



Facilities Management Quarterly Strategic Planning Report

First Quarter – Fiscal Year 2016

APPA Award for Excellence

UNC Charlotte Facilities Management

WINNER



July – September 2015

...Creating a Campus of Distinction

LEADERS



Strategic Planning Session

Facilities Management's Goals

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



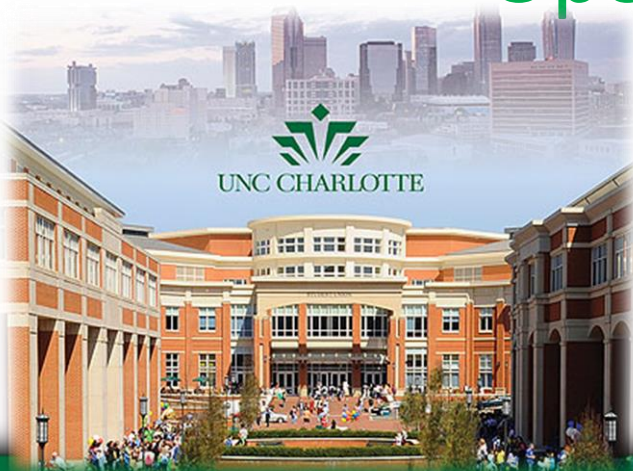
UNC CHARLOTTE

"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. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.
5. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”

Actions Completed

1. Weekly review of work assignment completion.
2. Completed initial training in all Zones “Operating like a business.”

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

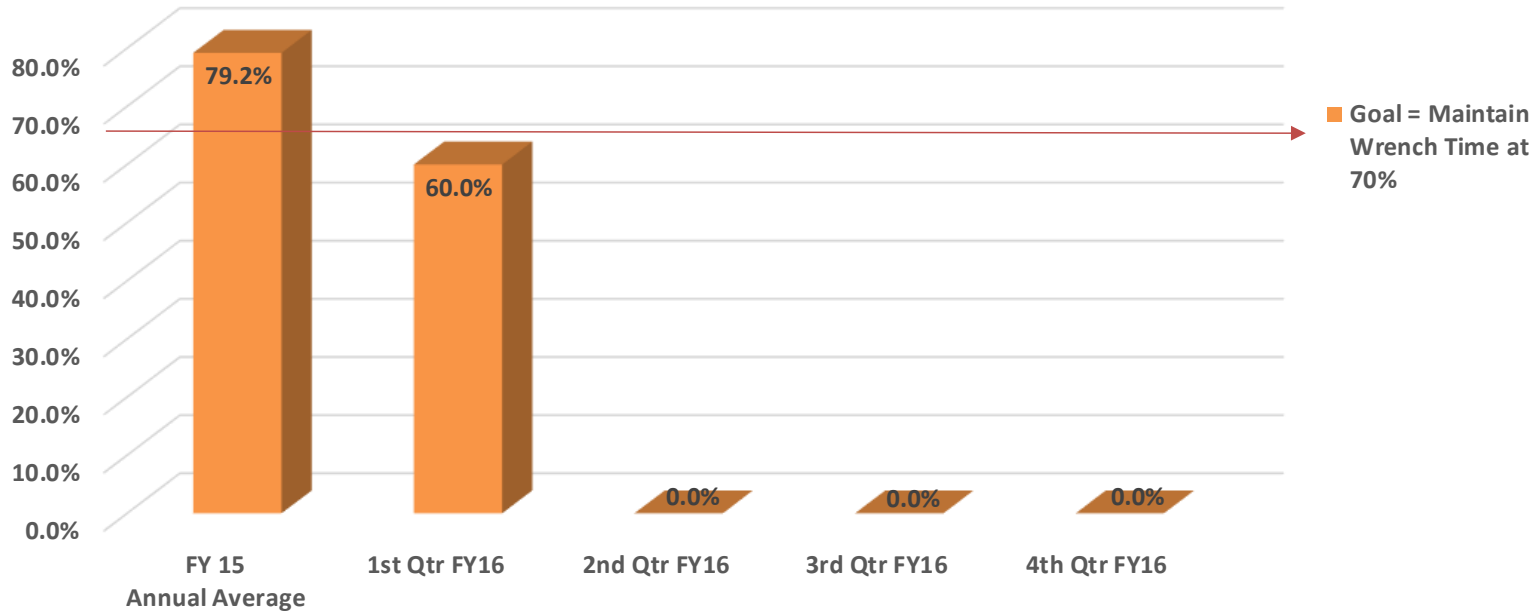
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process

Wrench Time



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). Monitor daily tracking of long lead items and spikes in usage (historically the main causes for inability to fill).
2. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers).
3. Monitor the req to PO processing time and discuss weekly.

Actions Completed

1. Promoted the continued use of SDI Punch-out.
2. Assigned additional approvers to help expedite the process.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

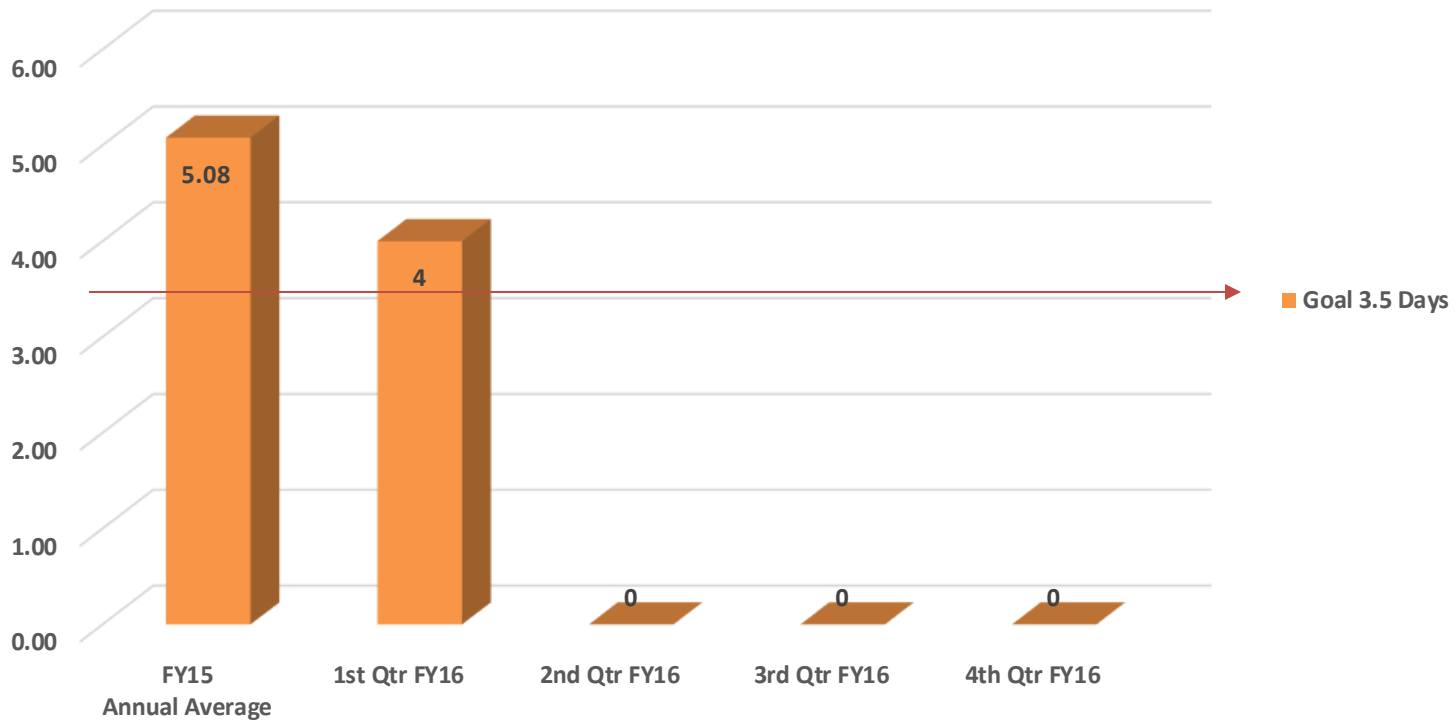
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request..
2. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
3. Weekly meeting with Zone Supervisors to monitor 30 day report.
4. Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented Sept 2015.
5. Supervisors meeting with technicians on a daily basis.

Actions Completed

1. Communicated work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014.
2. Reviewed recurring services and scheduled services currently being completed using PM work requests; August 2014.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

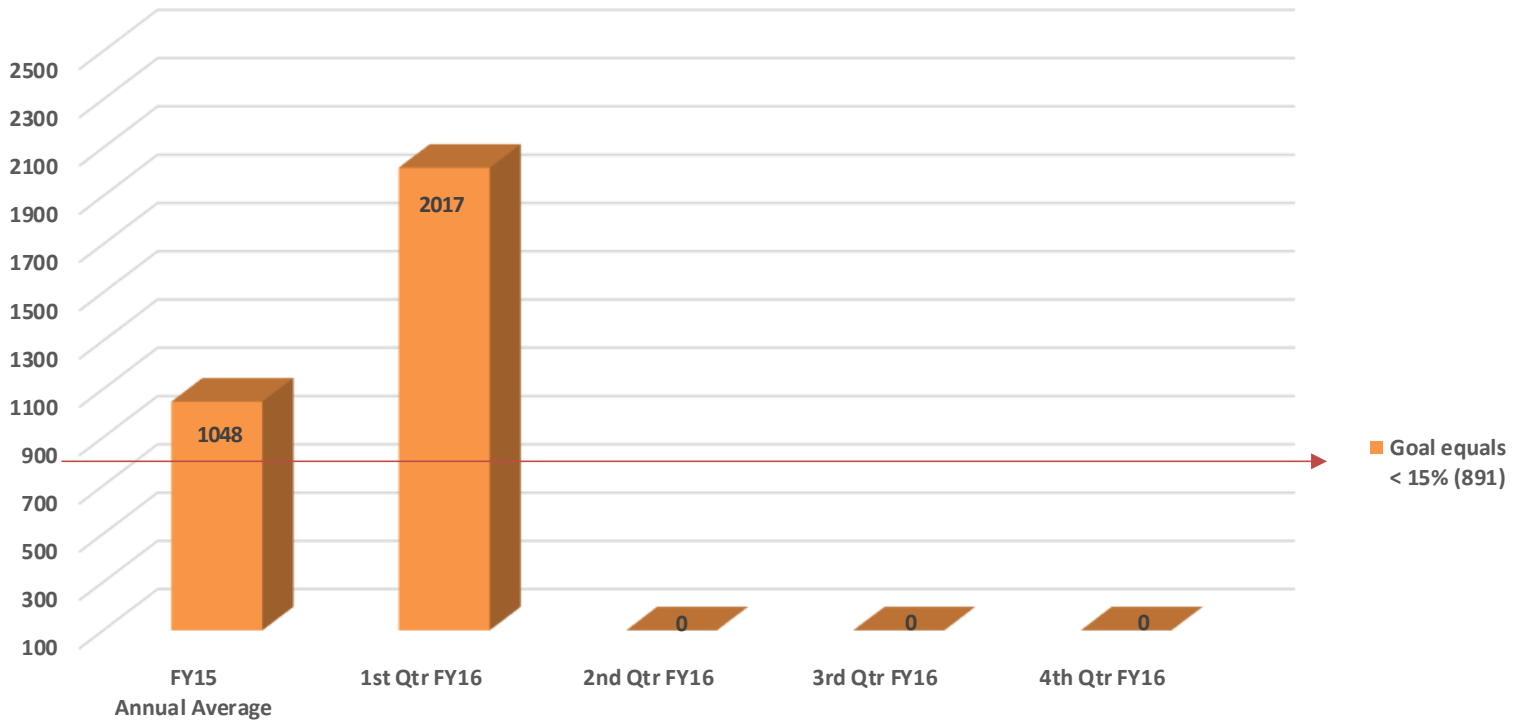
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

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

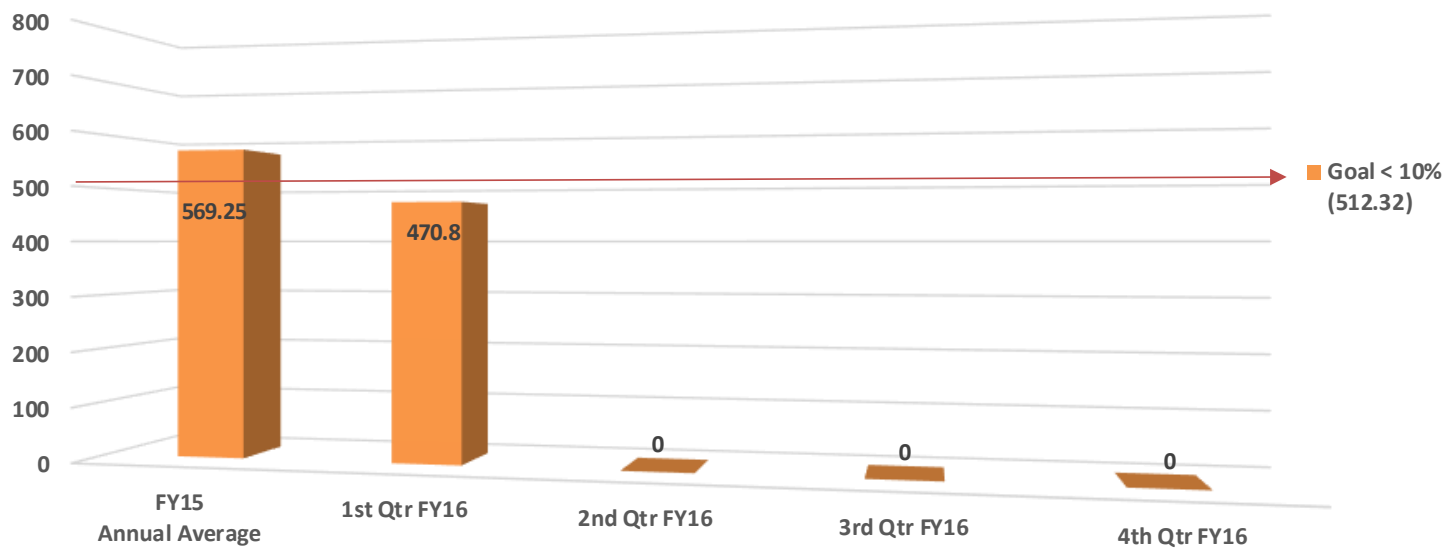
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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 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
 - Began routine process of EDA Inventory Count (6/2015)
 - (OS1) Boot-camp Part II (8/2015)
 - Simon Institute Symposium (8/9/2015 – 8/12/2015)
 - Implemented new Daily Task Process at Center City (9/2015)
 - Janitor University – sent 3rd BES Group (9/29/2015 – 10/1/2015)
 - Building Audit Inspections (10/2015)
- Actions Planned
 - Update Hiring Process/Flow Chart (10/2015)
 - Full utilization of Daily Logs by Zone Supervisors and Lead Technicians (11/2015)
 - (OS1) Boot-camp Part III (12/2015)
 - Implement new quarterly self-audit process in Archibus – Monthly inspection of PMs per building (12/2015)
 - Develop In-service training curriculum and matrix (12/2015)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (12/2015)

Lead
BES

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

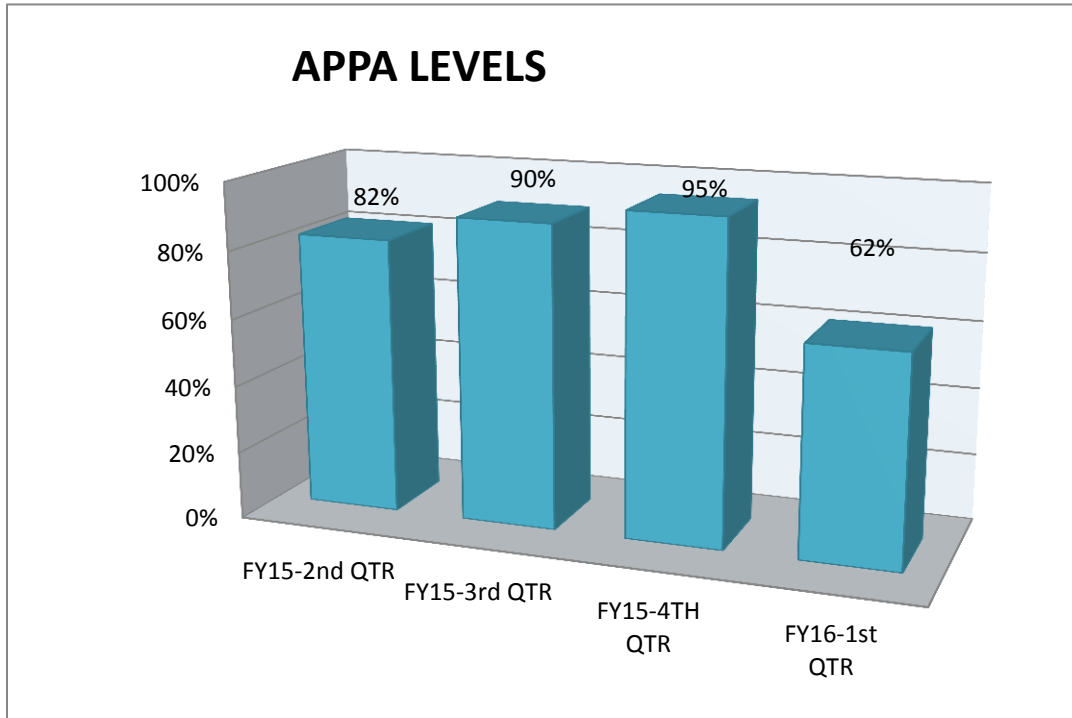
Objective: 1.4: Improve BES Processes

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

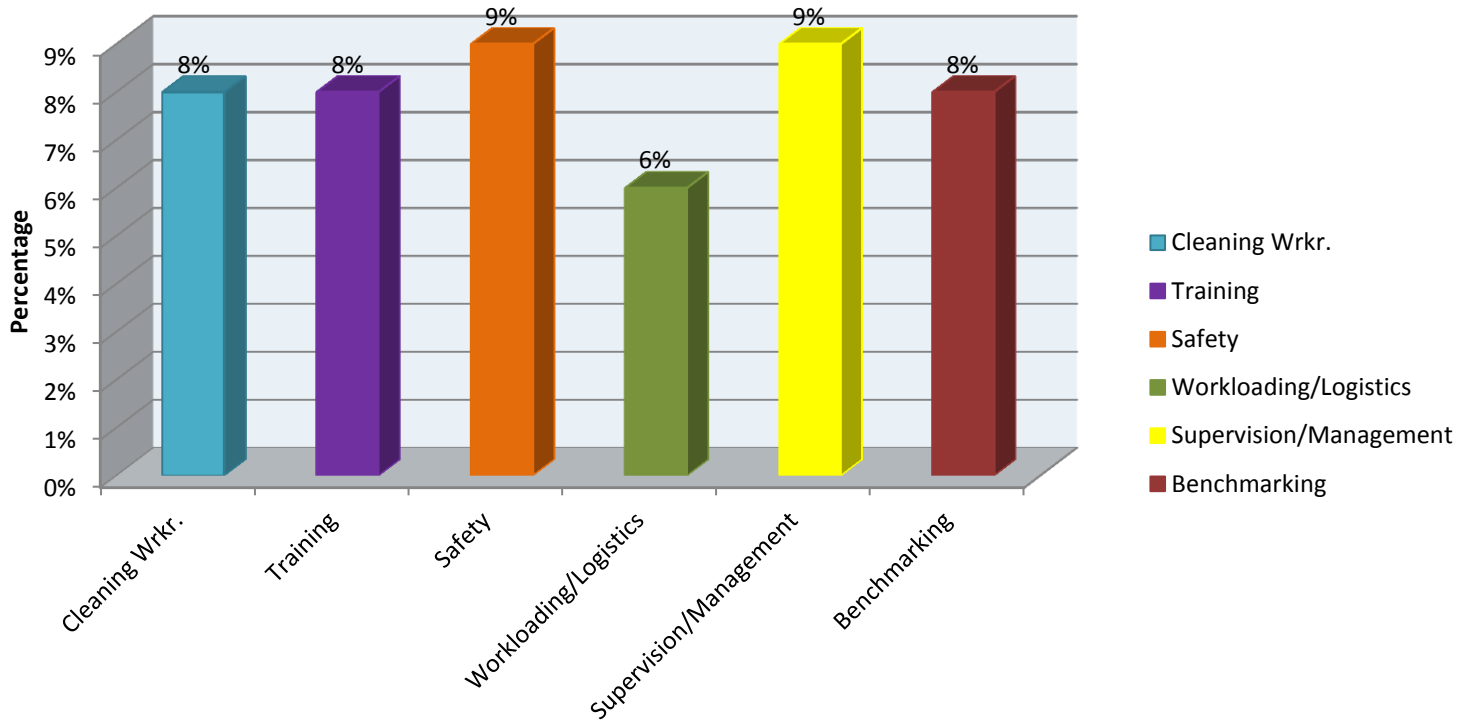
Balanced Scorecard Category: Customer Perspective

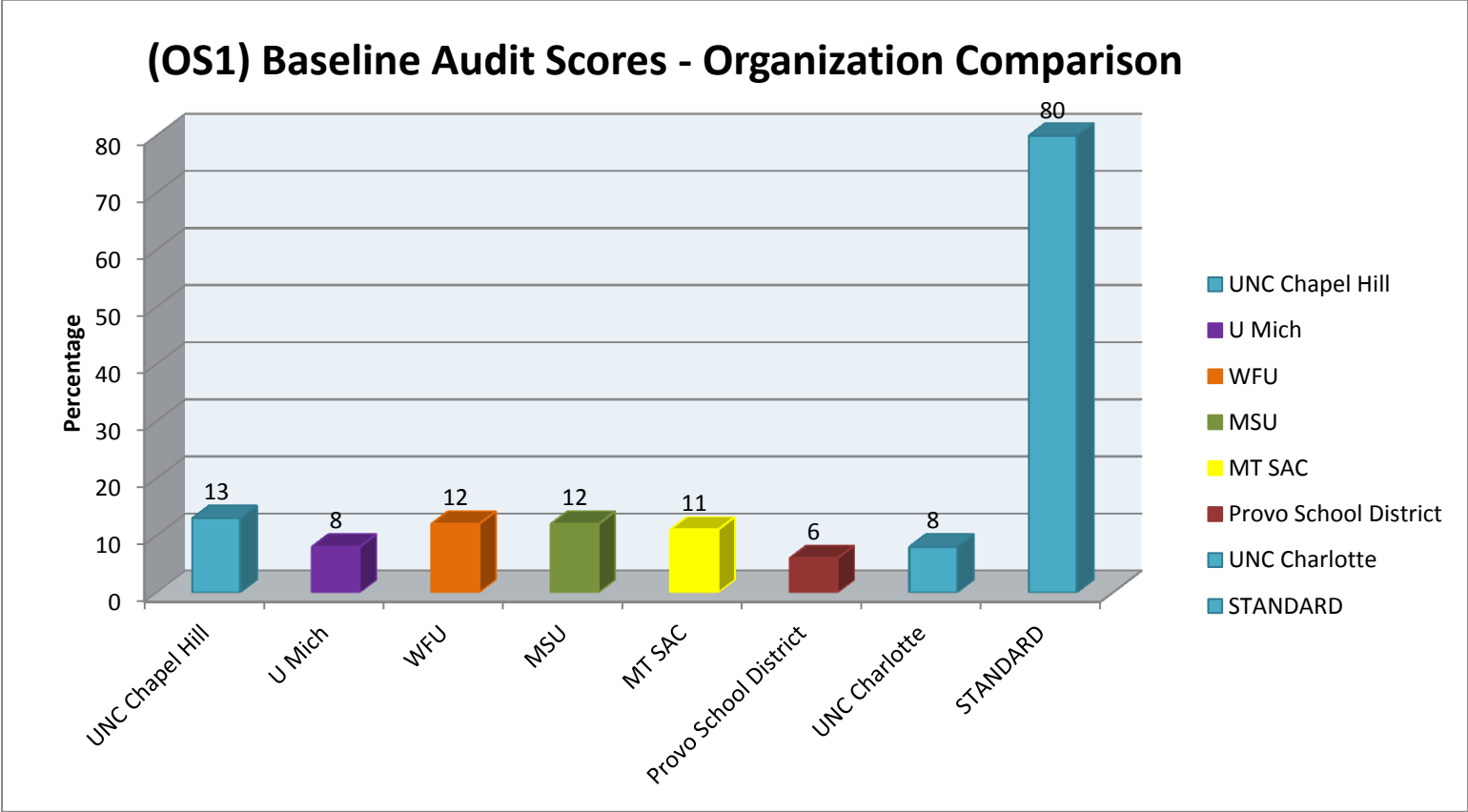


Percentage = 62%

STATUS

(OS1) Baseline Audit Scores - Job Category





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%

Lead
F. O.

ACTION PLAN

Actions Planned

1. Reorganize PM Program; Hire PM Supervisor (November 2015)
2. Complete conversion from old PM Module to new PM Module.
3. Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4. Continue to review CRDM Project List. Identify and prioritize equipment conditions and needs, for replacement. Indicate urgency and recommend future funding dates.
5. Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.

Actions Completed

1. Incorporate FCAP inspection process into CRDM and Daily Operations

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

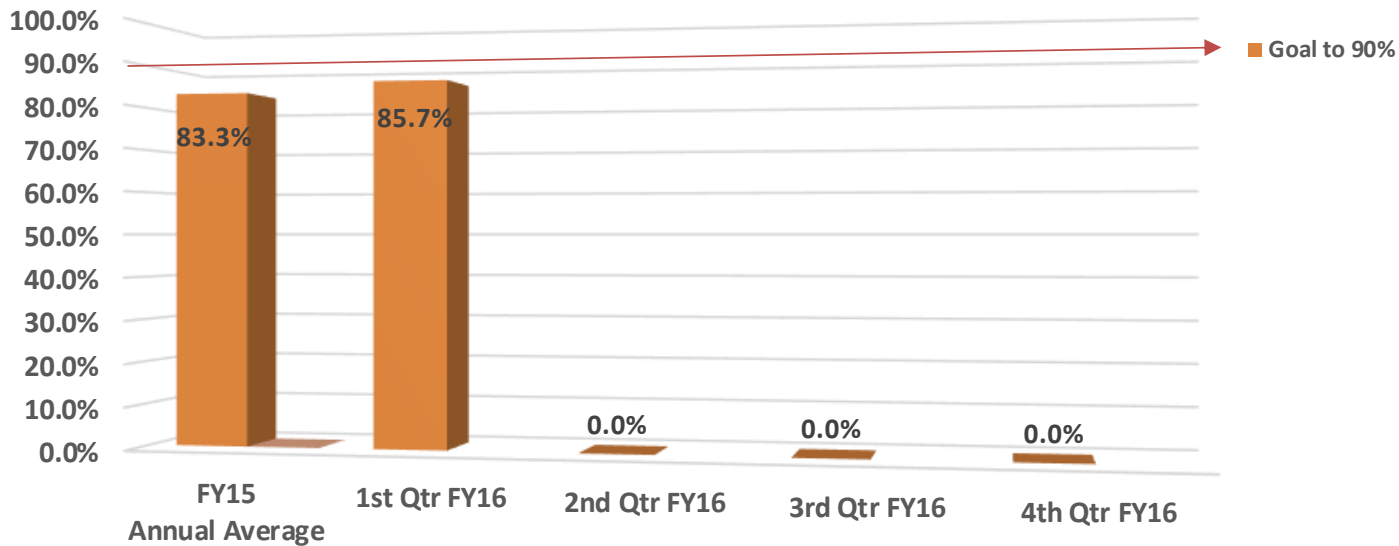
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

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

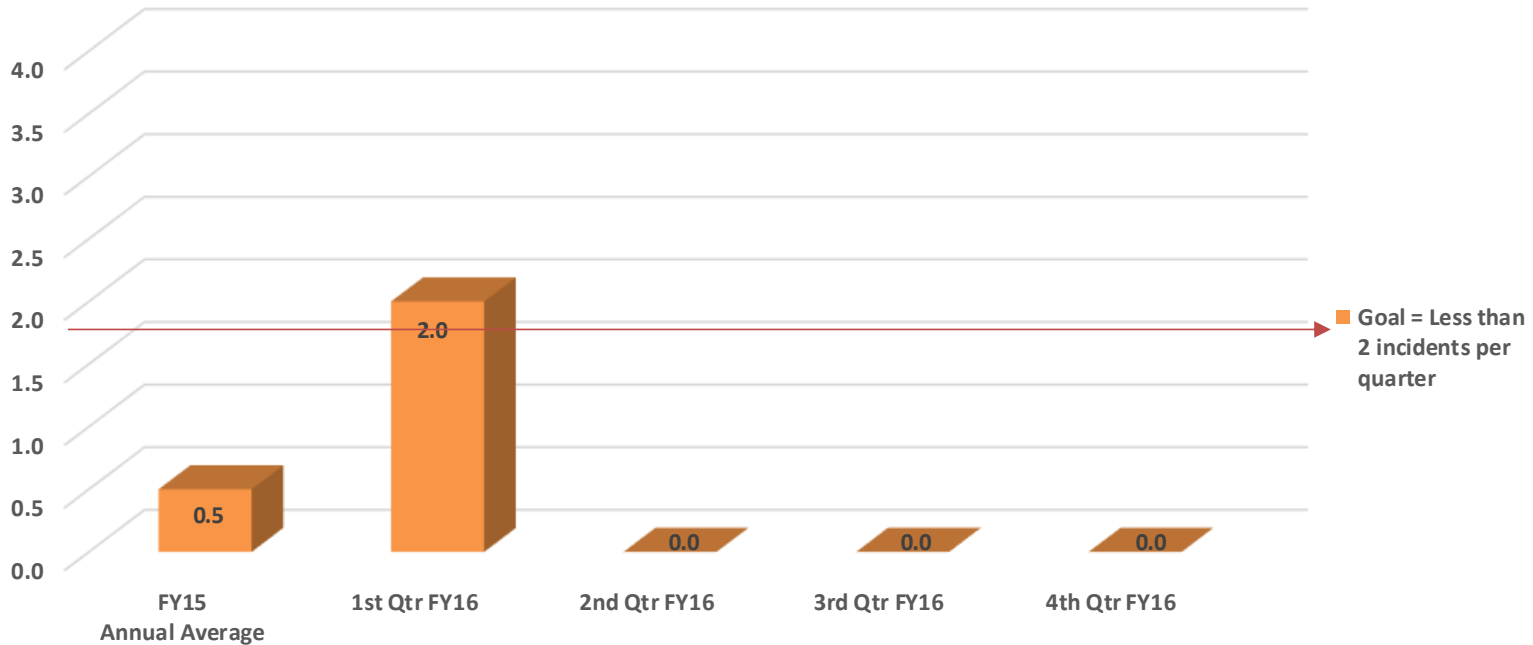
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

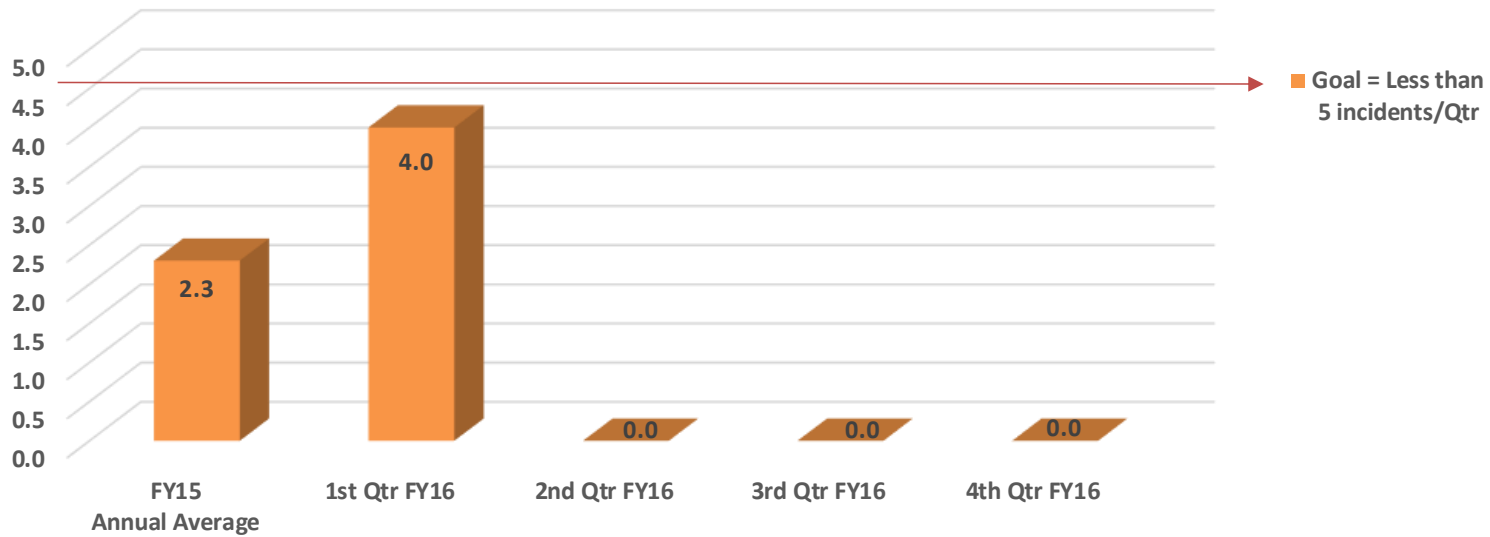
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages



Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

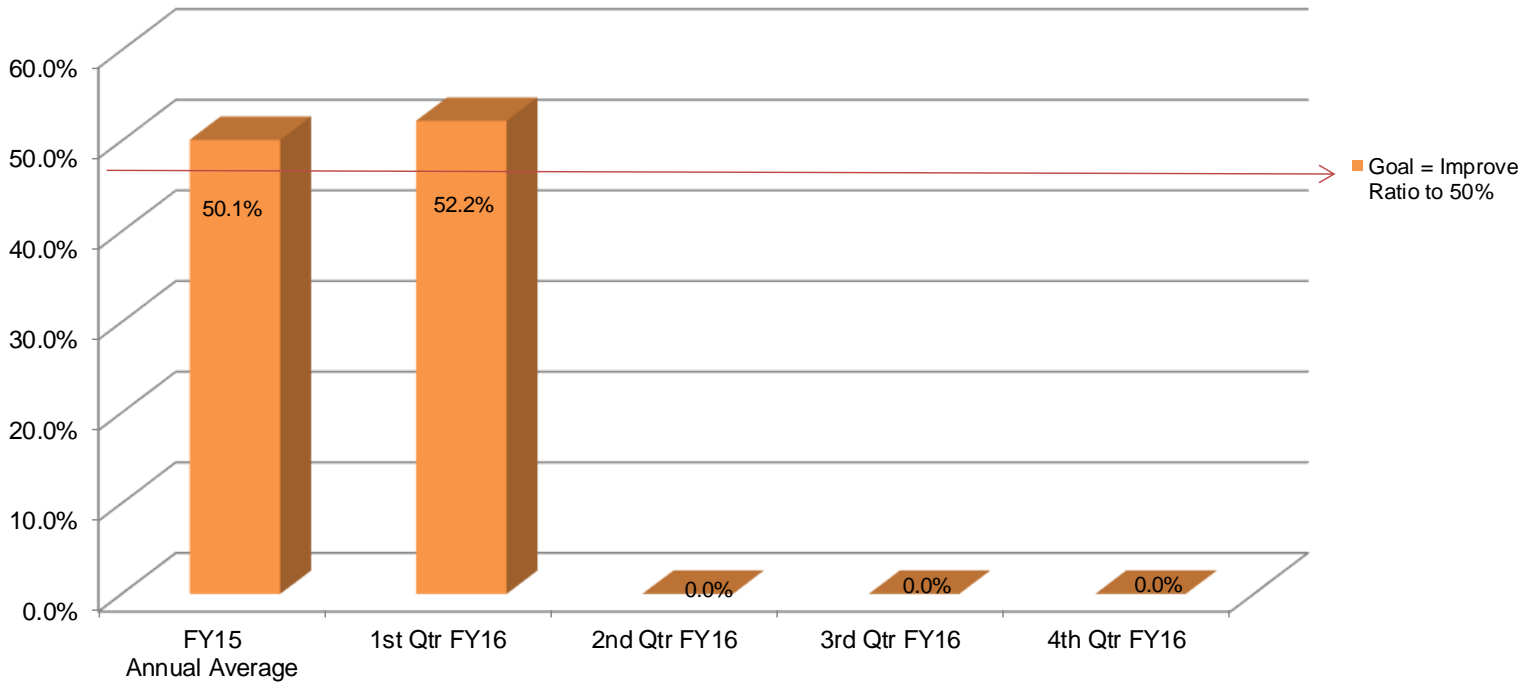
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

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



STATUS

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



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. Migrated Primavera to State Construction Nov 2015.
2. Deploy and Test ARCHIBUS Mobile Space Survey Nov 2015.
3. Complete Testing and Go Live with Mobile Map Utilities Nov 2015.
4. Finalize and Test Space Management GIS Setup by Nov 15, 2015.
5. Complete 25% of Building Space Audits by Dec 31, 2015.
6. Go Live with Project Customer Moodle 2 training by Dec 31, 2015.
7. Complete Belk Gym BIM project by Jan 15, 2016.
8. Work with ITS to begin Set up for ImageNOW Capital Document Management and Schedule Capital Training by Jan 31, 2016.
9. Finalize Real Estate Lease application updates by Nov 30, 2015.
10. Complete SDI Enhancements/WR part update notifications Dec 30, 2015.
11. Complete Avigilon NVR Upgrade by Dec 31, 2015.
12. Deploy/Test New BAS Upgrade (N4) by Dec 1, 2015.
13. Complete Additional Open Options Script Improvements for faster data pull and craftsperson data by Dec 31, 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 Completed:

1. Completed and Went Live with all requested Design Services Enhancements.
2. Completed GIS Mobile Utilities Mapping Project.
3. Finalized/Went Live with Motor Fleet Customer Module Moodle2 Training.
4. Scheduled/Completed ImageNOW training for Design personnel.
5. Completed Archive Drawing ImageNOW Phase 1 project.
6. Completed new Space Survey Views for Space Building Auditing process.
7. Completed Open Options Scripting Improvements by Adding Additional Employee information.

Lead
FIS

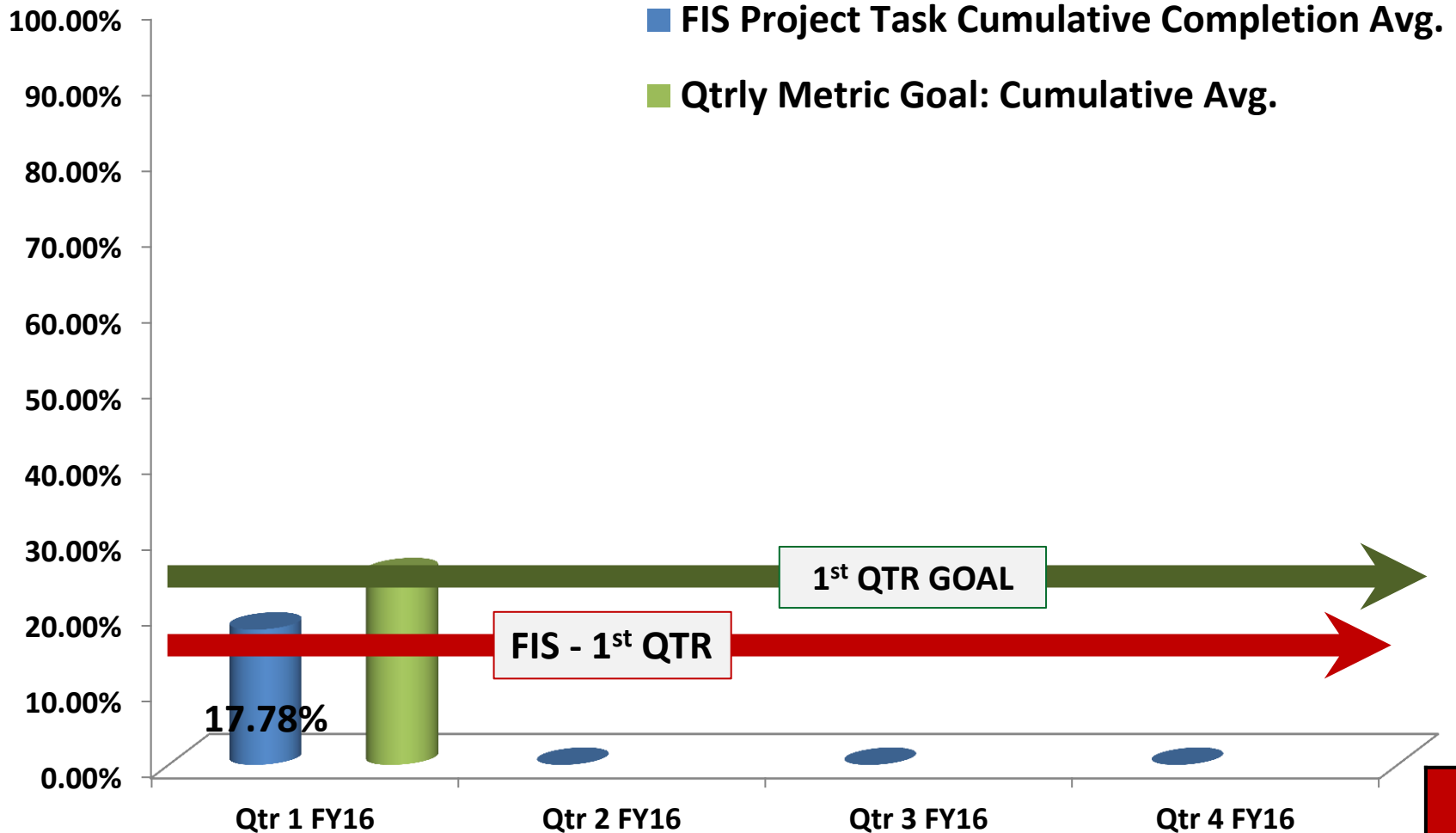
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

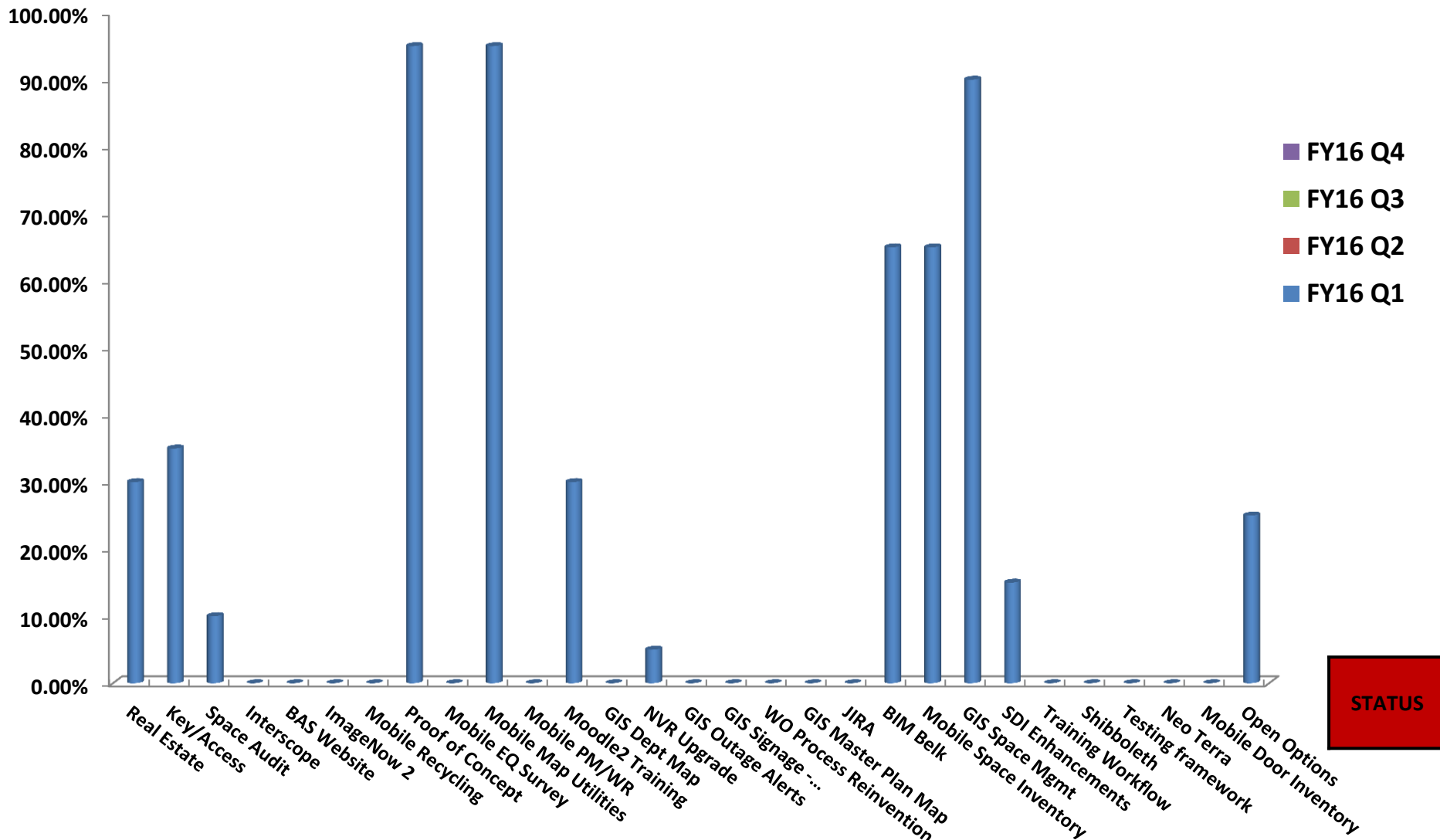
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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



FM Prioritized Projects – FY16

1. **ARCHIBUS Real Estate Leases and Suites** – Estimated Completion Nov 2015
2. **Access and Key Management** – **Roll over**; New Estimated Completion Oct 2015
3. **Space Audit, Approvals and Occupancy** – **Roll Over**; New Estimated Completion Jan 2016
4. **ARCHIBUS State Construction Interscope Integration** – Estimated Completion Feb 2015
5. **Building Automation System (BAS) Website Updates** – Estimated Completion May 2016
6. **ImageNOW Phase 2: Capital Document Management** – Estimated Completion Jan 2016
7. **Mobile Recycling** – Estimated Completion Oct 2015
8. **ARCHIBUS Mobile Proof of Concept** – **Roll over**; New Estimated Completion Aug 2015
9. **Mobile Equipment Survey** – **Roll over**; New Estimated Completion Jan 2016
10. **Mobile Space Inventory** – **Roll over**; New Estimated Completion Oct 2015
11. **Mobile Map Utilities Field Units** – **Roll Over**; New Estimated Completion Jul/Aug 2015
12. **Mobile PM & WR for iPad** – Estimated Completion May 2016
13. **ARCHIBUS Moodle 2 Training** – Motor Fleet, Project Customer, FAM and Key Customer
14. **GIS Departmental Map Search** – Estimated Completion May 2016
15. **NVR Upgrade Phase 2** – Estimated Completion Apr 2016
16. **GIS Construction Outage Alerts/Notifications** - Estimated Completion Nov 15, 2015
17. **GIS Wayfinding Digital Signage System** Estimated Completion March 2016
18. **Mobile Door Inventory** – **Roll Over**; Estimated Completion May 2016
19. **ARCHIBUS Work Order Process Reinvention Support** – Estimated Completion Mar 2016
20. **GIS Live Planning Master Plan Map** – Estimated Completion May 30, 2016
21. **JIRA FIS Project Management** – Estimated Completion Apr 2016
22. **BIM Belk Gym** – **Roll over**; Estimated Completion Aug 2015
23. **GIS Space Mgmt. Set Up** – Estimated Completion Aug 2015
24. **SDI Enhancements** – **Roll Over**; New Estimated Completion Nov 2015
25. **Neo Terra Radio** – Estimated Completion Jan 1, 2016
26. **ARCHIBUS Training Work flow** – Estimated Completion May 2016
27. **ARCHIBUS Testing Framework** – Estimated Completion April 2016
28. **ARCHIBUS Shibboleth** – Estimated Completion May 15, 2016
29. **Open Options Scripting Updates** – Estimated Completion Dec 31, 2015

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:* **FY16 QTR 2 – DESIGN SERVICES TESTING PHASE IS NOW ONGOING**
- Convert Excel Purchase Requisition (PR) to Archibus PR.
 - ✓ *Timeline:* **On Hold**
- Updates to Estimating Workbook to improve Contingency and Fee calculations.
 - ✓ *Timeline:* **FY15 QTR 4 – UPDATED AND PROVIDING ACCURATE CALCULATIONS**

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:* **FY16 QTR 2 - FY16 QTR 4 – Work In Progress**

ONGOING IMPROVEMENTS

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

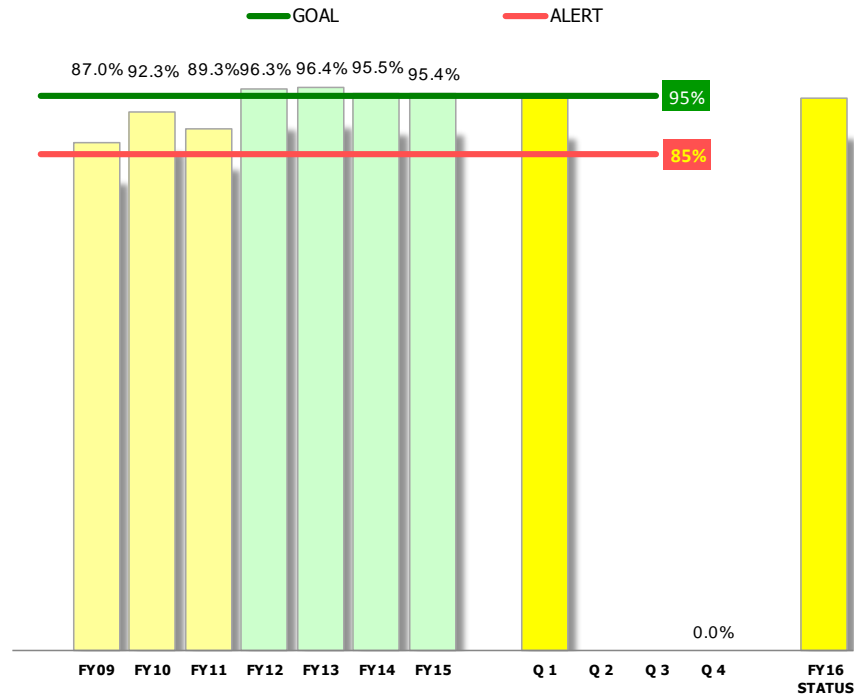
Balanced Scorecard Category: Internal Business Process

YTD STATUS 94.7%	ANNUAL GOAL 95.0%	1st QRT STATUS 94.7%	Lead Design Services
----------------------------	-----------------------------	--------------------------------	-----------------------------

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	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY09	115	100	15	87.0%
FY10	182	168	14	92.3%
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
Q 1	19	18	1	94.7%
Q 2	0	0	0	0.0%
Q 3	0	0	0	0.0%
Q 4	0	0	0	0.0%
FY16 STATUS	19	18	1	94.7%



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: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT March 2016.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Continue to update CRDM data (ongoing)**
- **Integrate feedback from users of map and master list (ongoing)**
- **Update FCI tracker by building to capture FCAP changes and project completions to calculate movement in FCI (ongoing)**
- **Provide status and recommendations to attain a 5% improvement (July 2016)**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

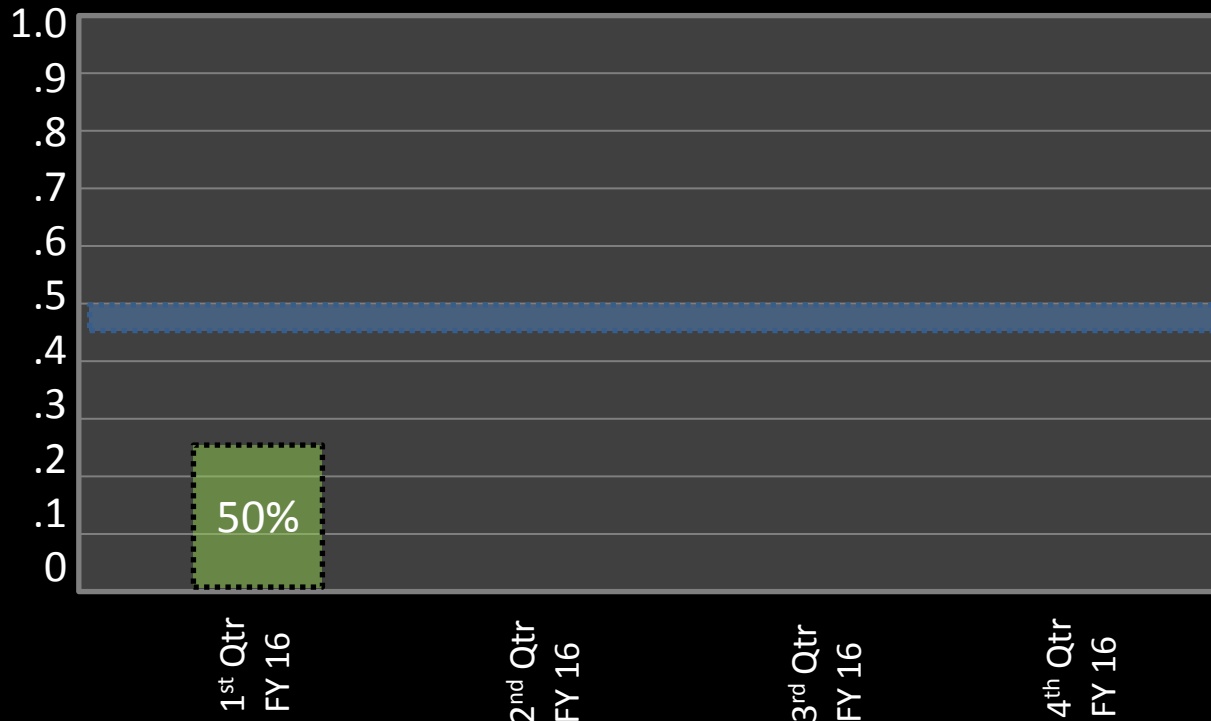
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT March 2016.

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: Assignable square footage of space allocation for specific room uses for new and renovation projects will be within +/- 10% of recommended range.

Measure: Measure Assignable Square Feet of allocated space compared to recommended guideline and metric.

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Conduct physical audit of all campus space Fall 2015**
- **Develop Space Guidelines – incorporate in Space Management Policy**
- **Develop Metrics for Room Use Categories based on national standards**
- **Assess current utilization of space associated with UNC Charlotte science programs (engage consultant)**
- **Assess current utilization of space associated with UNC Charlotte science programs (engage consultant)**
- **Develop recommendations for space use for existing and future science space (instructional labs, research labs, faculty and staff office space)**
- **Assess proposed space use for new construction and renovation projects to evaluate alignment with accepted metrics**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.1: Assignable square footage of space allocation for specific room uses for new and renovation projects will be within +/- 10% of recommended range.

Measure: Measure Assignable Square Feet of allocated space compared to recommended guideline and metric.

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

- **Status**

- **Tactic was transitioned from Planning to Space Management in August 2015**
- **Physical audit is underway**
- **Space Guidelines - included in draft of proposed revisions to Space Policy**
- **Establish Metrics for Room Use Categories – not started**
- **RFP for Science Space Utilization Study due Nov. 3, 2015**

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 ONLY

- **Sustain current process of completing Operating Budget sheets for new projects**
- **Support Capital, when required, with further study related to funding (e.g. Health and Wellness Center, etc. work)**
- **Complete for projects Science Building, to date**

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

- Interscope Plus go live date was September 1, 2015. (Design posting no longer performed in Capstat)

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 – accurate, used weekly by PMs & CMs
- 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.
- Hire one project manager.

Facilities Management Strategic Planning Session – First Quarter FY 2016

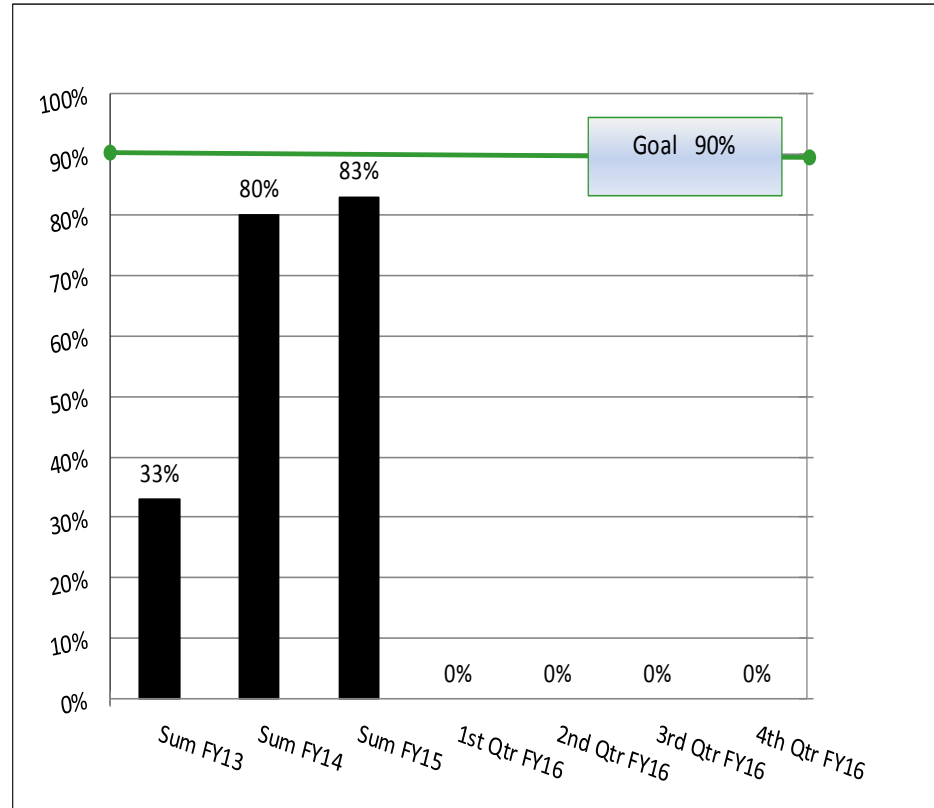
**Lead
Capital**

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	7	5	1	83%
1st Qtr. FY-16	0	0	0	N/A
2nd Qtr. FY-16	0	0	0	
3rd Qtr. FY-16	0	0	0	
4th Qtr. FY-16	0	0	0	



Tactic Measurement for 1st Quarter is N/A

Status

Facilities Management Strategic Planning Session – First Quarter FY 2016

**Lead
Capital**

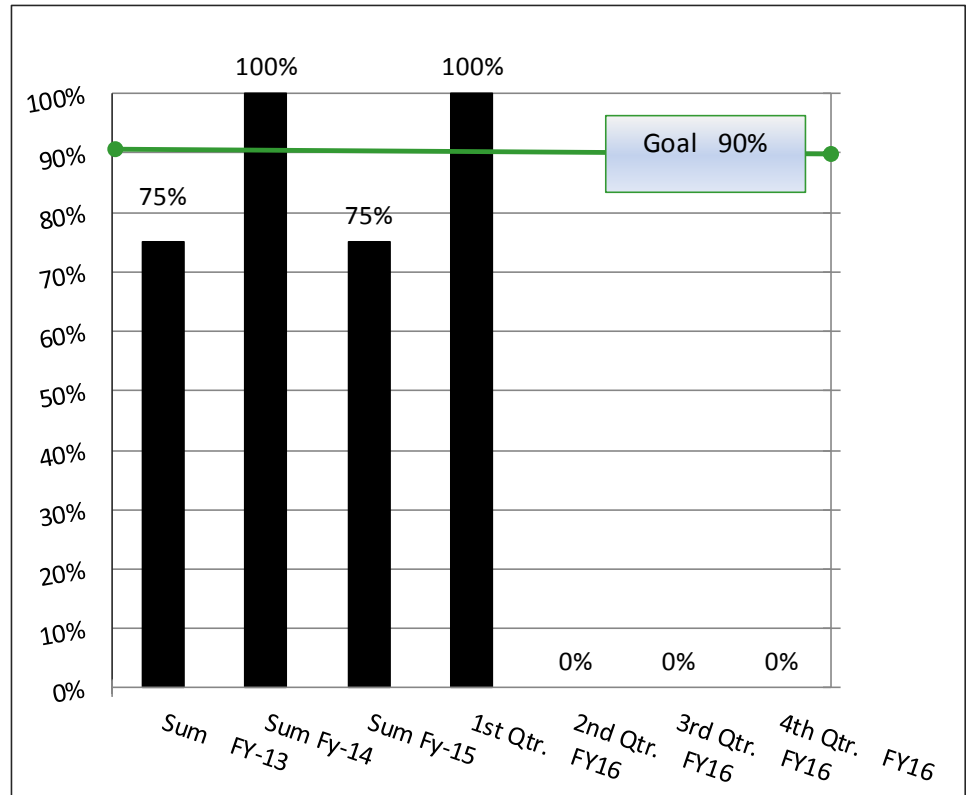
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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	3	1	75%
1st Qtr. FY-16	1	0	100%
2nd Qtr. FY-16			
3rd Qtr. FY-16			
4th Qtr. FY-16			



Status

Tactic Measurement for 1st Quarter is 100%

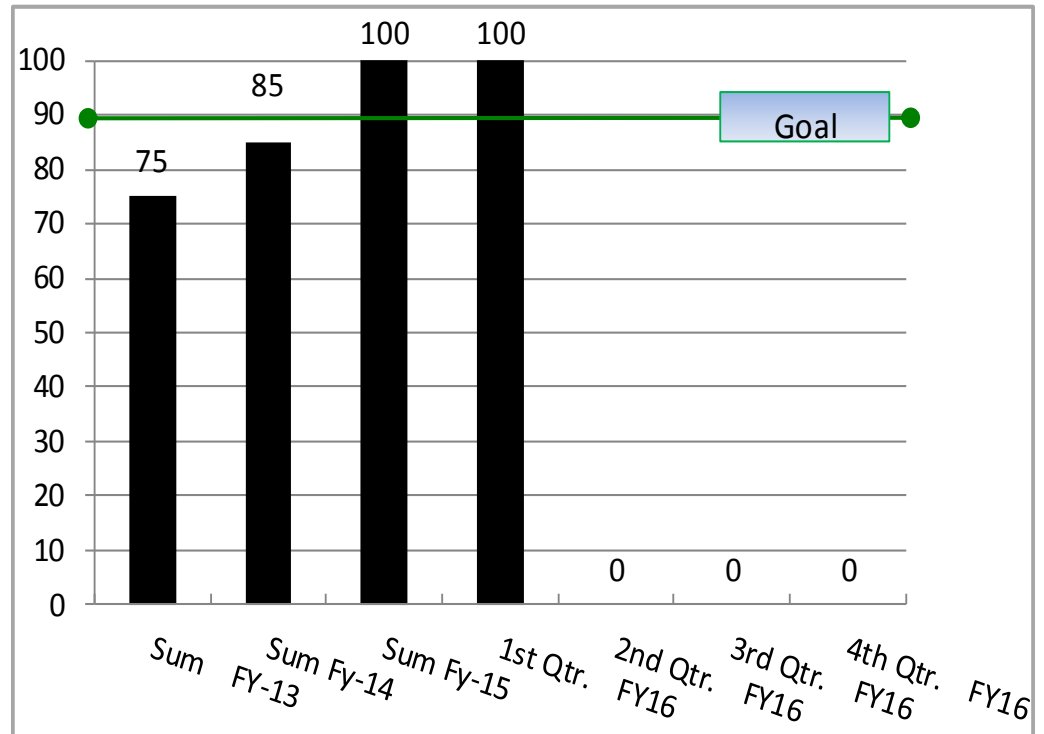
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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	3	0	100%
1st Qtr. FY-16	1	0	100%
2nd Qtr. FY-16			
3rd Qtr. FY-16			
4th Qtr. FY-16			



Tactic Measurement for 1st Quarter is 100%

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

- Holshouser Hall Renovation (Final inspection by ClarkNexsen 7/31/15)
- Music Annex (accepted 9/15/15)
- Oak Hall Renovation (accepted 8/24/15)
- Outdoor Events Shelter (9/10/2015)
- Residence Hall Phase 13 (accepted by SCO 7/28/15)

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
- 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.
- Manage construction scope creep

Facilities Management Strategic Planning Session – First Quarter FY 2016

**Lead
Capital**

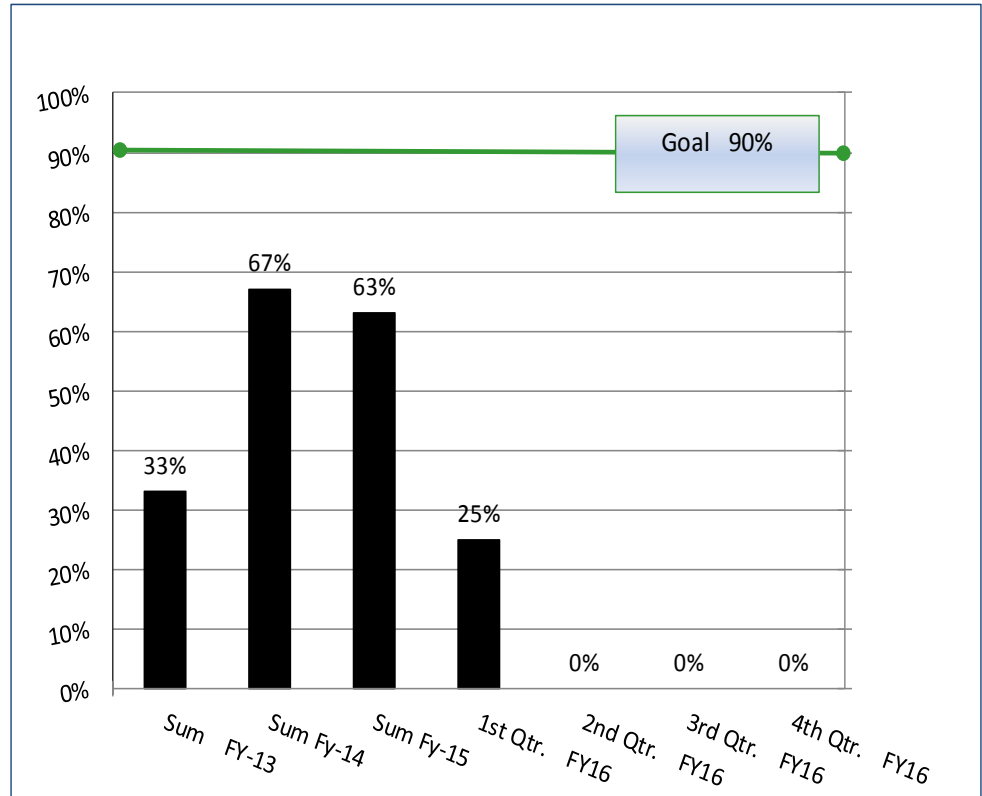
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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	5	3	63%
1st Qtr. FY-16	1	3	25%
2nd Qtr. FY-16			
3rd Qtr. FY-16			
4th Qtr. FY-16			



Status

Tactic Measurement for 1st Quarter is 25%

Facilities Management Strategic Planning Session – First Quarter FY 2016

**Lead
Capital**

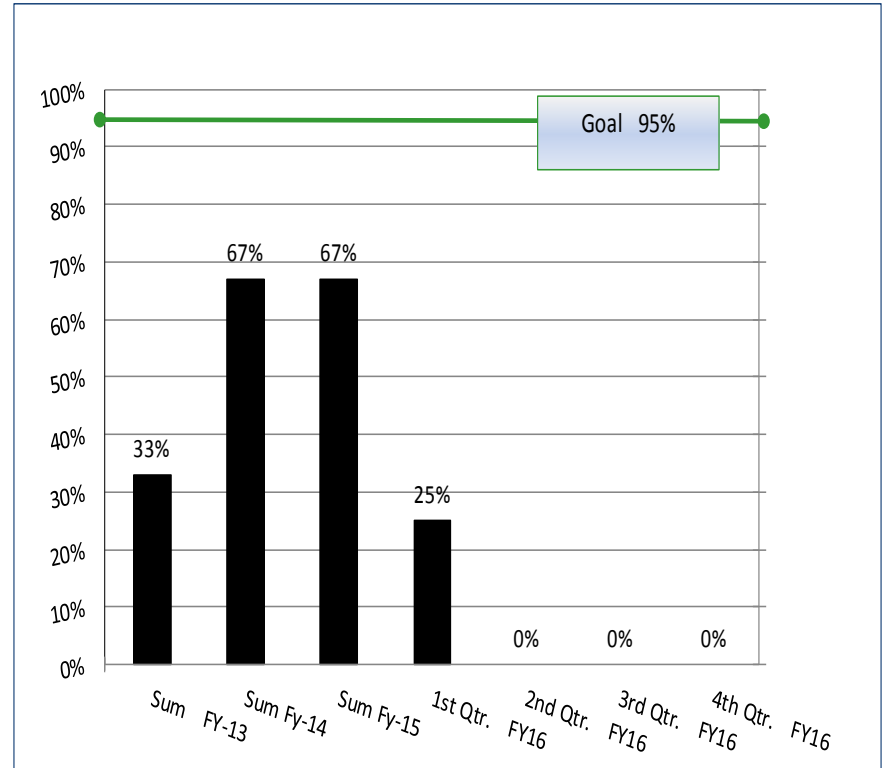
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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	4	2	67%
1st Qtr. FY-16	1	3	25%
2nd Qtr. FY-16			
3rd Qtr. FY-16			
4th Qtr. FY-16			



Status

Tactic Measurement for 1st Quarter is 25%



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 93% (**proposed**) 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

ACTION PLAN

Customer Survey

- Customer interview feedback to be shared with Directors **On Hold for new Communications Officer**
 - Questions will relate to how FM can help customers get their work done better and/or faster via website, projects, etc.
 - Ask feedback for following scenario: a customer service center entering and managing work requests
- Action plans, based on interviews and 2014 Customer Survey to be developed by Directors. **On Hold**
- Next Urban Institute survey projected: **FY 2016**

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:

Continuously improve customer service/satisfaction

Tactic 3.1.1:

Achieve overall customer satisfaction of 93% (proposed) for FM services.

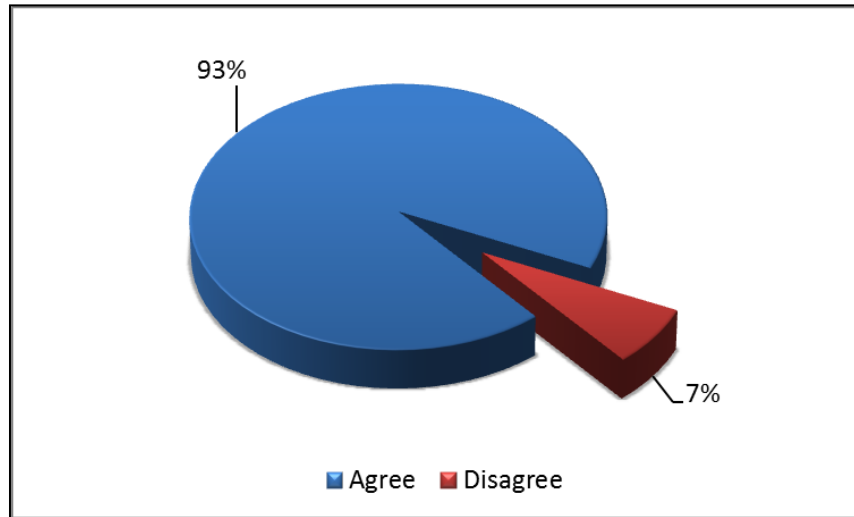
Measure:

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%



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

Lead
F. O.

ACTION PLAN

Actions Planned

1. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.
2. Continue to develop BAS Controls section and cross-train with Zones.
3. Continue to include Energy Manager in Bi-Weekly Operations' meetings.
4. Continue daily monitoring of building temperatures within Zones.
5. Develop Utilities Team (focus on BAS Team; retro commissioning and Utility Manager) December 2015

Actions Completed

1. Supported Capital to get buildings commissioned and retro-commissioned (ie, Kennedy Building).
2. Implemented daily monitoring of temperature using BAS and field verification. Continue to develop controls section and cross-train with Zones.
3. Implemented Customer Satisfaction Survey.
4. Stayed engaged with performance of ESCO contract; kept customers informed; walked the buildings and worked with the Energy Manager to keep customers informed; daily communication.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

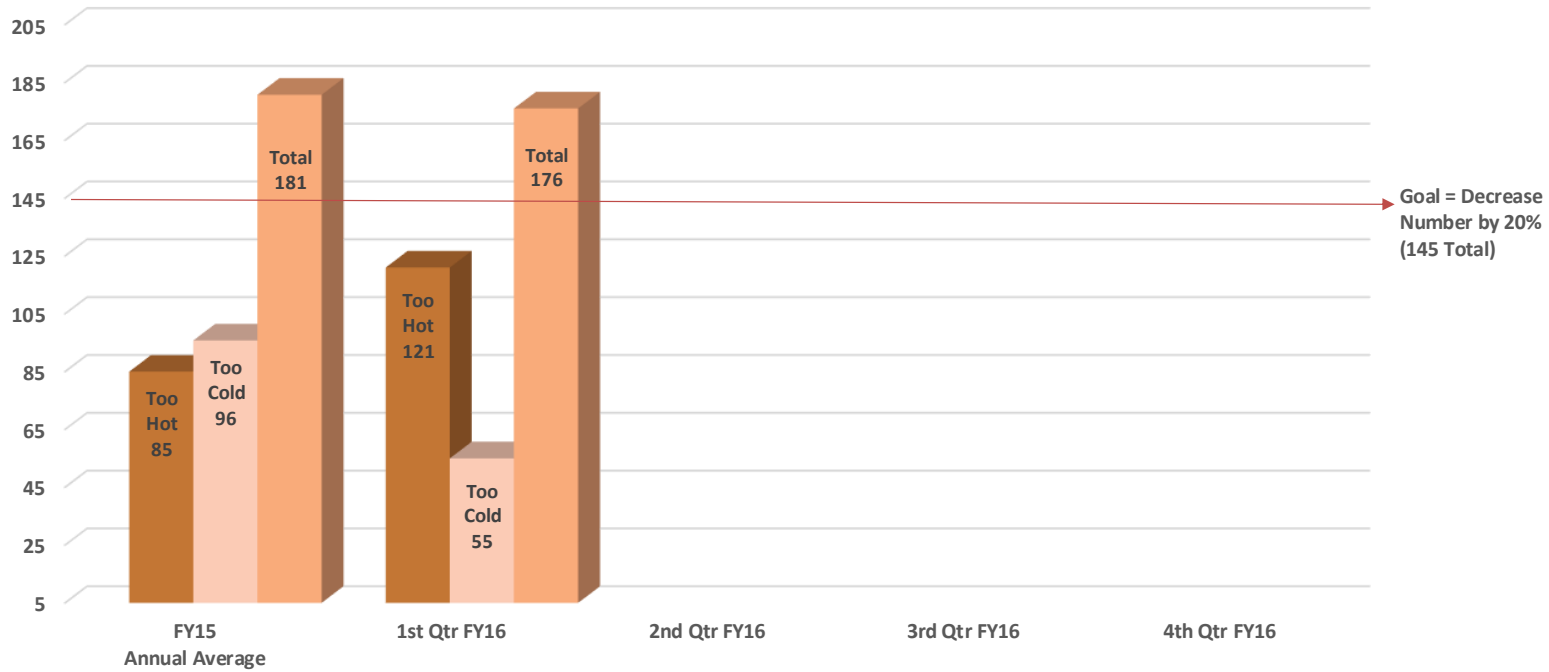
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 90% of Informal Project Customers are satisfied or very satisfied
Measure: Results from Archibus – Design Services Projects Customer Survey

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:

Actions taken by Members of the Design Services Team & Results of Actions:

- **Stop by Customers after the project is complete and in use to review how the renovated space is performing. Received excellent feedback; this helps the design and finish options going forward on other projects.**
- **Keeping the communication lines open by email, phone and face to face works wonders.**
- **Sending daily construction field reports has been working for one very “hands on” Customer.**
- **Hold weekly meetings on job site to discuss progress with Customer. Customers enjoy getting to see the project and discuss any issues or concerns face to face.**
- **Each Customer is unique and so must be the way I communicate with them. Sometimes it's face to face, other times email or a phone call. It also depends on what needs to be discussed. The process is simple to state and difficult to master; effective communication is not easy.**

Facilities Management Strategic Planning Session – First Quarter FY 2016

YTD STATUS 100.0%	ANNUAL GOAL 90.0%	1ST QRT STATUS 100.0%	Lead Design Services
-----------------------------	-----------------------------	---------------------------------	-----------------------------

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

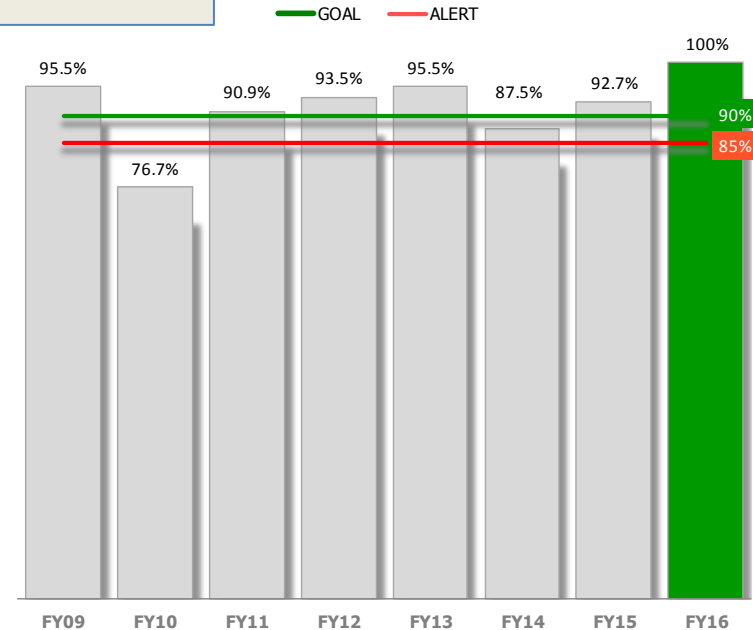
Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied
Measure: Results from Project Related Customer Surveys

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
FY09	22	22	18	3	0	95.5%
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
FY16	17	10	7	3	0	100%
	17	10	RESPONSE RATE			58.8%



Customers Comments:

PC kept us informed on all issues, the project timeline was a concern, but to no fault of the PM, Very pleased with the out come.

PC communicated updates and informed us on the status of the project. Very pleased with the results.

PC is wonderful to work with - highly competent, responsive, organized.

PC was very good about communicating issues and overcoming challenges.

Project was done quicker than expected. PC kept deadlines in mind when scheduling work.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

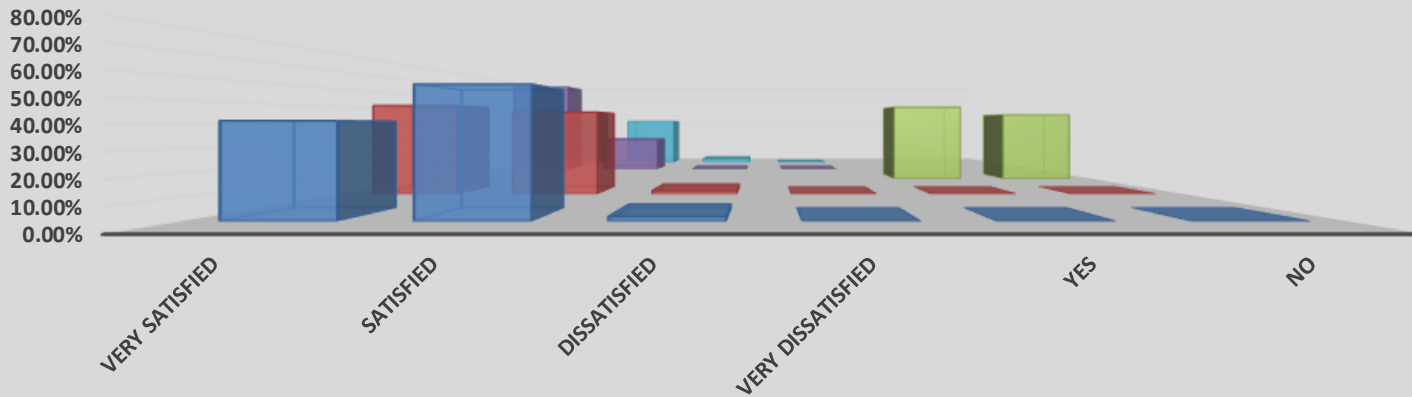
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

Measure: Percent satisfied or very satisfied on SurveyShare email Survey Results

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Customer Service Satisfaction



	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Yes	No
How satisfied were you with the time it takes for Fac Ops staff to respond to you issue?	41.51%	56.60%	1.89%	0.00%	0	0
How satisfied were you with the resolution of your issue or concern?	50.94%	47.17%	1.89%	0.00%	0	0
Was there follow-up? Yes/No					52.83%	47.17%
How satisfied were you with our staff's courteousness and professionalism?	73.58%	26.42%	0.00%	0.00%		
How satisfied were you with your overall experience?	52.83%	43.40%	3.77%	0.00%		

STATUS

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.5: Build brand awareness
Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN**Publicity/Public Relations:**

- **Campus Construction Reports*:** Goal to prepare and distribute approx. every six weeks. Last one sent March 3, 2015; **On Hold**
- **Press Releases:** Write and distribute through several media channels. Continual through **On Hold**
 - Clean fuel grants, energy savings, Aperture sculpture, etc.
- **Publicity documentation and analytics*:** Will report annually. Next is **On Hold**

Internal Communications:

- **Intranet** Begin content review and user feedback. (*note: level 0 security information*) **On Hold**
- **Regularly scheduled communications meetings** with BES and Operations **On Hold**
 - Bimonthly meetings for both. Had first meeting with Operations in March, 2015, prior to Shelly's departure. BES meetings have been held for several months now.
- **Focus group meeting facilitator** for employee communications survey review. Group participants being identified.
 - Meeting **On Hold**; Completion and results: **On Hold**
- **Workshops*:** Expand FM audience and subject materials **On Hold**
- **Communications Policy Update:** Proposed policy given to Melanie and Jennifer **On Hold**

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.5: Build brand awareness
Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN**Customer Communication Initiatives (interrelated):**

- **Launch 2nd customer feedback interviews On Hold**
 - Share results with Directors **On Hold**
 - Results will assist with customer survey action plans to be developed by Directors **On Hold**
- **External Marketing Campaign*:** “Creating A Campus of Distinction”
 - Project Signage launch **This launched in February, 2015, as scheduled.**
 - Operations and Design Services have implemented and now manage.
 - Solicit feedback/input from Directors **On Hold**
 - Execute campaign tactics (testimonials, LCD signage, website, etc.) **On Hold**
- **SOP review, development On Hold**
- **Customer Handbook* update, launch and remarket; digital and print On Hold**
- **Website and QA* On Hold**
 - Review web comm. key QA issues/reminders
 - Review requested pages from different units for content/QA
 - User testing
- **Customer Facing technology Scheduled to launch March, 2015**
 - Communication plans and user testing assistance with Campus Map and CRDM report

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction
Tactic 3.1.5: Build Brand Awareness
Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Special Projects:

- **Sustainability Magazine Launch** Launched March 3, 2015
 - Limited print to occur in late Mar./Early April (see Mike Lizotte)
- **Traffic communications committee (joint partnership with U. Communications):** Research, write and provide upcoming and current campus and perimeter traffic/transportation-related projects to campus stakeholders.
 - Quarterly e-newsletter, articles, announcements, etc. **On Hold**
- **Editing/writing award submissions.** As requested **On Hold**
 - Campus Tree USA Designation/Award: Submitted Dec. 2014; anticipated response March 2015.
 - Notified as award winner in February, 2015. To be announced in sync with Arbor Day and Campus Clean Up.
- **Presentation assistance** as requested
- **Communication Plans:** BES and Operations key announcements, FIS new campus map, CRDM program, customer handbook **On Hold**
- **Personnel:** Temporary position request submitted and approved through FY 15 budget process **On Hold**

* = Areas where temp. communication position would assist to help meet timeframes and deliverables.



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**

1. Increase the pool of qualified applicants and ensure a qualified, diverse applicant pool. **As appropriate through June 30, 2016**
2. Timely and efficient processing position management actions. **As appropriate through June 30, 2016**
3. Ensure FM maintains current on budgeted positions. **As appropriate through June 30, 2016**
4. Targeted Selection. **Ongoing**
5. Interview Guides. **Ongoing.**

Facilities Management Strategic Planning Session – First Quarter 2016

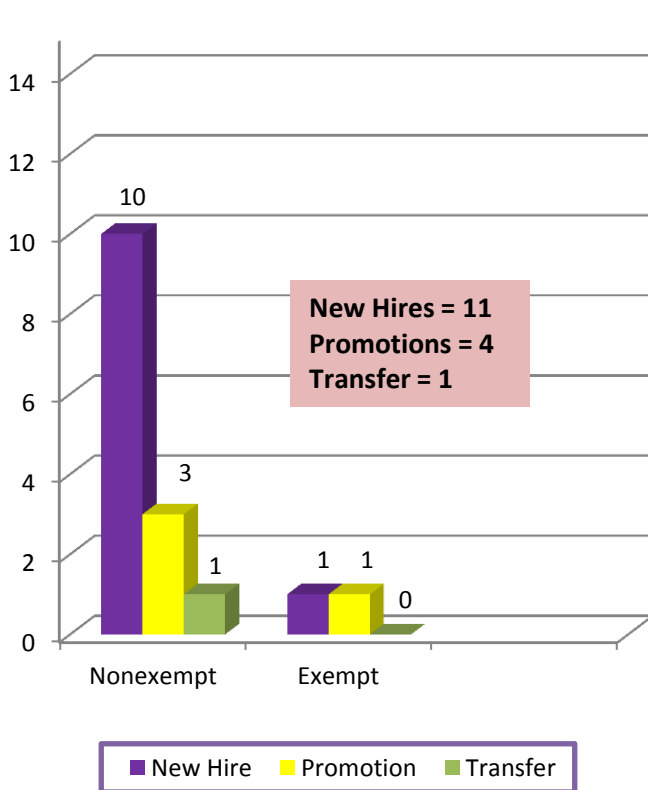
Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

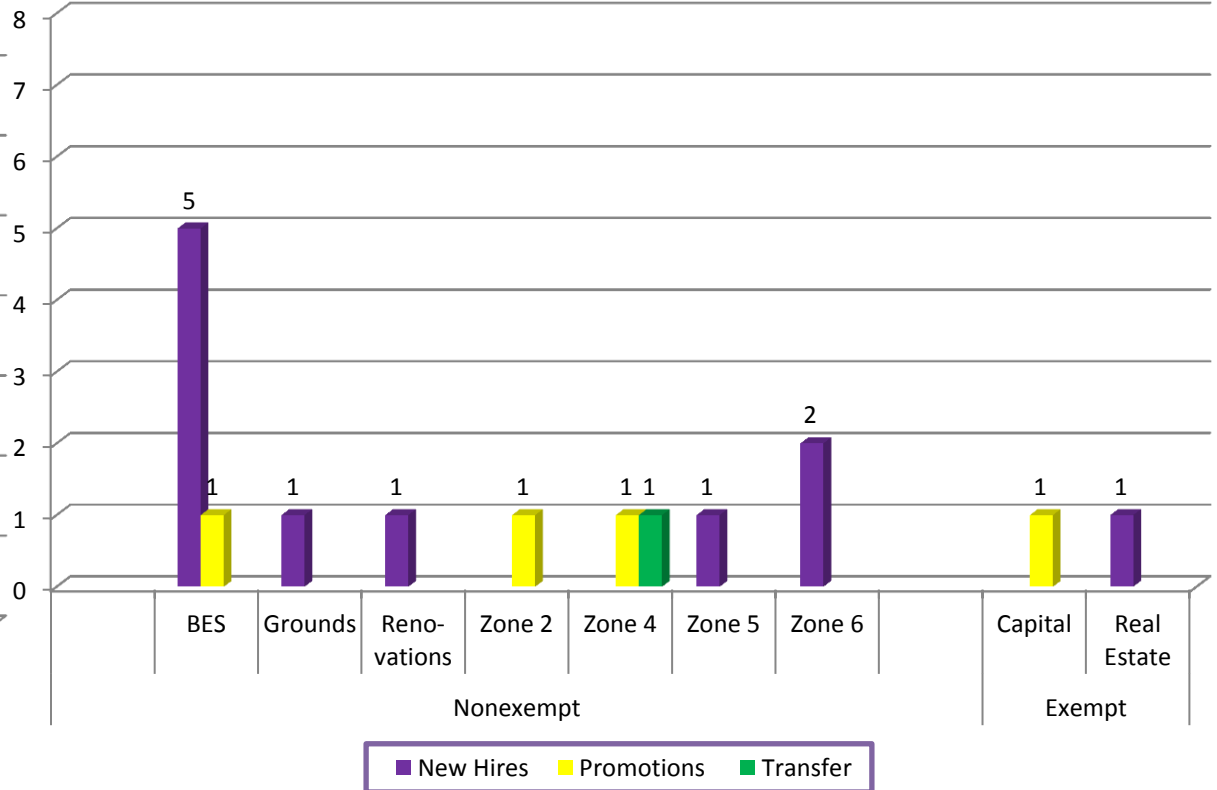
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/Promotion/ Transfer



FM New Hires/Promotions/Transfers per Department



Facilities Management Strategic Planning Session – First Quarter 2016

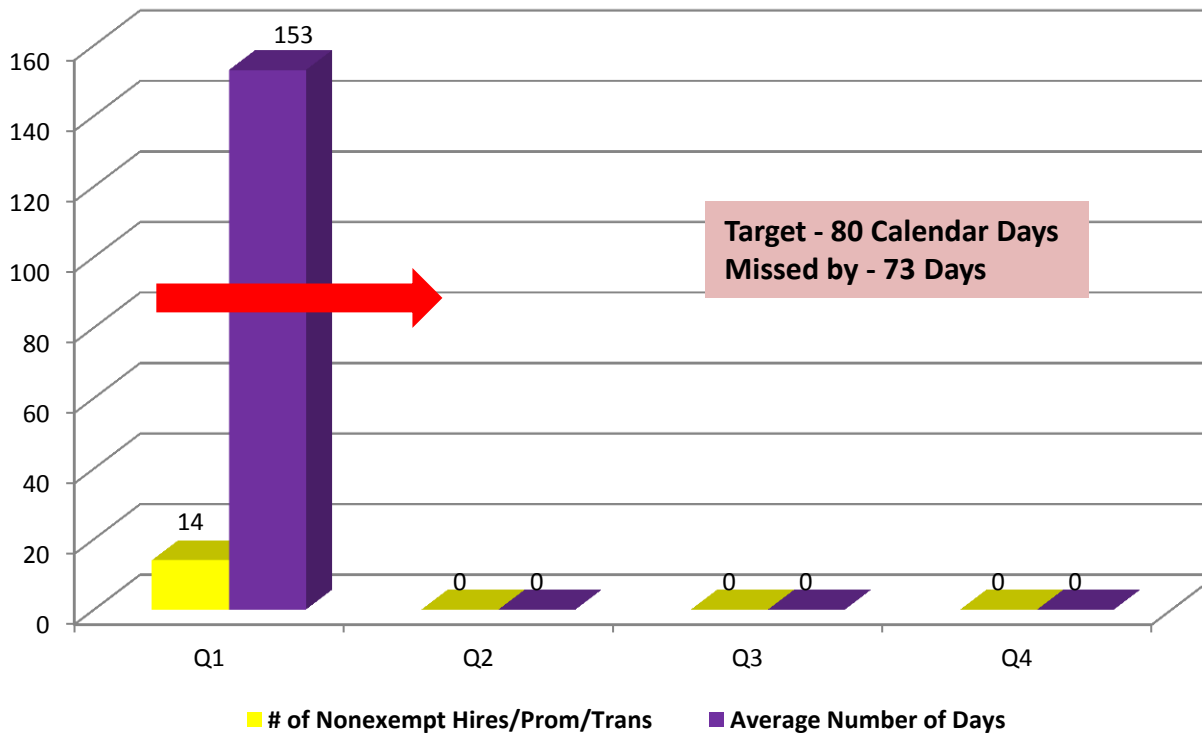
Lead
FBO

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 Nonexempt Vacancies



STATUS

Facilities Management Strategic Planning Session – First Quarter 2016

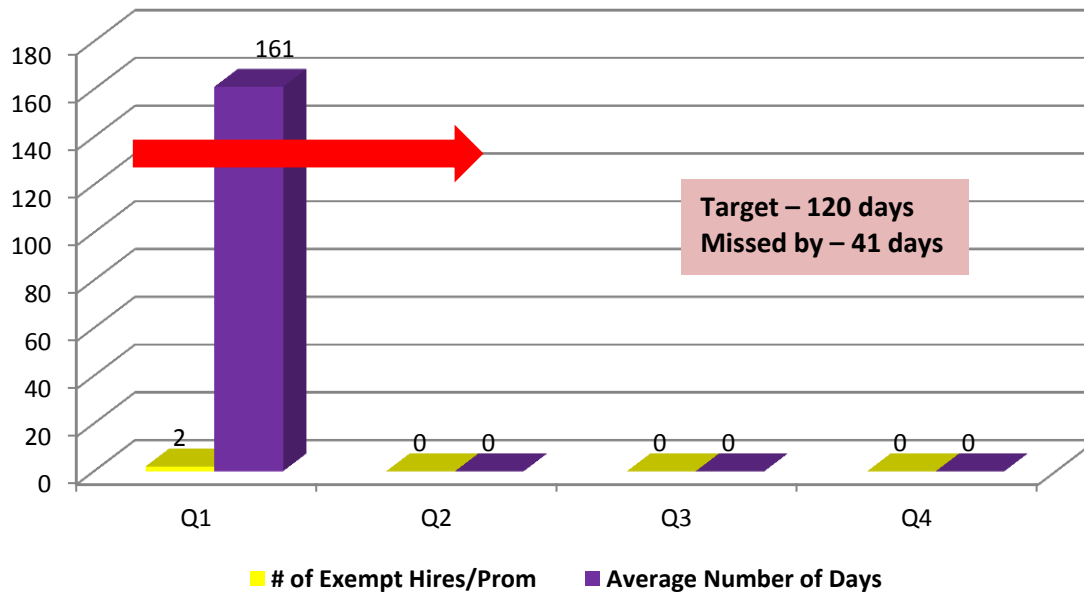
Lead
FBO

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

Number of Days to Fill Exempt (Salaried) Vacancies



STATUS

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:

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

ONGOING AND CONTINUOUS – Through June, 2016

- 1) **Strive to hire the best qualified candidate**
- 2) **Maintain updated position descriptions**
- 3) **Work Plans**
- 4) **Probationary Period**
- 5) **Employee Evaluations**
- 6) **Employee relations documentation - 3 causes for disciplinary action**
 - a) **Unsatisfactory job performance** - problems with quantity/quality of performance; not following procedure; timeliness; accuracy & absenteeism
 - b) **Unacceptable personal conduct** - behavior, attitude (falsifying job application, theft, alcohol, refusing to accept assignment, betraying confidential info)
 - c) **Grossly inefficient performance** - destroying state property, causing harm or loss of life, etc.

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

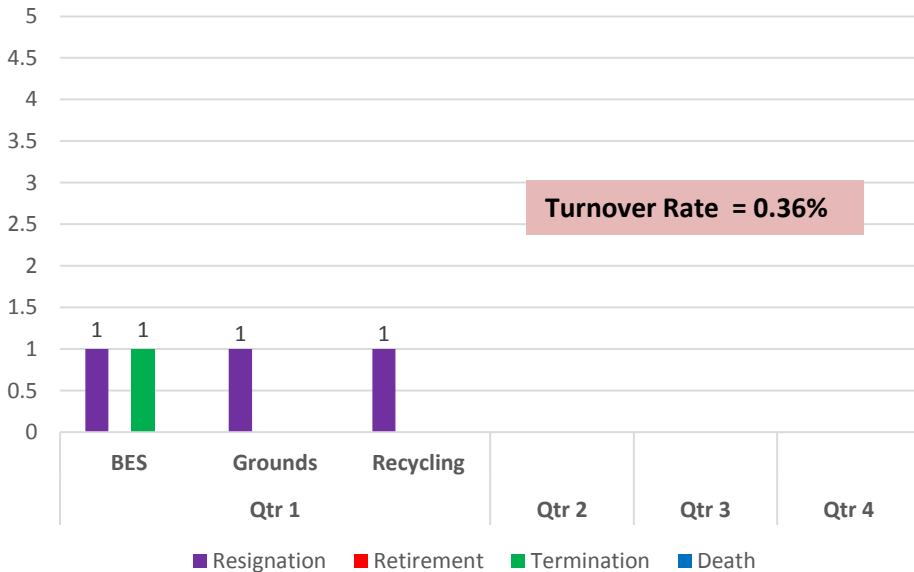
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

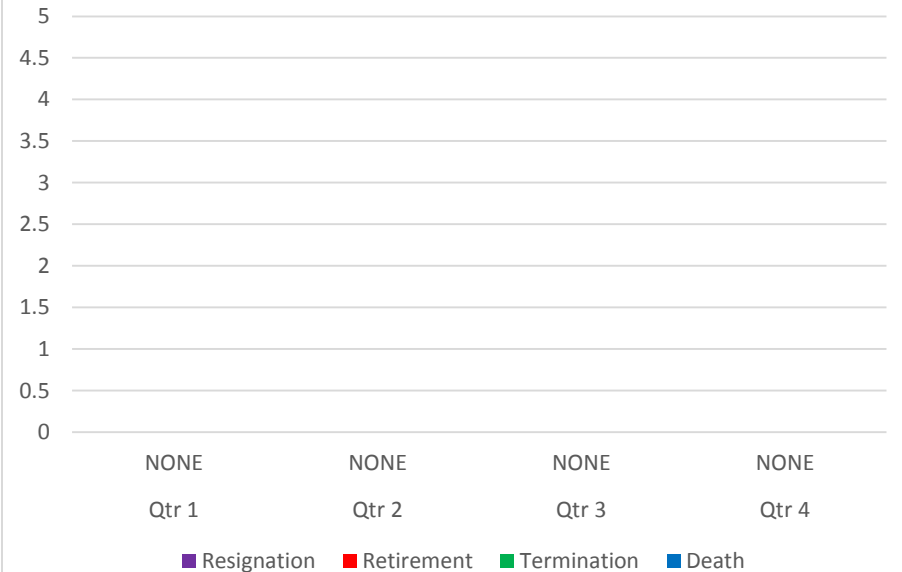
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations by Department During Probation Nonexempt



Separations by Department During Probation Exempt



Status

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%

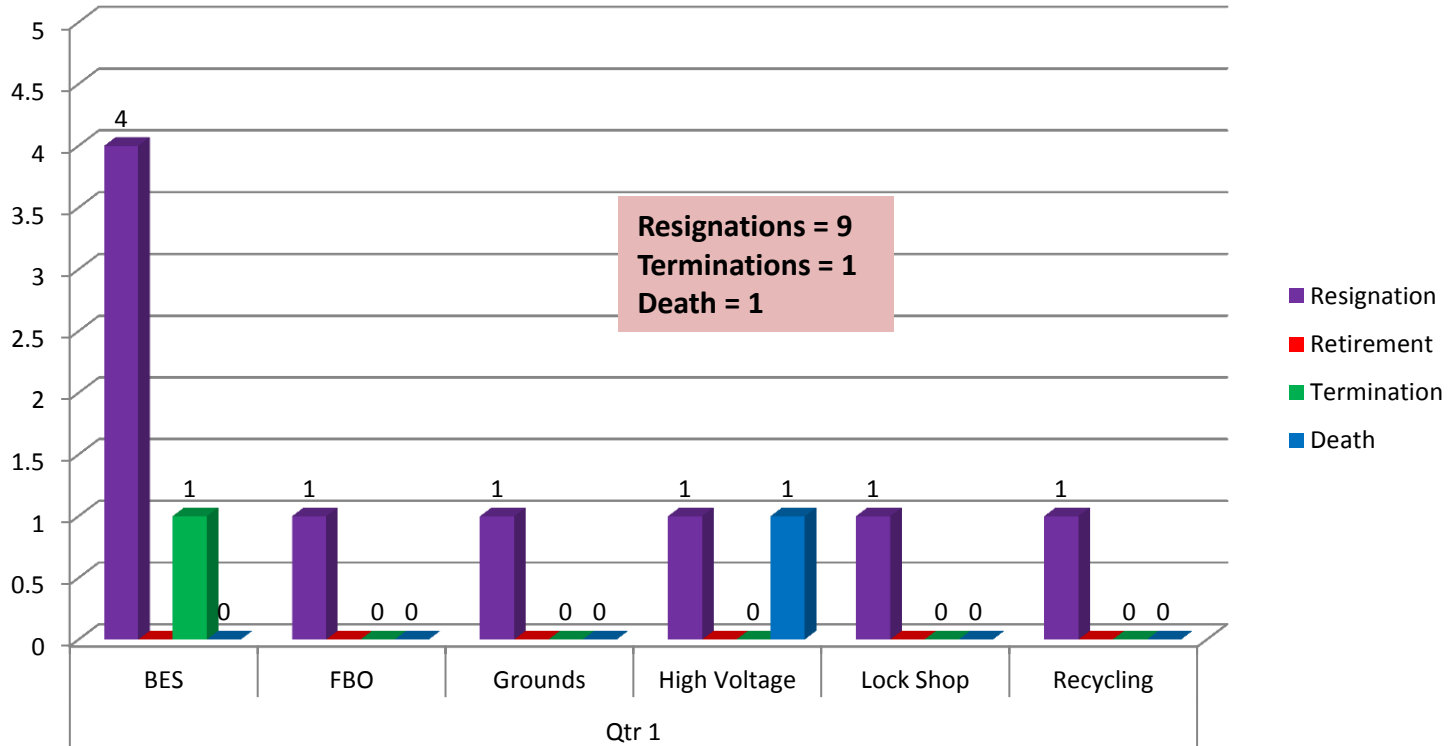
Measure:

Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations for 1st Quarter - Nonexempt



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

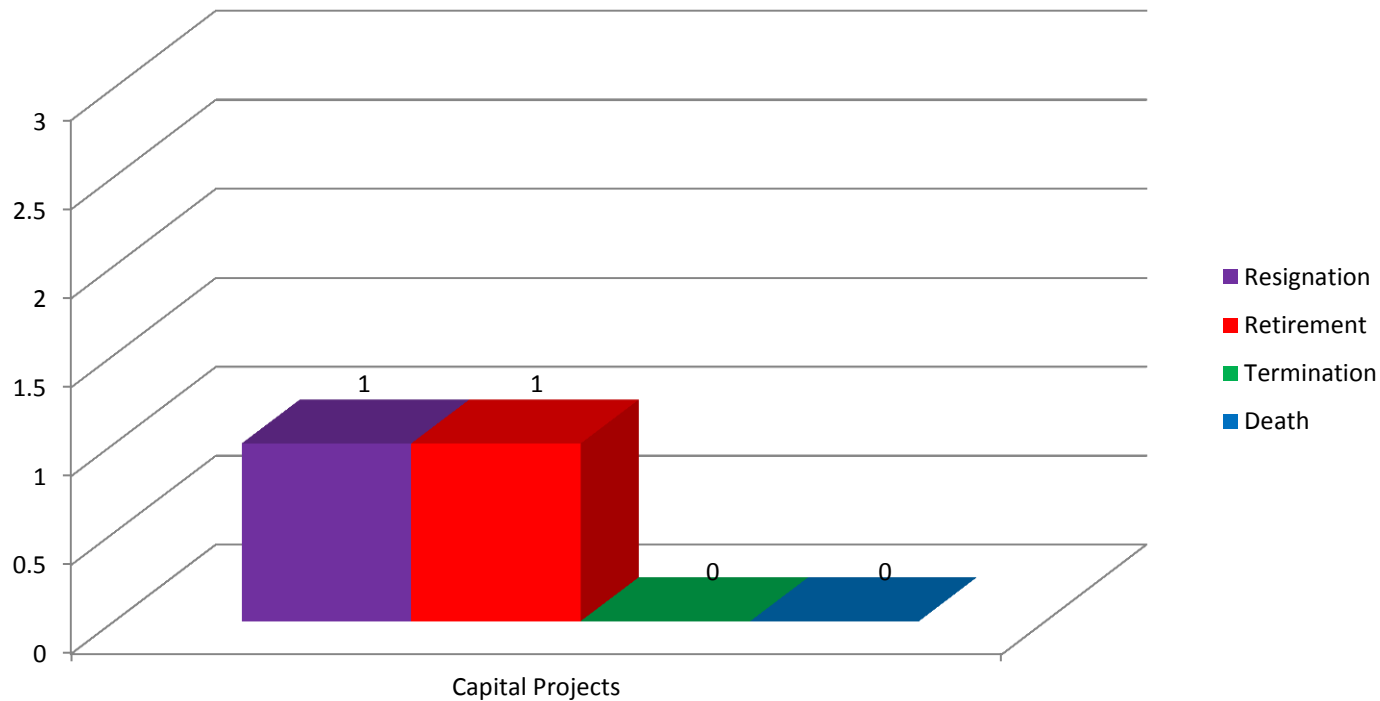
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations for 1st Quarter - Exempt



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>	
– Trouble Shooting Mechanical Drives Systems & Rotating Equipment	June 2015
<u>Safety</u>	
– Supervisor Safety Talks	Monthly
– Forklift, Aerial & Telescopic Compliance Training (EHS) 2015	April
– Blood Borne Pathogens (EHS)	May 2015
<u>Leadership</u>	
– APPA Leadership Academy	May 2015
– Documentation & Disciplinary Process 2015	Spring
– NEO redesign	June 2015
– Cultural IQ Training	TBD
<u>Externally Driven Initiatives</u>	
– Kronos implementation/training - Sub pilot in FM building (<i>Financial services</i>)	Jan 2015
– Niner Talent (formerly People Admin) version 7.35 upgrade/training (<i>Main HR</i>)	July 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

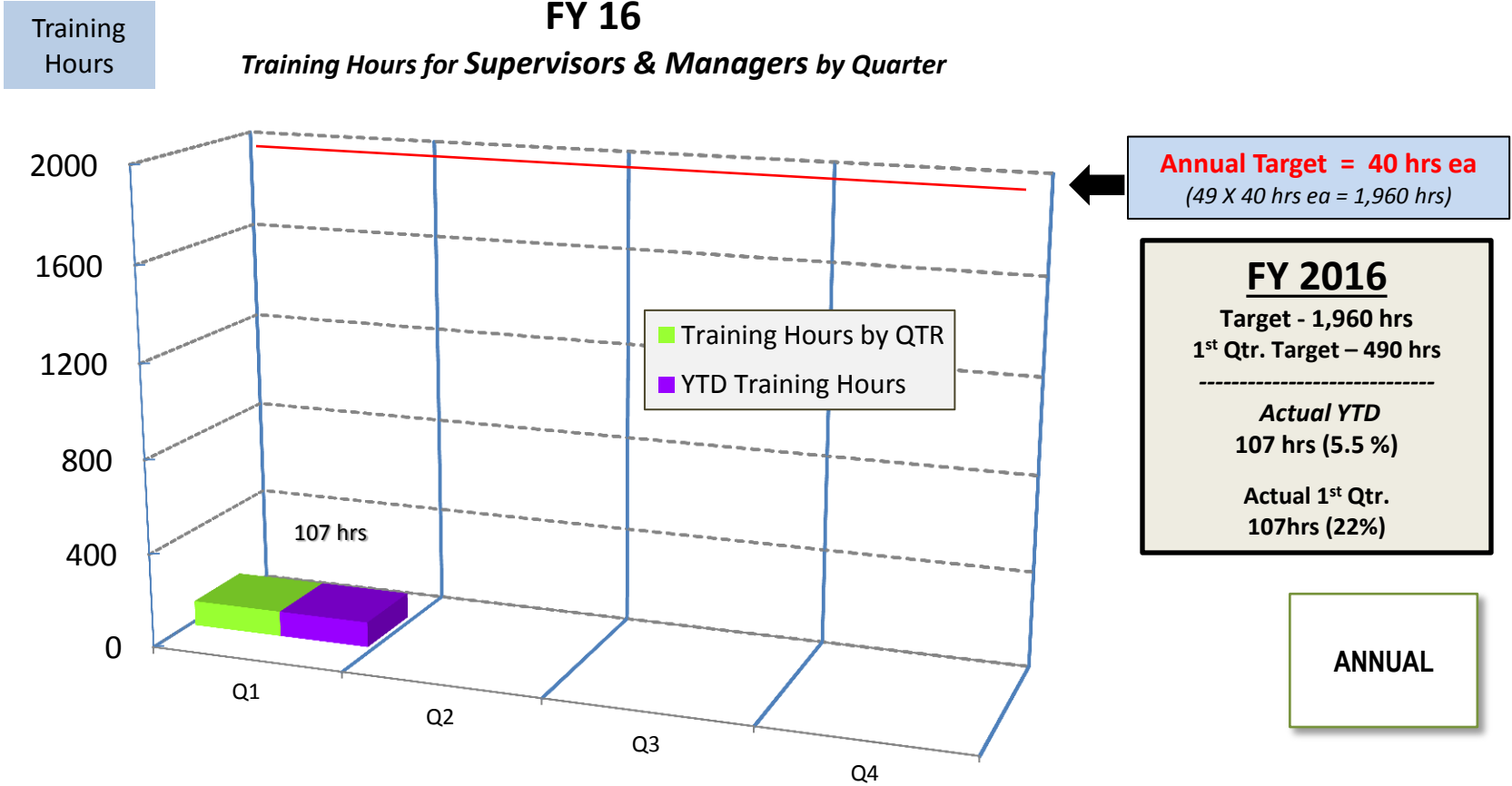
Lead: Facilities Business Office**Balanced Scorecard Category:** Internal Business Process, Learning and Growth**ACTION PLAN**

- Training hours for 1st Quarter FY16 – 583 hours
- Bi-weekly attendance at F/O staff meetings
- Monthly attendance at BES staff meetings
- Regular meetings with BES & FO training coordinators
- Lending Library – solicit subject matter requests from Directors/Managers

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

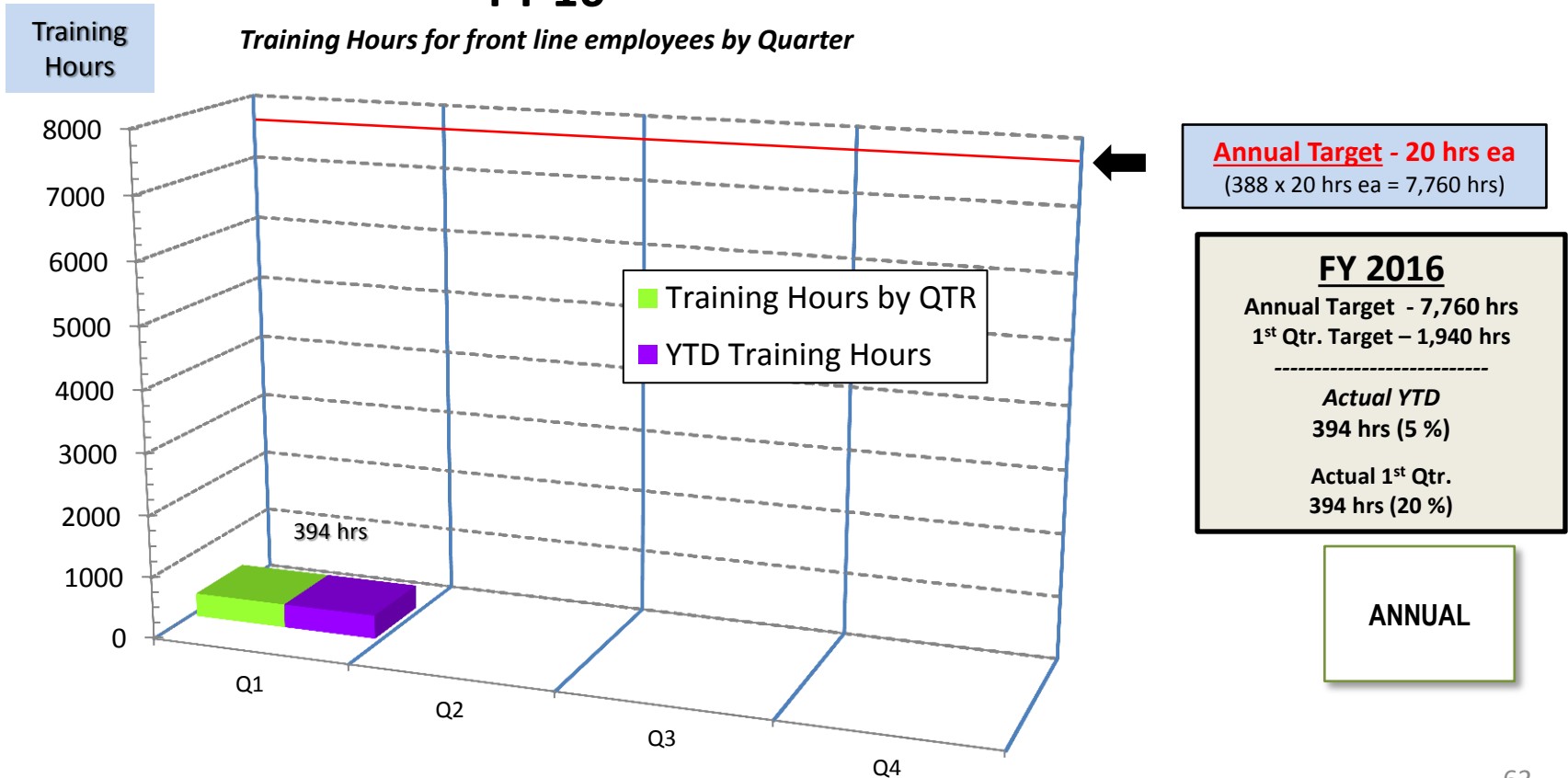


GOAL #4 Recruit, Develop and Retain Quality Employees

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

FY 16



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 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 2015**
 - Creation of a survey focus group consisting of non-supervisory employees 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. 01/15/2016
 - Focus group members to be notified in December 2015; Work/meetings anticipated to begin in January 2016 with a proposed 3 week maximum time commitment by members;
- Next survey date TBD.

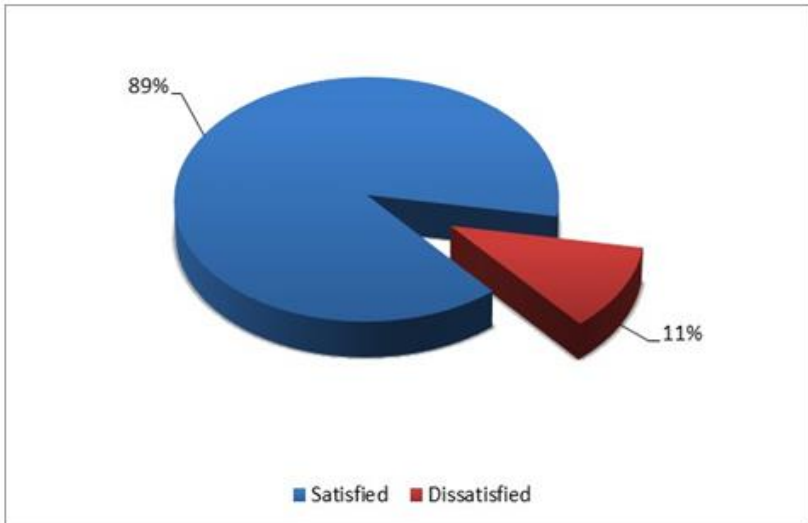
GOAL #4 Recruit, Develop and Retain Quality Employees

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

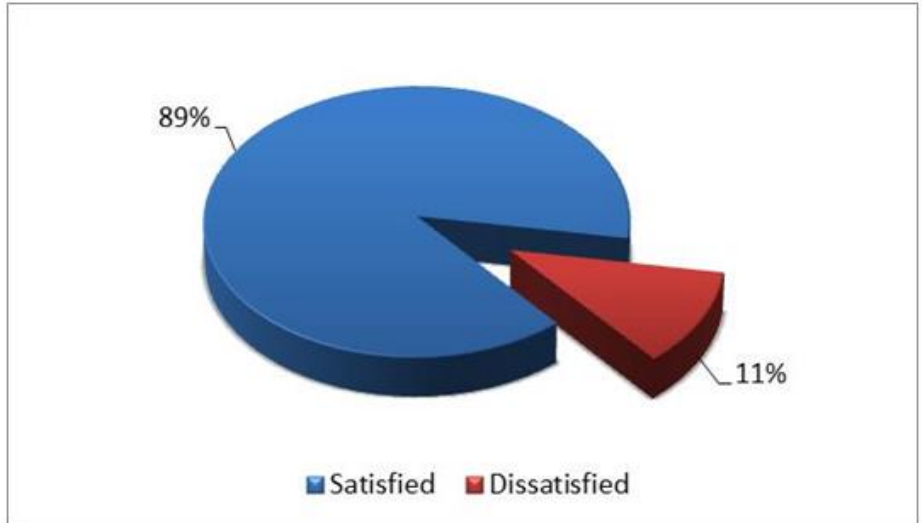
Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

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)

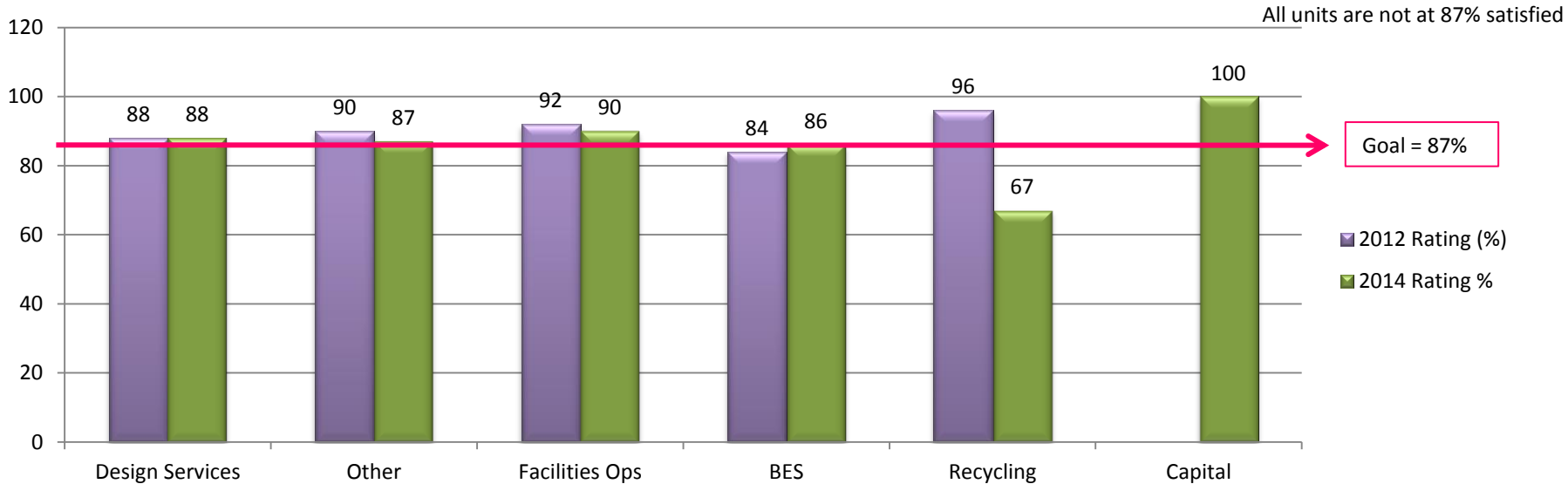


GOAL #4 Recruit, Develop and Retain Quality Employees

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

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
Measure: Percent of employees completing mandatory compliance training

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Activities to foster “Safety Mindset”

- Supervisor Safety Talks (SST)
- 5th Annual FM Safety Fair
- 7th Annual FM Safety Slogan Contest
Annual

Monthly
Annual

Safety Training

- “Safety Training Needs Assessment” sent to new employees & their supervisor
- “EHS Safety Check List” sent to Directors
- List Safety training topics/links on FM Learning & Development web page
- Communicate EH&S training schedule to FM

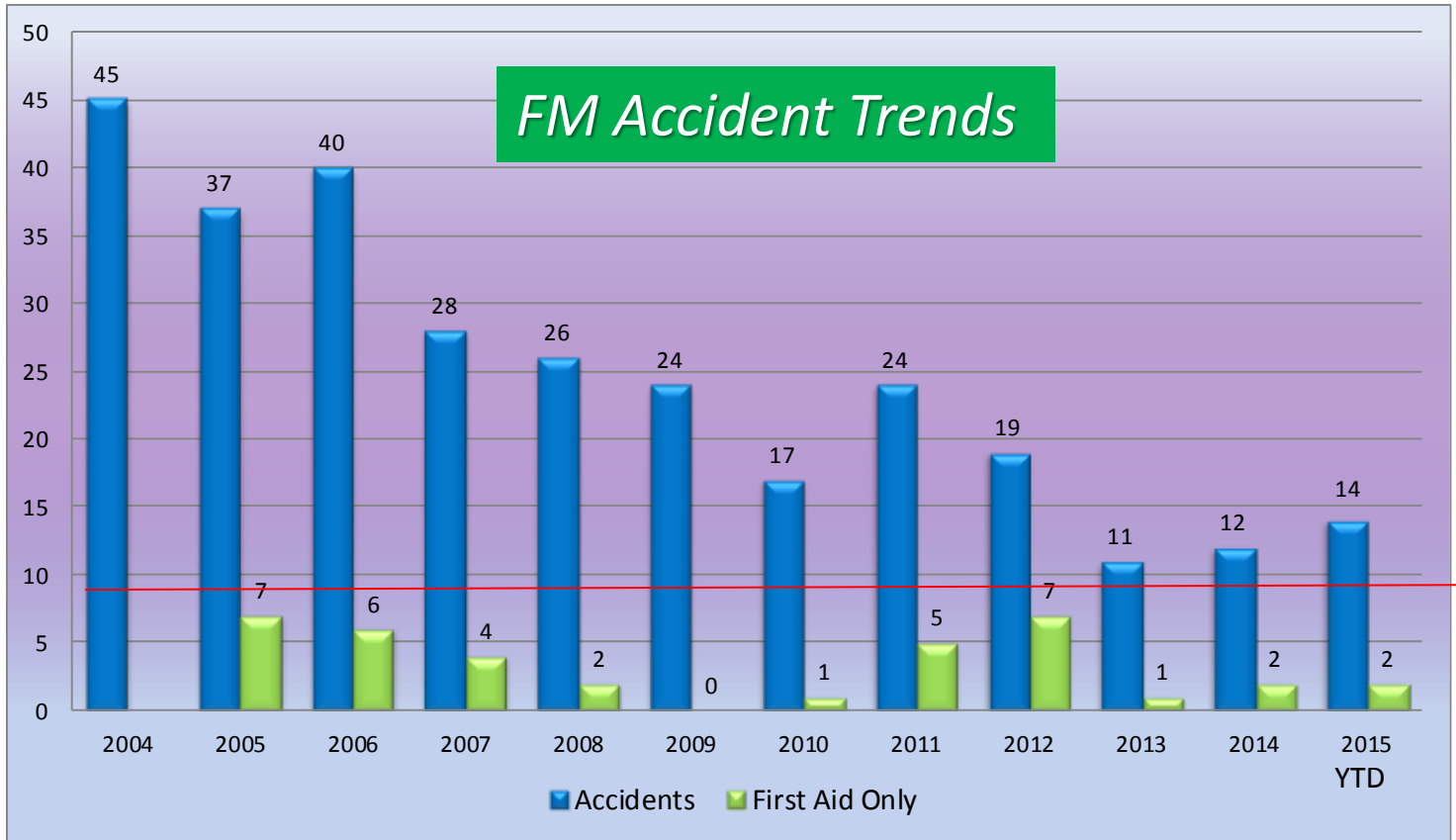
Ongoing
Oct 2015
Oct 2015
Monthly

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



2015 Continuous Improvement Target ≤ 9

STATUS

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

ACTION PLAN

Action Item	Target Date
-------------	-------------

Safety Training stats FY15 YTD – 583 hours

- | | |
|---|------------|
| • <u>Training Needs Assessment</u> to new employees | Ongoing |
| • <u>Safety Training Checklist</u> to Supervisors/Managers | Oct 2015 |
| • Winter Preparedness Expo | Dec 2015 |
| • Safety related activities | |
| • FM Safety Committee meeting | Bi-monthly |
| • Supervisor Safety Talks | Monthly |
| • Safety Slogan Contest - <u>“Safety Pays In Many Ways”</u> | July 2015 |
| • Accident/Incident totals YTD (CY15) | |
| • Accidents - 14 | 2015 YTD |
| • Minor incidents - 2 | 2015 YTD |

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
-------------	-------------

FM Academy

- Web Content Development, working with NiCole Lynch, FM Communications Officer, on updates in Learning & Development webpage. Ongoing
 - Developed an online training evaluation form with FIS (Pam); Under review for approval;
 - Adding Safety topics/links
 - Training vendor sourcing & selection (as needed/as funded)
 - Updates to website on upcoming L & D events

Leadership

- Contacted Suzanne Healy at APPA; working to arrange the hosting of APPA leadership courses onsite. Leadership Academy Level 1 completed May 2015. Courses be held at Center City as availability allows.
 - APPA Leadership Academy (Level 2) Feb 2016
 - APPA Leadership Academy (Level 3) Mar/Apr 2016
 - APPA Supervisor Toolkit Summer 2016

Technical

- Working with Doug Pierce in Materials Management. Highly recommended that FM does an RFP to secure onsite training providers. As this process can be lengthy, exact dates will be confirmed and communicated.
 - Electrical Troubleshooting & Preventive Maintenance Mar 2016
 - Pump Repair & Maintenance Apr/May 2016



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:**

- Call for Recurring and One-Time funding completed on time; Total FM request approx. \$13M;
- Call for Divisional one-time funding list for FY 16 completed on time; Total FM request \$2.8M
- Awaiting new recurring budget for FY 16 – General fund anticipated late Fall (November 2015); Currently operating using FY 15 budget amounts;
- Holding Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams;
- Re institute capital project budget meetings with Capital team; Meetings to begin in October 2015
- FM Budgeting 101 training development underway with “color of green” sessions/meetings; Date of first session TBD; Training will incorporate both the GF and Capital;

Supplemental Grant/Award Funding:

- 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 2016;

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:**

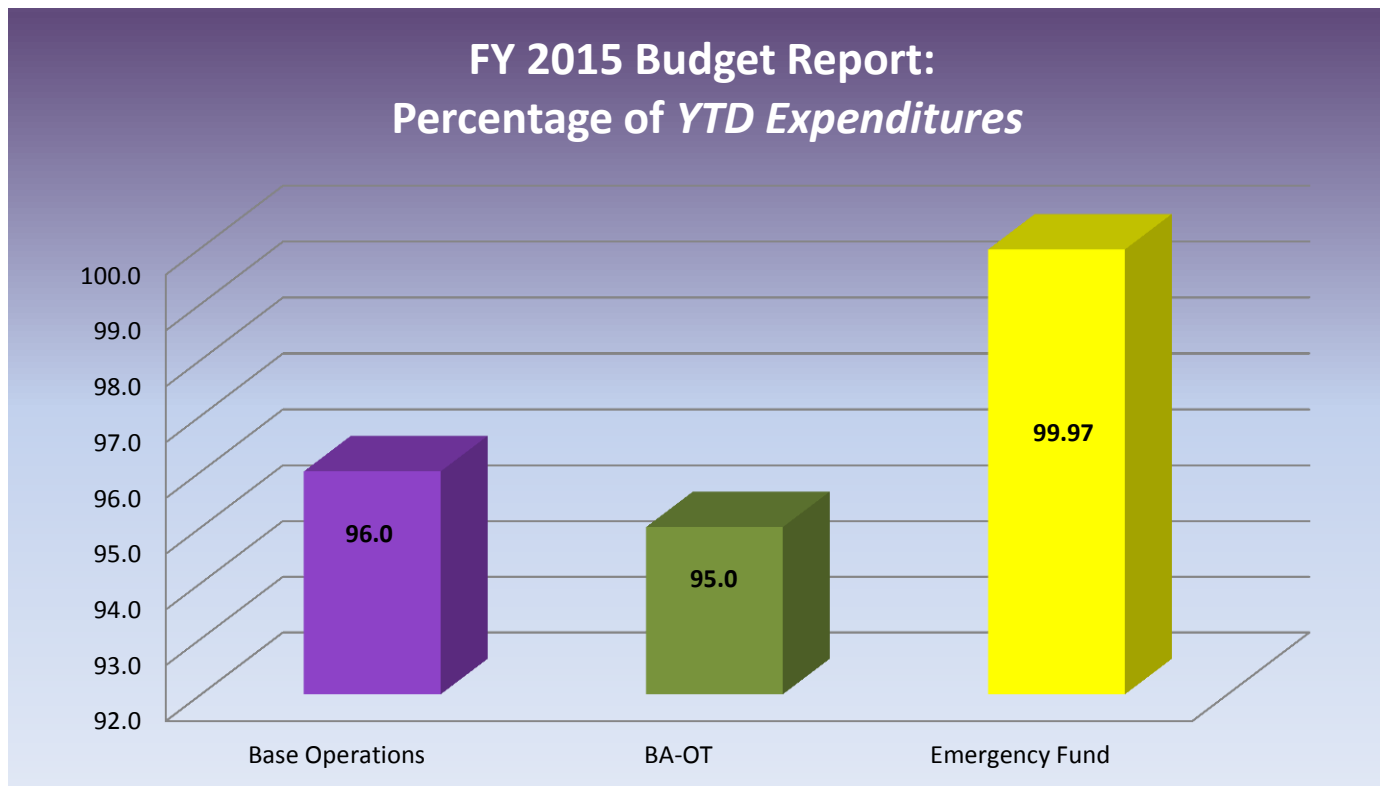
- Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2016
 - Improve org code usage – July 2015 through June 2016; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org;
 - Home Org completed for KRONOS pilot;
 - Timesheet org complete
 - Funding org underway with several changes made in June 2015; Additional changes are under discussion with Position Control and should be completed by September 2015.
 - Reviewing budget revision process departmental wide to begin July 2015 – will not be completed until the new FY 16 budget has been allocated by the AVC;
 - Workflow approvals in 49er Mart: review completed in July 2015;
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. – **15th of each month;**
- Requested an entry-level accountant position for FY 16 to improve and monitor use of account codes across FM;
- APPA Survey – Data gathering; Survey underway. Anticipated submission to AVC for review: November 23rd

Lead
FBO

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



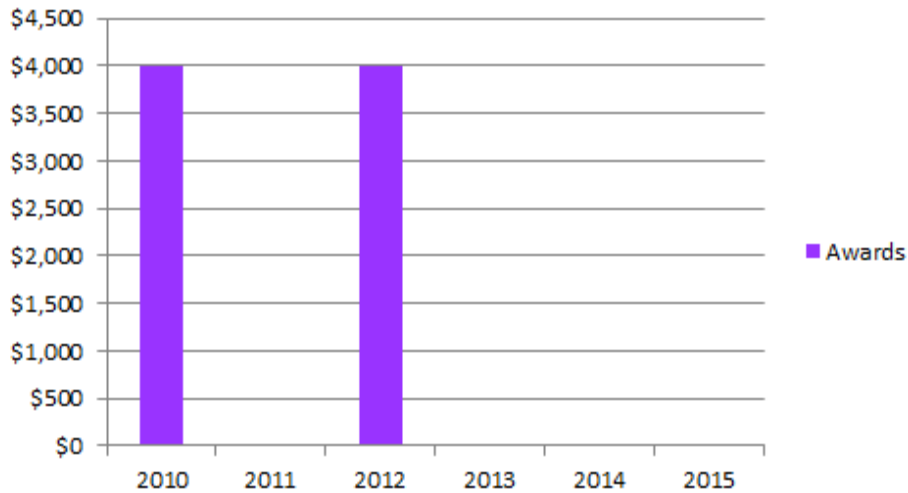
ANNUAL

GOAL #5 Promote Good Stewardship

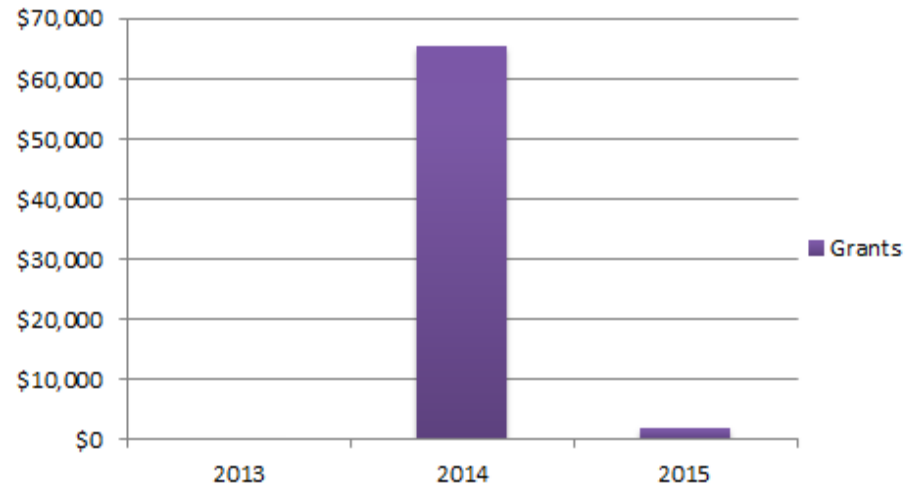
Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Measure: Percent increase in supplemental funding

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

Monetary Awards



Grants



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 15 APPA Survey:**

- Data collection for FY 15 survey underway;
- Upon opening of survey, questions will be reviewed; participants (data providers) will be given a heads up and the survey questions will be delivered.
- Anticipated submittal of survey for review by AVC is November 23, 2015.

GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.3:

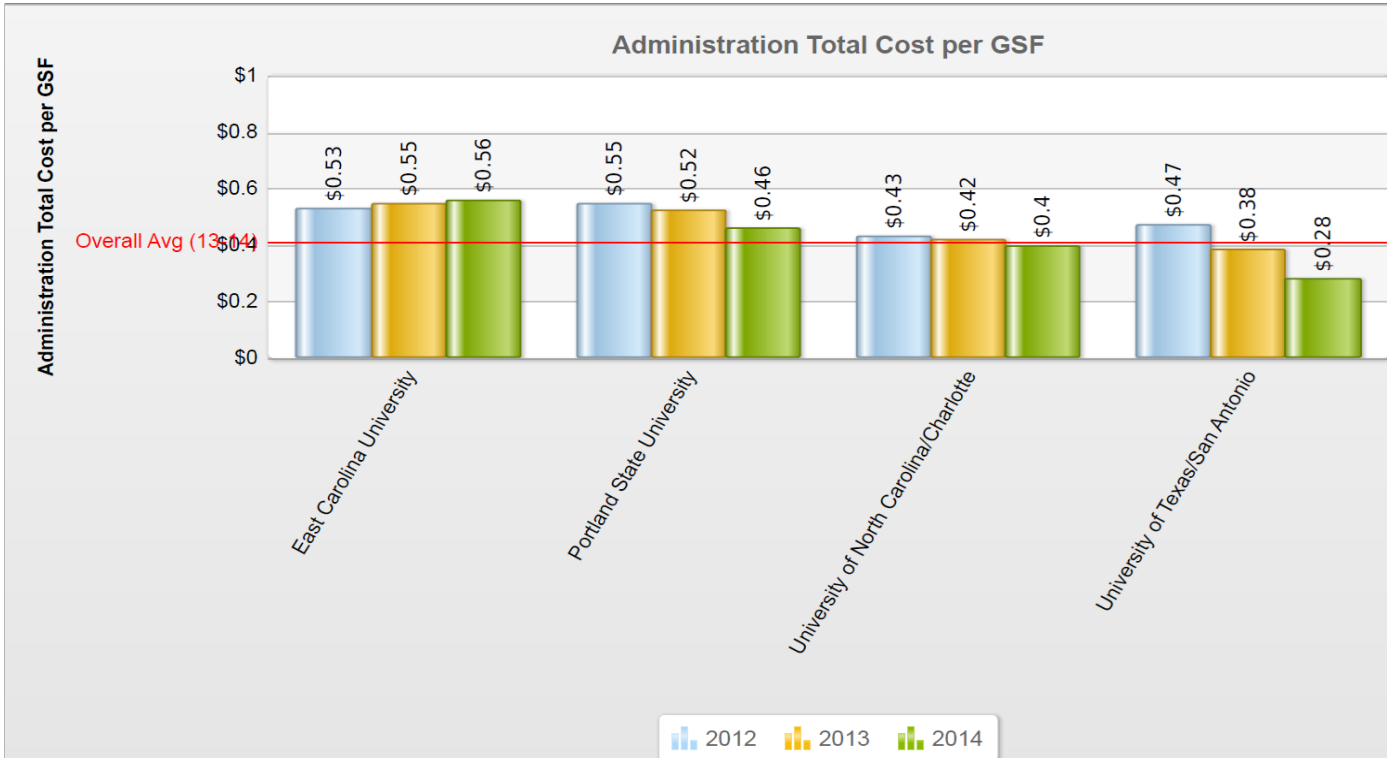
Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Measure:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



Overall APPA Avg. = \$0.55
 SRAPPA Avg = \$0.44
 Target = \$0.404 (-5%)
 UNC Charlotte = \$0.40

GOAL #6 –Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

Tactic 5.1.4: Achieve Custodial Costs/Student FTE Plus or Minus 5% of the APPA Average for Peer Institutions
(Internal UNC Peers = East Carolina)
(National Peers – Portland State University, University of New Mexico, University of Texas at San Antonio)

Lead
BES

ACTION PLAN

- Actions Completed
 - Implemented new EDA-Equipment Inventory (EDA-EI) Process and developed Master List of equipment for BES Zones (7/2015)
 - Implemented new Budget process for BES Zone Supervisors (8/2015)
 - EPIC laundry room installation (9/2015)
 - Submitted First Draft of 5-Year BES&R Plan to Phil Jones (9/1/2015)
- Actions Planned
 - Research compostable PPE's and Trash bags at Center City (11/2015)
 - Complete logistics portion of Supply Chain Management Project in McEniry (11/2015)
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (12/2015)
 - Submit Second Draft of 5-Year BES&R Plan to Phil Jones (12/2015)
 - Install COED and Kennedy laundry rooms (2/2016)
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (ongoing)

Facilities Management Strategic Planning Session – First Quarter FY 2016

GOAL #5 –Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility
Tactic 5.1.4: Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina) (National Peers – Portland State University, University of New Mexico, University of Texas at San Antonio)

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

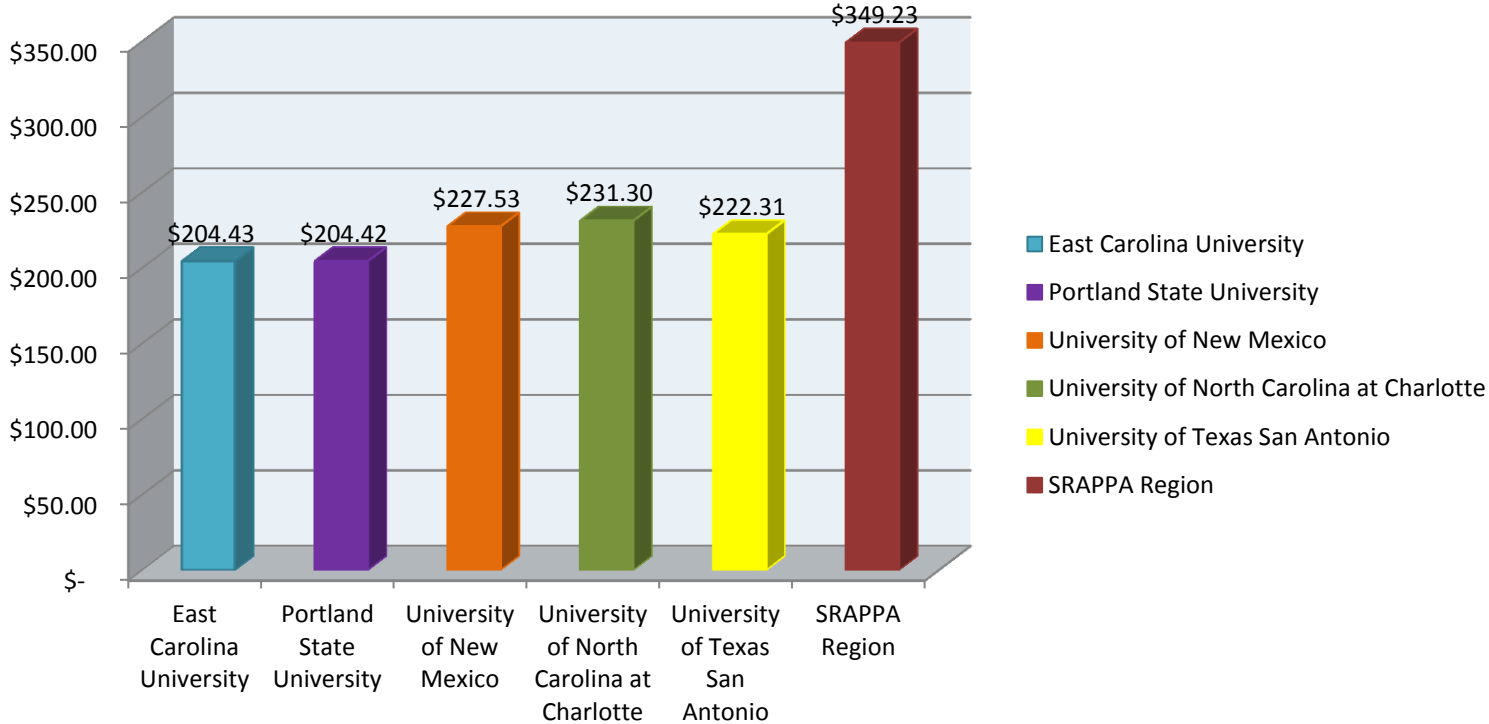
Balanced Scorecard Category: Financial Perspective

Avg. cost/student = \$217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

Custodial-Total Cost/Student FTE



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 July 2015. Rough draft completed; working with Dr. Jay Raja.
2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
3. Tracking Labor Services bi-weekly with separate shop goals.
4. Active participants in upcoming Process for Reengineering Project.

Actions Completed

1. Identified opportunities to expand reimbursable work in an effort to support labor services funds by Nov 2014.
2. Realigned the labor services positions to ensure maximum utilization of resources by Jan 2015.
3. Reviewed monthly Labor Service accounts with FBO to identify gaps and improved processes. Finished end of fiscal year in the black.

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

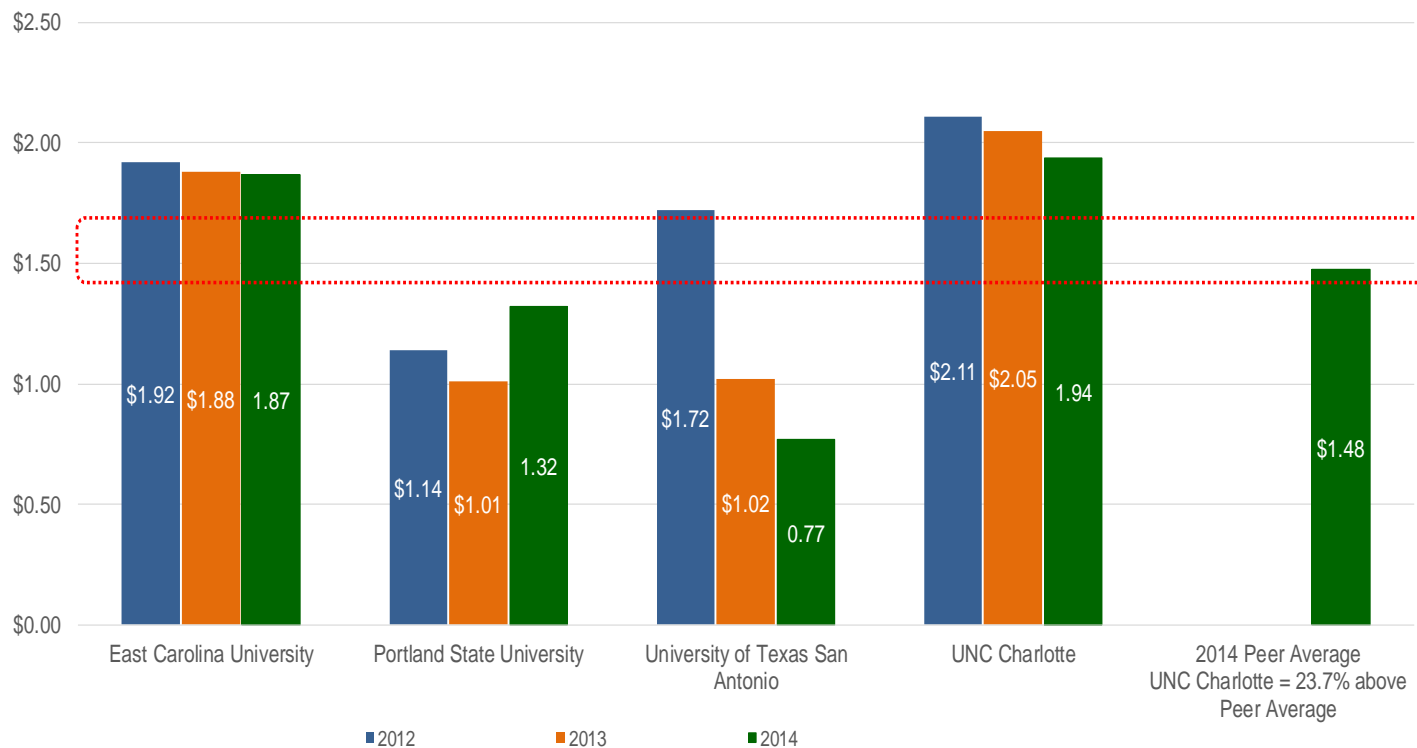
Tactic: 5.1.5: Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Maintenance Total Cost per GSF



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

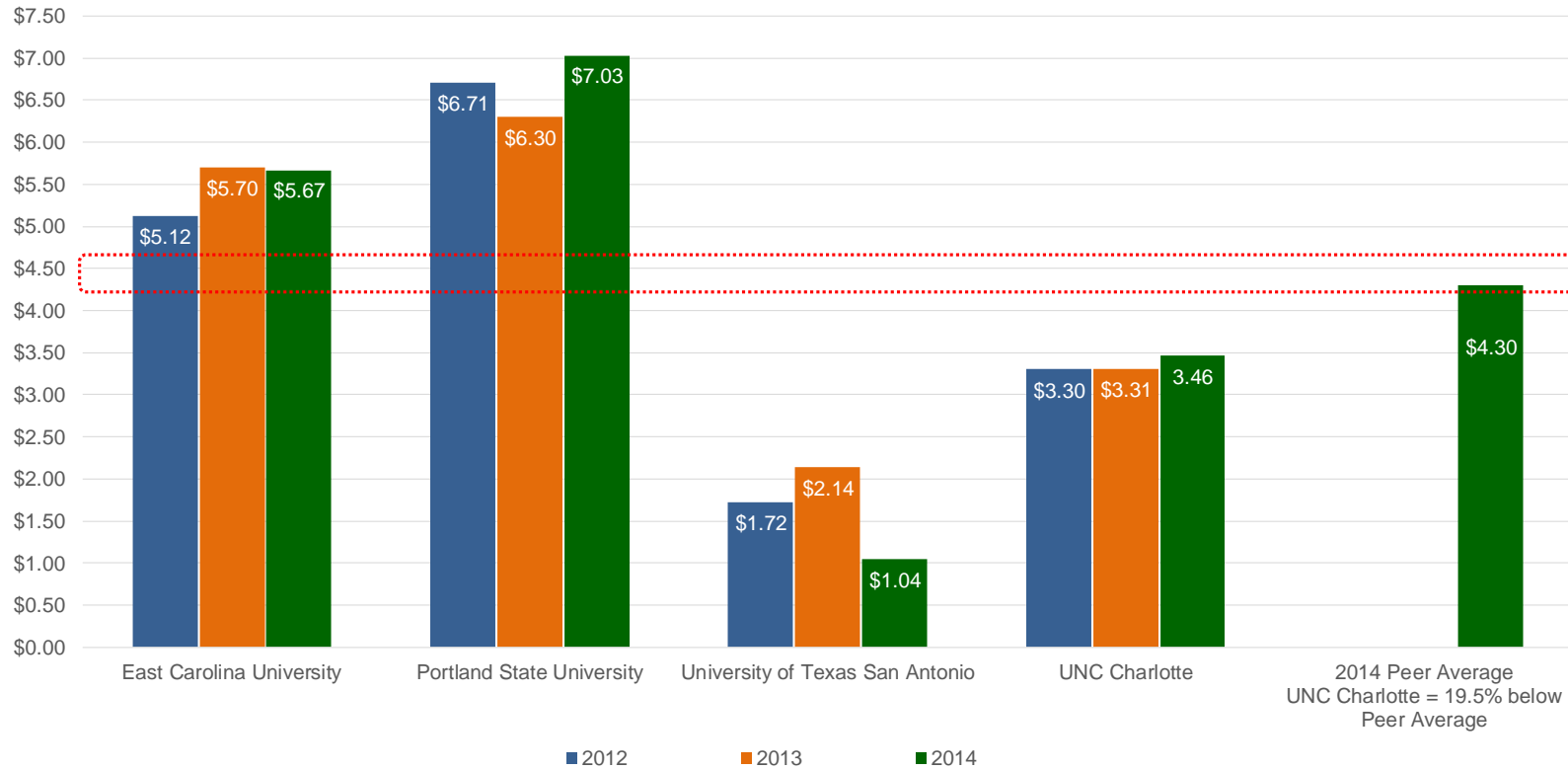
Tactic: 5.1.6: Achieve total Landscape cost/acre \pm 5% of APPA Average for Peer Institutions

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

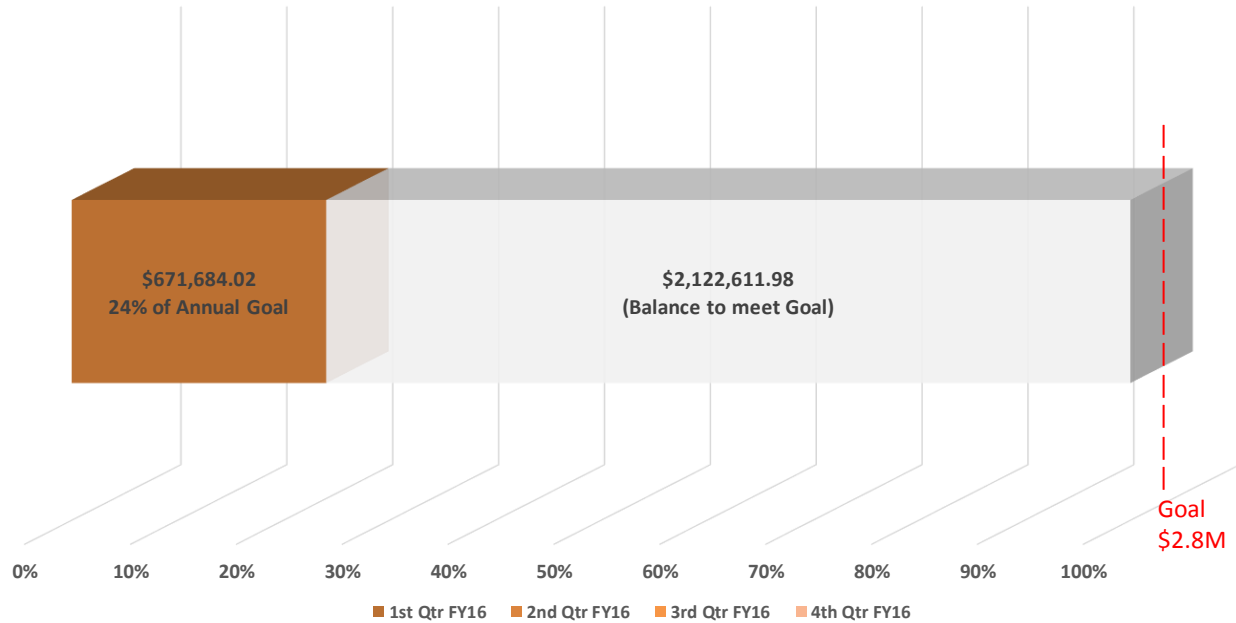
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

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



Objective 5.2: Develop a Sustainable Campus

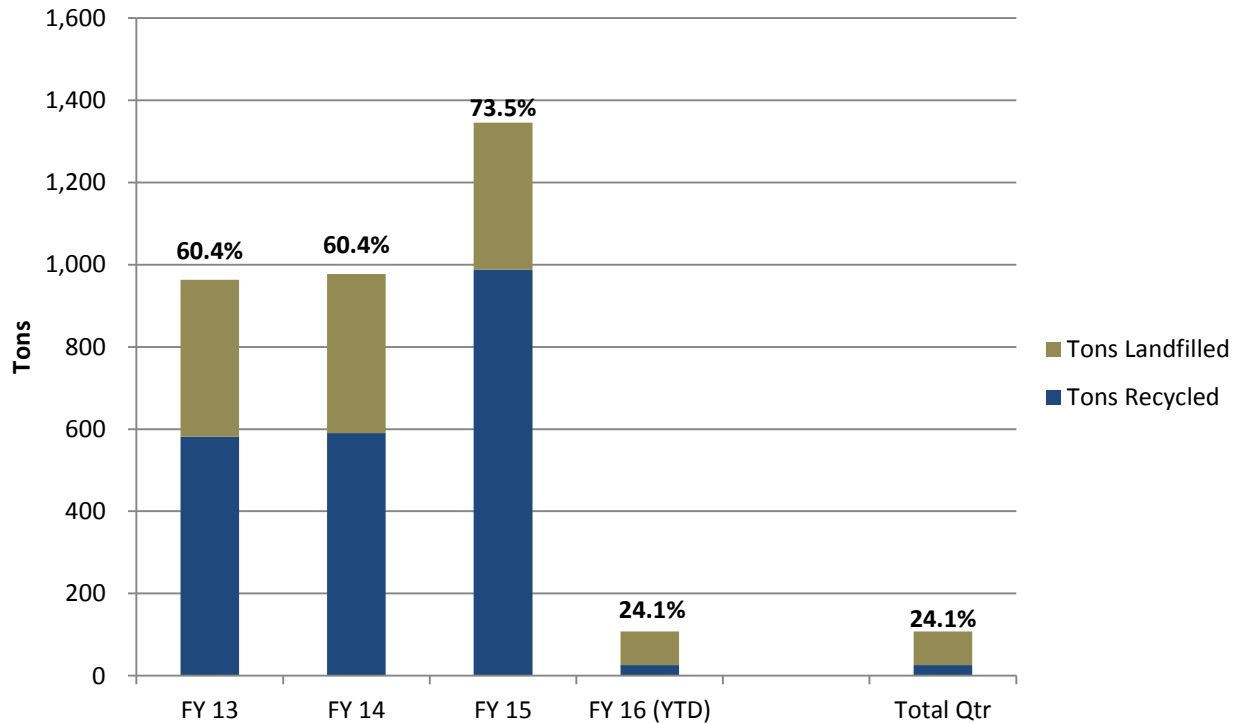
Tactic 5.2.1

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 FY16



**STATUS:
1st Qtr**



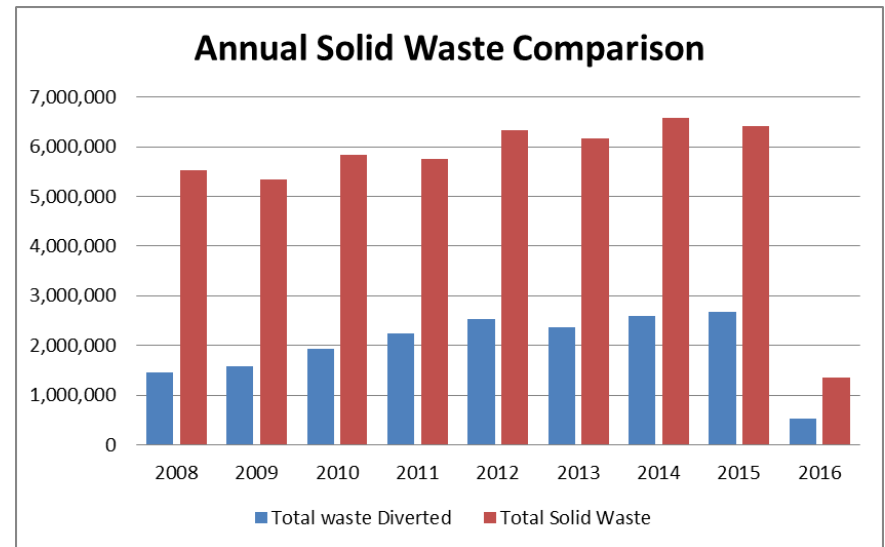
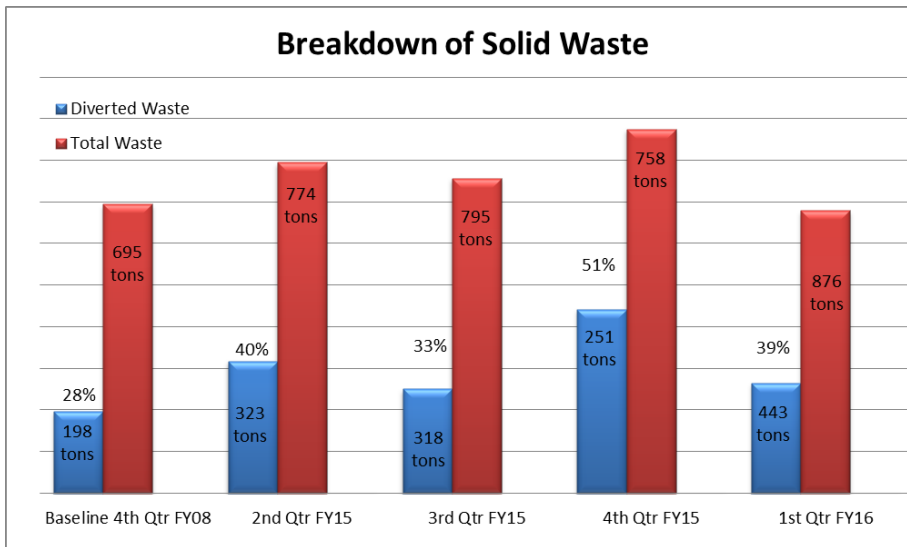
Tactic 5.2.2

Increase Percent of Solid Waste Diversion on Campus to 45% by 2020

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



*Notable increase in 4th quarter due to a Grounds project in May that removed tons of dirt from campus.



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



ACTION PLAN

• Waste Reduction and Recycling

Actions Complete

- Continuing work with HRL to increase recycling rates in residence halls
- C&D Coordinator/Contract Administrator position filled; she begins November 30.
- Began Football season – Zero Waste programming. New signs and fewer volunteers.

2nd Quarter Actions Planned

- Onboarding C&D Coordinator. (First day is November 30)
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream – ON HOLD (space constraints and scheduling)
- Conduct waste audits in housing quads where there are no recycling bins (continue working with HRL to pair up all trash and recycling bins) – ON HOLD (space constraints and scheduling)
- Complete Football season (signage, materials sorting)
- Expand green events and explore going zero waste at basketball
- Continue working with FIS to update recycling location map

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 16.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Assess additional actions list for achieving STARS Silver (completed – documentation actions only).**
- **Renewed AASHE and STARS Subscriptions**
- **Submit for rating by end of year.**

STATUS

GOAL #5 – Promote Good Stewardship

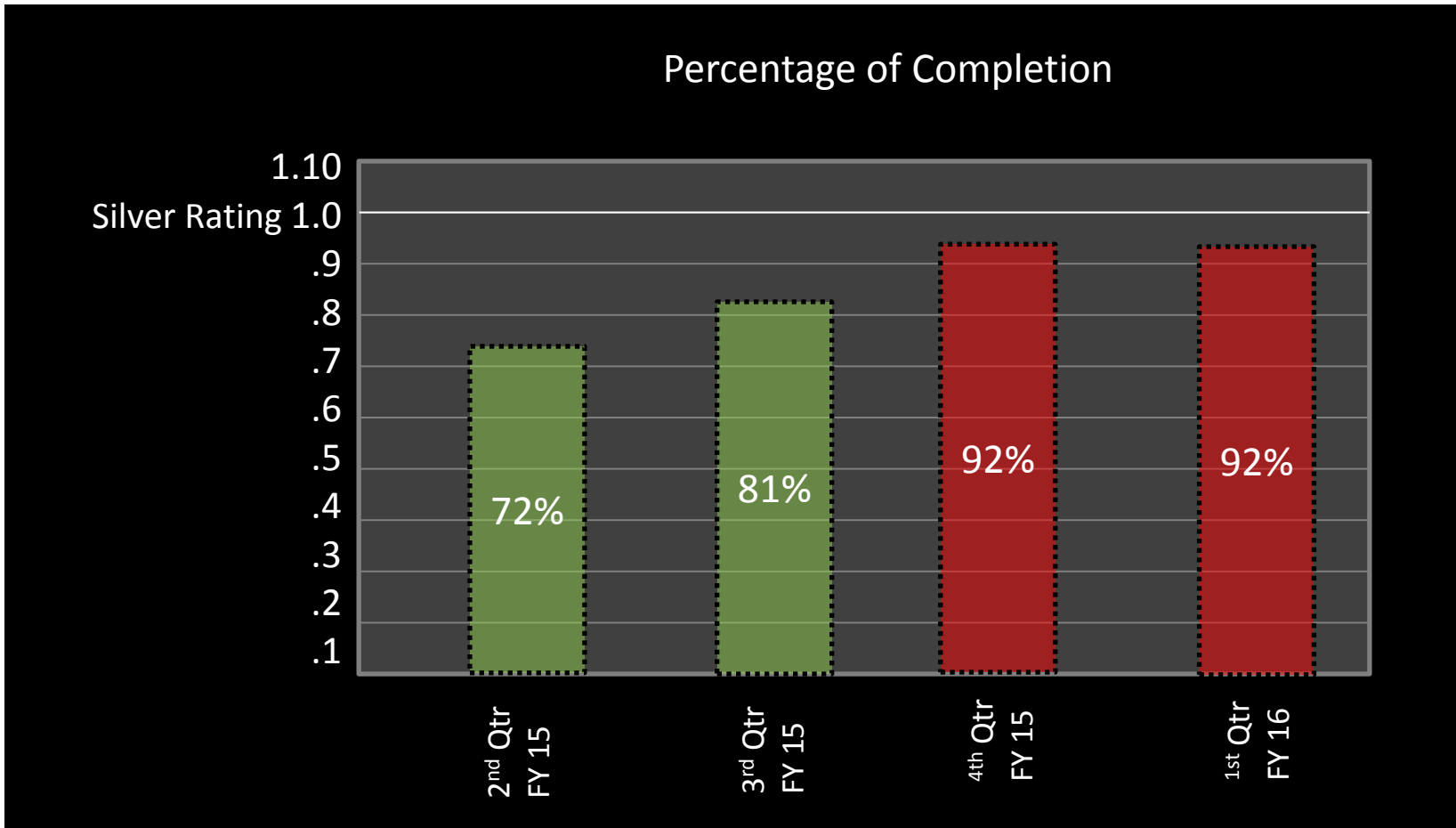
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 16.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



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 16.**Measure:** Percent of Campus Sustainability Plan best practices implemented**Lead:** Facilities Planning**Balanced Scorecard Category:** Innovation and Learning Perspective**ACTION PLAN**

- **Applying 7 themes for implementing best practices:**
 1. **Assessment (December STARS Submission)**
 2. **Faculty Development for Curriculum (Plan Spring Workshop for Faculty)**
 3. **Campus as a Laboratory (CGI: \$28k for studies underway, supplies)**
 4. **Outreach Communications (Website development; CGI: \$5k for signs)**
 5. **Design Standards (CGI: \$92k for biking, water, recycling, gardens, etc.)**
 6. **Standard Operating Procedures (CGI: \$15k for EV monitoring)**
 7. **Purchasing Practices (Need to start new Task Force)**

- **Reached 61% of best practices implemented by July 2015 (COMPLETED):**
 - **Continue: In-house certifications (e.g. Green Office)**
 - **New: Sustainability Website based on 7 Themes**

GOAL #5 – Promote Good Stewardship

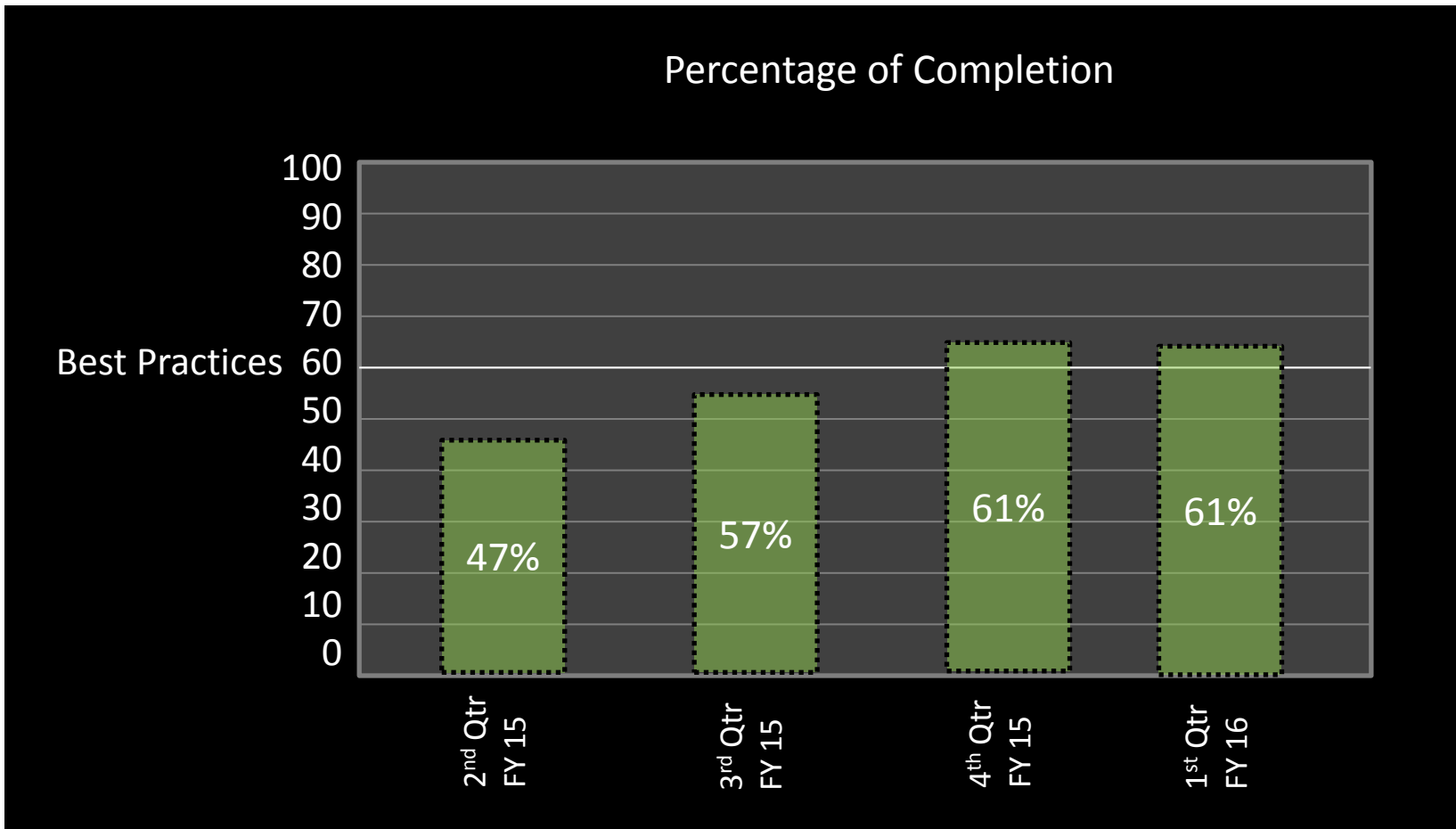
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 16.

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

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- System Wide Lighting Performance Contract
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
 - Street light replacements fixtures have been finalized project to be complete by Jan.
 - Replacing building mounted HID's
 - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 40% reduction by 2025

GOAL #5 – Promote Good Stewardship

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

Lead
Capital

ACCOMPLISHMENTS

- 2014 to 2015
 - GSF Increased 4%
 - Utility \$ decreased by 2%
 - \$/GSF decreased by 9%
 - Energy usage decreased by 4%

Lead
Capital

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage by 40% by FY2025

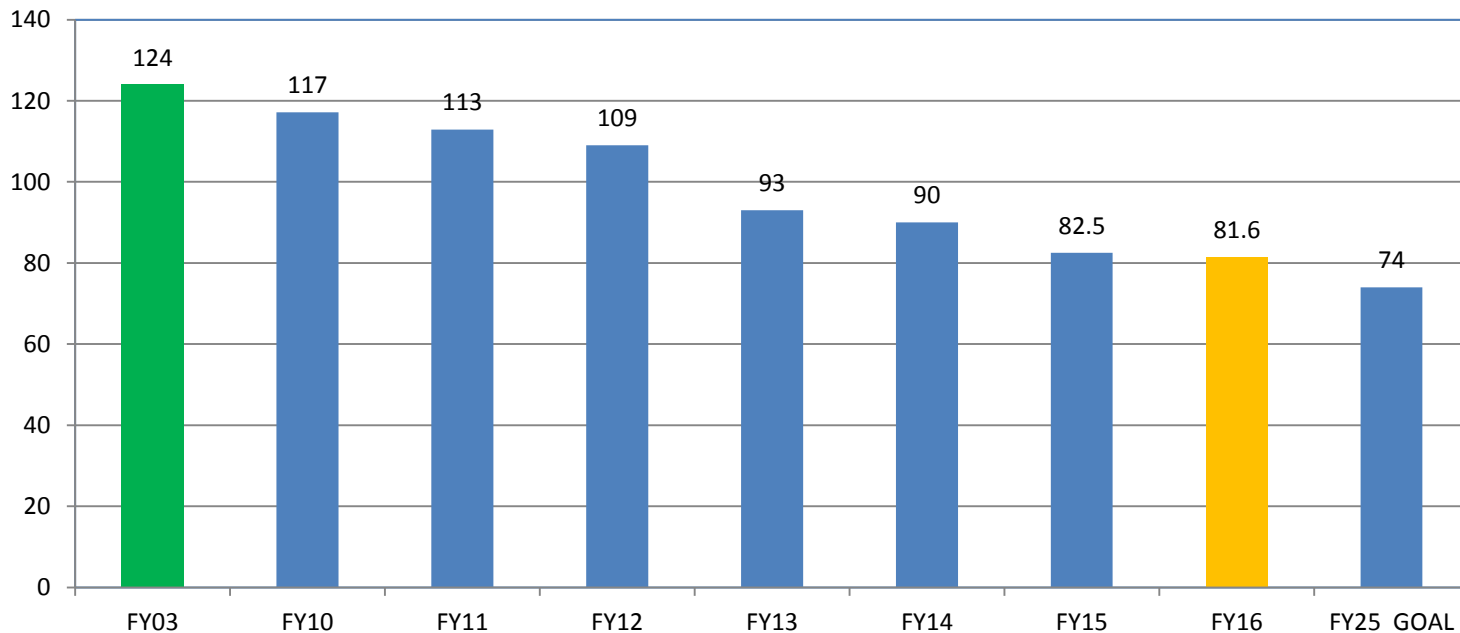
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 33%
System Goal of 40% by
2025

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



Facilities Management Strategic Planning Session – First Quarter 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

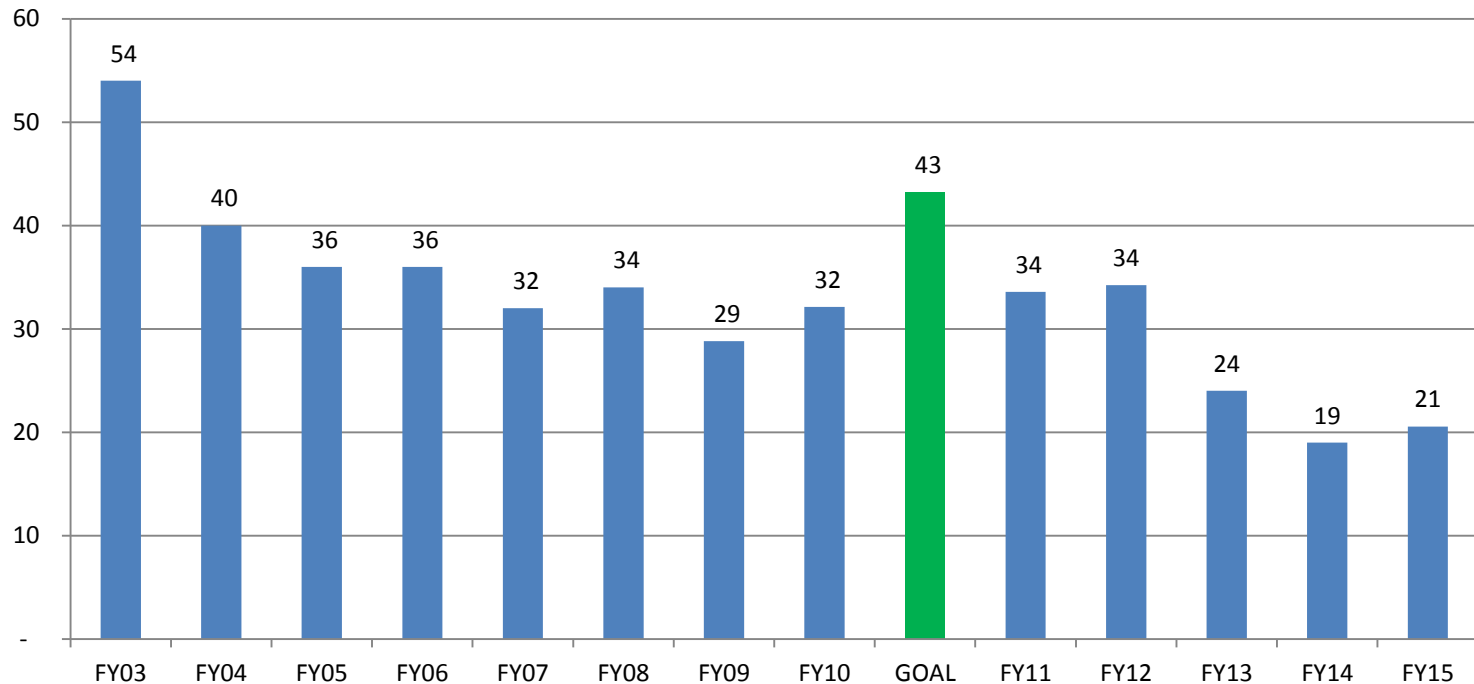
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF

STATUS



Goal Exceeded in FY2010

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**ACTION PLAN**

- Establish project specific participation goals for single prime projects
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded on CMAR projects
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO/DOA to ensure HUB information is accurately reflected in InterscopePlus
- Work with SCO to revise new Prequalification Policy
- Conduct Construction *Meet & Greet* March 10, 2016

GOAL #5 – Promote Good Stewardship

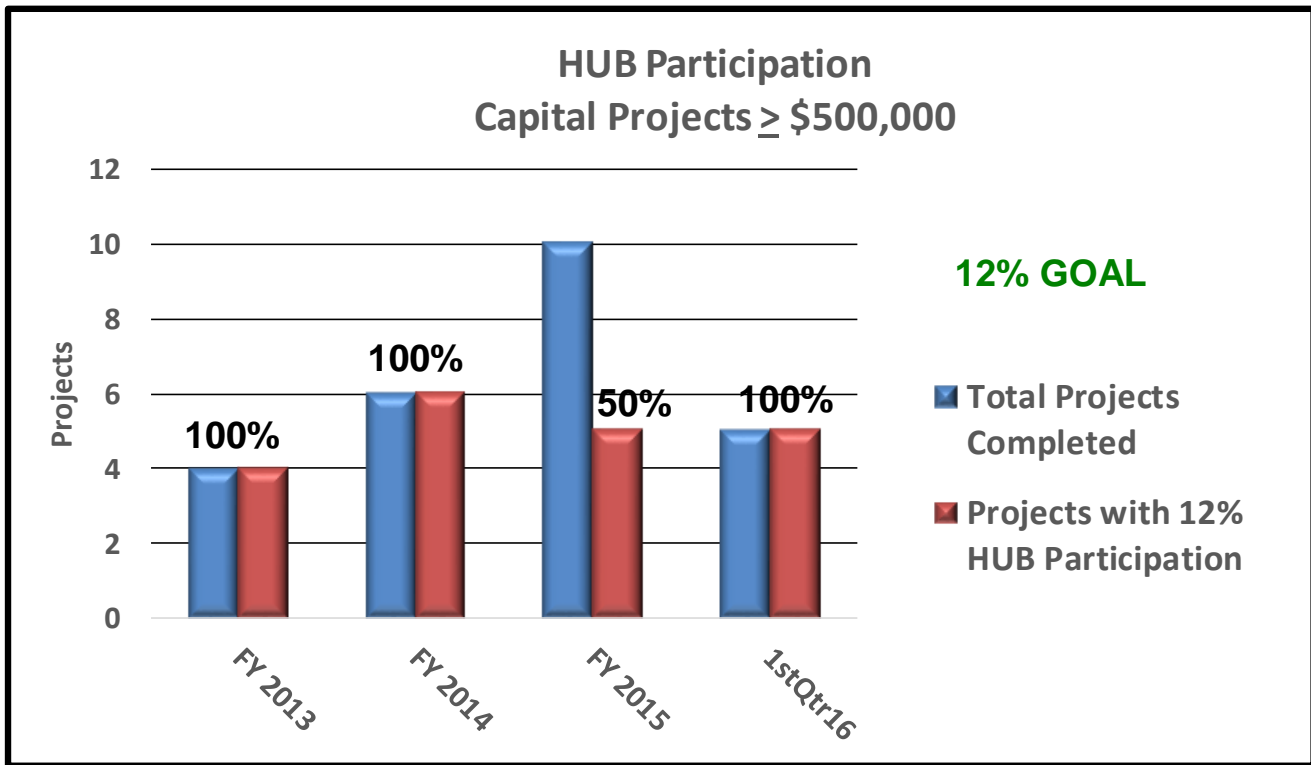
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



- Hauser Alumni Pavilion – 23.3%
- Holshouser Hall Renovation – 36%
- Johnson Band Center – 25%
- Laurel Hall – 43%
- Oak Hall Renovation – 31%

STATUS

GOAL #5 – Promote Good Stewardship

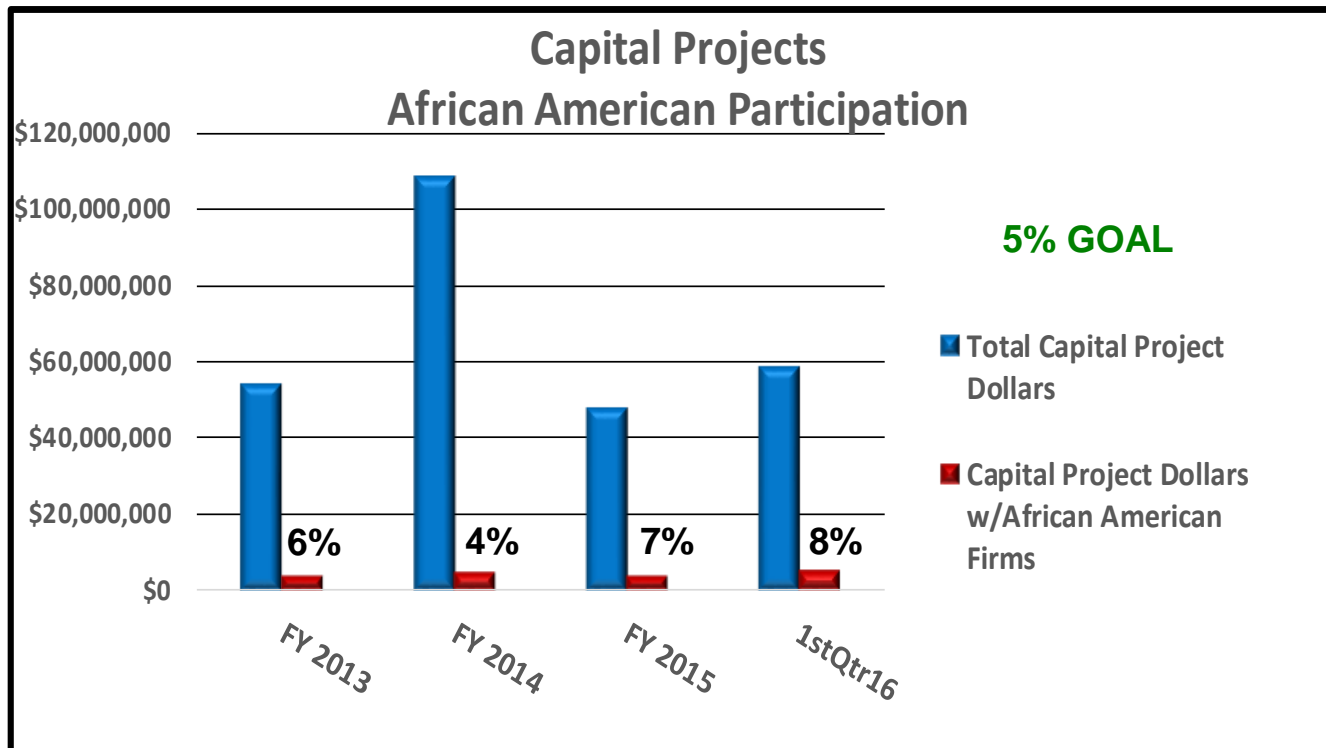
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



- Hauser Alumni Pavilion – 18%**
- Holshouser Hall – 7.2%**
- Johnson Band Center – 12%**
- Laurel Hall – 8.1%**
- Oak Hall Renovation – 6.1%**

STATUS

GOAL #5 – Promote Good Stewardship

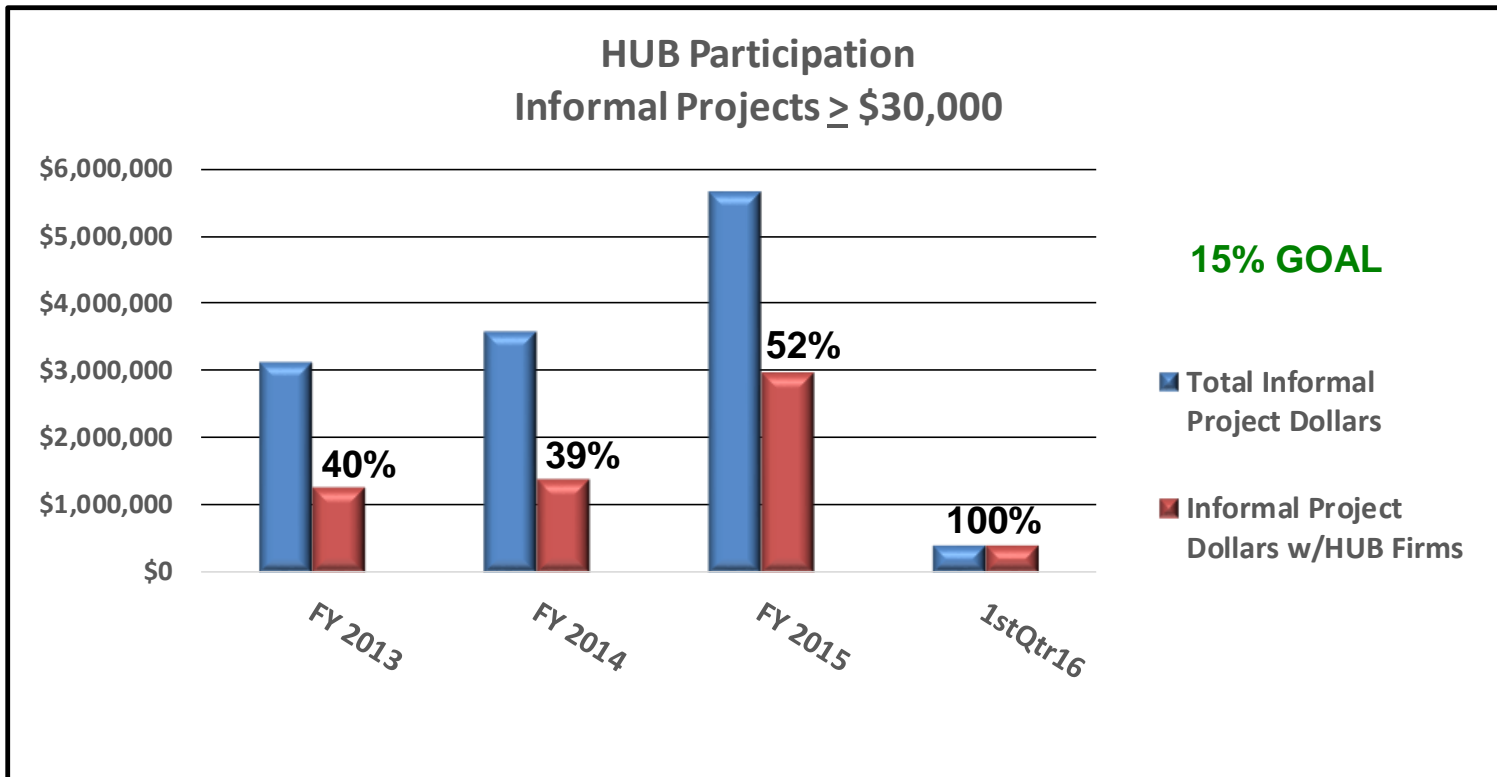
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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
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.

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.

Facilities Management Strategic Planning Session – First Quarter FY 2016

ANNUAL STATUS 36.6%	ANNUAL GOAL 13.0%	1ST QRT STATUS 36.6%	Lead Design Services
-------------------------------	-----------------------------	--------------------------------	-----------------------------

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

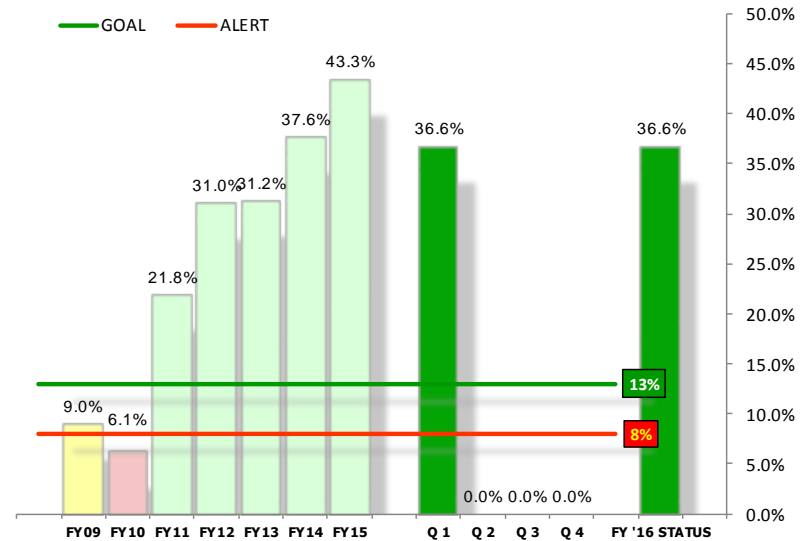
Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
Q 1	\$ 455,156	\$ 166,732	36.6%
Q 2			0.0%
Q 3	\$ -	\$ -	0.0%
Q 4	\$ -	\$ -	0.0%
FY '16 STATUS	\$ 455,156	\$ 166,732	36.6%

13% Overall HUB Participation – Summary Graph



Facilities Management Strategic Planning Session – First Quarter FY 2016

ANNUAL STATUS 0.3%	ANNUAL GOAL 3.0%	1ST QRT STATUS 0.3%	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

3% African American Participation – Summary Graph

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
Q 1	\$ 455,156	\$ 1,250	0.3%
Q 2			0.0%
Q 3	\$ -	\$ -	0.0%
Q 4	\$ -	\$ -	0.0%
FY16 STATUS	\$ 455,156	\$ 1,250	0.3%

