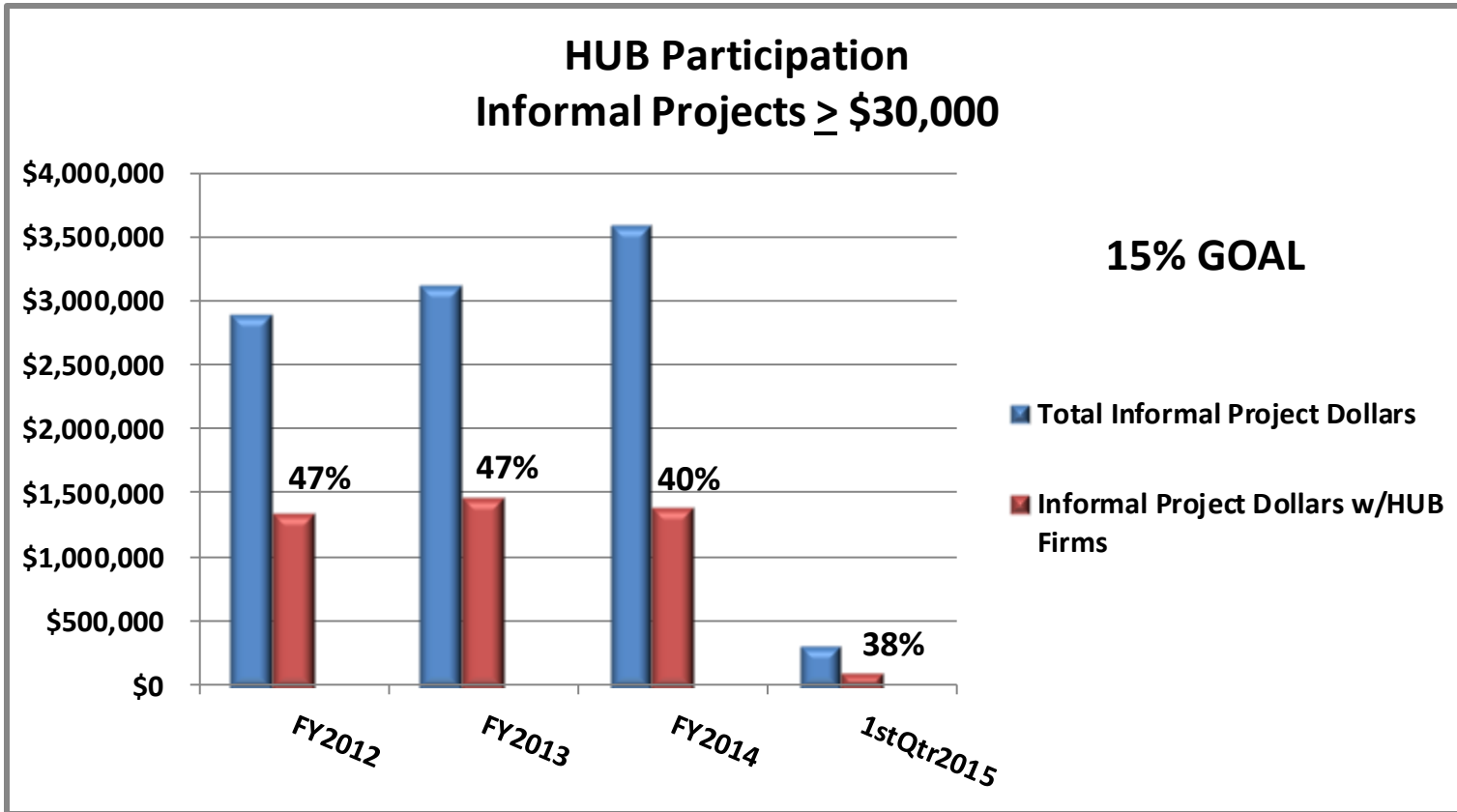
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.3: 15% overall HUB participation on Informal contracts \$30,000 and above

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4:	13% overall HUB participation on informal projects below \$30,000 including 3% African American
Measure:	Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts
Tactic 5.4.5:	3% African American participation on Informal projects below \$30,000
Measure:	Total African American contract dollars (Construction only) divided by Total Contract Dollars

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Design Services' HUB participation improvement is currently focused on expanding our outreach to new African American contractors & vendors.

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors & vendors via ARCHIBUS Strategic Quarterly Reports.

- Added new HUB Electric Supply Company: Mayer Electric Supply Company, Inc. – Woman owned.
- Added new HUB Audio Visual Specialty Contractor: Clark Powell Associates, Inc. – Woman owned.

ONGOING IMPROVEMENTS

All Coordinators are encouraged to reach out to new vendors for work on our Under \$30K projects - Ongoing.

- Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
- Amanda Caudle acts as advisor for other Coordinators.

GOAL 13.0%	STATUS 30.4%	Lead Design Services
----------------------	------------------------	--------------------------------

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

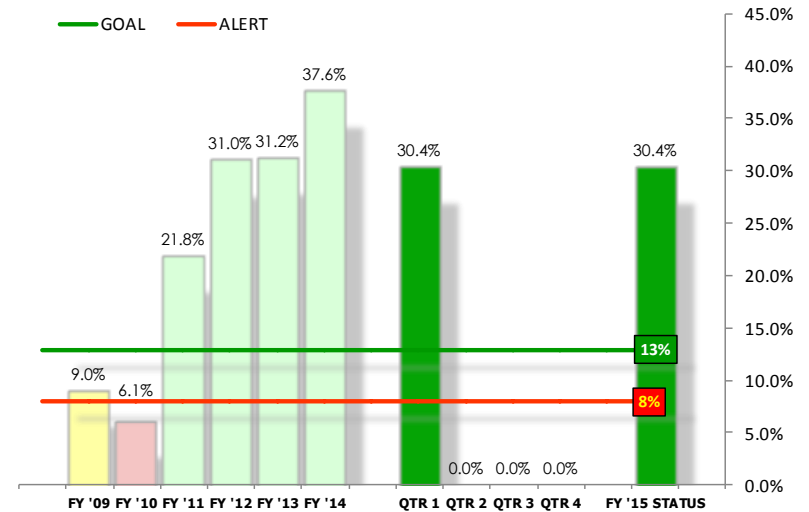
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4: 13% overall HUB participation on informal projects below \$30,000 including 3% African American
Measure: Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

**13% Overall HUB Participation
Informal Projects Below \$30,000**

13% Overall HUB Participation – Summary Graph

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
FY '14	\$ 1,863,533	\$ 700,603	37.6%
QTR 1	\$ 495,625	\$ 150,457	30.4%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '15 STATUS	\$ 495,625	\$ 150,457	30.4%



GOAL 3.0%	STATUS 0.0%	Lead Design Services
---------------------	-----------------------	-------------------------

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.5: 3% African American participation on Informal projects below \$30,000
Measure: Total African American contract dollars divided by Total Contract Dollars

**3% African American Participation
Informal Projects Below \$30,000**

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
FY '14	\$ 1,863,533	\$ 103,513	5.6%
QTR 1	\$ 495,625	\$ -	0.0%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '15 STATUS	\$ 495,625	\$ -	0.0%

3% African American Participation – Summary Graph

