



**Facilities Management
Quarterly Strategic Planning Session**

**First Quarter – Fiscal Year 2017
July – September 2016**

APPA Award for Excellence
UNC Charlotte
www.uncc.edu
AGENDA

Opening – Phil Jones

Personnel Discussion

Strategic Planning Metrics and Actions Plans

Wrap Up and Look Ahead – Phil Jones

...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



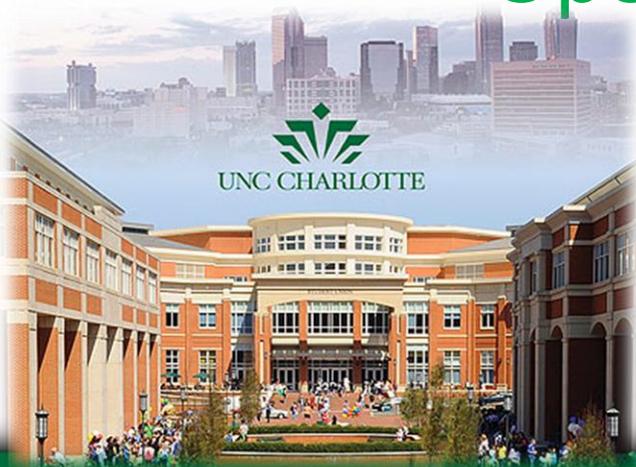
UNC CHARLOTTE

"When a team outgrows individual performance and learns team confidence, excellence becomes a reality.

-- Joe Paterno

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. FM to select company for the RFP “Work Order Process Improvement.” (October 2016)
4. Realigning Utilities Manager and supporting units
5. Craftsperson Work Request Board

Actions Completed

1. Weekly review of work order assignments.
2. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
3. Realigned Admin Support Group; phasing in processes
4. Hired Utility Manager, Lead Admin Support and other positions
5. Worked with FIS to develop snapshot of Work Order Status

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

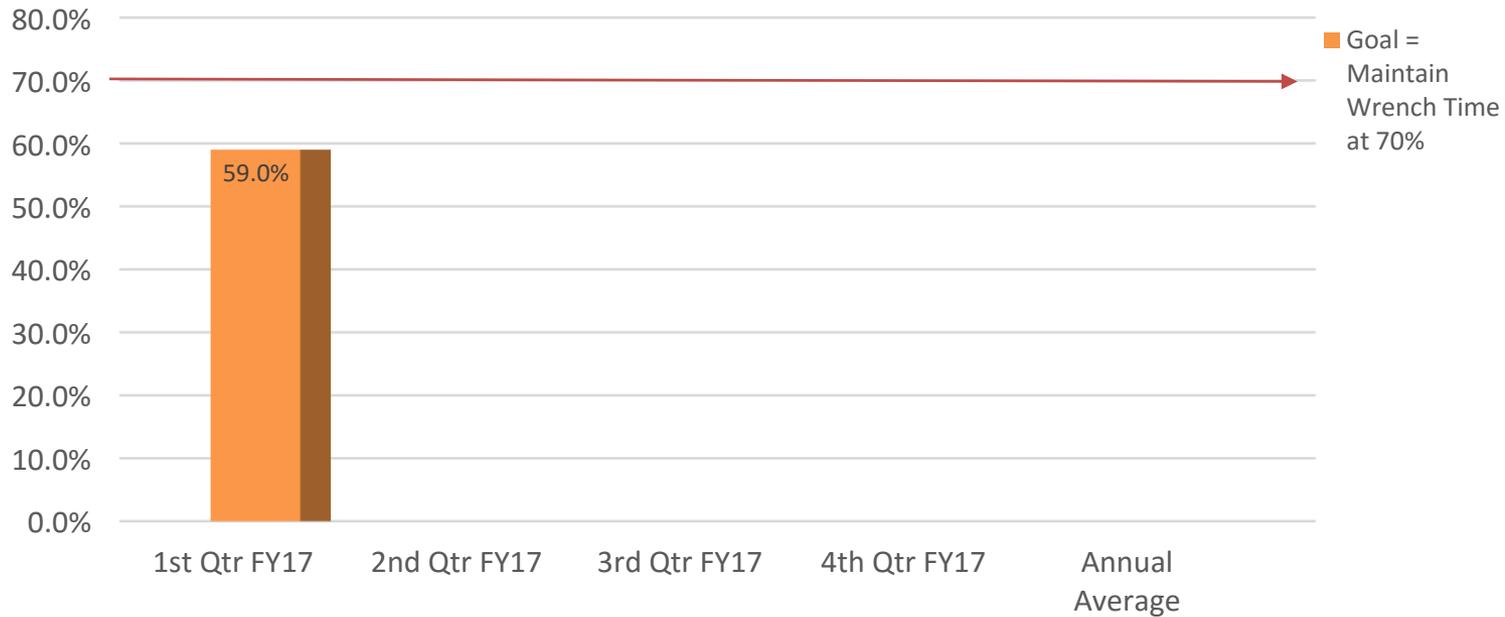
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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
1st Quarter

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. Continue to identify items that have been repeatedly ordered as non-stock items to become stock items; continue to streamline existing stock inventory.
2. Monitor daily tracking of long lead items and spikes in usage (historically the main causes for inability to fill).
3. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers).
4. Continue to monitor the requisition to PO processing time.
5. Pilot program for Google Group email notification.

Actions Completed

1. Assigned additional approvers to help expedite the process.
2. Streamlined stock inventory

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

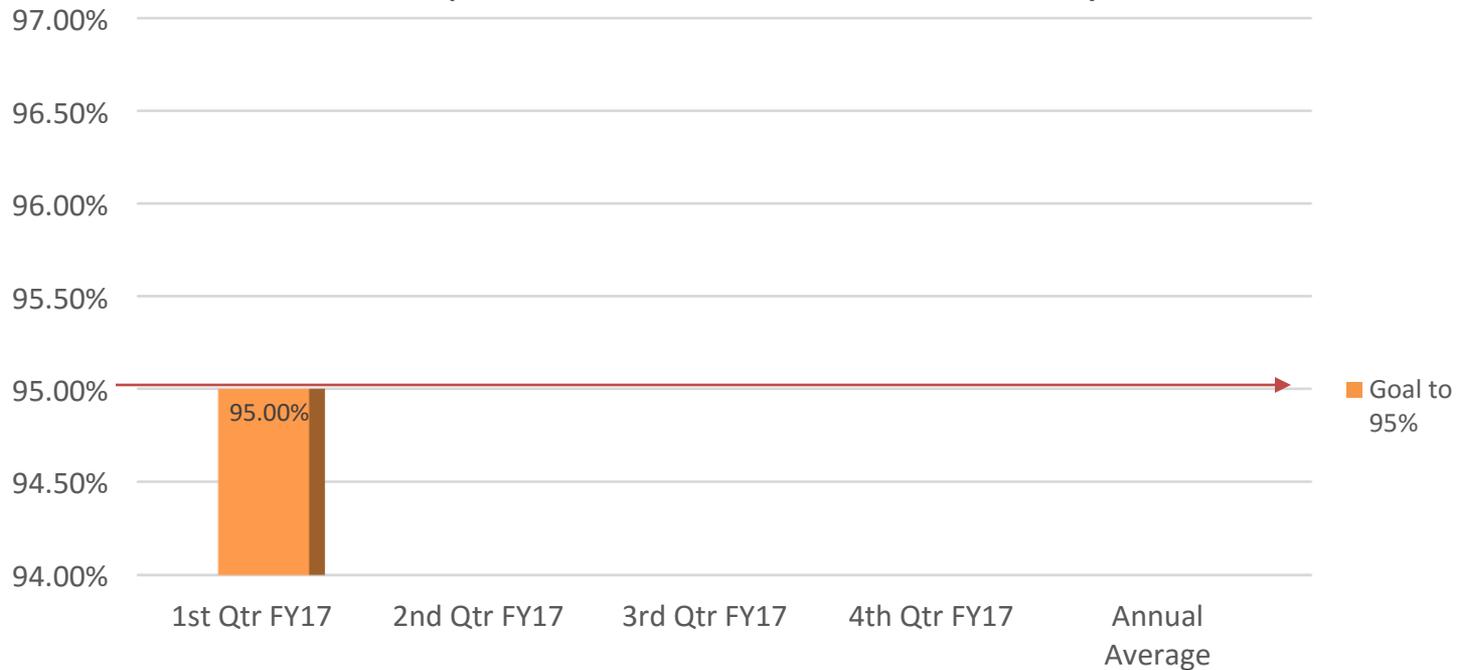
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

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

Improve Non-stock on-time Delivery



STATUS
1st Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

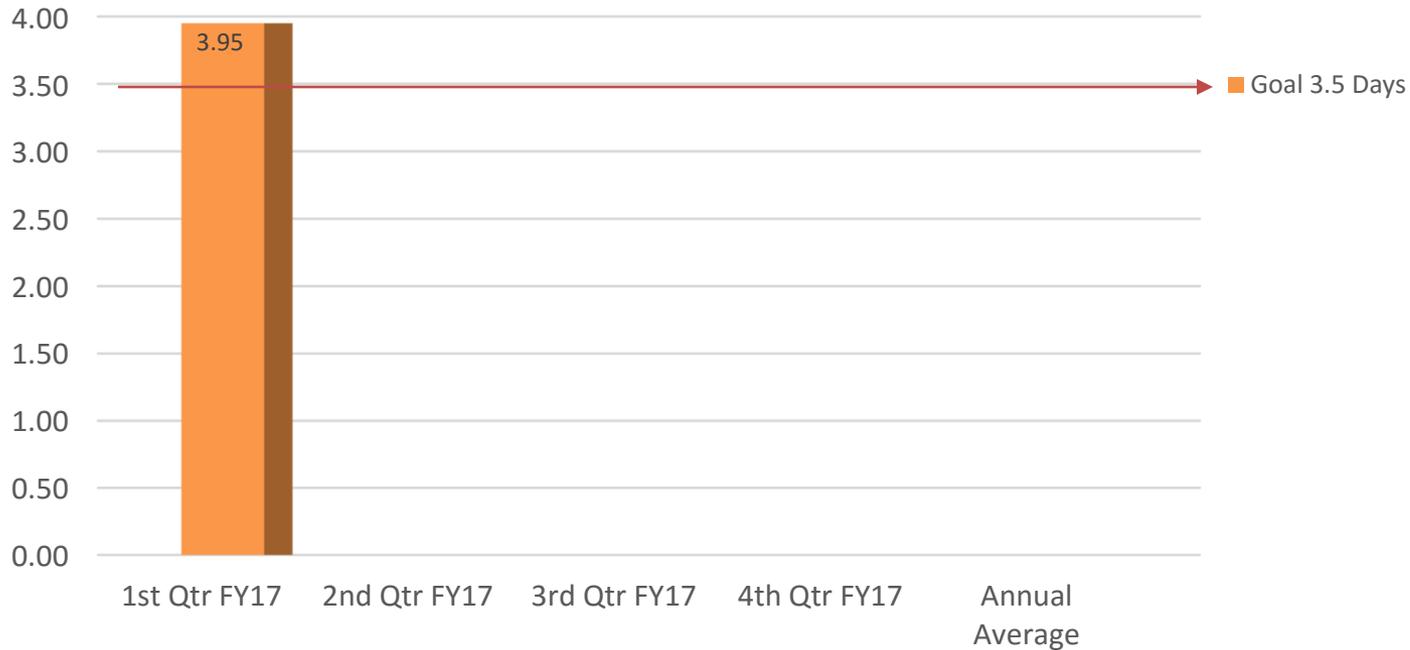
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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
1st Quarter

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. Daily check and balance of completed work orders.
3. Monthly review with Supervisors to monitor 30 Day Report.
4. Supervisors meeting with technicians on a daily basis to prioritize work assignments.
5. Develop and implement White Board Work Request Status Report (October 2016)

Actions Completed

1. Reduced active work orders on 14 Day Report by 40%.
2. Implemented White Board Work Request Status Report in September 2016

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

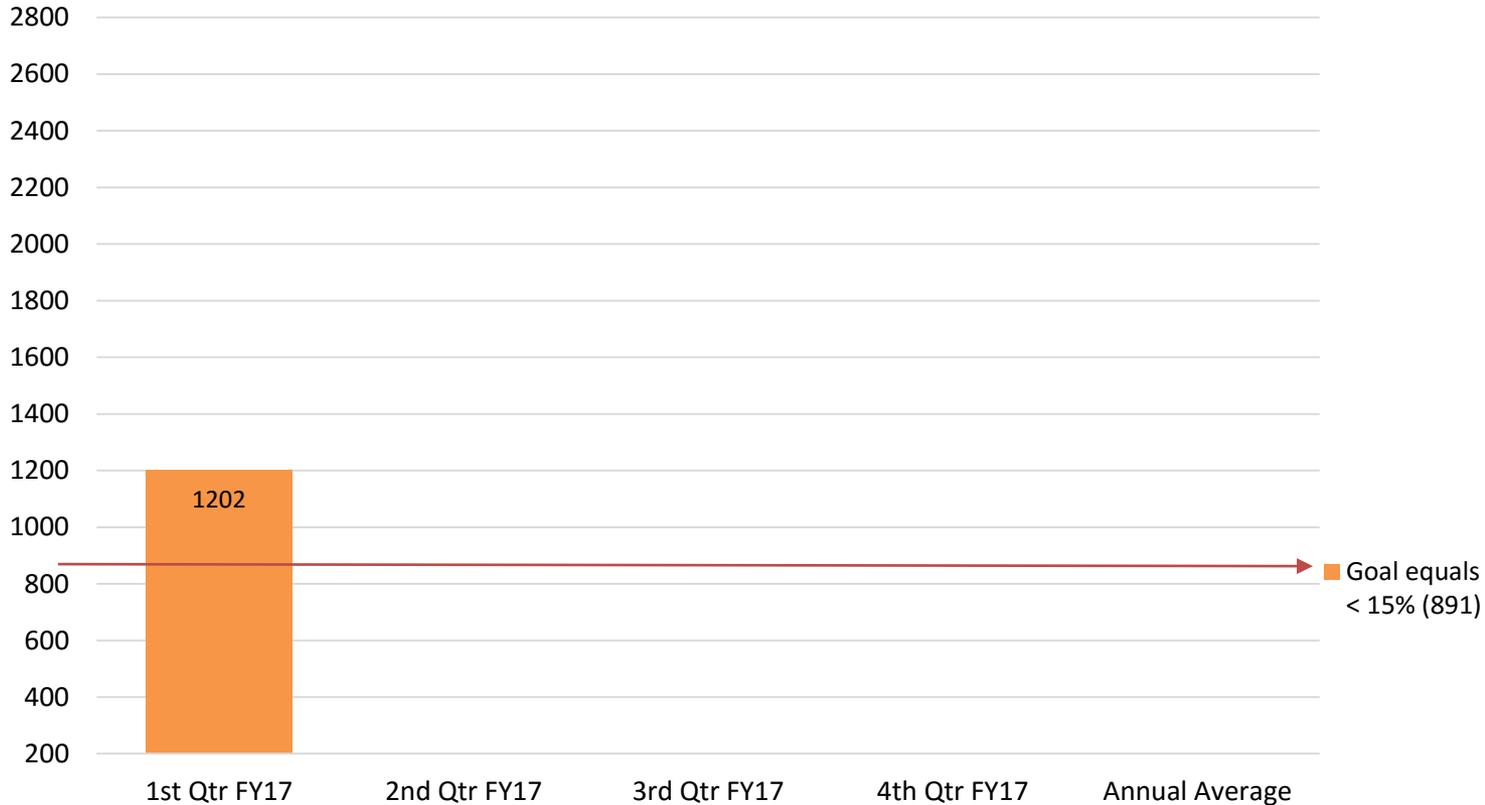
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

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
1st Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

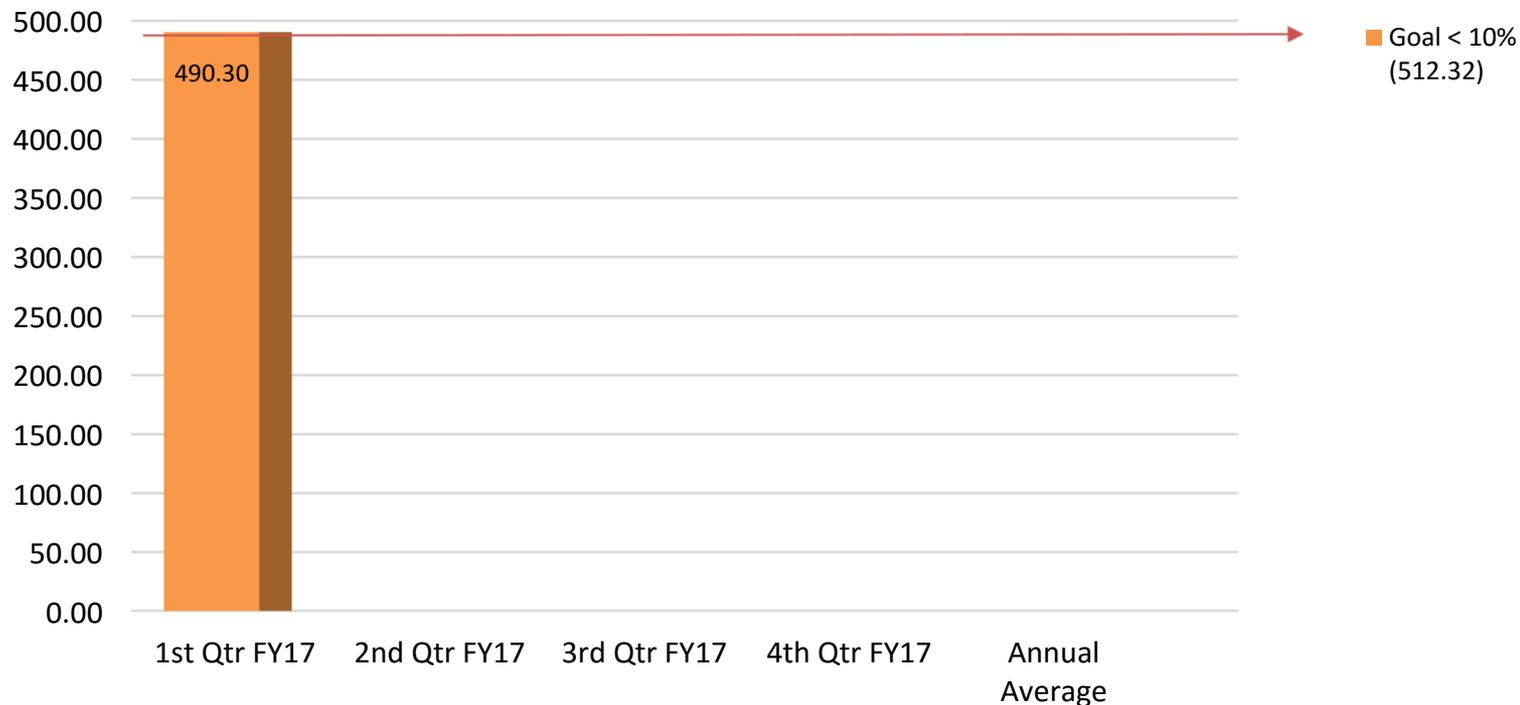
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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
1st Quarter

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 BES&R Intranet Pilot (8/2016)
 - Hiring Process Draft (8/2016)
 - Initial Workloading of McEniry Building (8/2016)

- **Actions Planned**
 - CCAP Classroom Renovation Pilot (11/2016)
 - (Part III) Attend Workloading Workshop (11/2016)
 - Complete Hiring Process/Flow Chart (11/2016)
 - (2nd Iteration) Workload McEniry building (11/2016)
 - Implement new quarterly self-audit process in Archibus – Monthly inspection of PMs per building (12/2016)
 - Workload Bioinformatics building (12/2016)
 - Implement In-service training curriculum and matrix (12/2016)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)
 - Implement High Performance Team Cleaning (ongoing)

Facilities Management Strategic Planning Session – First Quarter FY 2017

Lead
BES

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

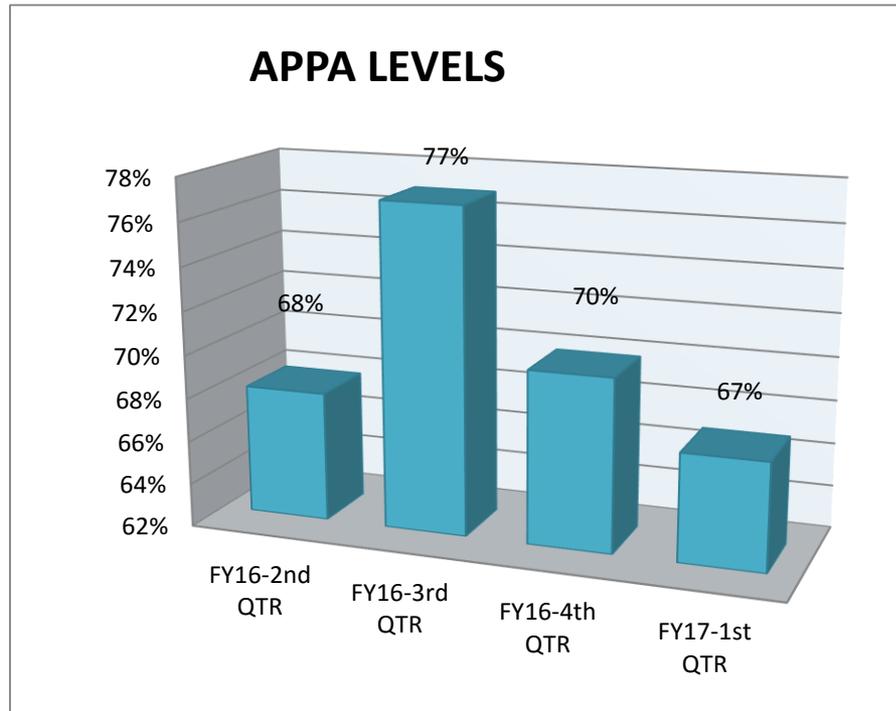
Objective: 1.4: Improve BES Processes

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

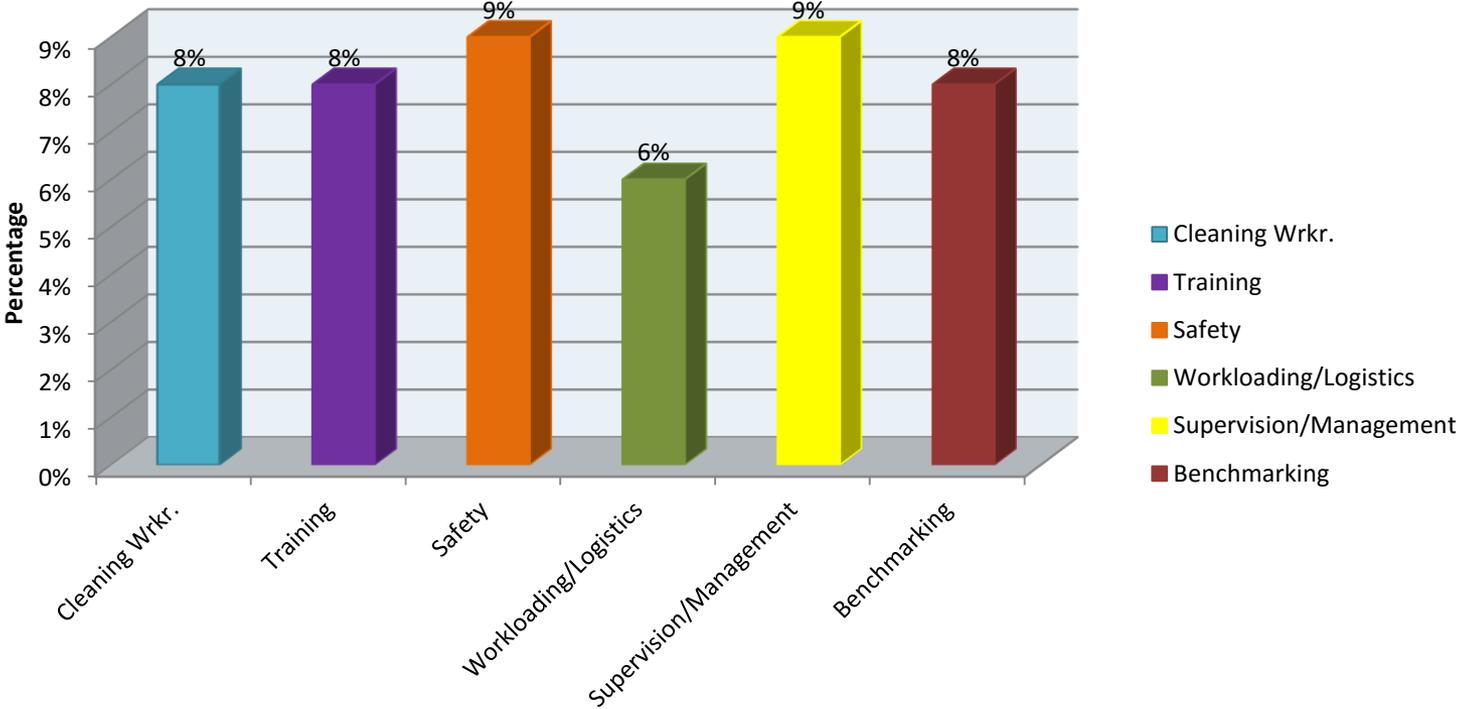
Balanced Scorecard Category: Customer Perspective

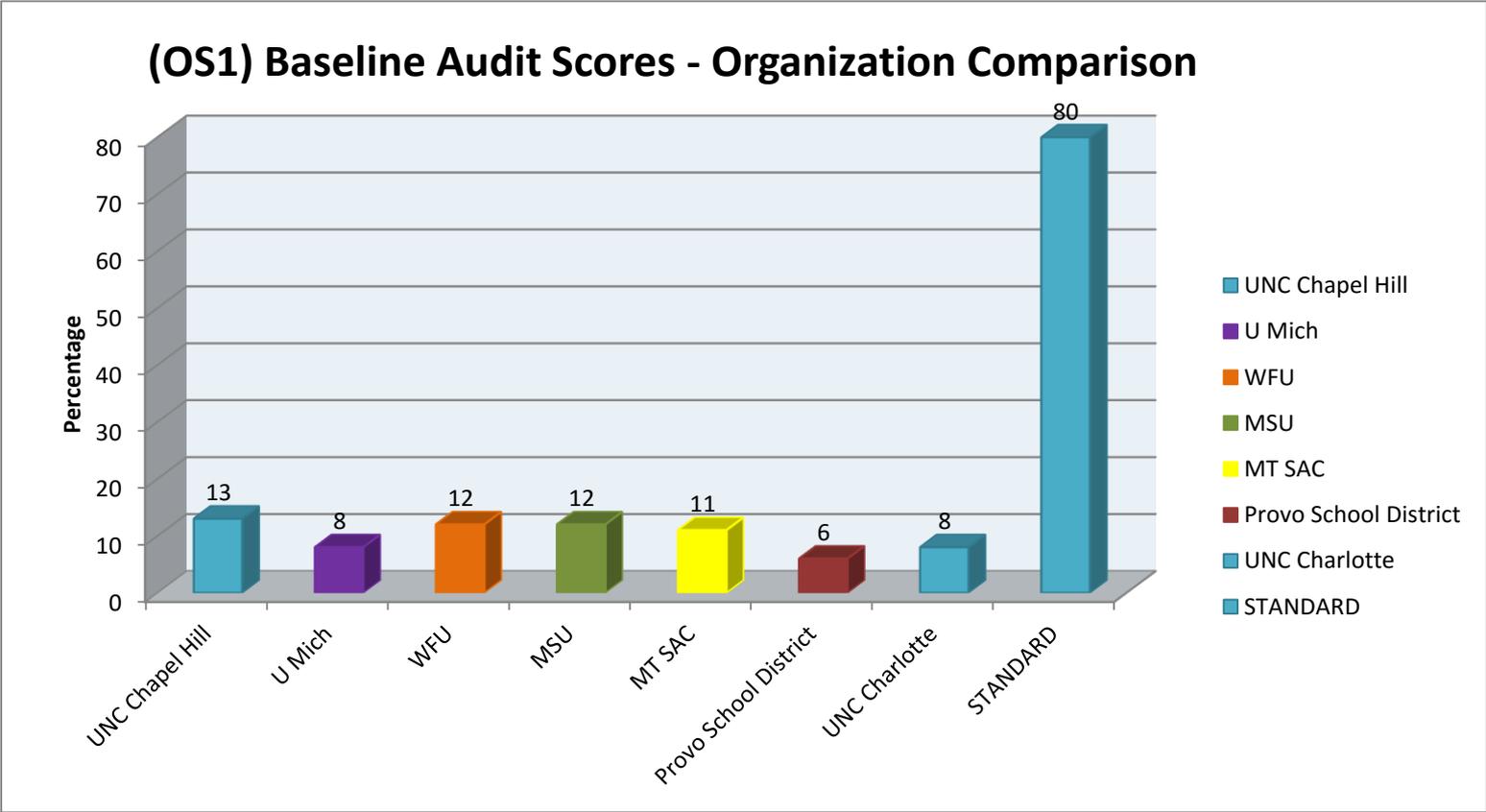


Percentage = 67%

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%

ACTION PLAN

Actions Planned

1. Realign PM Program; complete conversion from old PM Module to new PM Module. (3rd Qtr FY 17)
2. Continue expansion of PM Program; Work with key customers (Aux Svs)
3. Restructure the Archibus PM Equipment Manager module.
4. Integrate BIM into all Capital Projects (March 2017)
 - A. Hire Consultant (January 2017)
 - B. Hire In-House staff? (March 2017)
5. FCAP is identifying and prioritizing equipment conditions and needs, for replacement. This information is used to support CRDM projects.

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Recruited an engineering student

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

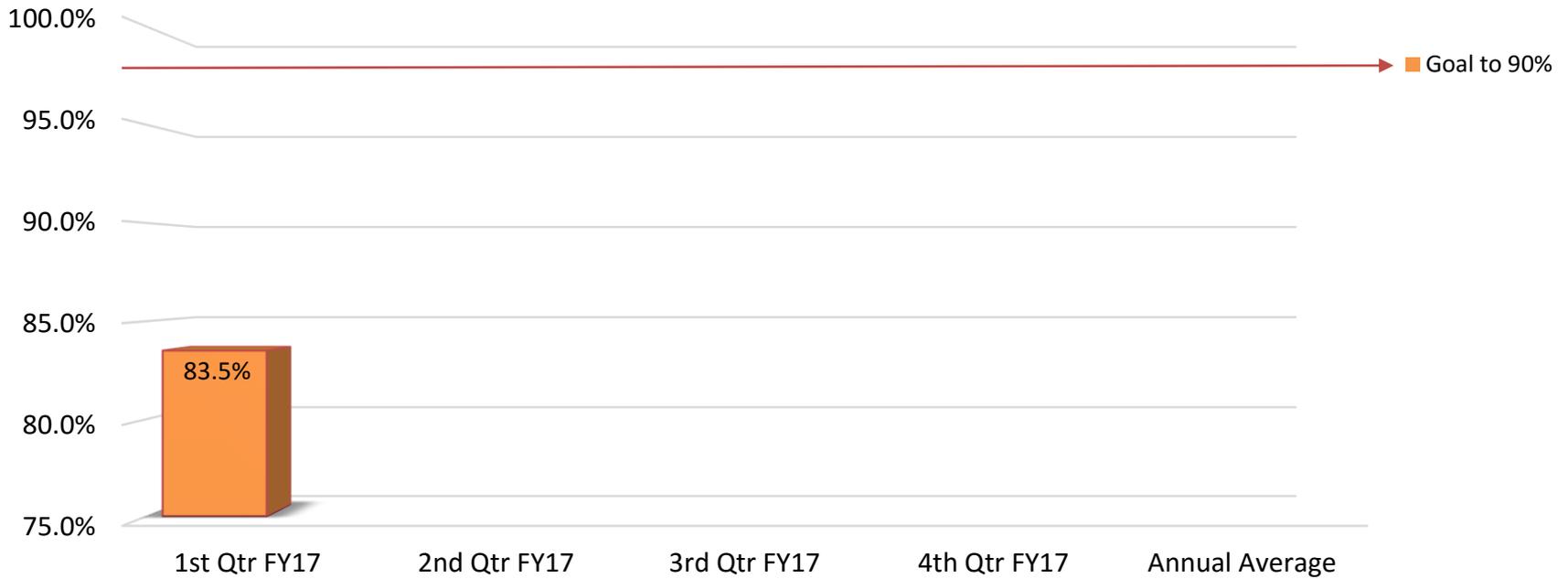
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS
1st Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

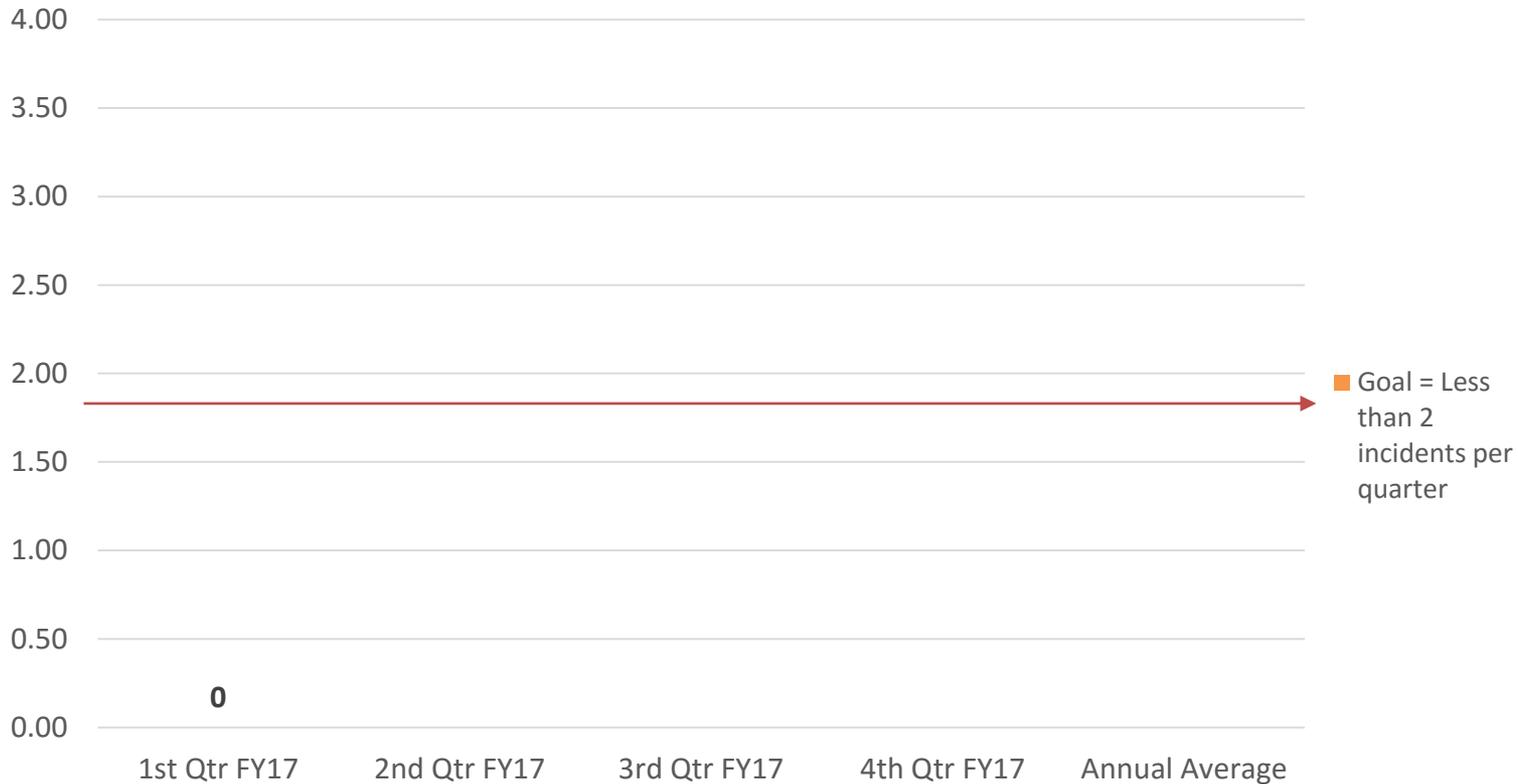
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS
1st Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

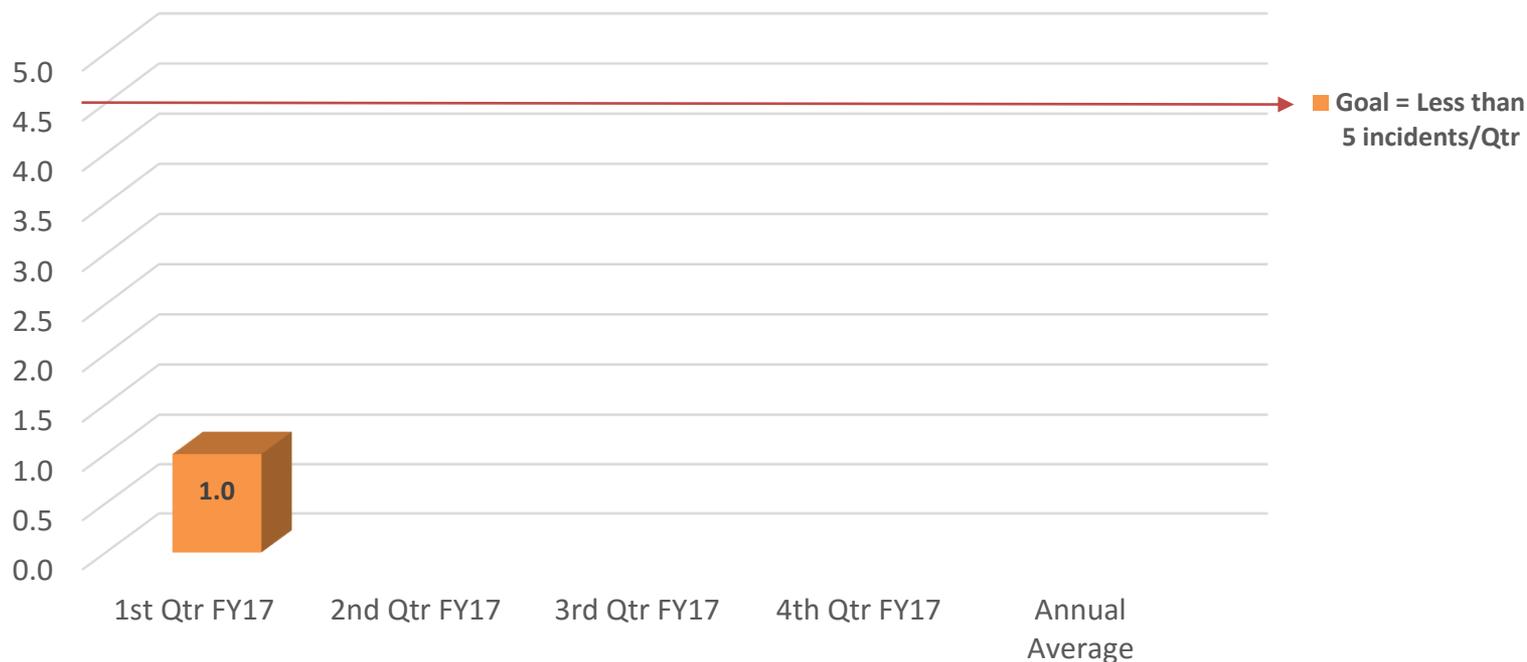
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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
1st Quarter

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

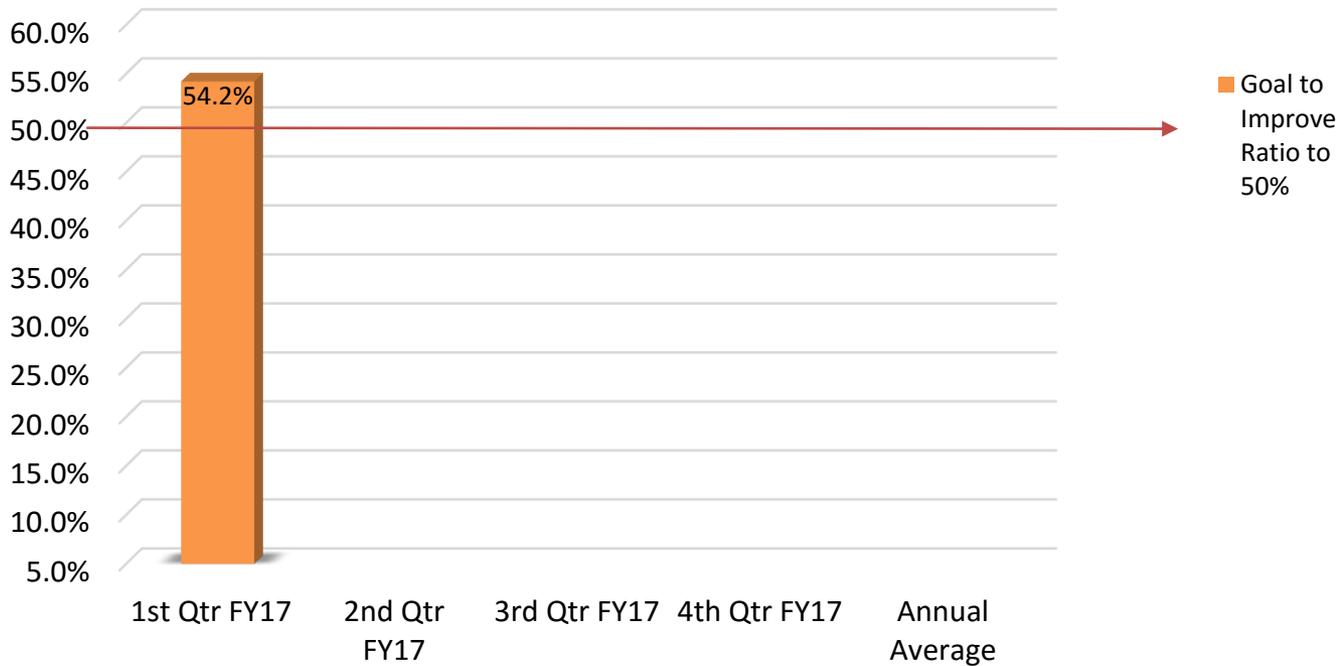
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

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





UNC CHARLOTTE

Great leaders help their people see how they can directly impact the company's objectives and their own personal goals.

Chip Conley

GOAL #2

Create a Reliable and Sustainable Physical Infrastructure



FM Prioritized Projects – FY17

1. **Mobile PM & WR** – Estimated Completion Jun 15, 2017
2. **GIS Master Plan Map** – Estimated Completion Jun 30, 2017
3. **ARCHIBUS Work Order Reinvention** – Estimated Completion Jun 30, 2017
4. **ARCHIBUS Upgrade 23.1** – Estimated Completion Nov 8, 2016
5. **ARCHIBUS Training Workflow** – Estimated Completion Jun 30, 2016
6. **BAS Website Upgrade** – Estimated Completion Jun 30, 2017
7. **GIS Dept. Map** – Estimated Completion Apr 30, 2017
8. **GIS Wayfinding Signage** – Estimated Completion Jun 30, 2017
9. **FM Windows 10 Upgrades** – Estimated Completion Jun 30, 2017
10. **FM Computer Hardware** – Estimated Completion Dec 30, 2016
11. **ARCHIBUS Training: Transition to CANVAS** – Estimated Completion May 1, 2017
12. **Mobile Floor Plans** – Estimated Completion Jun 1, 2017
13. **Water Valve Survey** – Estimated Completion Jun 2, 2017
14. **Fire Hydrant Survey** – Estimated Completion Jun 30, 2017
15. **ADA Pathways Phase 1 & 2 – Phase 1 Completed**; Phase 2 Est. Completion Feb 10, 2017
16. **Impervious Layer Clean-up/Updates** – Estimated Completion Jun 30, 2017
17. **FM Screens & Banner Asset 2017 Inventory** – Estimated Completion Mar 15, 2017
18. **ARCHIBUS Security Upgrades** – Estimated Completed Nov 16, 2016
19. **WO Assignment status board** – **Completed Sept 1, 2016**
20. **ARCHIBUS Non-Assignable area** – Estimated completed Jun 30, 2016
21. **Geodatabase Cleanup Project** – Estimated Completion Dec 27, 2016
22. **ARCHIBUS Survey Reports Improvements** – Estimated Completion Nov 23, 2016
23. **GIS Publishing Rule Improvements** – Estimated Completion Jun 30, 2016
24. **Mobile Intent Reinvention** – Estimated Completion Apr 10, 2017
25. **Remote Key Admins** – Estimated Completion Dec 14, 2016
26. **PM Forecasting Report** – Estimated Completion Mar 30, 2017
27. **CRDM 3rd Generation** – Estimated Completion Apr 10, 2016
28. **Database Migration to ITS** – Estimated Completion Mar 20, 2017
29. **Estimating Workbook Upgrade** – Estimated Completion May 25, 2017
30. **Dropbox for Asset Management (BIM)** – Estimated Completion Jun 30, 2017

Other Projects (Not Calculated)

1. **BAS N4 Website Upgrade**
2. **Key Management Module**
3. **Equipment Maps**
4. **ARCHIBUS Card Access Integration**
5. **Campus Outdoor Lighting Controls**
6. **SDI Enhancements**
7. **BES Mobile App**
8. **Dropbox Records Mgmt. for Design Services**
9. **Space Mgmt. Reports**
10. **Project Mgmt. Tools**
11. **ARCHIBUS Testing Framework**



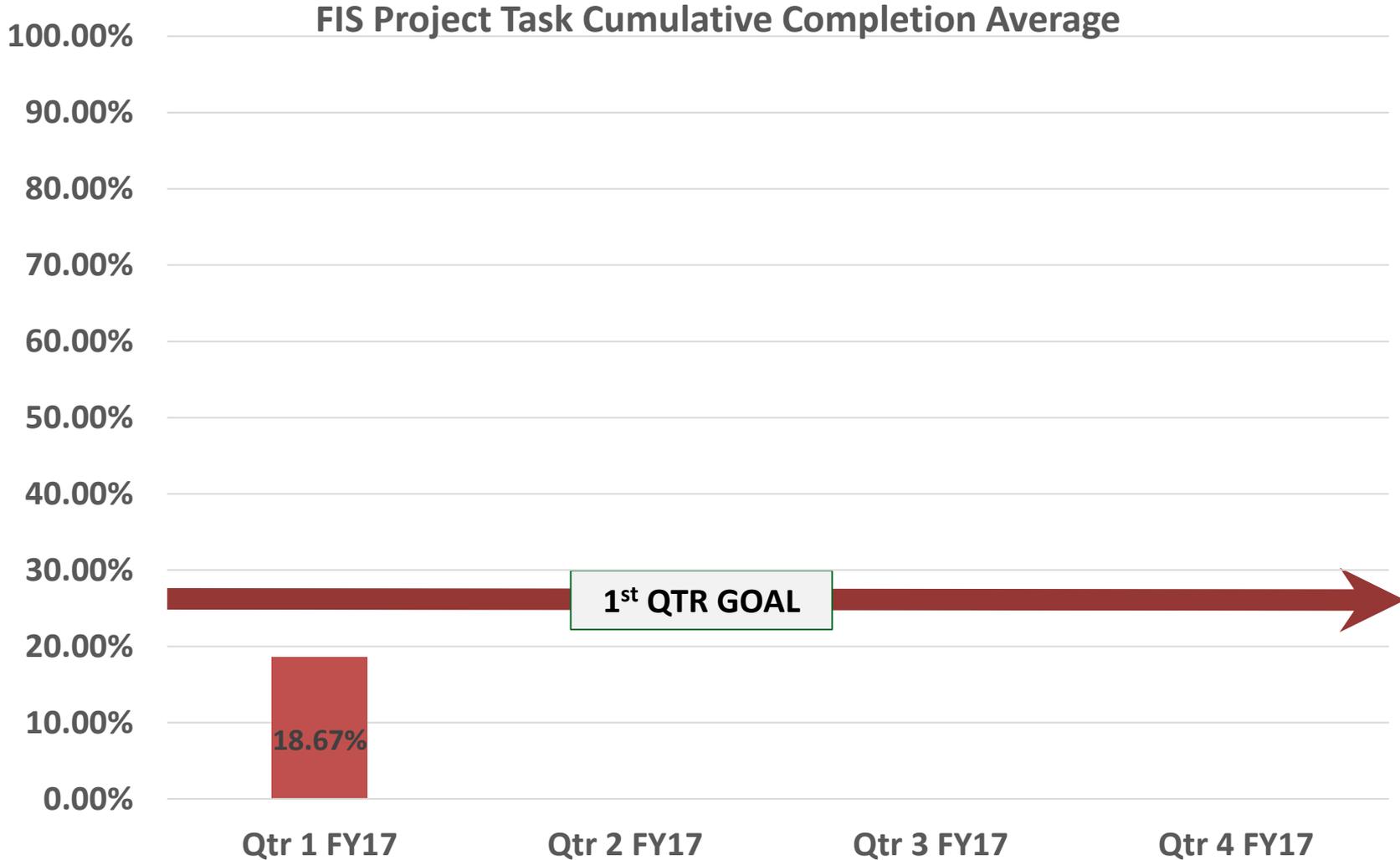
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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



Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

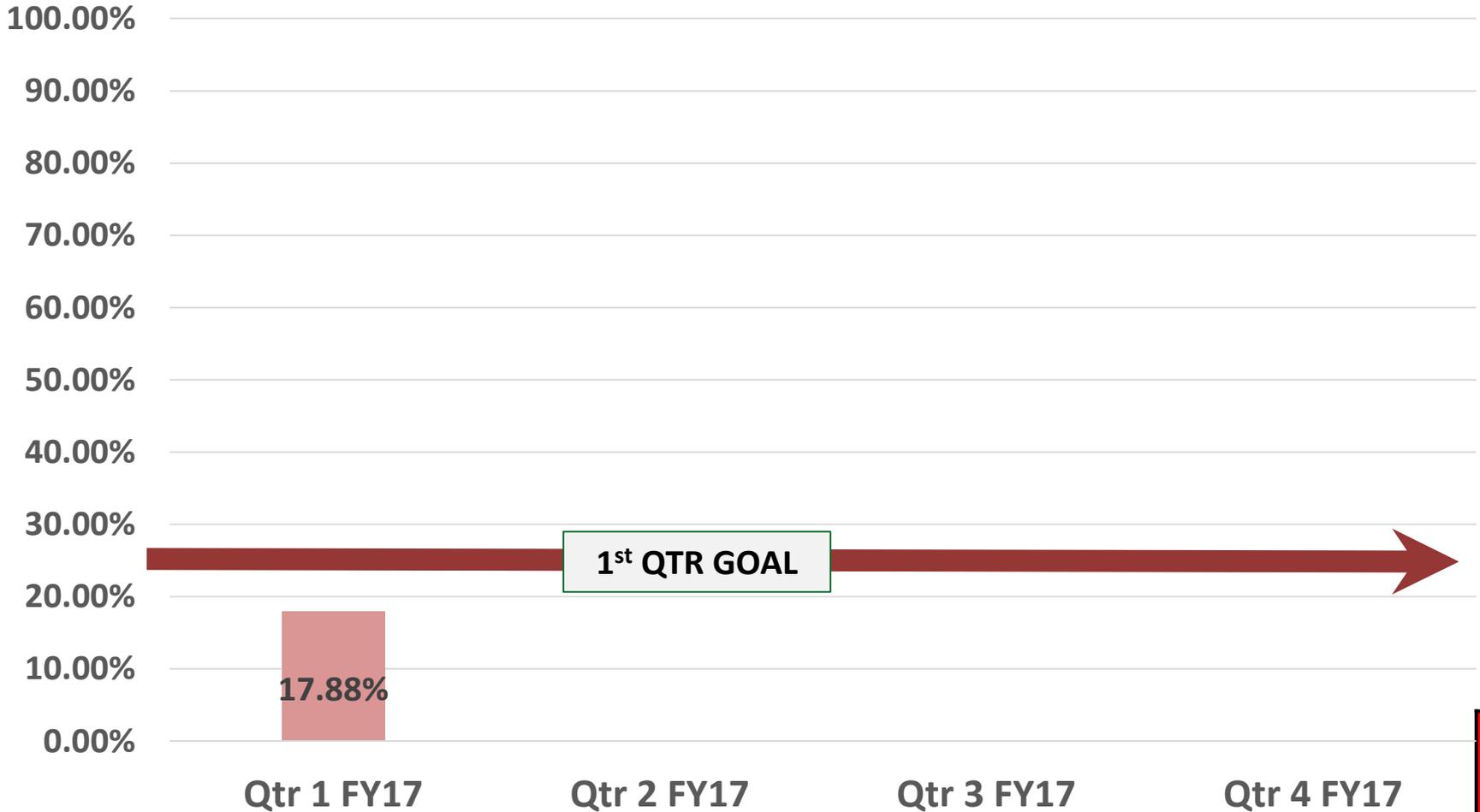
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

FIS Weighted Project Average Completion



STATUS

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**Lead
FIS**

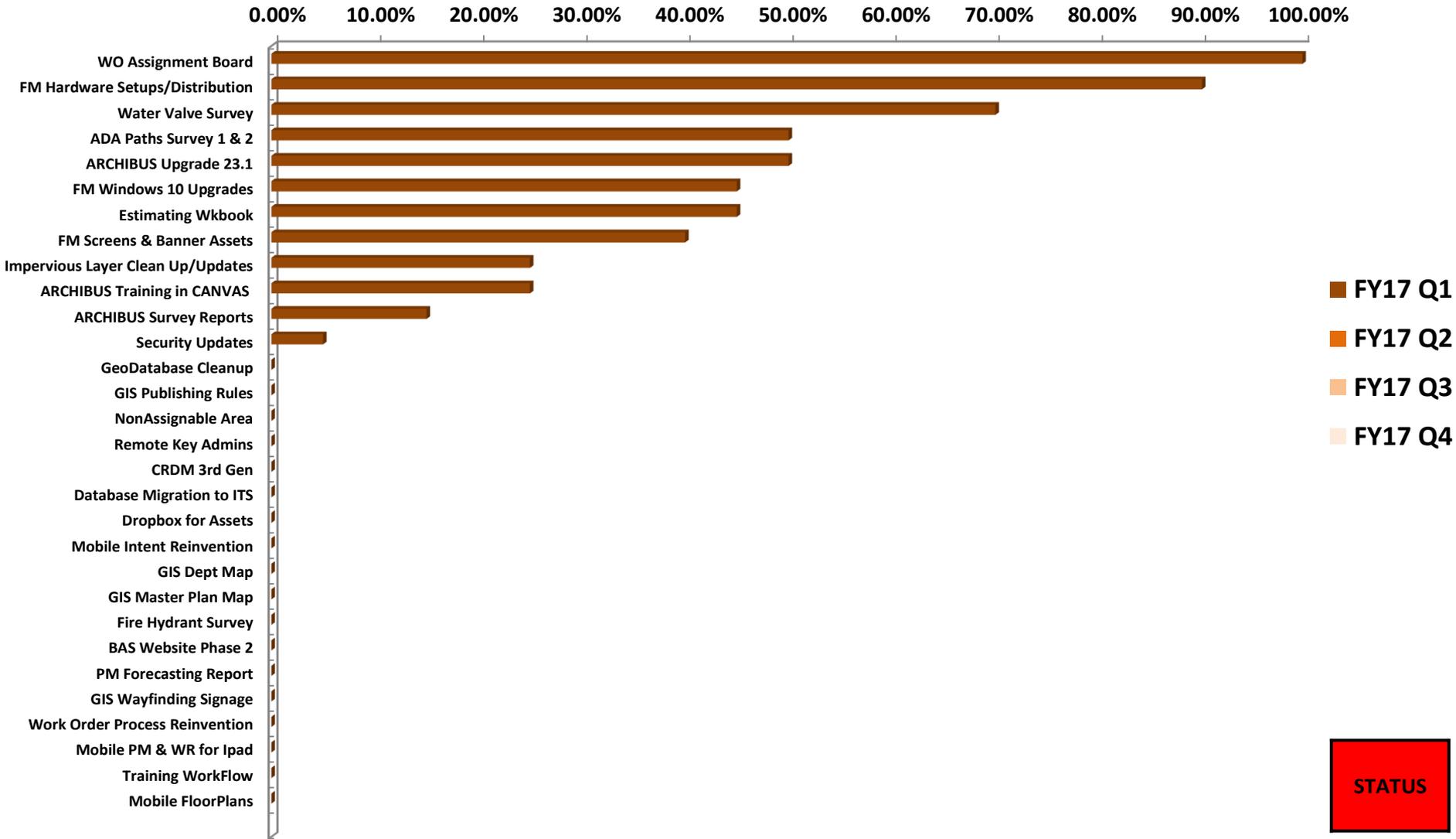
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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
Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes



FY17 Q1
FY17 Q2
FY17 Q3
FY17 Q4

STATUS

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. Finalize User Testing and Go Live with ARCHIBUS 23.1 Upgrade by Nov. 8, 2016.
2. Finalize Training Phase for new Facilities Notification process and Go Live on Nov 10, 2016.
3. Complete Water Valve Survey by Nov 20, 2016
4. Complete Final PC set up and distribution by Dec 1, 2016.
5. Complete Estimating Workbook process with Design Services Personnel by Nov 30, 2016.
6. Begin front page development, layout and structure for transition of ARCHIBUS Moodle2 Training courses into CANVAS by Dec 5, 2016.
7. Begin Dropbox for Asset Mgmt. and Design by Nov 15, 2016.
8. If funded, begin BAS N4 Graphics updates by Dec 15, 2016.

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 all GIS Outages/Construction Notifications Customer Testing and Go Live by Sept 15, 2016.
2. Finalized Building Automation Niagara N4 Template by Aug 15, 2016.
3. Completed/Finalized BAS website Phase 1 by Aug 15, 2016.
4. Scheduled and Conducted IT Prioritization meeting on Wed, Aug 3, 2016.
5. Scheduled user set up, issue resolution and follow up support for a total of 119 Facilities Management DELL Computer Distributions installed from July 1, 2016 through Aug 30, 2016.

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:

- Updates to Estimating Workbook to include Direct Pay for Capital & Special Purchases).
✓ *Timeline: **FY17 QTR 2***

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: **FY17 QTR 2 - FY17 QTR 4 – Work In Progress***

ONGOING IMPROVEMENTS

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

Facilities Management Strategic Planning Session – First Quarter FY 2016

Annual Goal
95%

QTR 1 Status
96.4%

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

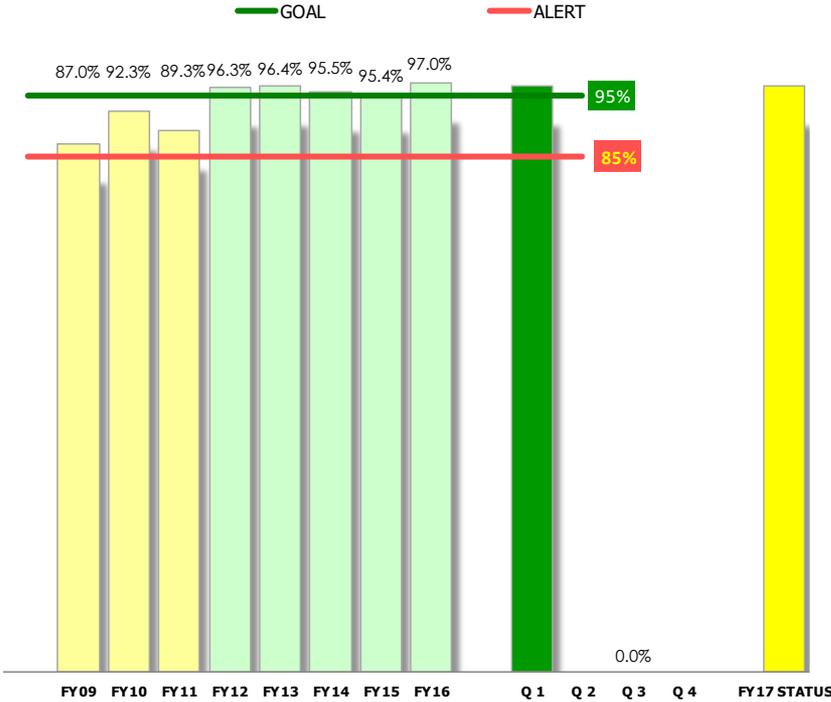
Lead: Design Services

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	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%
FY16	233	226	7	97.0%
Q 1	28	27	1	96.4%
Q 2	0	0	0	0.0%
Q 3	0	0	0	0.0%
Q 4	0	0	0	0.0%
FY17 STATUS	28	27	1	96.4%



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 July 2017.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of [CRDM 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 2017)
- Developed “Third Generation” CRDM – Forecasting reports for roofs (July 2017)

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

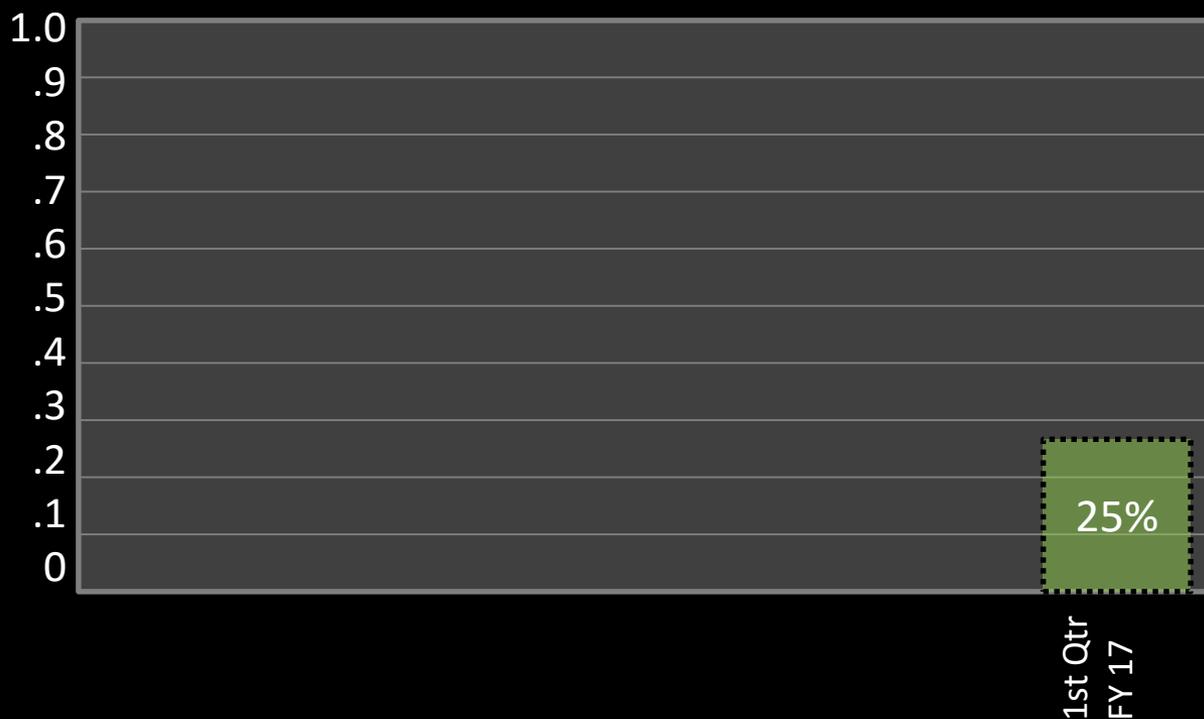
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2017.

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 2.5: 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**
 - **Continue to collaborate with Financial Services, the administration, and customers on the funding of the 5-Year Capital Plan.**

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

- Facilities Operations/Parking Services, Science Building, Union Deck, Academic Complex

Actions Planned

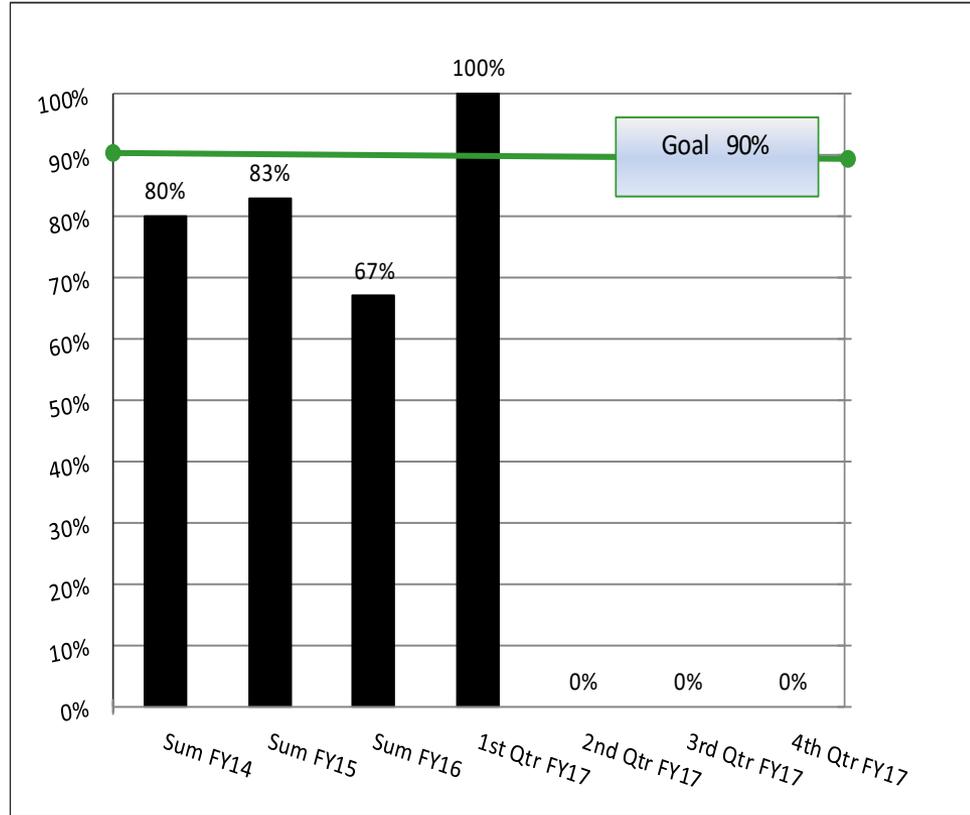
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules – accurate, used weekly by PMs & CMs
- PMs print project budget / 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.

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	Designer not under contract w/in 120	% Designers under contract
Summary FY-14	7	4	1	80%
Summary FY-15	7	5	1	83%
Summary FY-16	6	4	2	67%
1st Qtr. FY-17	1	2	0	100%
2nd Qtr. FY-17	0	0	0	
3rd Qtr. FY-17	0	0	0	
4th Qtr. FY-17	0	0	0	



Tactic Measurement for 1st Quarter is 100%

Facilities Management Strategic Planning Session – 1st Quarter FY 2017

**Lead
Capital**

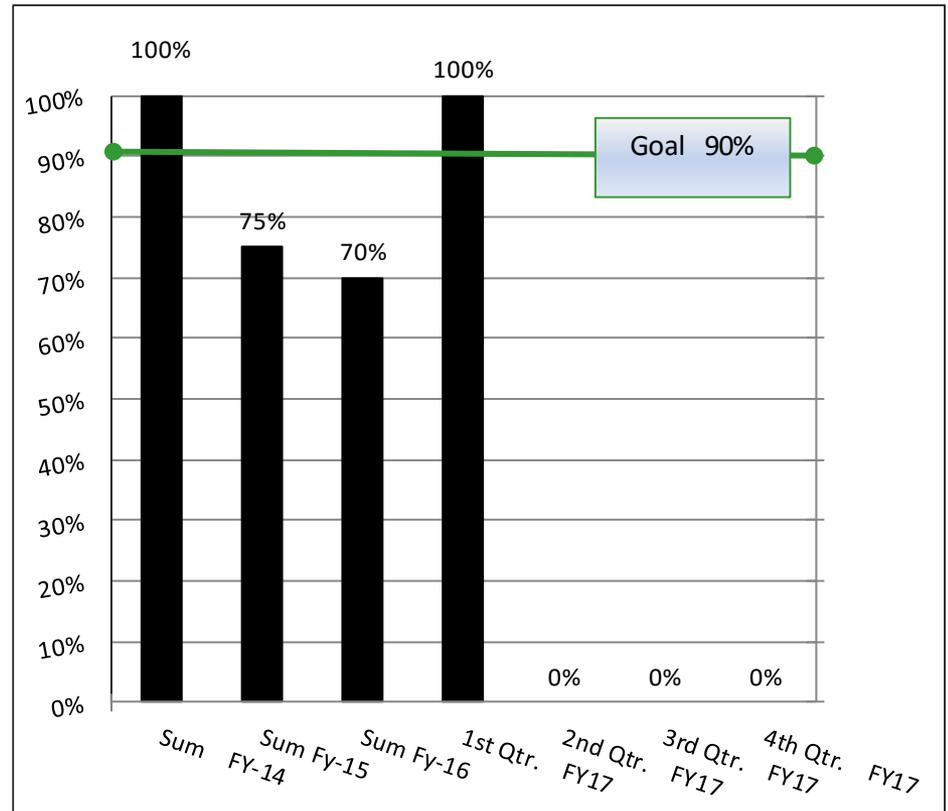
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-14	8	0	100%
Summary FY-15	3	1	75%
Summary FY-16	7	3	70%
1st Qtr. FY-17	1	0	100%
2nd Qtr. FY-17	0	0	
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Status

Tactic Measurement for 1st Quarter is 100%

Facilities Management Strategic Planning Session – 1st Quarter FY 2017

**Lead
Capital**

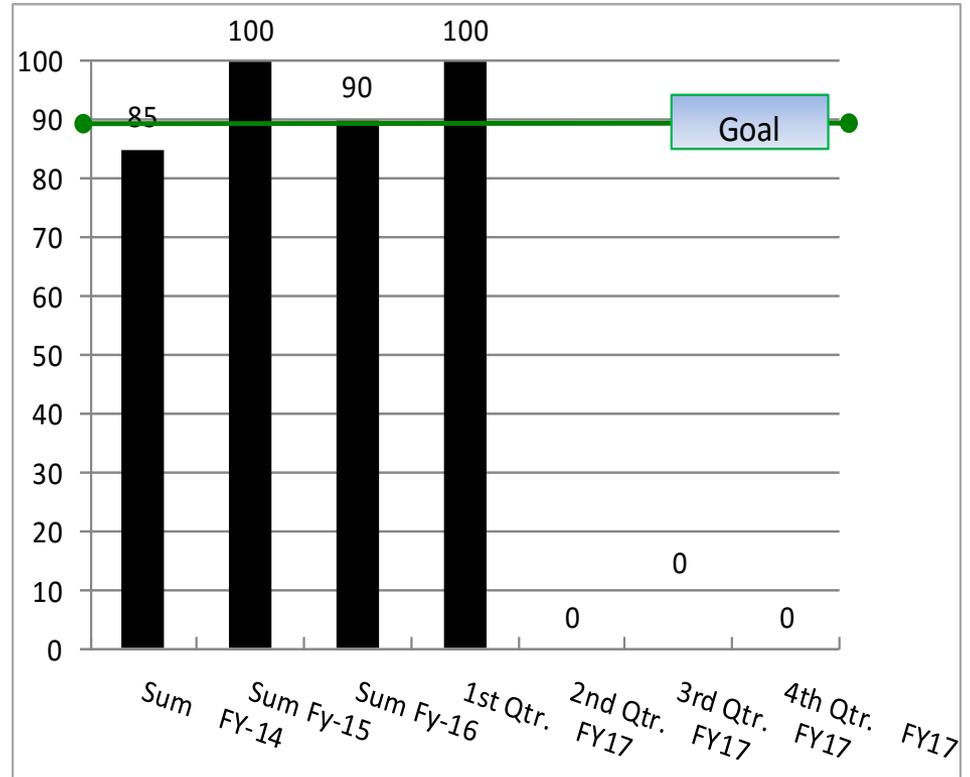
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-14	6	1	85%
Summary FY-15	3	0	100%
Summary FY-16	9	1	90%
1st Qtr. FY-17	1	0	100%
2nd Qtr. FY-17	0	0	
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Status

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

- Hauser Alumni Pavilion Sewer, Parking Lot 11A Expansion

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 – 1st Quarter FY 2017

Lead Capital

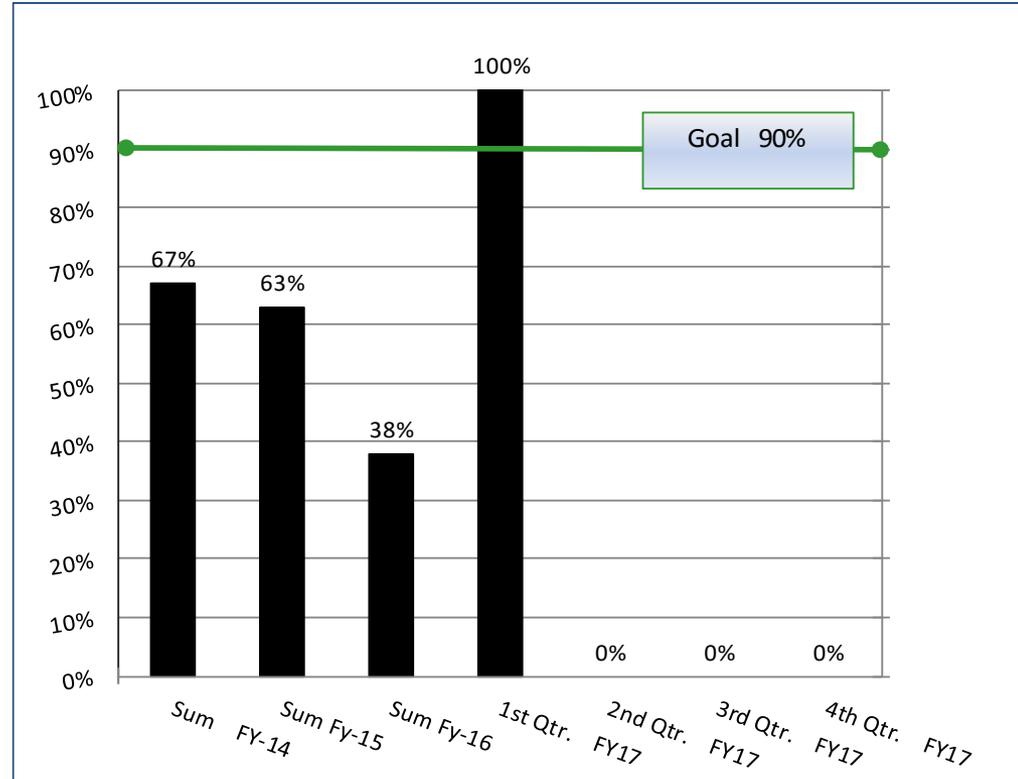
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-14	6	3	67%
Summary FY-15	5	3	63%
Summary FY-16	3	5	38%
1st Qtr. FY-17	2	0	100%
2nd Qtr. FY-17	0	0	
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Status

Tactic Measurement for 1st Quarter is 100%

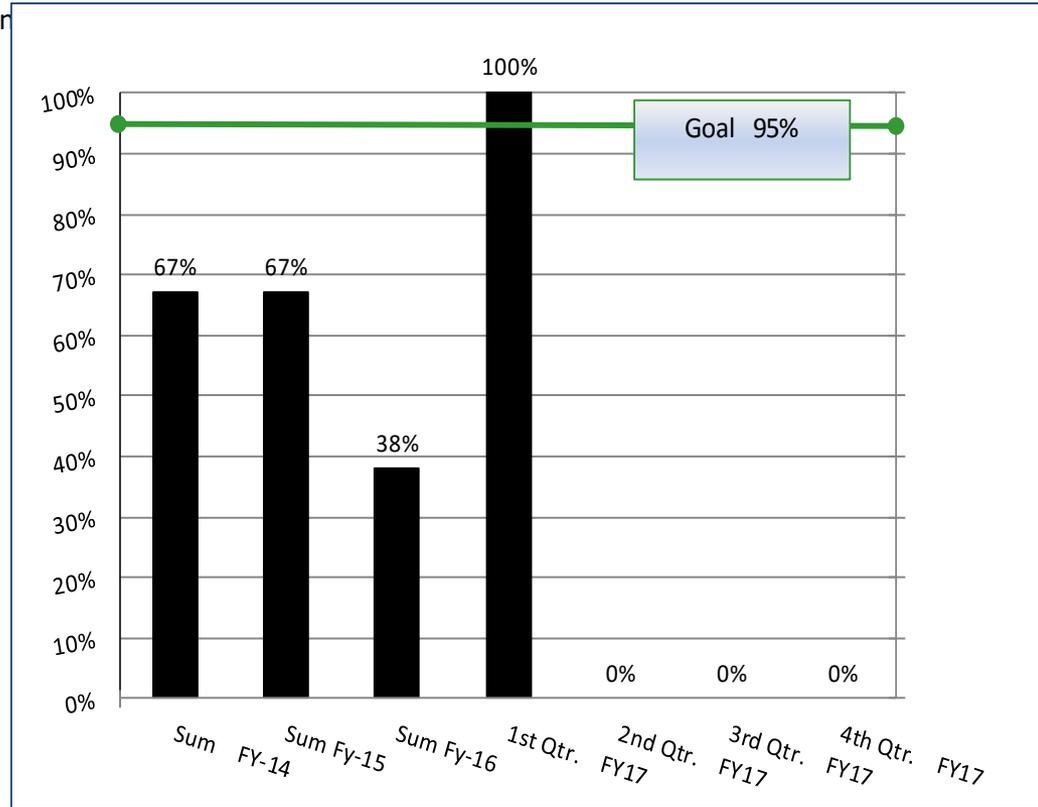
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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-14	6	3	67%
Summary FY-15	4	2	67%
Summary FY-16	3	5	38%
1st Qtr. FY-17	2	0	100%
2nd Qtr. FY-17	0	0	
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Tactic Measurement for 1st Quarter is 100%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.9: Develop a strategic plan for supporting research facilities, including installation of adequate redundant infrastructure to ensure continuous daily support (Action Plan only)

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

1. Construction of a new sub station (2018); Phase I funding approved; includes advanced planning
2. Continue monthly and annual PM service on generators
3. Implement Generator Load Bank Testing program (Funding approval October 2016)
4. Implement Fuel Polishing program (2017)
5. Implement Di-electric Oil Testing on transformers (2018)
6. Hire a Critical Facilities Supervisor (Position posted Oct 2016)

Actions Completed

1. Completed monthly and annual generator PM's (2015)
2. Hired Utility Manager (July 2016)



UNC CHARLOTTE

In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance... you thrive on that.

Bill Gates

GOAL #3

Foster a Customer Focused Organization



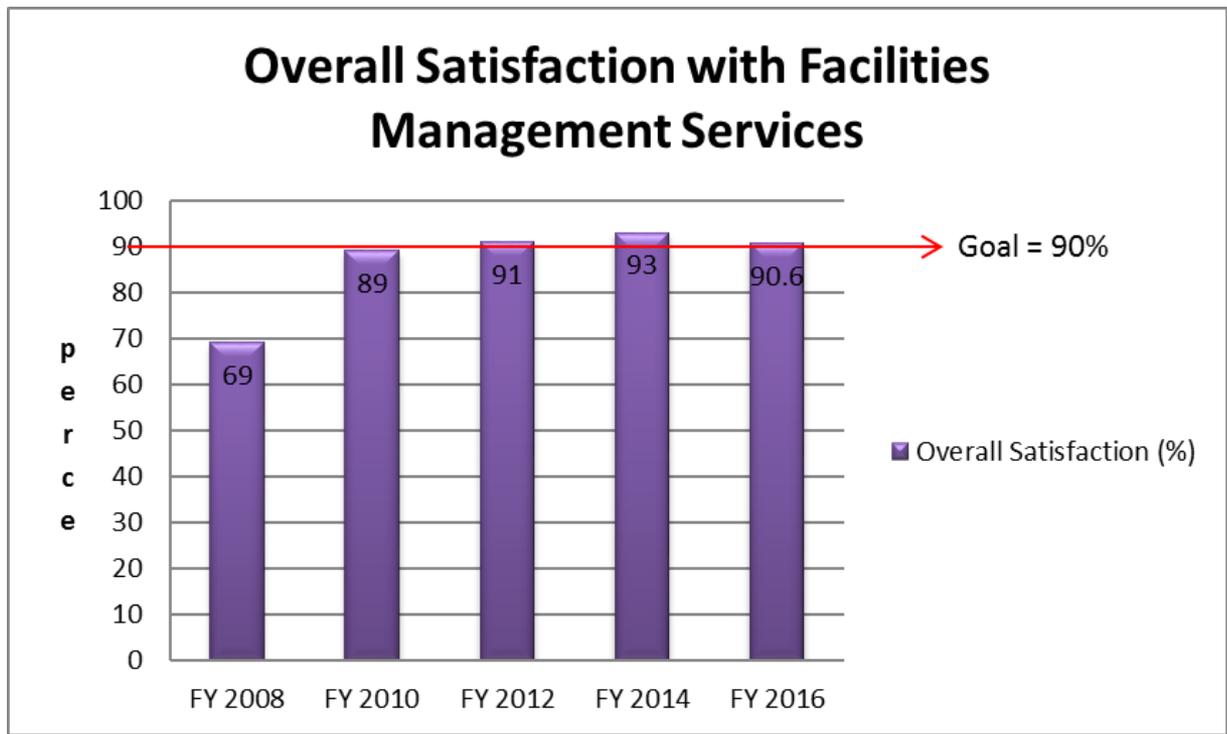
GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.1: Achieve overall customer satisfaction of 93% 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



STATUS

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 FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Prepare and distribute every four weeks. **Last completed 10/16, next 11/16**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - New LEAF, motor fleet addition; and human interests story about Brent Offenberger
- **Publicity documentation and analytics*:** Will continue to work with Cindy Tribucher on analytics; goal is to increase external media (in particular, trade publications) coverage.

Internal Communications:

- **Intranet and Web Site** Content review and user feedback. *(note: level 0 security information)* **Began working alongside FIS to begin a pilot phase of Confluence and assess the needs of BES and Operations.**

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. 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. Hire Lead BAS Technician (Reposting October 2016)
4. Continue to include Energy Manager in Bi-Weekly Operations' meetings
5. Ongoing discussions with FIS re campus wide analytics (BAS Dashboard)
6. Develop Utilities Team and Retro Commissioning Supervisor (November 2016)
7. Working with Capital; Retro-commissioning 3 buildings (Cameron, McEniry, Smith) (June 2016)
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)
9. Feedwater pump replacement (System Reliability) (October 2016)
10. Develop and implement customer follow-up plan (Call backs)

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Updated temperature policy (July 2015)

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

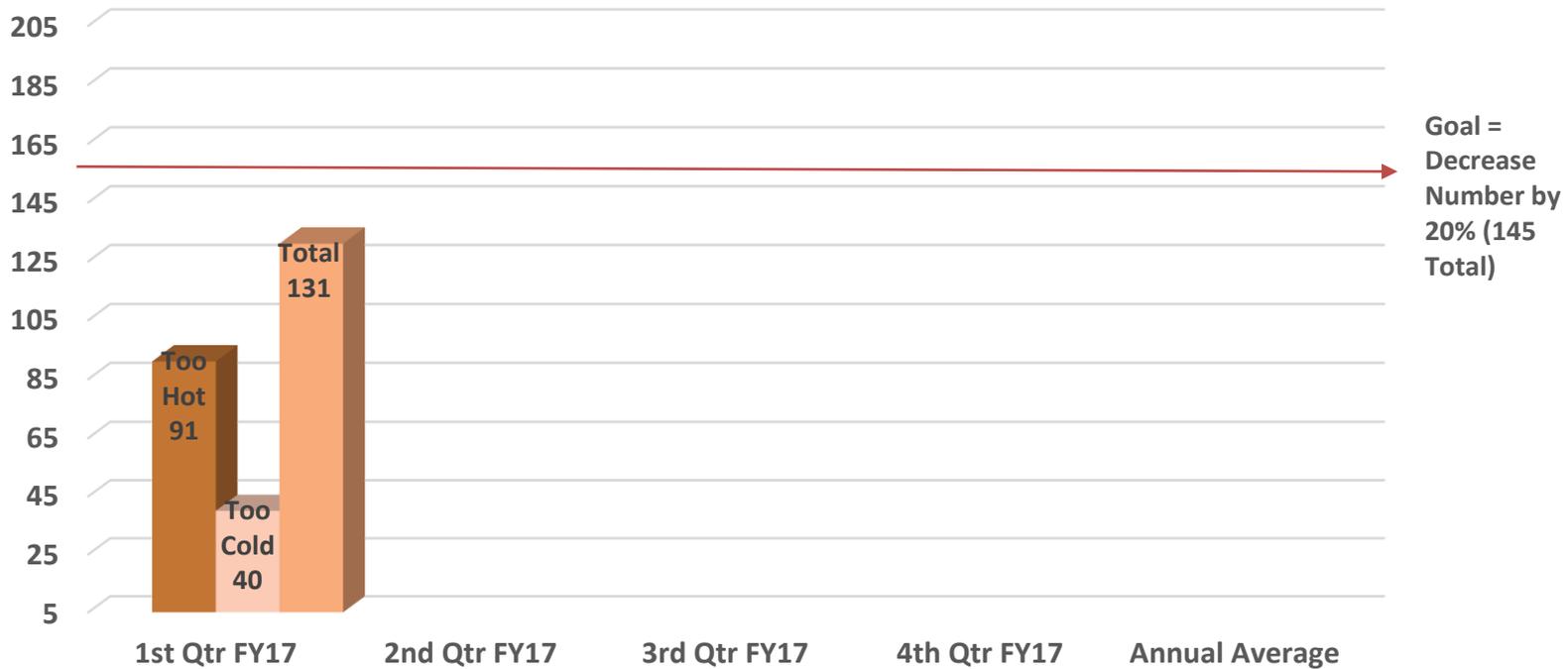
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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
1st Quarter

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 2017

Annual Goal
90%

QTR 1 Status
50%

Lead
Design Services

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

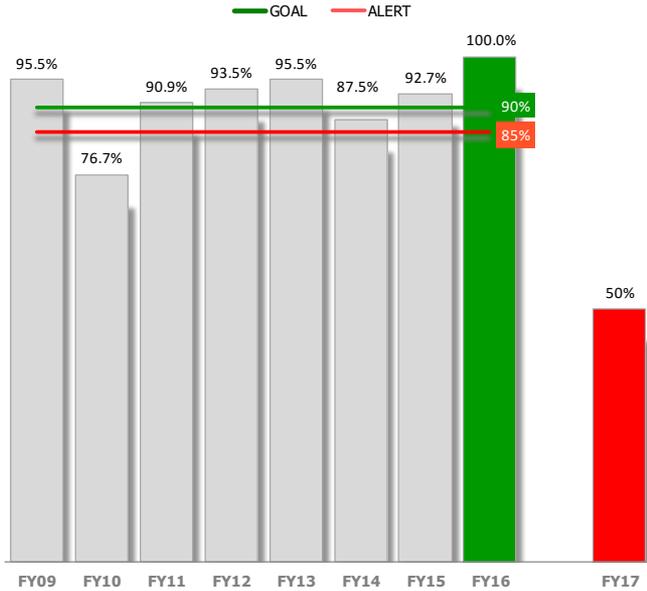
Lead: Design Services

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	115	32	28	4	0	100.0%
FY17	22	2	1	0	1	50%
RESPONSE RATE						9%



Customer Comment:

Example of One “Less than Satisfied” Customer Comment:

Communication with our project coordinator and the subcontractors was lacking and led to work being done incorrectly or not at all. Regular meetings are highly recommended for all projects, but particularly for projects that are unique in nature and scope.

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 FOR IMPROVEMENT

Customer Communication Initiatives (interrelated):

- **Launch 2nd customer feedback interviews Early Spring 2017**
- **Customer Facing technology Ongoing**
 - ARCHIBUS Notifications migration development, testing, and training nearing completion

Special Projects:

- **Light Rail Coordination Committee** (member of the communications working group)
- **Academic Complex Communication Plan** (implementation underway)
- **5-Year Plan External Communication Plan** (implementation underway)
- **5-Year Plan website** (in progress)
- **FM Communication SOPs** (targeted completion December 5)
- **Traffic communications committee** (joint partnership with University Communications):
 - Request guidance from AVC



UNC CHARLOTTE

Start with good people, lay out the rules, communicate with your employees, motivate them and reward them. If you do all those things effectively, you can't miss.

Lee Iacocca

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 FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2016

Recruitment Strategies

- Increase the pool of qualified applicants and ensure a qualified, diverse applicant pool by expanding advertising venues when appropriate;
- Ensure timely and efficient processing of position management actions;
- Ensure that budgeted vacancies do not reach the abolishment threshold;
- Mandatory Targeted Selection for Supervisors;
- Updated Interview Guides.

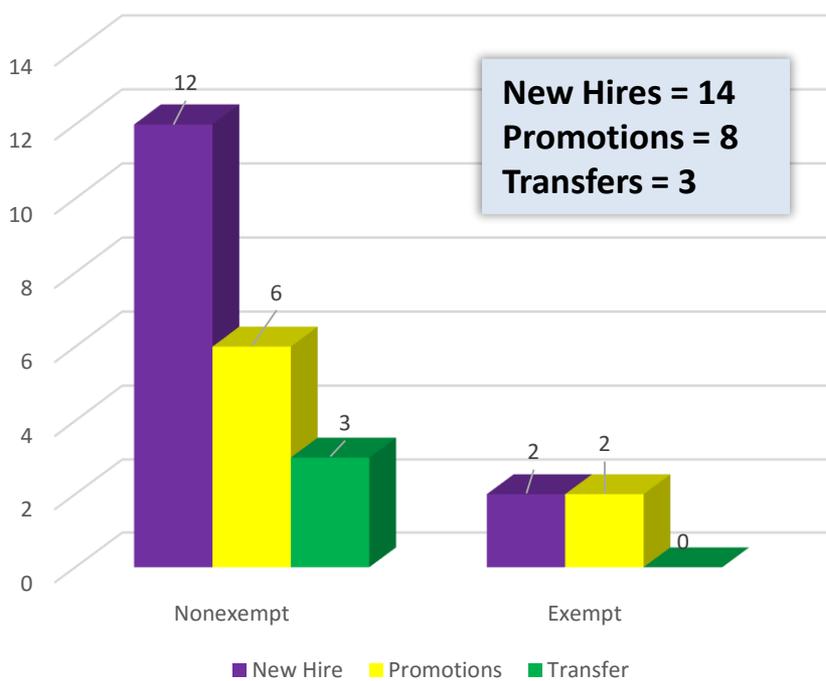
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

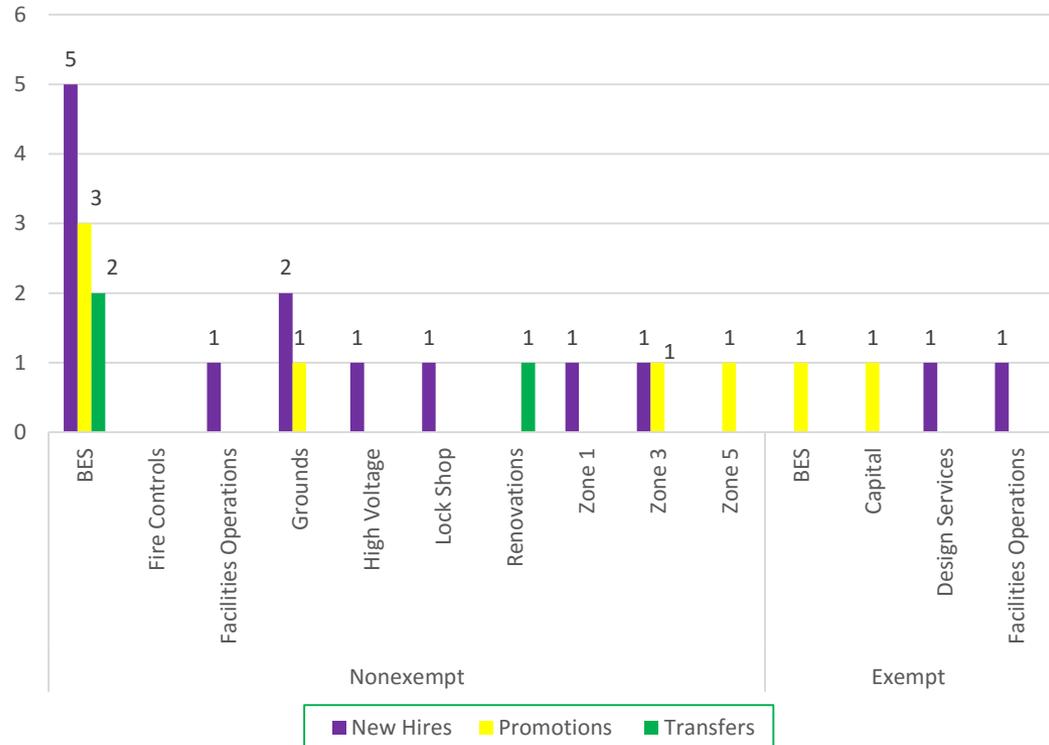
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotions 1st Quarter FY 2017



FM New Hires / Promotions per Department 1st Quarter FY 2017



GOAL #4 Recruit, Develop and Retain Quality Employees

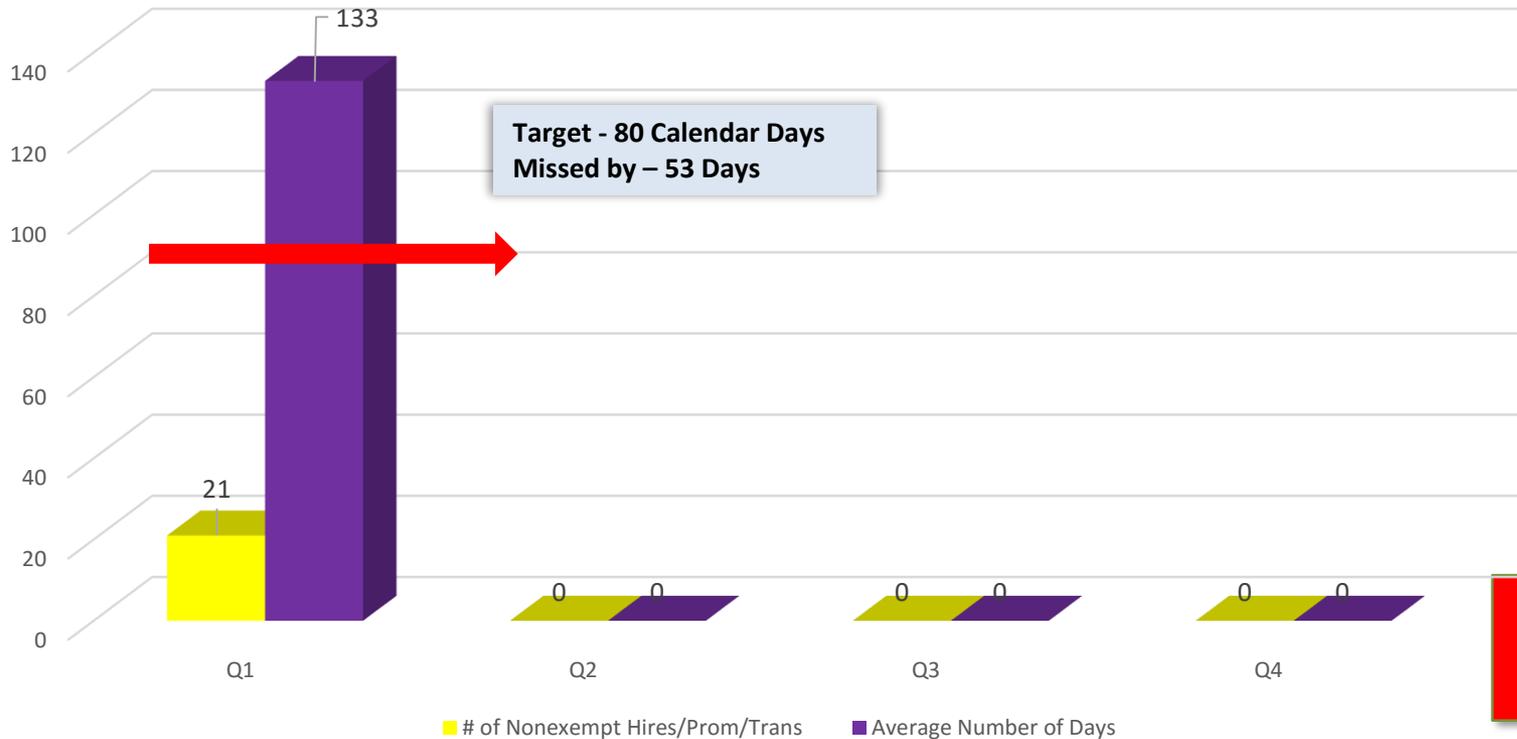
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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 - FY 2017



STATUS

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

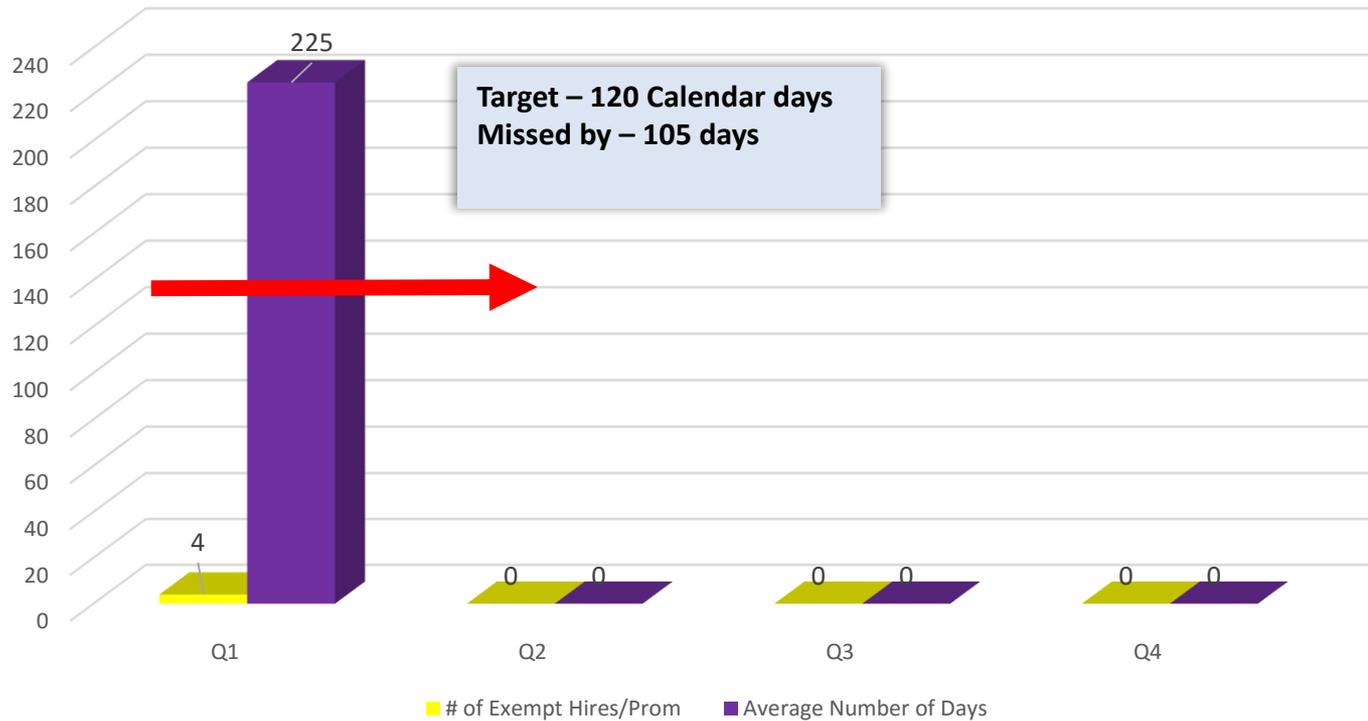
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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) Vacancies - FY 2017



STATUS

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 FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2016

- 1) **Maintain updated position descriptions**
- 2) **Work Plans**
- 3) **Probationary Period**
- 4) **Employee Evaluations**
- 5) **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.

Facilities Management Strategic Planning Session - First Quarter 2017

GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

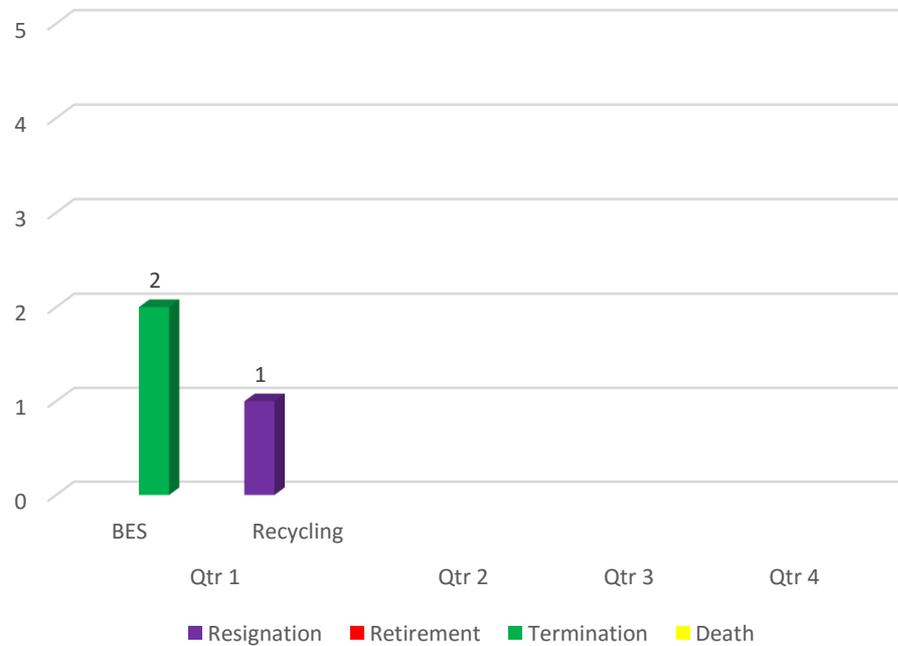
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

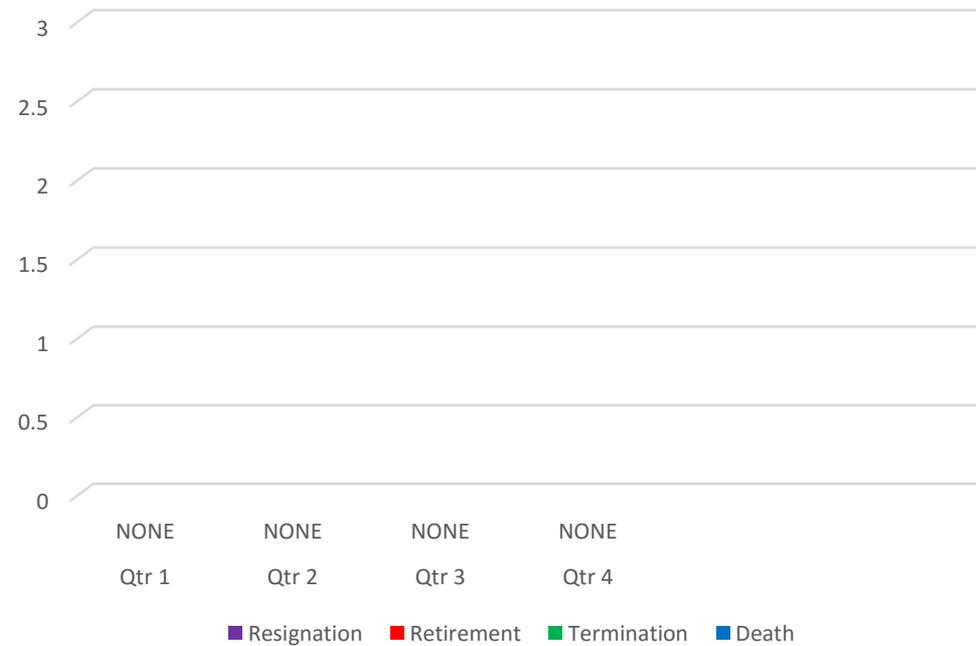
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations by Department During Probation Nonexempt FY 2017



Separations by Department During Probation Exempt (Salaried) FY 2017



Status

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

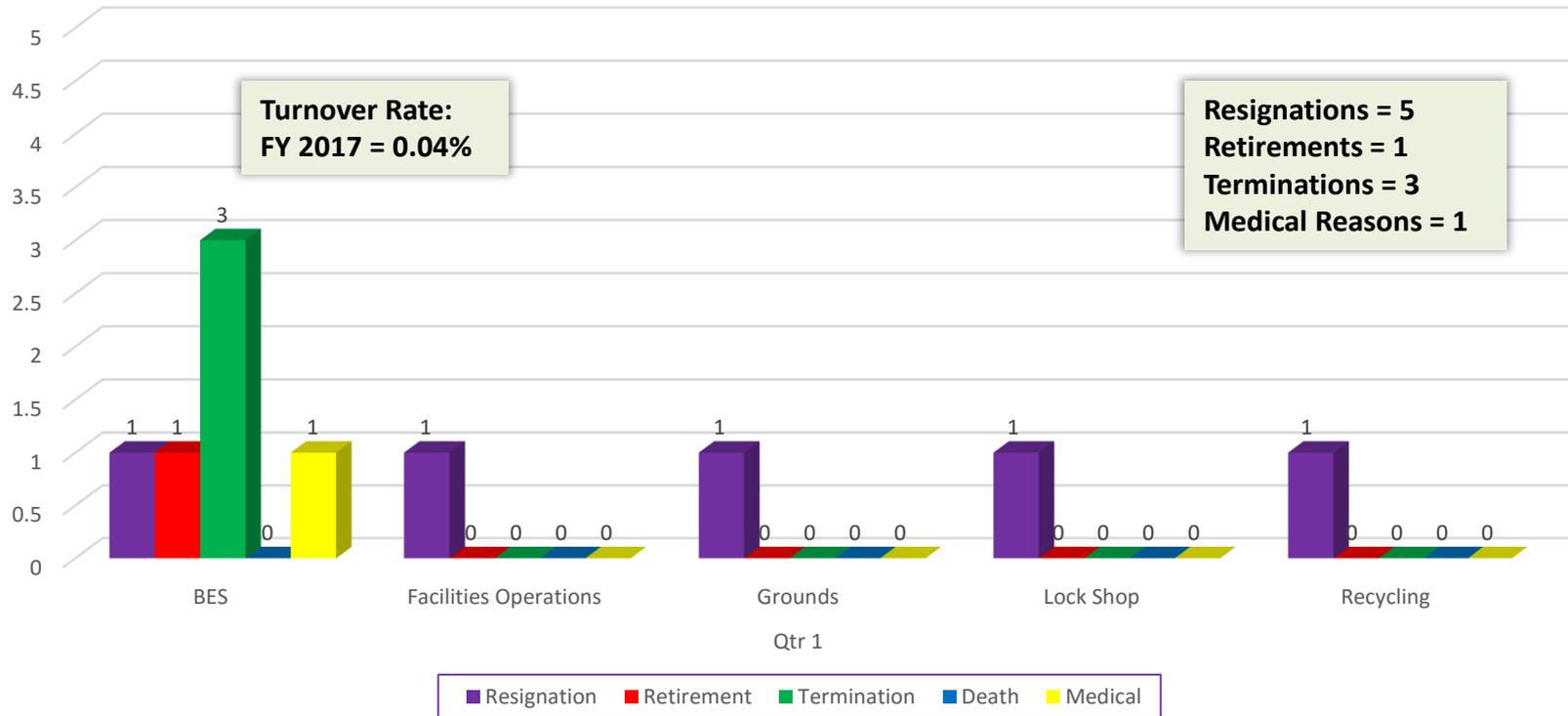
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2017 - Nonexempt



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

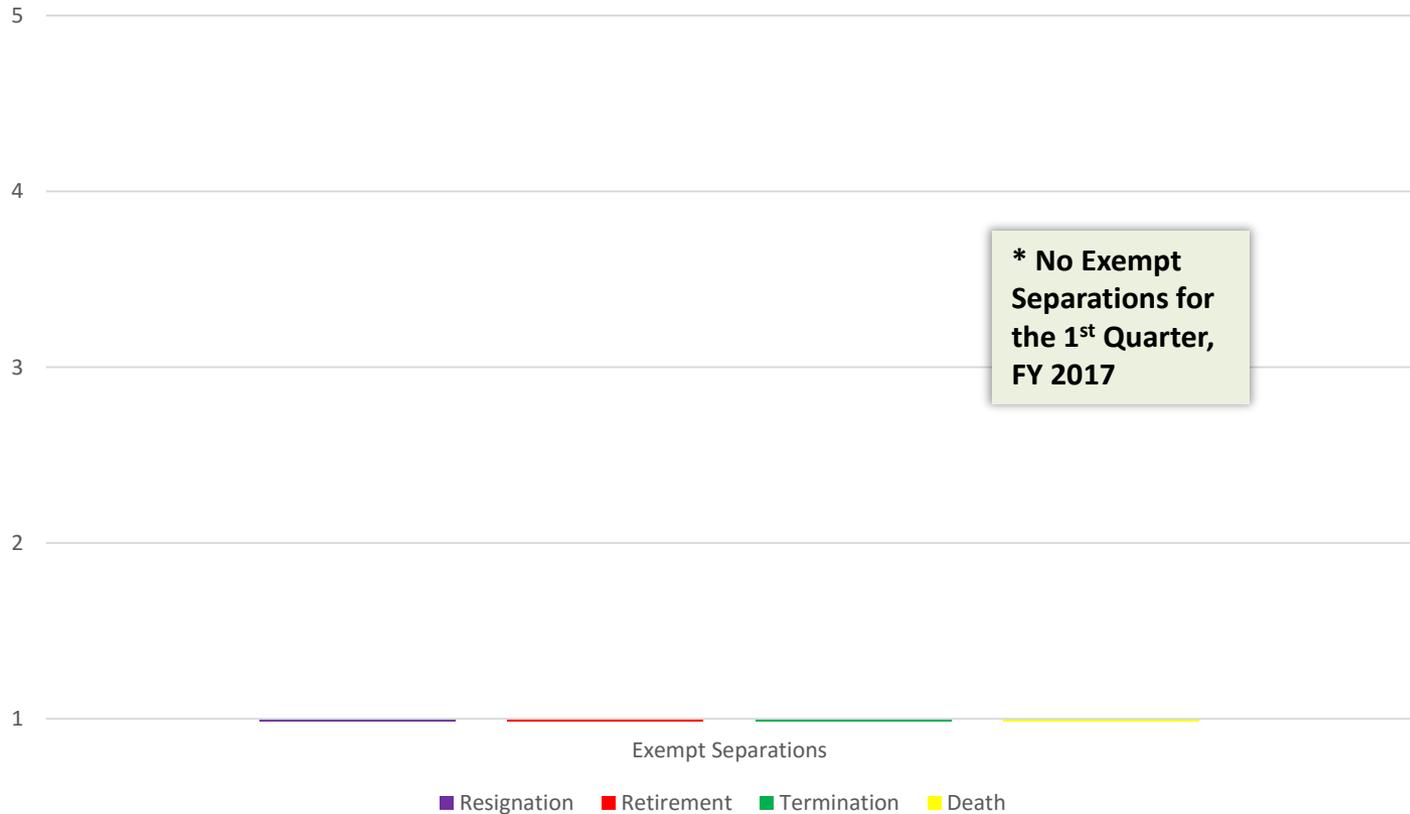
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2017 - 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

ACTION PLAN FOR IMPROVEMENT

FM ACADEMY

Action: Increase training opportunities available to FM Employees Planned/Completed

Technical

- Electrical Trouble Shooting & Preventive Maintenance March 2016
- Pump Repair & Maintenance May 2016

Safety

- Supervisor Safety Talks Monthly
- Winter Preparedness Expo (Dec 2015) Completed

Leadership

- APPA Leadership Academy – Level II Feb 2016
- APPA Leadership Academy – Level III March 2016
- APPA Supervisor Toolkit June 2016
- NEO redesign June 2016
- Cultural IQ Training TBD

Externally Driven Initiatives

- Niner Talent “Workplan” training Jan 2016
- Kronos training As needed

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 FOR IMPROVEMENT

Departmental Development

- Attend staff meetings with FO and BES to support L&D needs.
- Identify and source vendors for training delivery;
 - Areas of focus: Leadership, Technical, Administrative, Safety & Professional Development
- Communicate upcoming training events to FM employees;
- Review objective metrics with AVC for next FY;
- Coordinate and collaborate with other FM Learning and Development specialists;
- Research apprenticeship program feasibility for FM.

NEO Review and Revamp

- New FM NEO format developed to include presentations by Unit Directors and/or designee.
 - AVC approved, started July FY 17
 - Directors informed and presentation guidelines provided

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

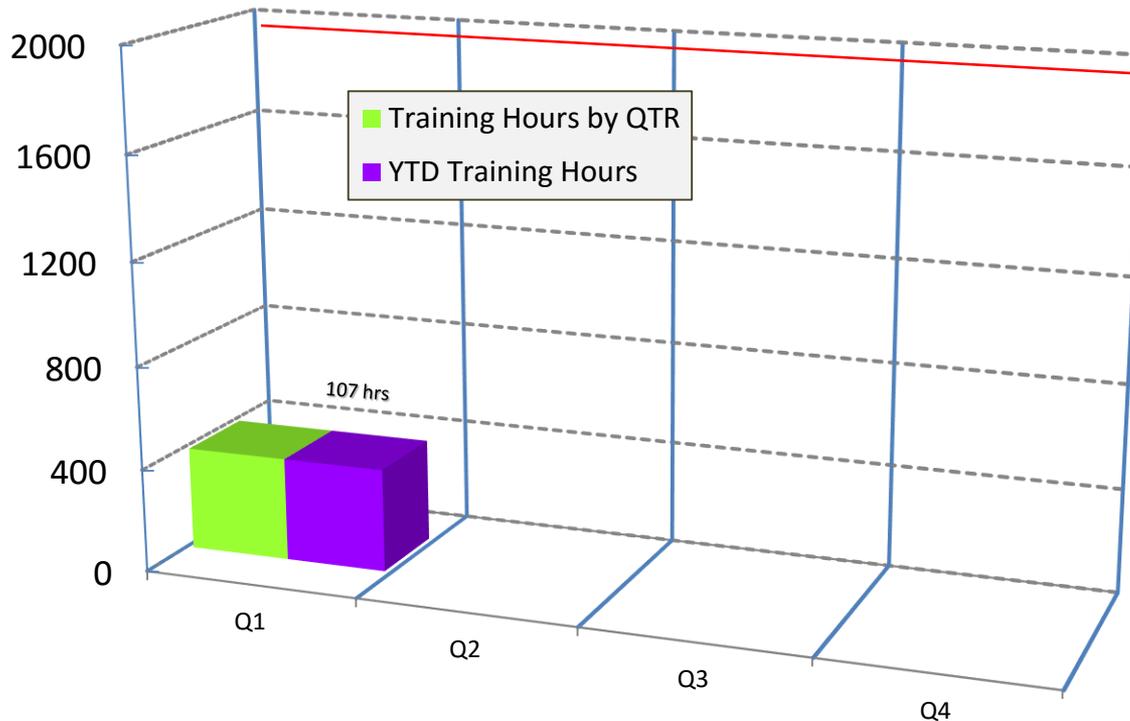
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 17

Training Hours for Supervisors & Managers by Quarter



Annual Target

FY 2017
 Target - 1,960 hrs
 1st Qtr. Target – 490 hrs

 Actual YTD
 400 hrs (20.4 %)
 Actual 1st Qtr.
 400 hrs (82 %)

STATUS

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

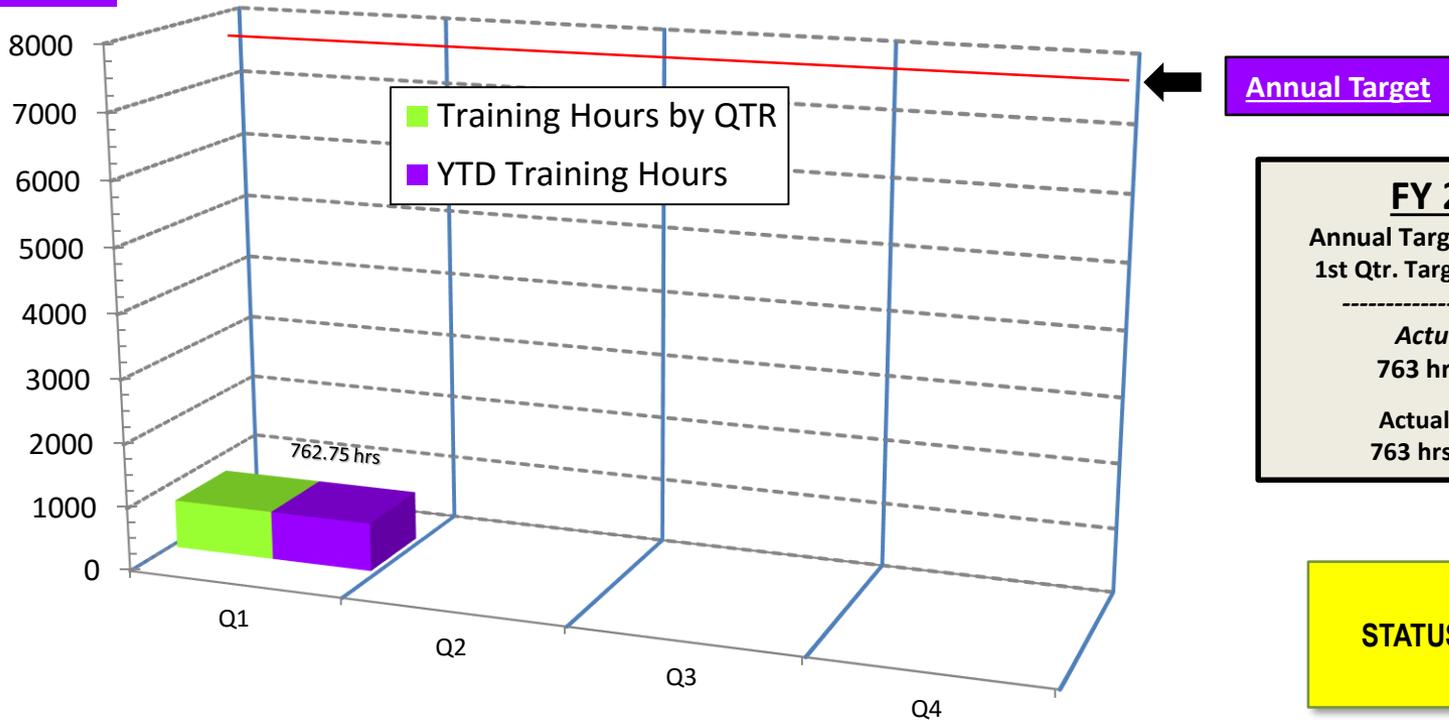
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 17

Training Hours for front line employees by Quarter

Training Hours



Annual Target

FY 2017
Annual Target - 7,760 hrs
1st Qtr. Target - 1,940 hrs

<i>Actual YTD</i>
763 hrs (10 %)
<i>Actual 1st Qtr.</i>
763 hrs (39.3 %)

STATUS

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 FOR IMPROVEMENT

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.);
 - Contract signed October 2016
 - Focus Group development and assignment to begin November 2016
 - Revise, add or update questions based upon Focus Group feedback; Secure approval of changes from AVC-FM
- Determine scheduling timeframes – December 2016;
- Coordinate with L&D specialists within the larger units of FO and BES to ensure maximum participation;
- Next survey date TBD. Projected timeframe – Spring 2017.

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 FOR IMPROVEMENT

Efforts to reduce accidents:

Safety Training Provided FY17 YTD – **418 hours**

- **Safety Training Taskforce** (Collaborative initiative with EHS)
 - Work progressing in development of training matrix topics/schedules to include: what, when, who and how strategies between FM and EHS;
 - Discussion held on best way to report training;
 - Need for access to current campus Learning Management System (LMS) by both FM and EHS;
 - Recommended course of action is to have this championed by AVC-FM and AVC-RMS at Senior Staff Level;
- Ladder Safety Training - Aug 2016
- Initiate Safety related activities
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks (*12-month topics posted to website; coordinating topic selection with EHS*)
 - Safety Slogan Contest - *“Safety Pays In Many Ways”*
- Current Stats for Accident/Incident Totals (**CY16**)
 - Accidents - 11
 - Minor incidents – 0

Lead
FM Wide

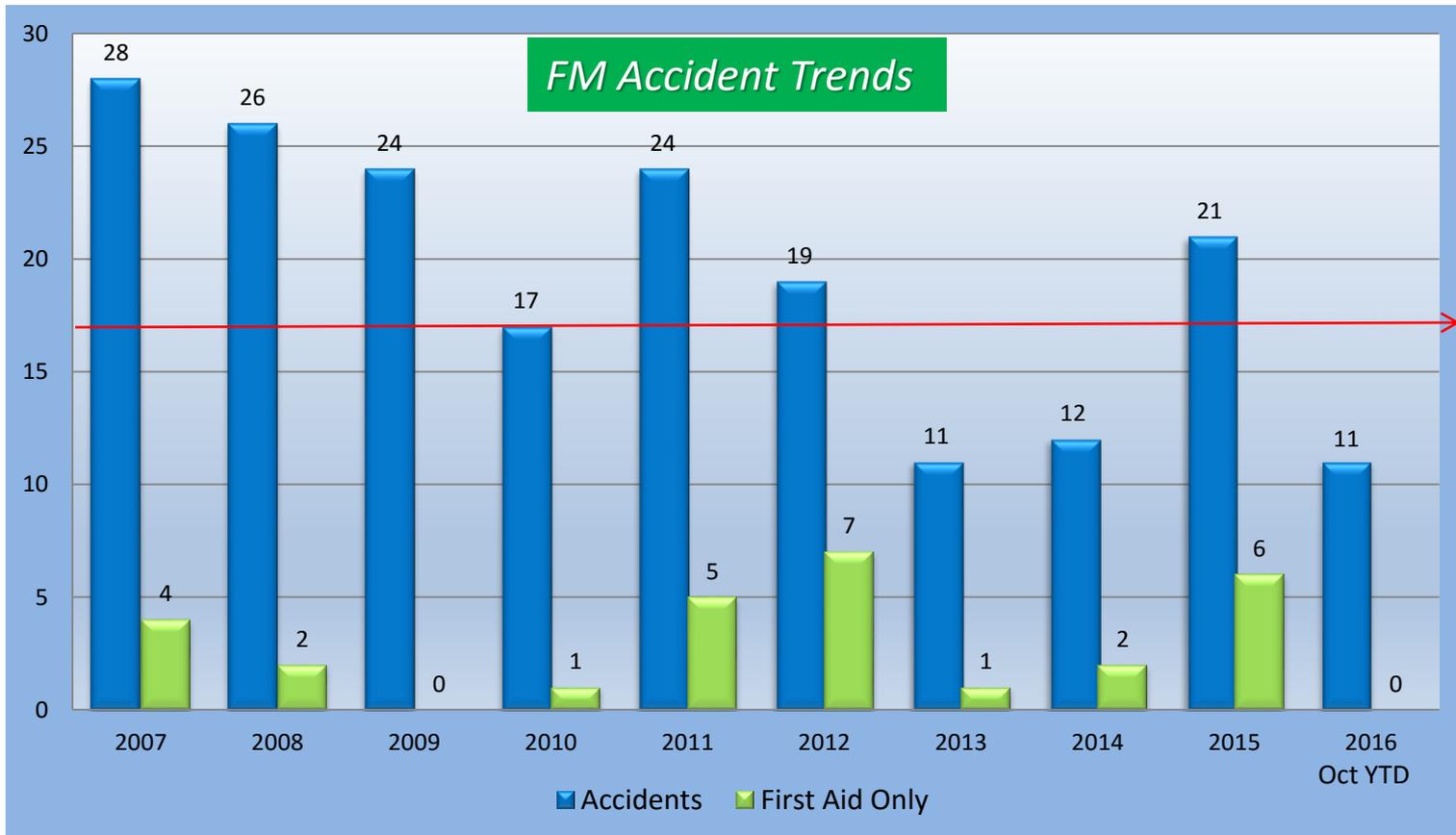
GOAL #4 Recruit, Develop and Retain Quality Employees

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



CY 2016
Continuous
Improvement
Target ≤ 17

STATUS

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 FOR IMPROVEMENT

Action Item	Target Date
FM Academy	
<ul style="list-style-type: none"> • Web Content Development, working with FM Communications Officer <ul style="list-style-type: none"> – Online training evaluation form posted to FM website – Supervisor Safety Talk (SST) topics 2016 calendar published – Commonly used FM Acronyms listing (published Feb 2016) – Training vendor sourcing & selection (as needed/as funded) – Updates to website on upcoming L & D events 	Ongoing
Leadership	
<ul style="list-style-type: none"> • APPA leadership workshops. <ul style="list-style-type: none"> – APPA Leadership Academy (Level III) (Completed) – APPA Supervisor Toolkit – APPA Leadership Academy (Level IV) (Four employees) – Updates to FM Leadership Development Matrix 	Sept 2016 Spring 2017 Jan 2017 In Process
Technical	
<ul style="list-style-type: none"> – Ladder Safety Training – Stihl Equipment Training (Automotive/Grounds) – Apprenticeship Project (Business case preparation) 	Sept 2016 Aug 2016 In Process



UNC CHARLOTTE

Transparency, honesty, kindness,
good stewardship, even humor,
work in businesses at all times.

John Gerzema

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 ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Finance/Budget:

- FY 17 Call for Central and recurring funding completed on time;
- FY 17 One-Time VCBA budget call completed; anticipate allocations in November 2016.
- **NEW:** Management Process for projects managed by FO – Growing area of concern regarding budget management and tracking of expenses for larger dollar (capitalized – over \$5K) projects done by FO. Trial process underway using current central fund projects with FO as lead.
- **NEW:** Meetings with FO front-line supervisors initiated September 2016; Request for meetings to recur quarterly except 4th qtr.
- Annual Budget Process – draft underway; New component will be a three year look ahead for personnel. Anticipate distribution in January 2017 with review and approval by AVC-FM.
- Strategic Personnel discussion with FM leadership anticipated to begin in October 2016.

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 2017;
- Encourage use of APPA grant and award program to supplement funding within FM;
 - BES winner of new award/grant for FY 17

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 FOR IMPROVEMENT

Cost Accounting – Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management; Need for an entry-level accountant position to improve and monitor use of account codes, cost centers, etc. across FM; Position will assist in the areas of reporting; monitoring and management; Key component for FBO organizational structure and succession planning, as well;
- Improve org code usage – July 2016 through June 2017;
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. – **15th of each month**; Positions with insufficient budget have become a growing concern – recommend using annual budget process as possible means to address this strategic issue.
- **APPA Survey** – Cost data gathering anticipated to begin – July 2016. Survey due: December 2016. Data collection due in September 2016. Submission to AVC for review anticipated early November 2016.

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 FOR IMPROVEMENT

FY 16 APPA Survey:

- Cost Data collection for FY 16 survey: *Underway*;
- Beta version available: February 2017 - tentative;
- Actual results available: March - April 2017 - tentative;
- Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF : April 2017

FY 16 NACUBO Key Facilities Metrics Survey:

- Data collection for FY 16 survey completed and submitted on time;
- Actual results available: March 2017 - tentative;
- Review of data and next step determination is outstanding; AVC guidance needed.

Administrative Cost/GSF Analysis:

- Cost per GSF for administration – higher than peer institutions.
 - Possible reasons – growth of FM staffing in this area to include Real Estate and Space positions
 - Anticipate same trend as support area needs (i.e., FBO, FIS, etc.) continue to manifest.

Lead
FBO

GOAL #5 Promote Good Stewardship

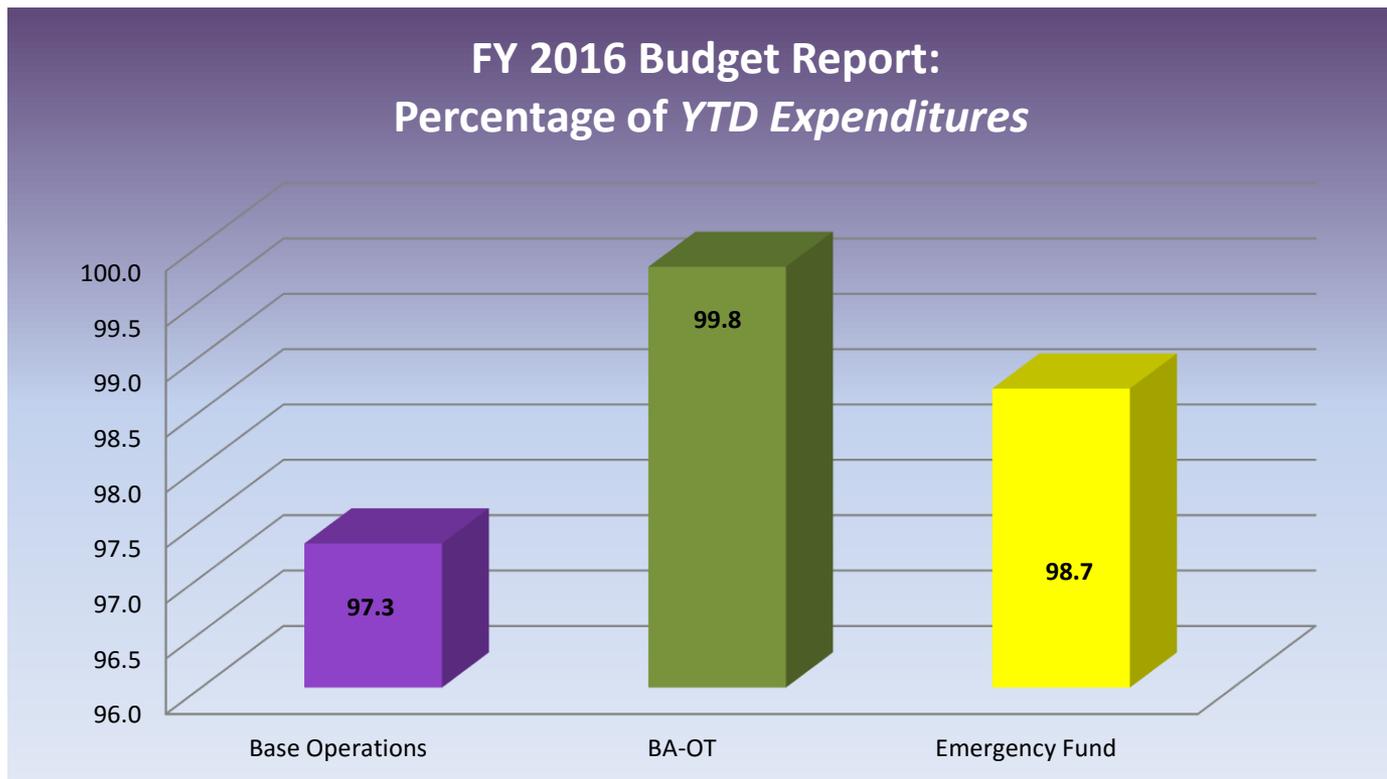
Objective 5.1: Promote Fiscal Responsibility

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

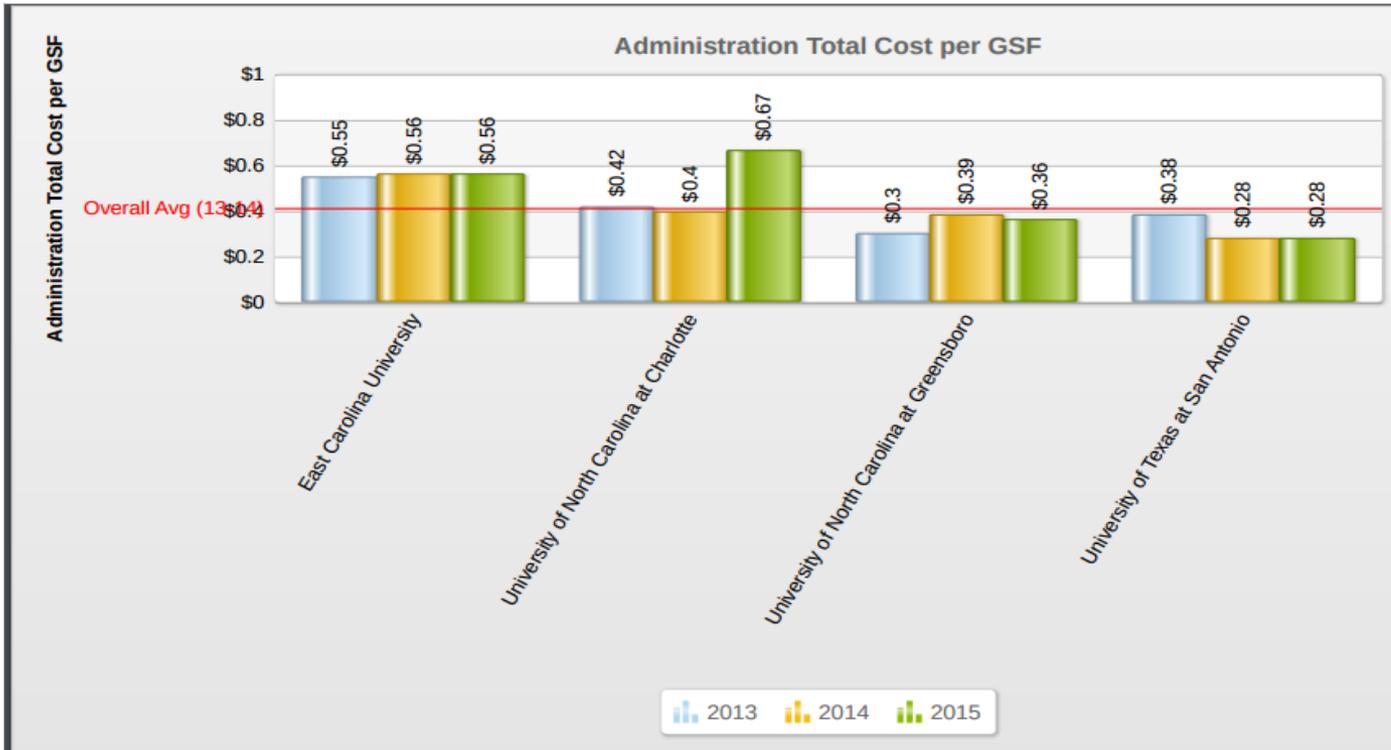
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3: 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. = \$0.53
 SRAPPA Avg = \$0.38
 Target = \$0.404 (-5%)
 UNC Charlotte = \$0.67

ANNUAL

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
 - Installed washers & dryers in COED and Kennedy laundry rooms and prepare for use (9/2016)
- Actions Planned
 - Implement internal labor resource model to include temporary, disabled, student, and vocational workers (2/2017)
 - Development of BES&R 5-year plan (2/2017)
 - Implement team cleaning model throughout all BES zones (ongoing)
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (ongoing)
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (ongoing)

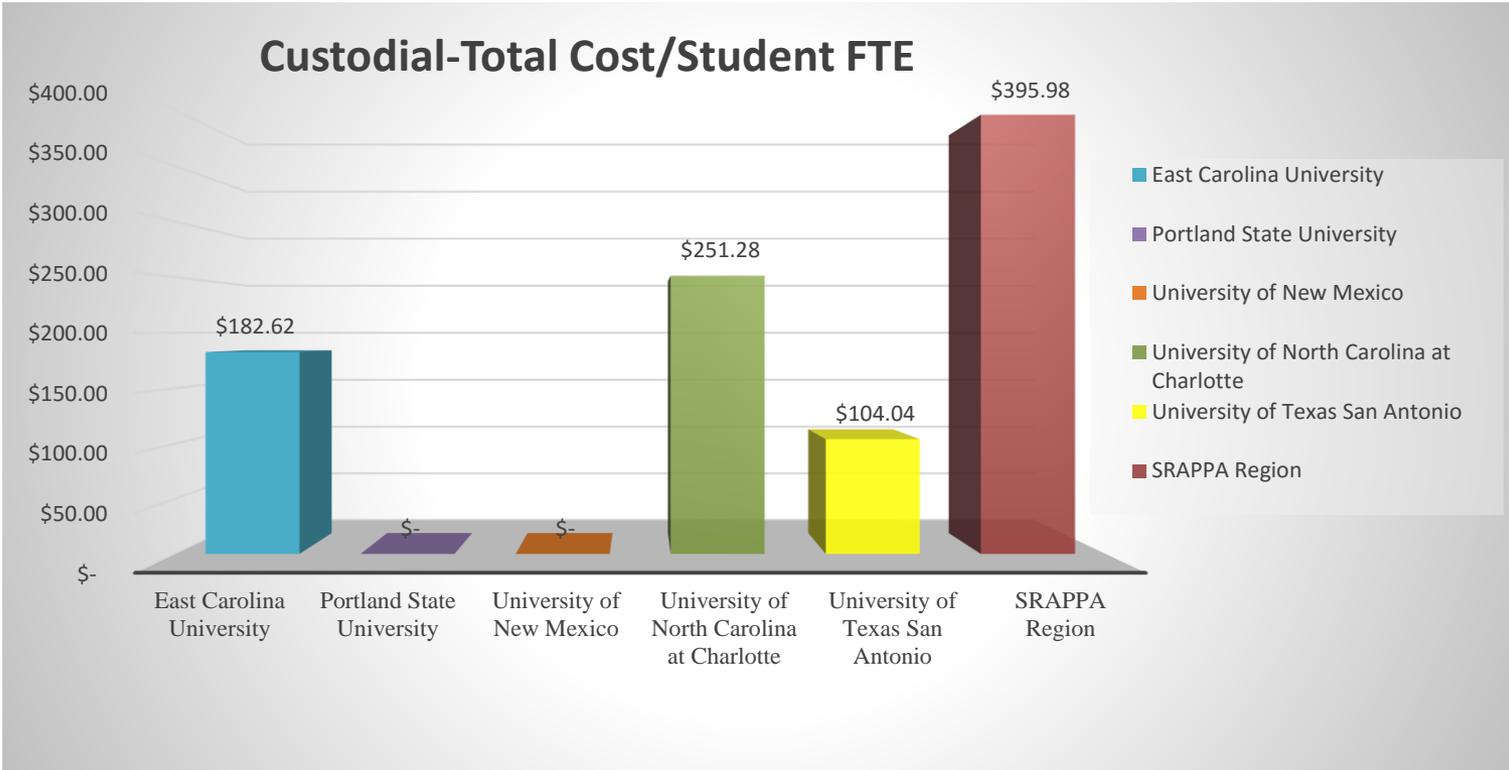
Facilities Management Strategic Planning Session – Third Quarter FY 2016

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 = \$233.48

UNCC = 7.34% above average

UNCC = 44.712% below SRAPPA average

STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

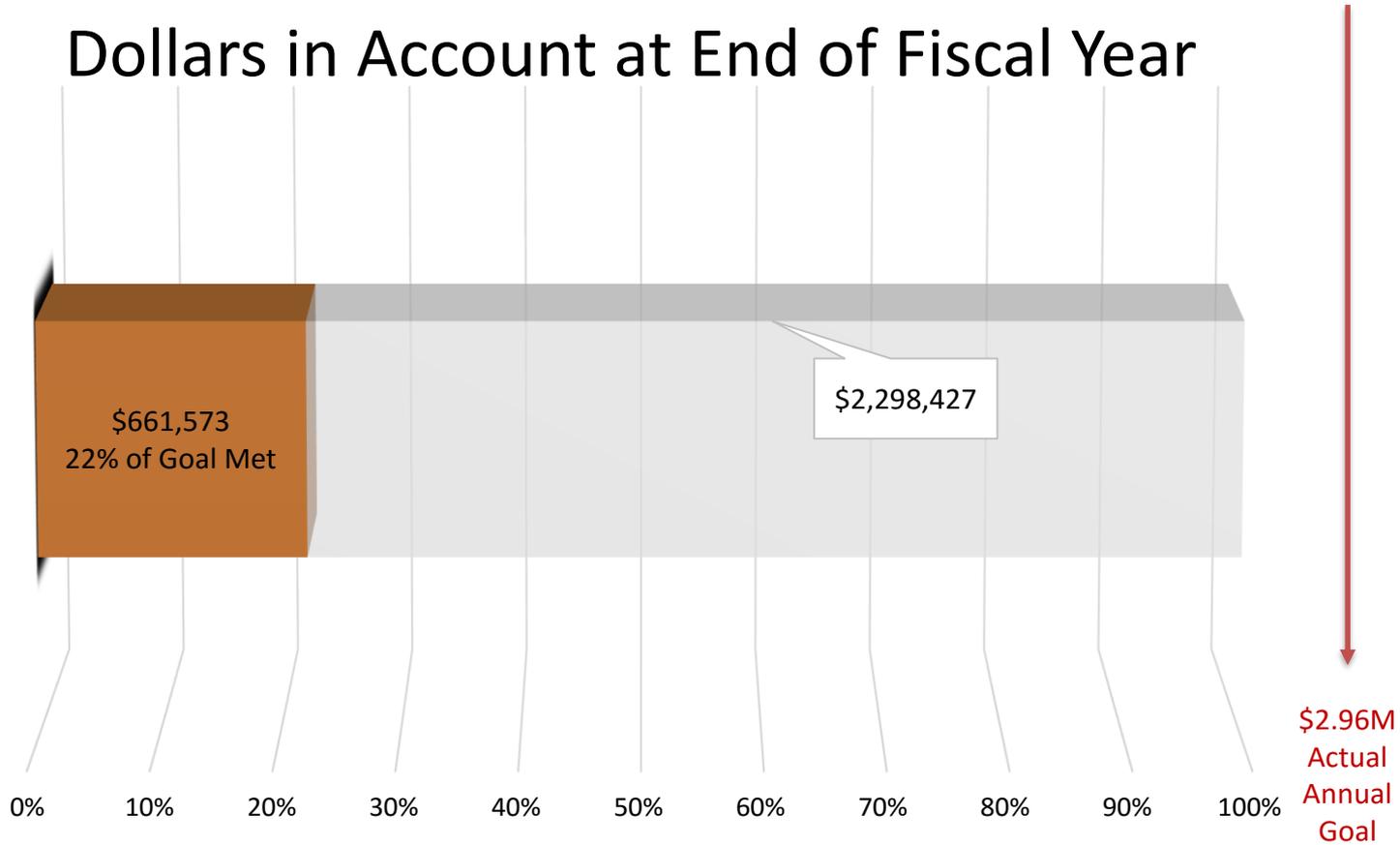
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

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

■ 1st Qtr FY17 ■ 2nd Qtr FY17 ■ 3rd Qtr FY17 ■ 4th Qtr FY17 ■ Goal Not Met

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

- Survived Move-In: Filled 7 roll-offs with cardboard (11,000 pounds) plus filled a 48' trailer with block Styrofoam (2,000 pounds). Great partnership with HRL!
- Prepared for Football and completed first two games (approx. 1.5 tons recycled/composted; about .5 tons for trash; still waiting on final weight tickets).
- Universal Waste Facility is now fully operational (collections areas for paint, automotive batteries, fluorescent lamps, refrigerant tanks, electronics, and a satellite hazardous waste area). Big thanks to Grounds for helping us move/load pallets of materials!
- With BES, developed a plan for all the moves that will take place with the 5-Year Capital Plan.
- Updated signage in all residence halls and academic/administrative buildings.

2nd Quarter Actions Planned

- Complete Zero-Waste football season (2 games in October; 2 games in November)
- First pickup of fluorescent lamps from Universal Waste Facility (October 24)
- Fall campus cleanup/tree banding (October 4)
- Implement BES&R plan for 5-Year Capital Plan for Denny complex (currently in process; Denny move in December)
- Upgrade and fill vacant Recycling Tech position (position closed; interviews take place November 1-3)

Facilities Management Strategic Planning Session – Fourth Quarter FY 2016



Objective 5.2: Develop a Sustainable Campus

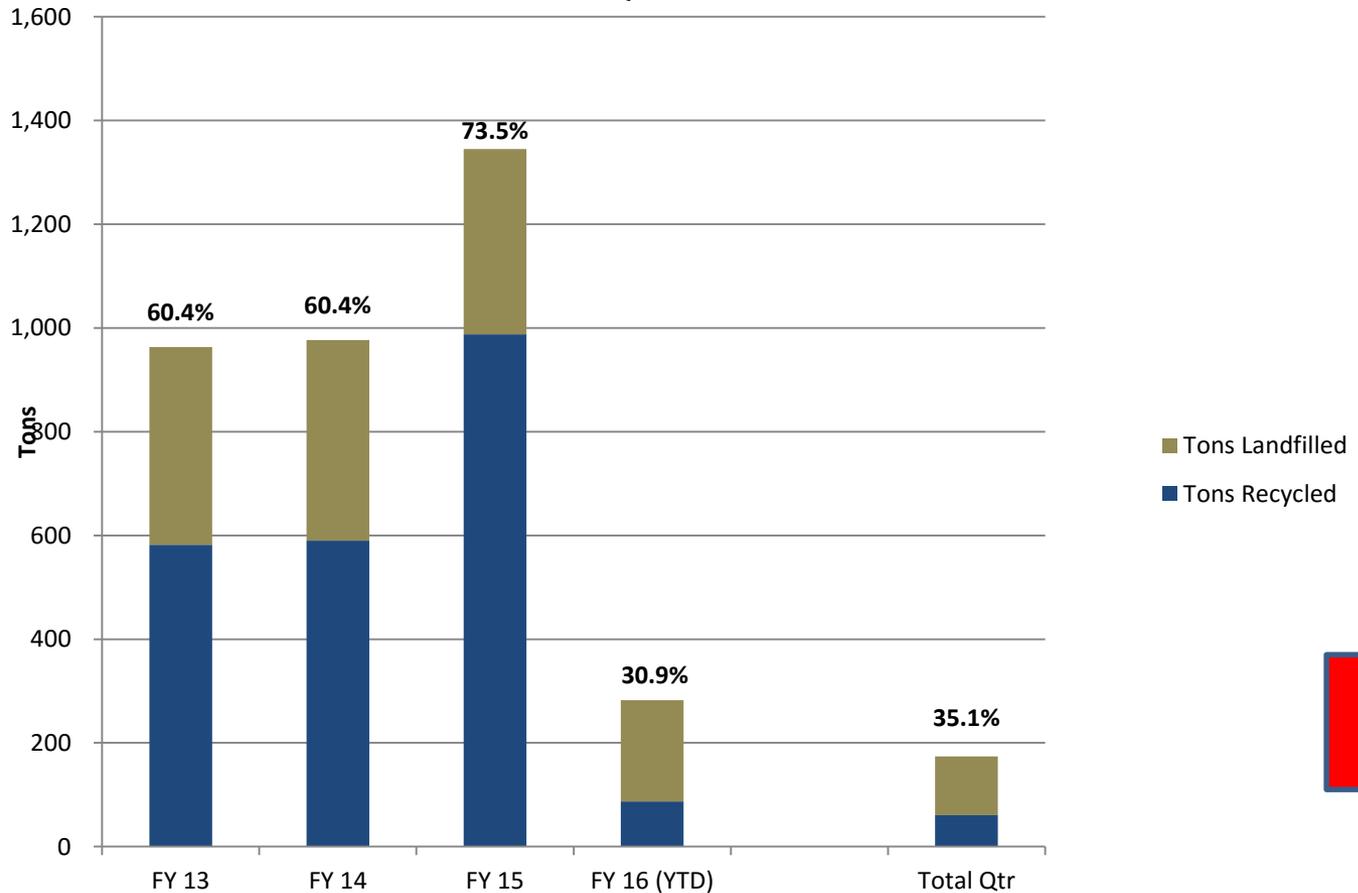
Tactic 5.2.1

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 4th Quarter FY16



STATUS:
4th Qtr



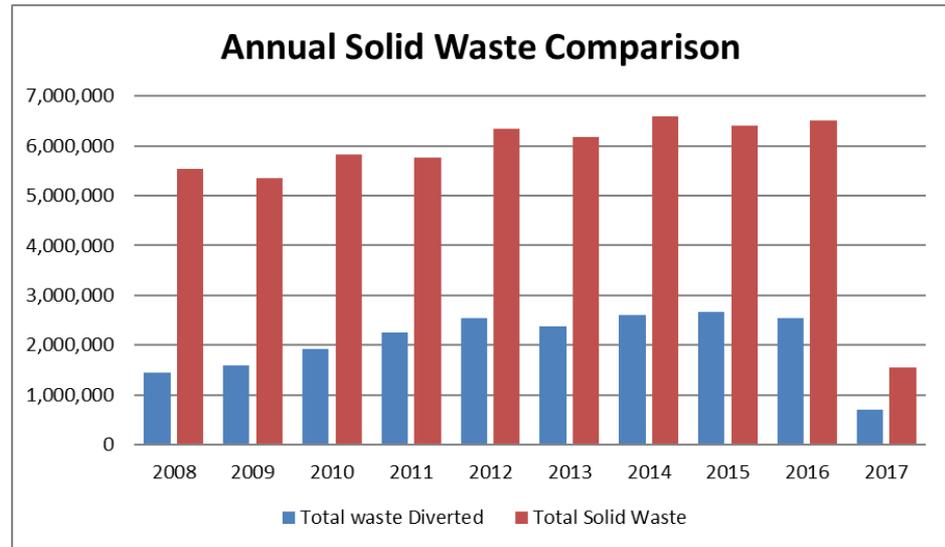
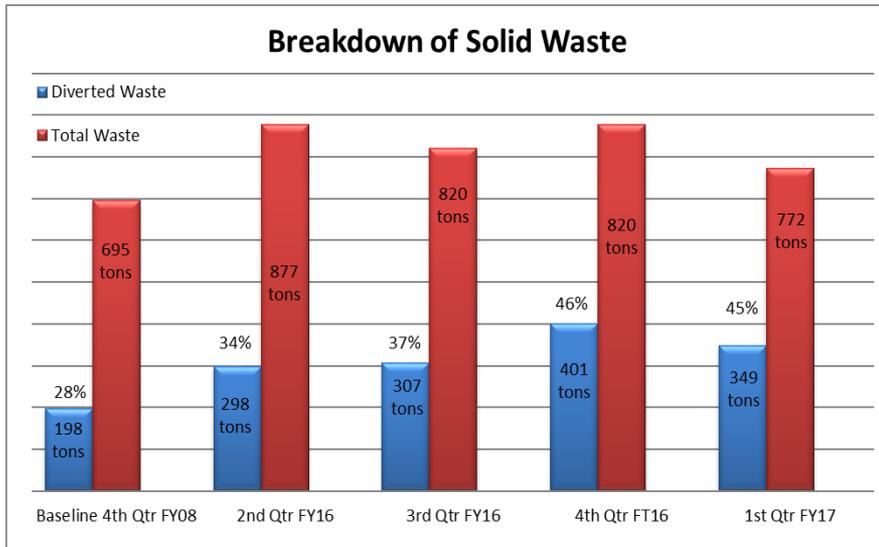
Tactic 5.2.2

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



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 17.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Achieved STARS 2.0 Rating of Silver in October**
- **Breakdown of Credits (earned/available):**
 - **Academics** (29.65/41 = **72%**)
 - **Operations** (24.09/69 = **35%**)
 - **Planning & Administration** (19.64/32 = **61%**)
 - **Engagement** (24.01/41 = **59%**)
- **Determine feasibility of achieving next level (STARS 2.1 Gold) in less than 2 years** (current rating expires, STARS 3.0 revision will move the goalposts)

STATUS

GOAL #5 – Promote Good Stewardship

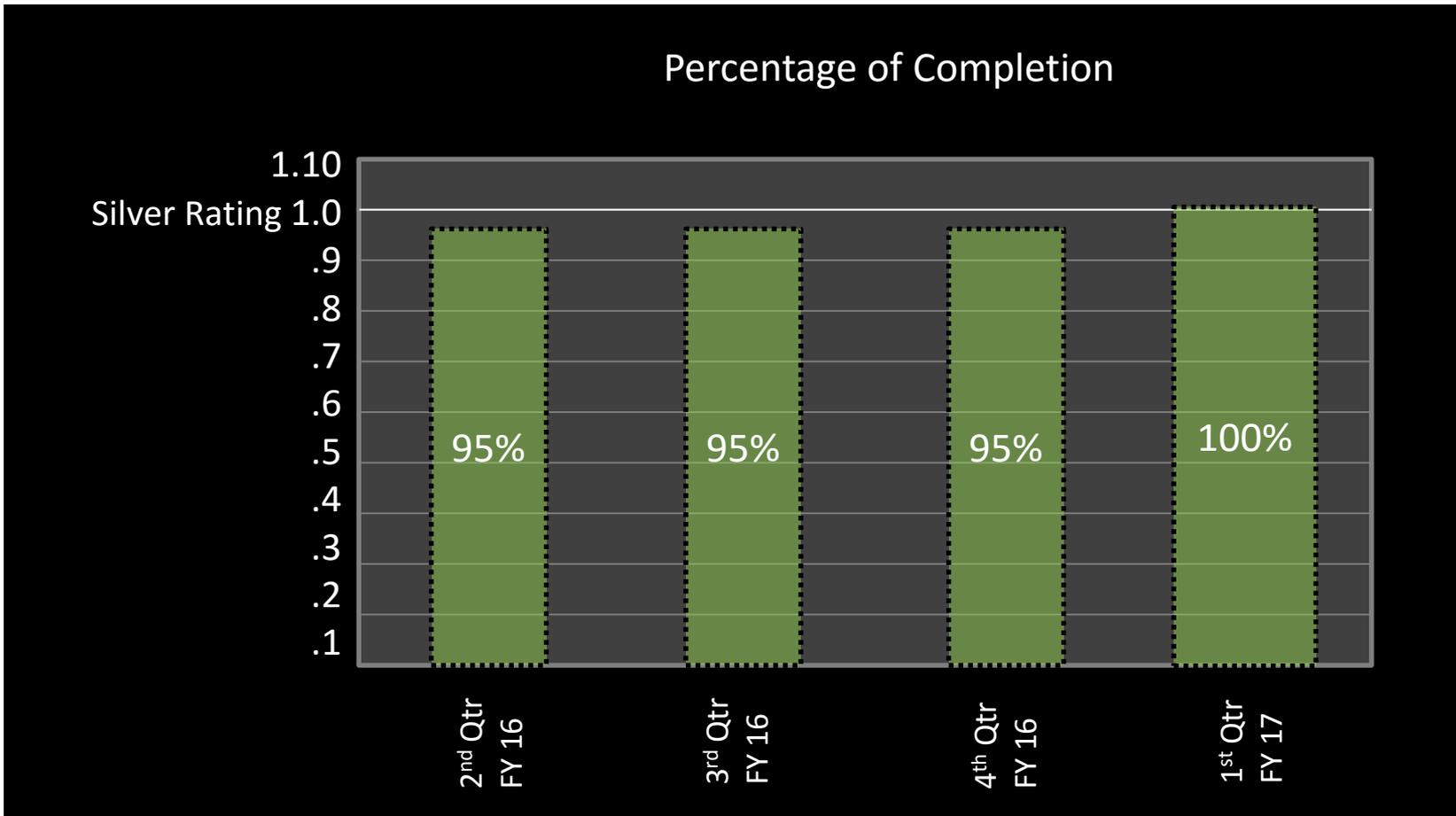
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 17.

Measure: STARS points to achieve silver 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 17.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Apply 7 themes for implementing best practices:**
 1. Assessment (STARS Completed; retained Princeton Review Green Guide standing)
 2. Faculty Development for Curriculum (2017 Workshop for Faculty)
 3. Campus as a Laboratory (CGI: \$21k for studies underway, EPA Rainworks)
 4. Outreach Communications (Website development, Campus Sustainability Week)
 5. Design Standards (Green Building Review; CGI projects; CFAT Vehicle Charging)
 6. Standard Operating Procedures
 7. Purchasing Practices
- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by end of 2017**

STATUS

GOAL #5 – Promote Good Stewardship

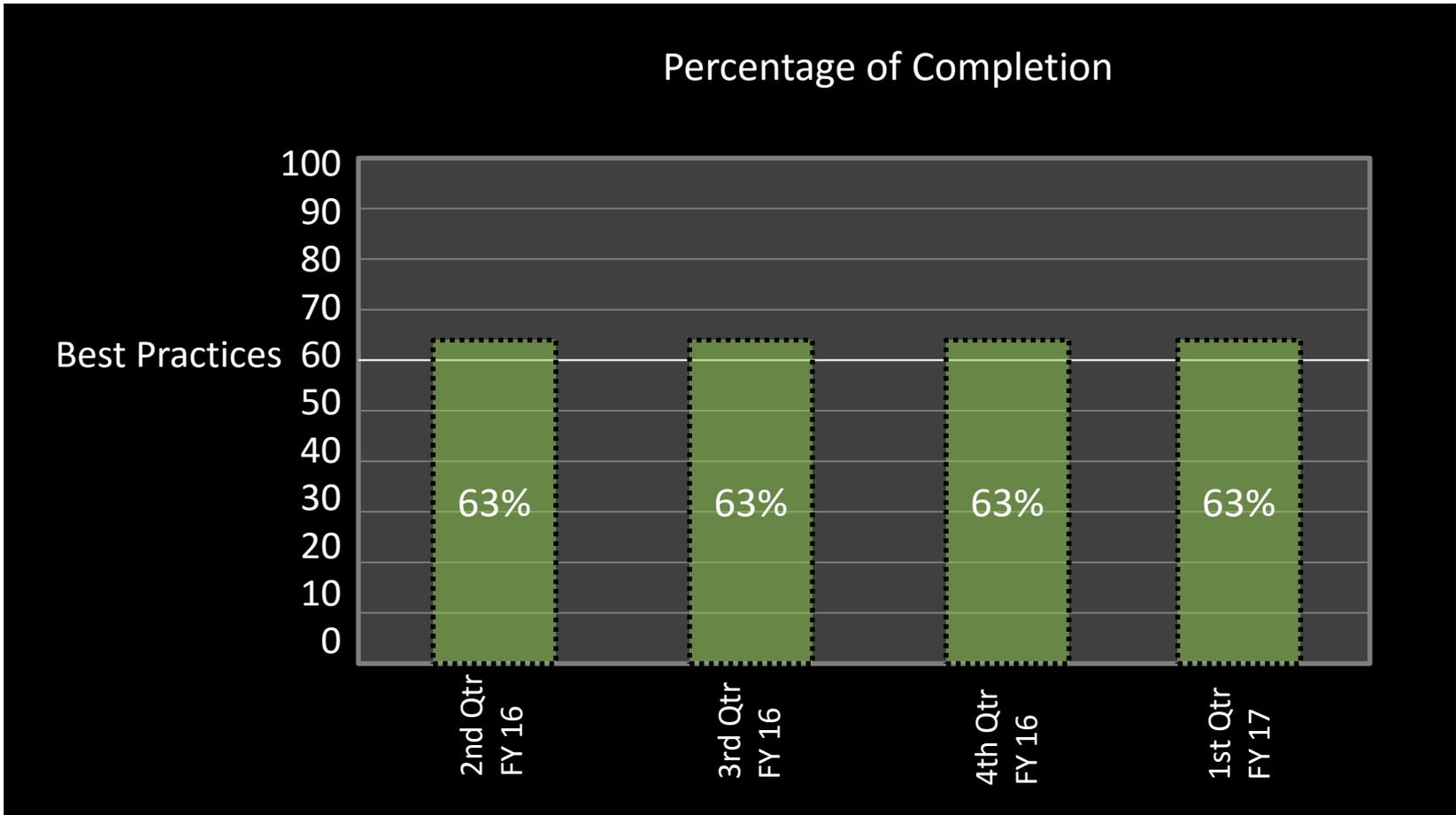
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 17.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #5 – Promote Good Stewardship

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

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Retro-commissioning program
 - Cameron, McEniry, & Smith completed
 - Grigg & Woodward Contracts are being processed
- Exterior Lighting upgrades to LED
 - 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 40% by FY2025

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

Retro Commissioning Results

- McEniry
 - RCx costs \$65,000 (\$0.57/GSF)
 - Repairs \$19,000
 - Electric Payback 30 months
- Smith
 - RCx costs \$42,000 (\$0.45/GSF)
 - Repairs \$37,000
 - Electric Payback 9 years
- Cameron
 - RCx Costs \$98,000 (\$0.67/GSF)
 - Repairs \$137,000
 - Electric Payback 15 years

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

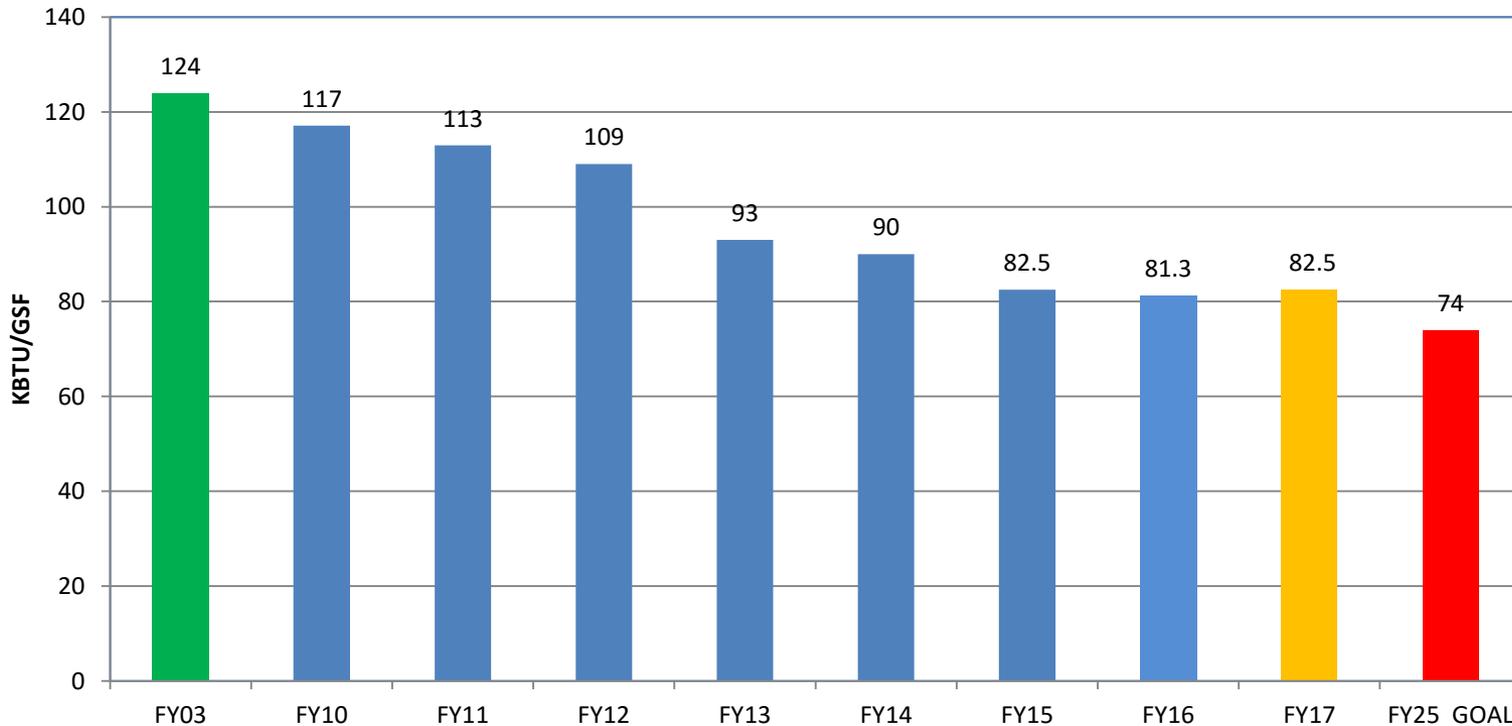
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

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

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship - First Quarter FY2017**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**

Continue . . .

- 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
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO to ensure HUB information accurately reflected in InterscopePlus

GOAL #5 – Promote Good Stewardship

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

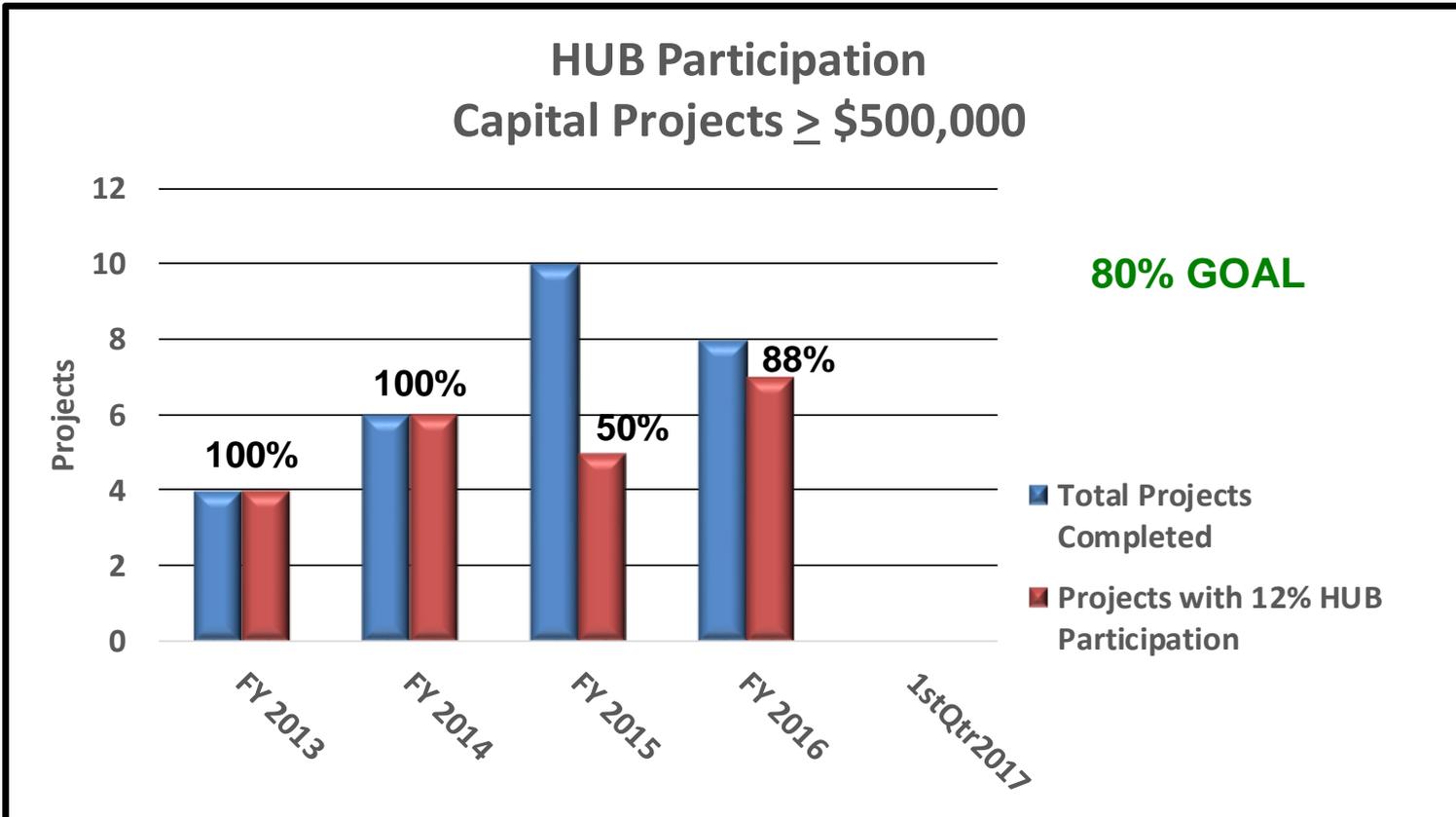
Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

No Projects To Report



1stQtr FY2017
STATUS

GOAL #5 – Promote Good Stewardship

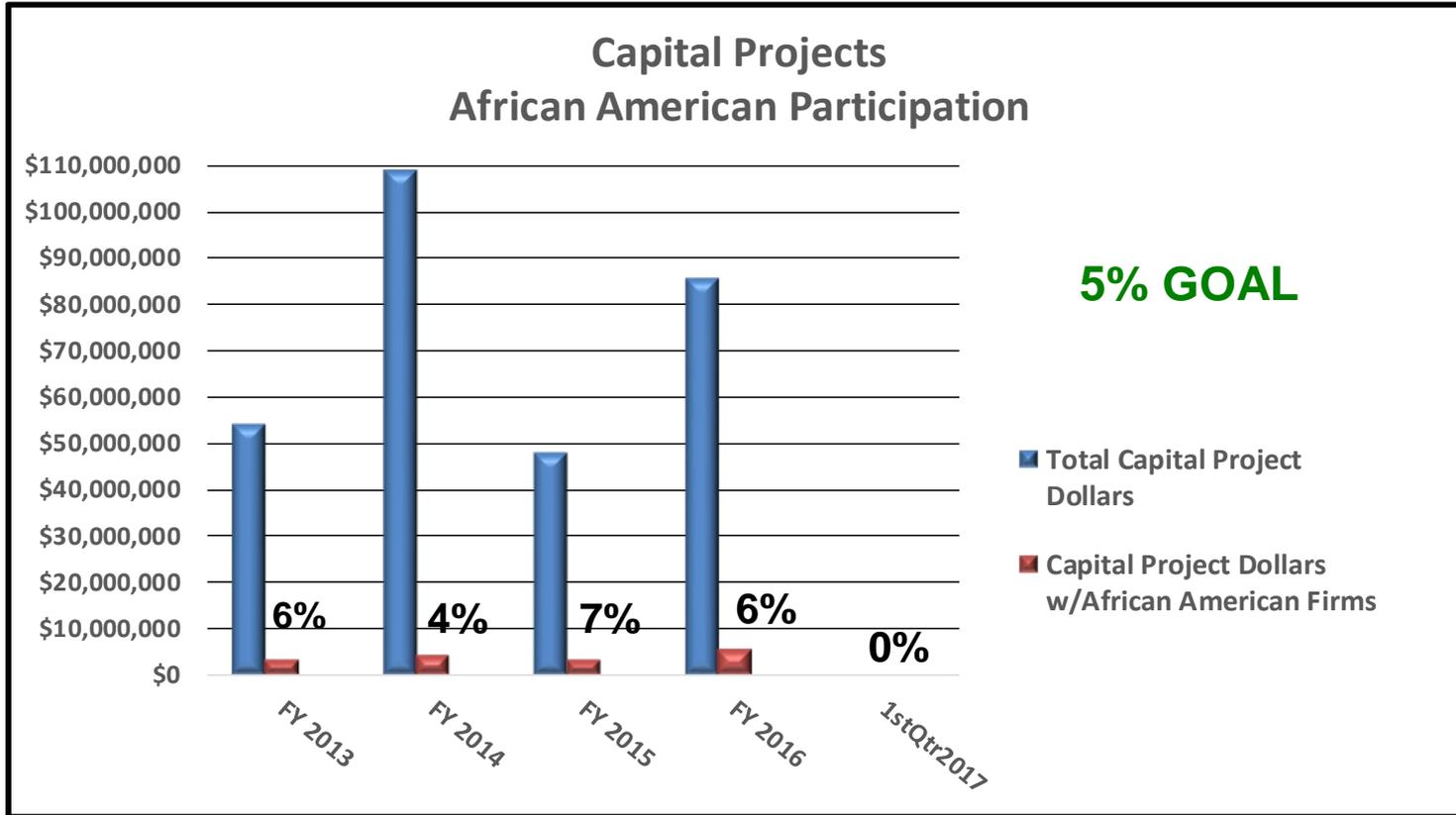
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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 **No Projects To Report**



1stQtr FY2017
STATUS

GOAL #5 – Promote Good Stewardship

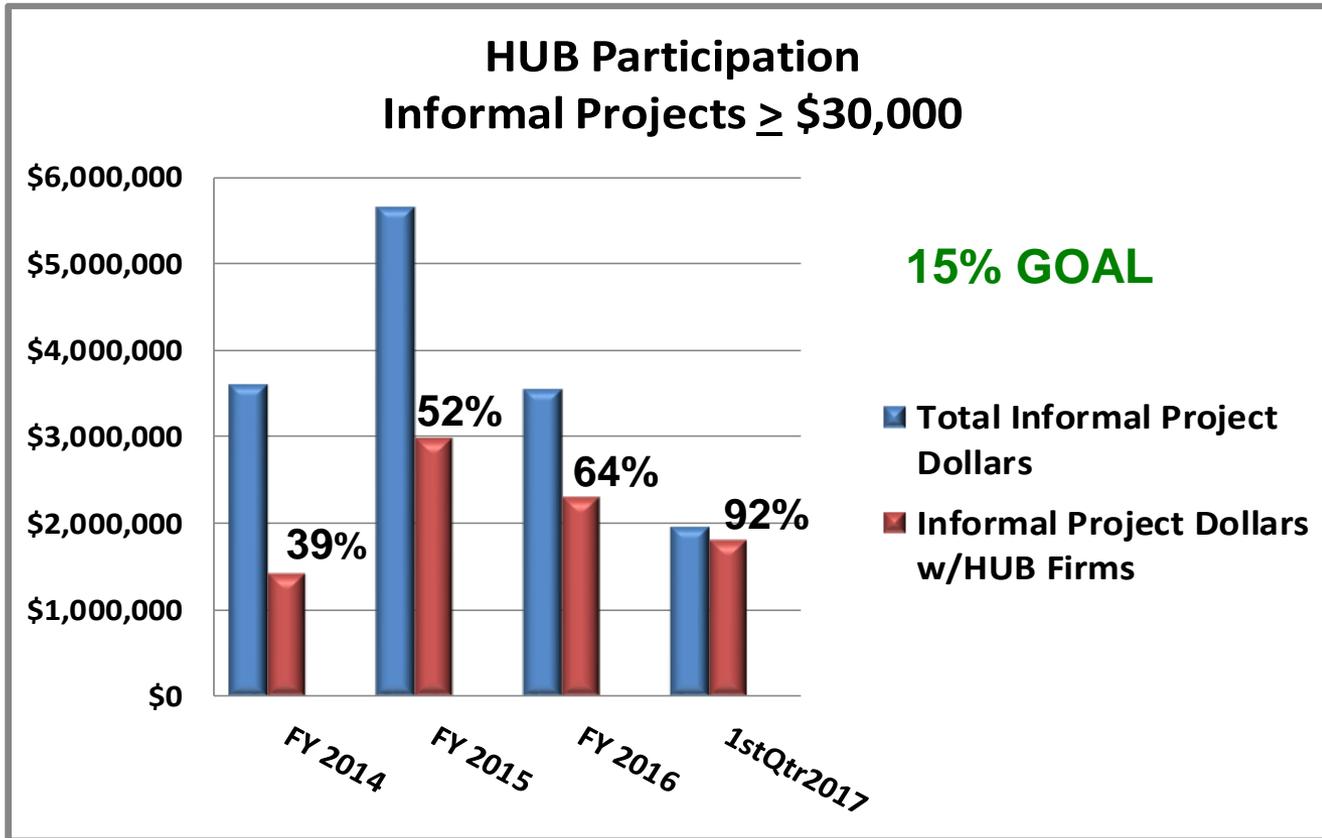
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



1stQtr FY2017
2STATUS

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

Ashley Sisco with Design Services is assisting Amanda Caudle with outreach for more African American contractors and verification of HUB contractor involvement.

ONGOING IMPROVEMENTS

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

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 and Ashley Sisco act as advisors to other Design Services Project Coordinators.

Facilities Management Strategic Planning Session – First Quarter FY 2017

Annual Goal
13%

QTR 1 Status
39.4%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

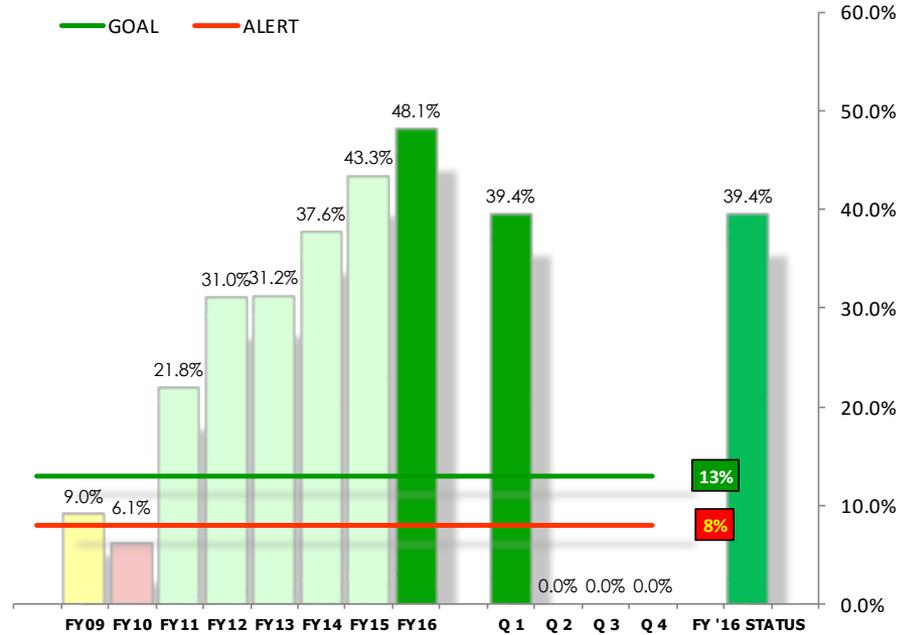
Balanced Scorecard Category: Internal Business Process

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**

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%
FY16	\$ 2,605,540	\$ 1,252,152	48.1%
Q 1	\$ 450,049	\$ 177,283	39.4%
Q 2	\$ -	\$ -	0.0%
Q 3	\$ -	\$ -	0.0%
Q 4	\$ -	\$ -	0.0%
FY '16 STATUS	\$ 450,049	\$ 177,283	39.4%

13% Overall HUB Participation – Summary Graph



Annual Goal
3%

QTR 1 Status
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
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%
FY16	\$ 2,605,540	\$ 47,345	1.8%
Q 1	\$ 450,049	\$ 0	0.0%
Q 2	\$ -	\$ -	0.0%
Q 3	\$ -	\$ -	0.0%
Q 4	\$ -	\$ -	0.0%
FY16 STATUS	\$ 450,049	\$ 0	0.0%

3% African American Participation – Summary Graph

