

A large group of people, likely staff and faculty, are seated in bleachers for a group photo. In the foreground, a white banner is held up, featuring the text 'APPA Award for Excellence' and 'AGENDA'. The background is a faded image of the group.

Facilities Management Quarterly Strategic Planning Session

**First Quarter – Fiscal Year 2018
July – September 2017**

APPA Award for Excellence
UNC Charlotte
WVU
AGENDA
APPA

Opening – Phil Jones

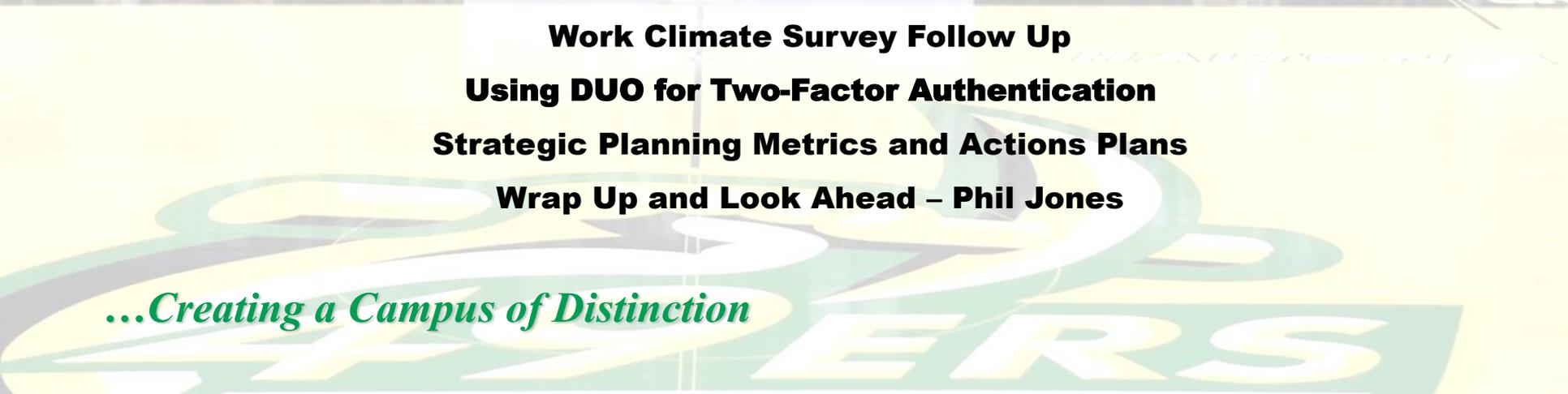
Work Climate Survey Follow Up

Using DUO for Two-Factor Authentication

Strategic Planning Metrics and Actions Plans

Wrap Up and Look Ahead – Phil Jones

...Creating a Campus of Distinction

A large, stylized logo for 'Campus of Distinction' is visible in the background. It features the word 'DISTINCTION' in a large, green, serif font, with 'CAMPUS OF' in a smaller, green, sans-serif font above it. The logo is set against a yellow and green background.



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

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 (on-going)
2. Follow up discussion to implement recommendations from RSM
3. Working w consultant to discuss WO process and materials acquisition strategies
4. Further consolidation of Admin Support Group

Actions Completed

1. Completed assignment of lead technician in absence of supervisor.
2. Working with FIS to integrate (API with Kronos and ARCHIBUS) employee leave time

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

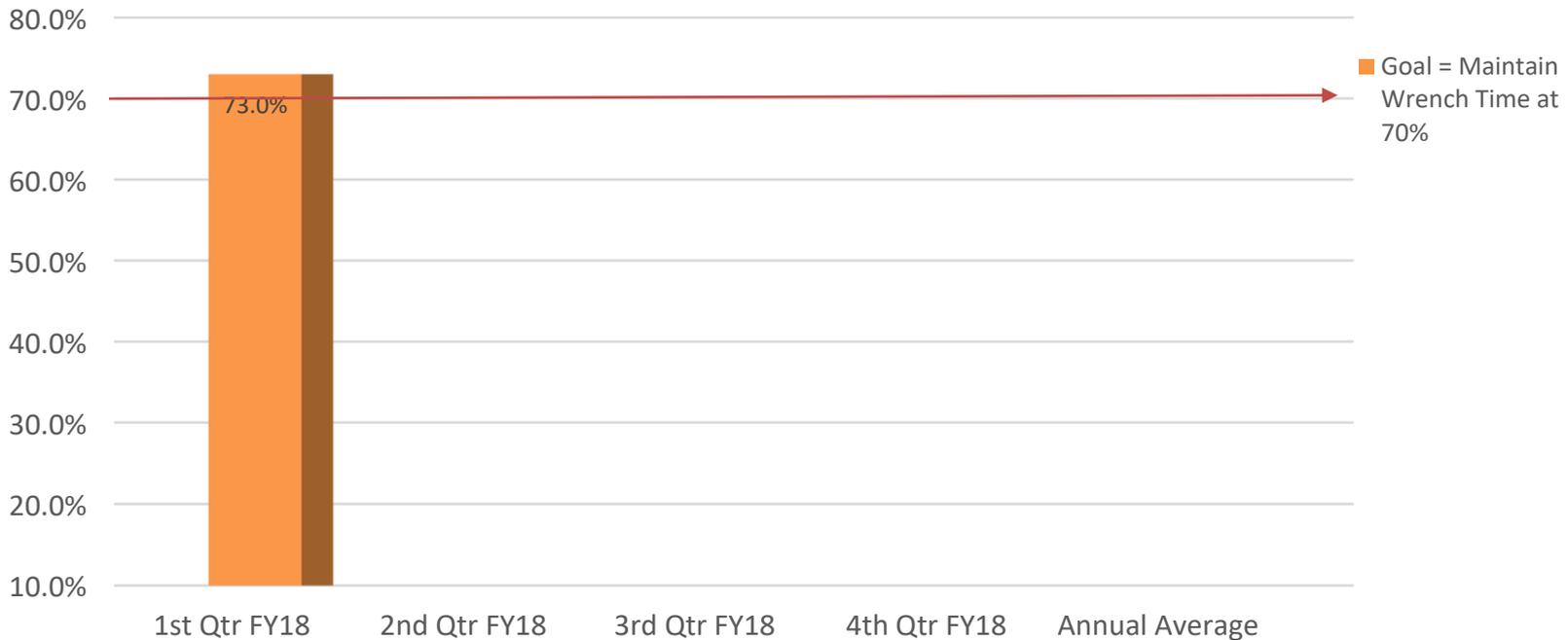
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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. Working w consultant to discuss materials acquisition strategies

Actions Completed

1. Remove Key & Lock Shop (long lead materials) from the Requisition to Receipt time
2. Assigned additional approvers to help expedite the process.
3. Streamlined stock inventory
4. Implemented email notification process for SDI orders

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

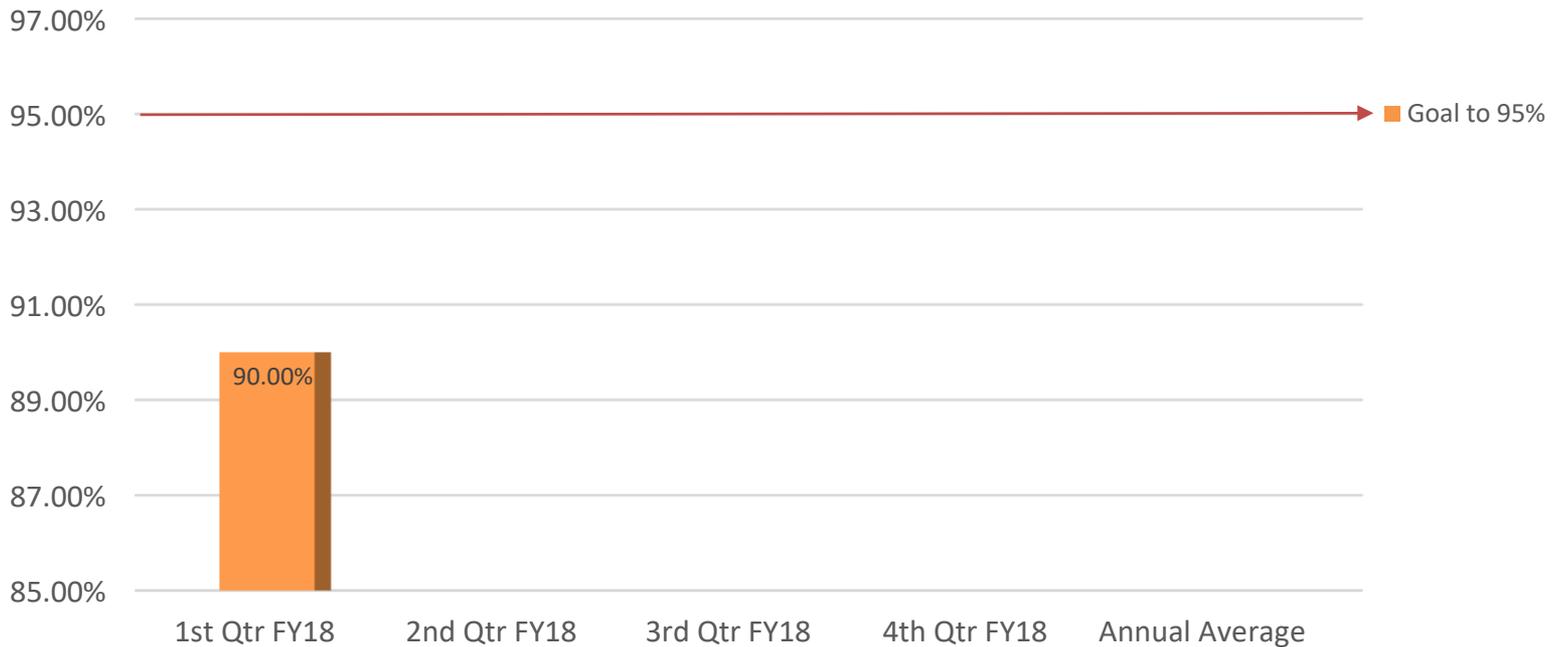
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

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

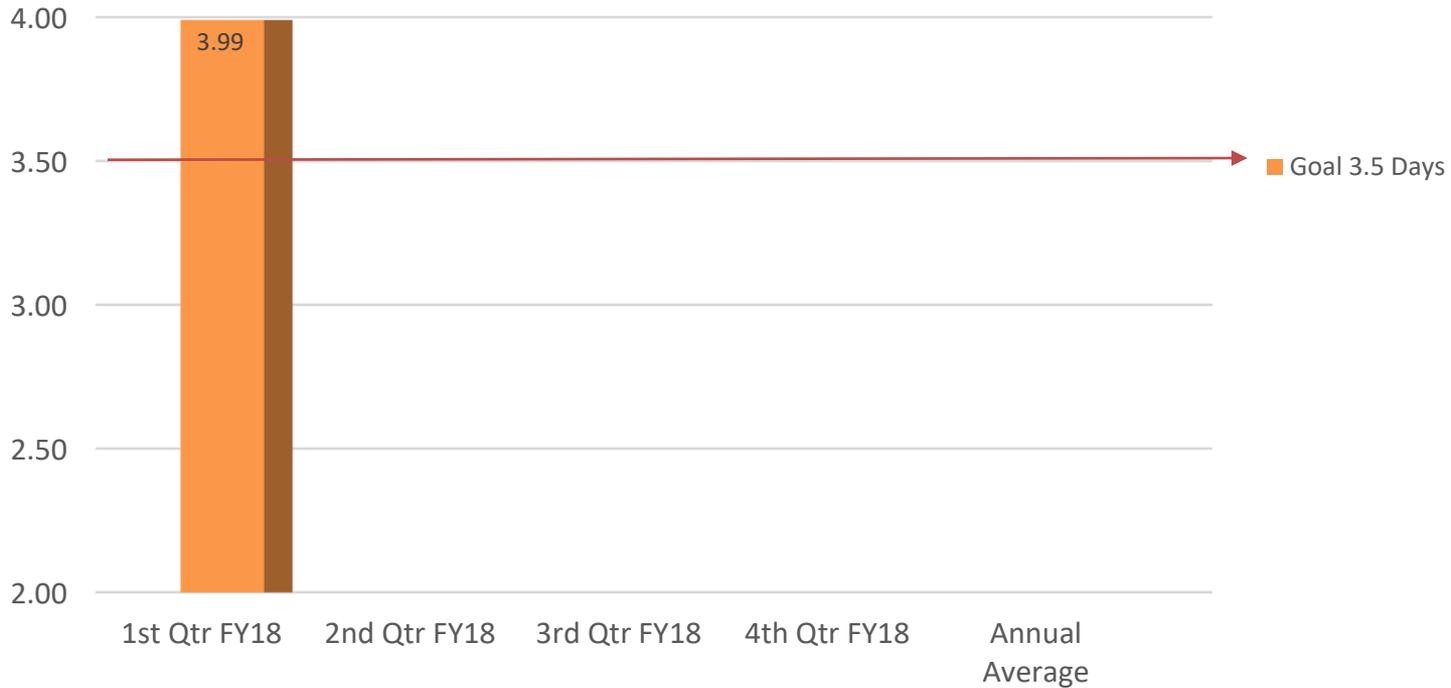
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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. Implementing tablets for technicians (five tablets per zone/shop); Working with FIS to complete implementation
2. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request. (on-going)
3. Monthly review with Supervisors to monitor 30 Day Report; Admin Support Group compiles data (on-going)
4. Supervisors meeting with technicians on a daily basis to prioritize work assignments. (on-going)
5. Continue consolidation of Admin Support Group and working with Grounds on process improvement

Actions Completed

1. Reduced active work orders on 14 Day Report by 40%.

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



STATUS
1st Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

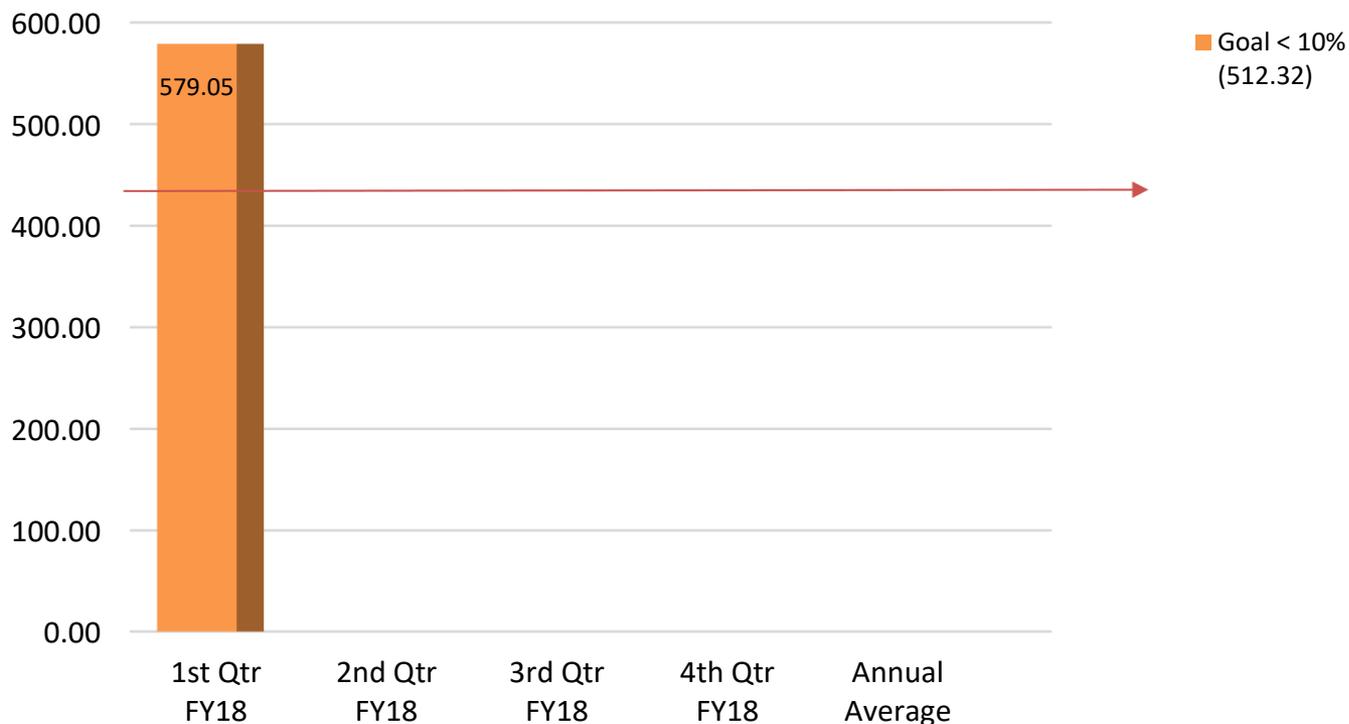
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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

Facilities Management Strategic Planning Session – First Quarter FY 2018

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

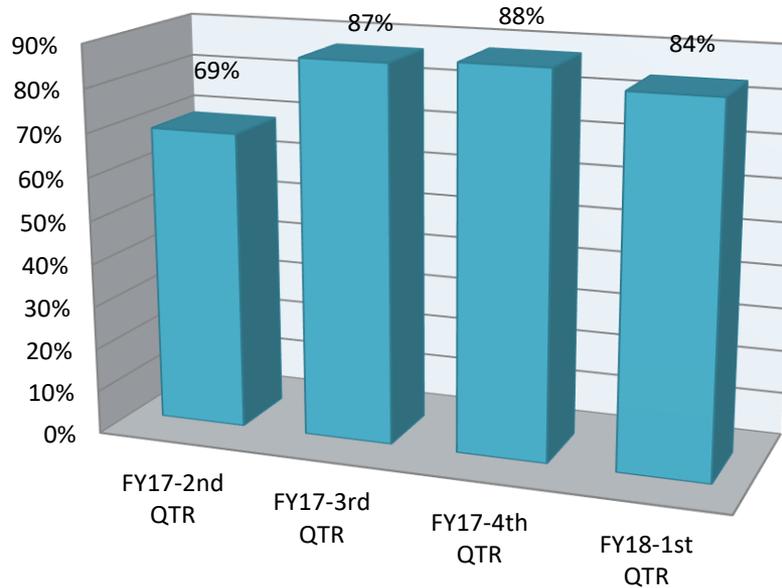
Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Lead: Building Environmental Services

Balanced Scorecard Category: Customer Perspective

APPA LEVELS

Percentage = 84%



STATUS

GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes
Tactic 1.4.2: Achieve APPA Level 2 in 98% of Buildings

Lead
BES

ACTION PLAN

- **Actions Completed**
 - Developed BES&R Performance Management Checklist
 - Completed initial BES-001 Hiring Pool for BES Contributing Positions
- **Actions Planned**
 - Complete revised standard work document for hiring – Pool hiring for Contributing positions (10/2017)
 - Implement new BioInformatics work loading (10/2017)
 - High Performance Team Cleaning (HPTC) Bootcamp – Grigg Zone (11/2017)
 - Implement new APPA Appearance forms into quarterly audits (11/2017)
 - Place Lead Tech keys into the Key Boxes (11/2017)
 - Implement High Performance Team Cleaning in all Academic and Administrative buildings (3/2022)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)

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; targeting specific areas Fire Systems, High Voltage, Zone 4/Dining Services (Fall 2017)
 - Load test sequence for generators and fire suppression systems for coordination
2. Continue expansion of PM Program; Work with key customers – Auxiliary Services (80% completed; on-going)
3. Continue to identify non-traditional equipment that requires PM (on-going)
4. FCAP will continue to identify and prioritize equipment conditions and needs, for replacement; This information is used to support CRDM projects. (on-going)
5. Conversion of old PM Module to new PM Module – October 2017
6. Hire BIM (Building Information Modeling) Manager – October 2017

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Re-implementing VDC/ILM (Virtual Design Construction/Integrated Lifecycle Management) program (Fall 2017)
3. Restructure the ARCHIBUS PM Equipment Manager module.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

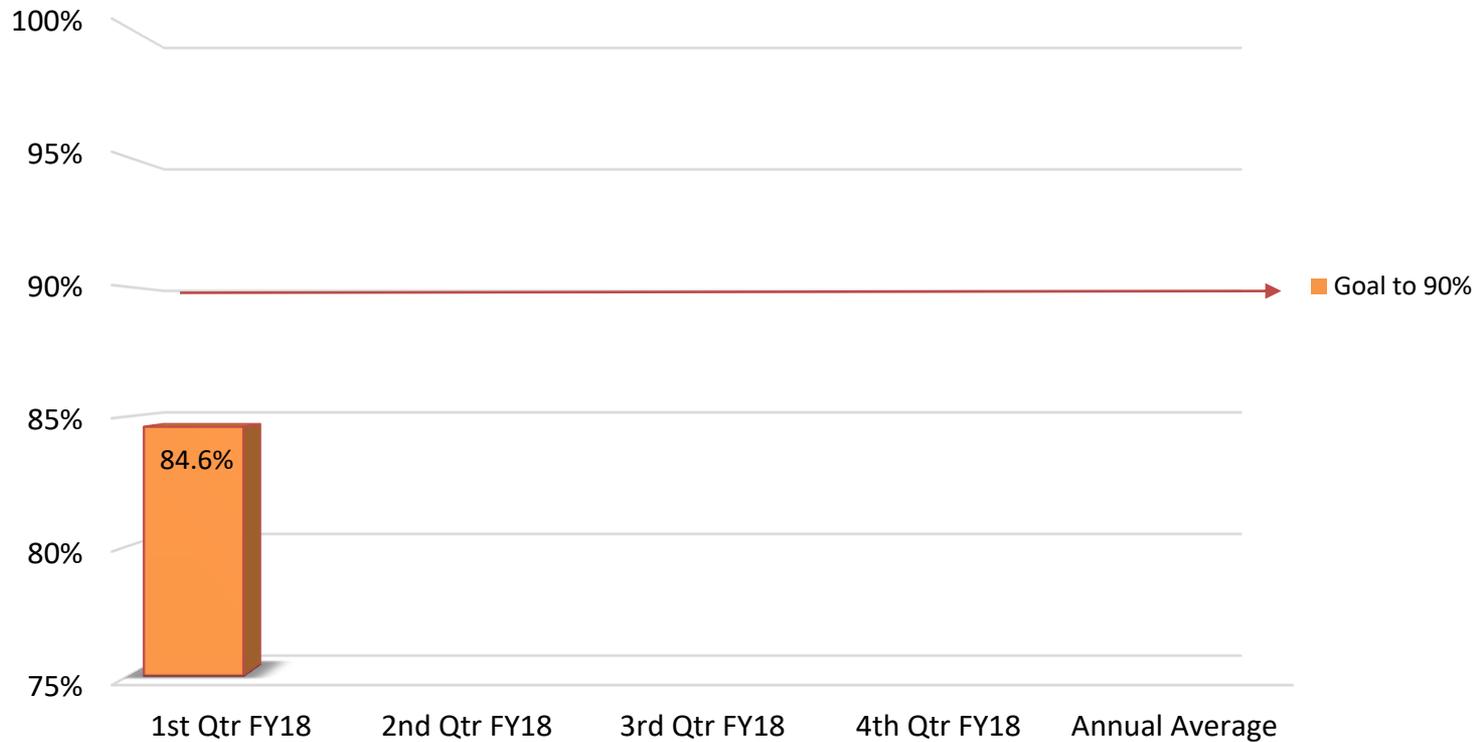
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

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

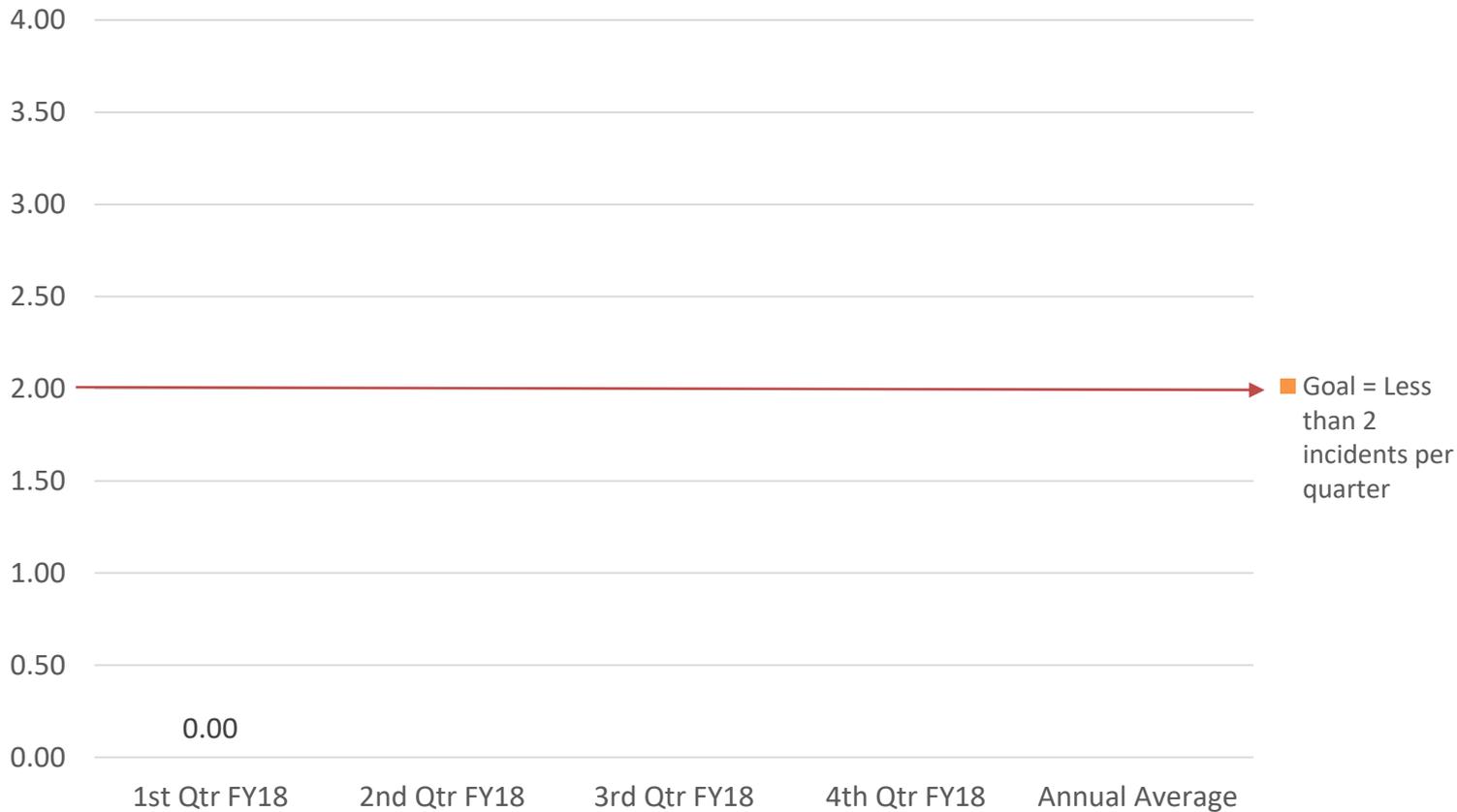
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

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

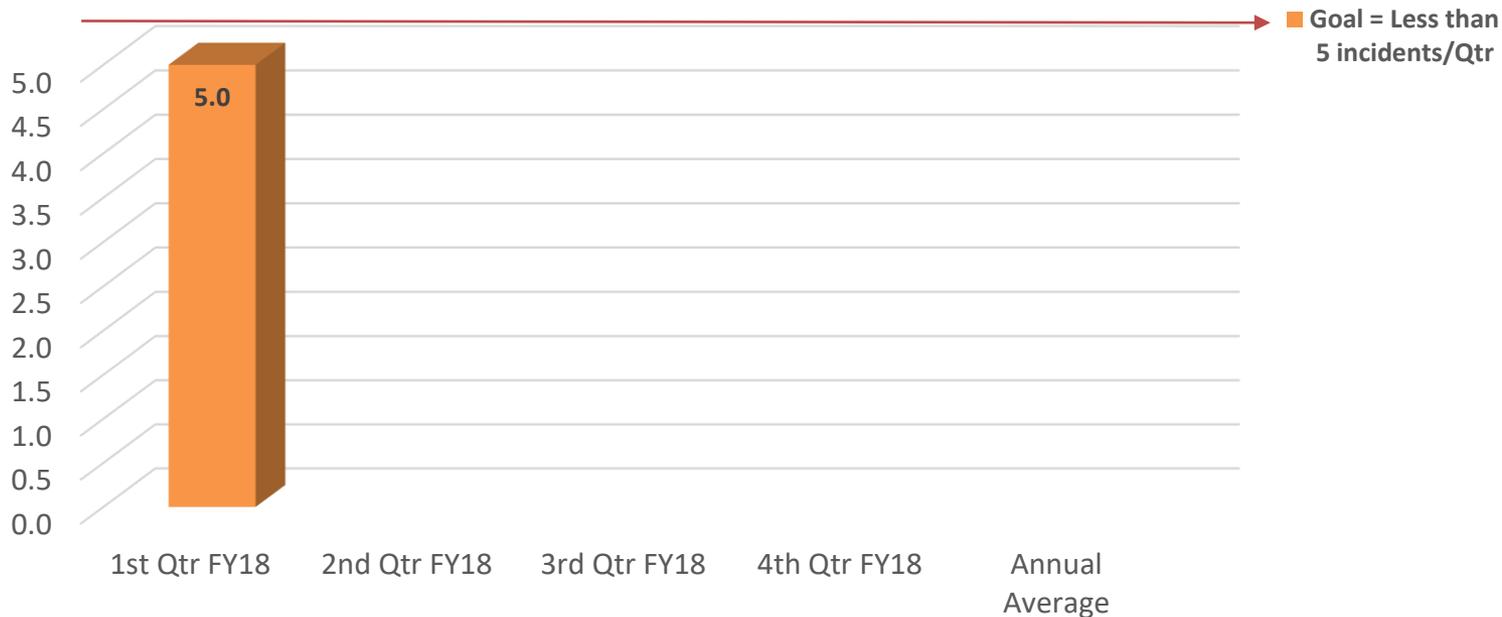
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

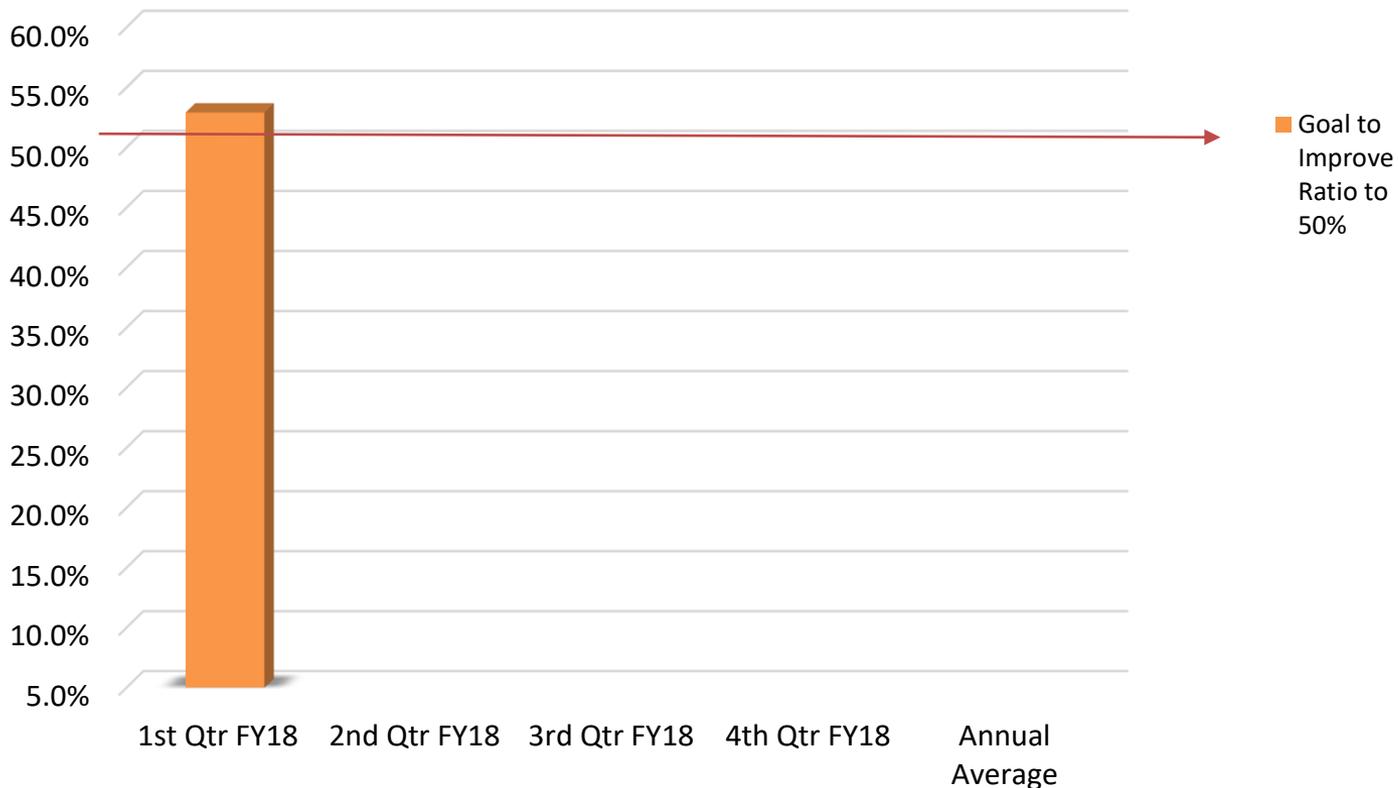
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

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



Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

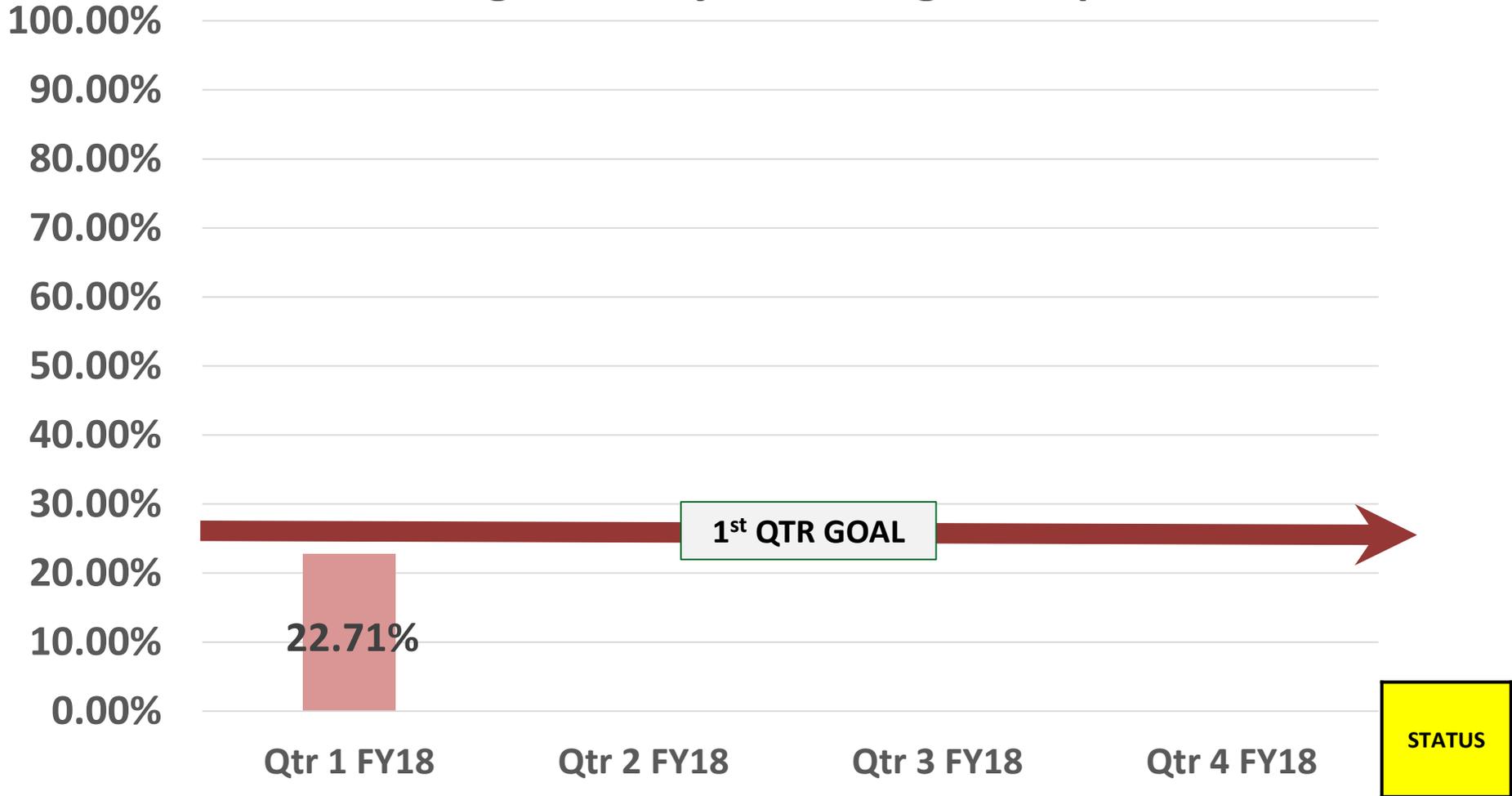
Objective: 2.1 **Maximize Facilities Management Effectiveness and Efficiency through Information Technology**

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



Facilities Management Strategic Planning Session – First Quarter FY 2018

**Lead
FIS**

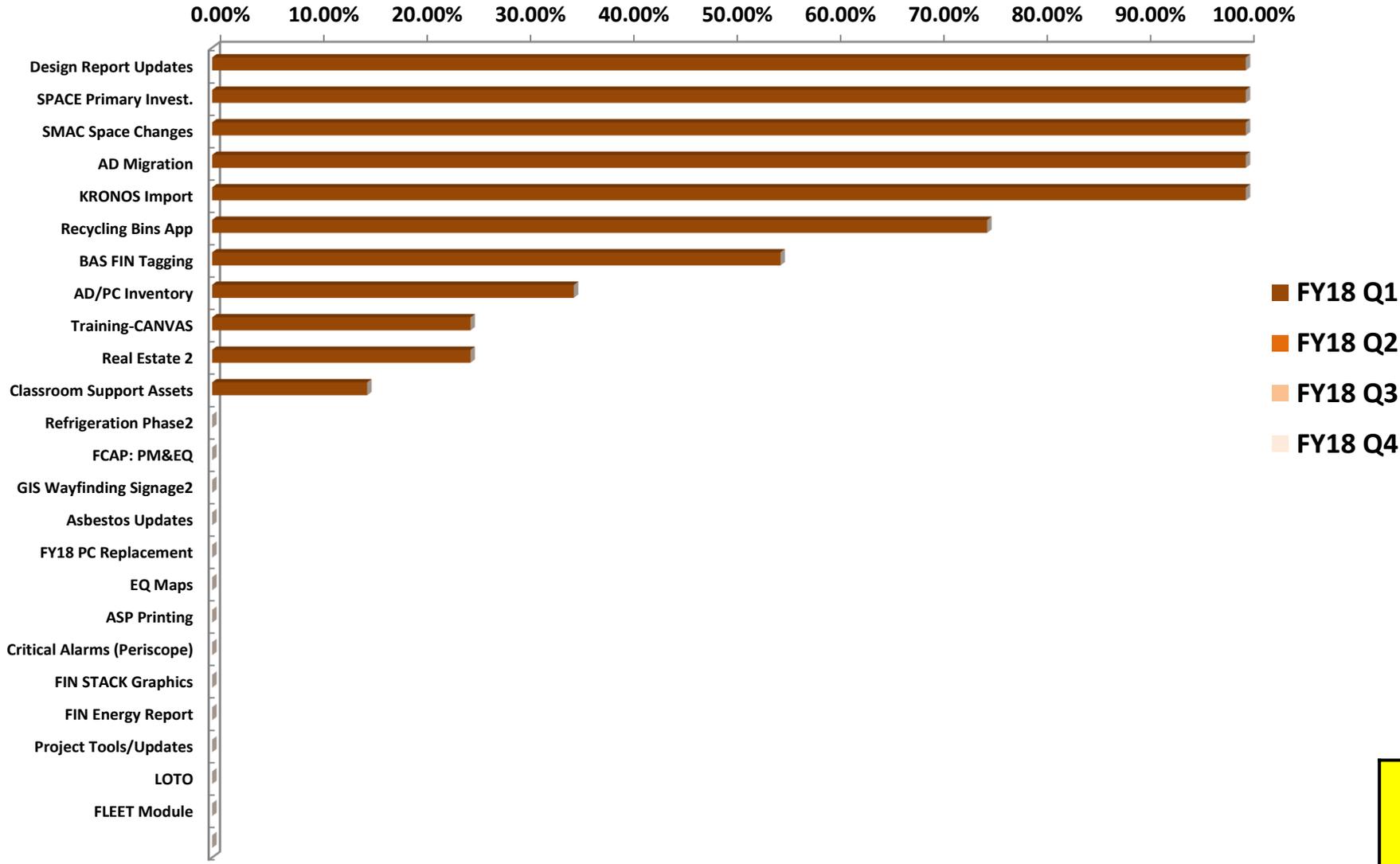
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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



STATUS

FM Prioritized Projects – FY18

1. **Equipment Maps** – Est. Apr 30, 2018
2. **ARCHIBUS Fleet Module** – *(Awaiting Funding)*
3. **ARCHIBUS WO Reinvention** – Est. Jun 30, 2018
4. **Department Drop boxes** - Est. Mar 30, 2018
5. **ARCHIBUS Testing Framework** - Est. Apr 30, 2018
6. **GIS Department Map** - Est. Apr 15, 2018
7. **Mobile Intent Reinvention** – Est. Jun 30, 2018
8. **Remote Key Admins** – Est. Jun 30, 2018
9. **Mobile Floor Plans** – Est. Jun 30, 2018
10. **GIS Wayfinding Signage** – Est. Jun 30, 2018
11. **Primary Investigators (SPACE)** – **Completed**
12. **Design Services Report Updates** – **Completed**
13. **KRONOS Training Import** - **Completed**
14. **AD PC Inventory Clean Up** – Est. Nov 15, 2017
15. **BAS FIN Tagging** – Est. Apr 30, 2018
16. **Critical Alarms (Periscope & FIN)** - Est. Apr 30, 2018
17. **FIN STACK Graphics** – Est. for Jun 30, 2018
18. **FIN STACK Energy Report** – Est. Jun 30, 2018
19. **Active Directory Migration Clean Up** – **Completed**
20. **FY18 Computer Replacement Project** – Est. Mar 15, 2018
21. **ARCHIBUS Canvas Training** – Est. June 30, 2018
22. **Refrigeration Compliance Phase 2** – Est. Nov 30, 2017
23. **BES Recycling Bin Revamp** – Est. Dec 15, 2017
24. **Real Estate Phase 2** – Est. Jan/Feb 2018
25. **FCAP: PM & Equipment** – Est. Jun 30, 2018
26. **Classroom Support Asset Tracking** – Est. Nov 30, 2017
27. **ARCHIBUS Lockout/Tag Out (LOTO)** – Est. Mar 15, 2018
28. **ASP Printing Revisions** – Est. Jun 30, 2018
29. **49er Mart Integration (Jaggaer)** – *(Awaiting Funding)*
30. **Asbestos Updates** – Est. Nov 15, 2017
31. **Project Management Tools/Updates** – Est. Jun 30, 2018
32. **Space Committee Changes (SMAC)** – **Completed.**
33. **Open Options Integrations (HRL)** – *(Awaiting Approval)*
34. **Risk Management Module** – *(Awaiting Safety Decision)*
35. **Card Office EQ Management** – Est. Jun 30, 2017

**Projects awaiting funding or approval are not calculated in project tasks.*

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. Hire GIS Developer position by Nov 30, 2017.
2. Complete the BINS Mobile App and testing for Recycling inventory process by Oct 15, 2017.
3. Begin Work Order Reinvention Improvement project meetings by Oct 20, 2017.
4. Complete Classroom Support Asset tracking mobile application by Nov 30, 2017.
5. Complete Refrigeration Phase 2 project by Nov 30, 2017 for user training to begin by Jan 2018.

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 the list of FY18 projects.
2. Completed and finalized Importing/FIN Tagging for BAS.
3. Rolled out WR PM App with 60 assigned Samsung Tablets.
4. Completed Building Graphics for FIN.
5. Completed HTML5 Floor Plans for ARCHIBUS.
6. Completed setup for BIM Data Import of Student Health.
7. Completed Primary Investigators (SPACE).
8. Completed Kronos Import.
9. Completed AD Migration Clean Up.
10. Completed Design Services Report Requests

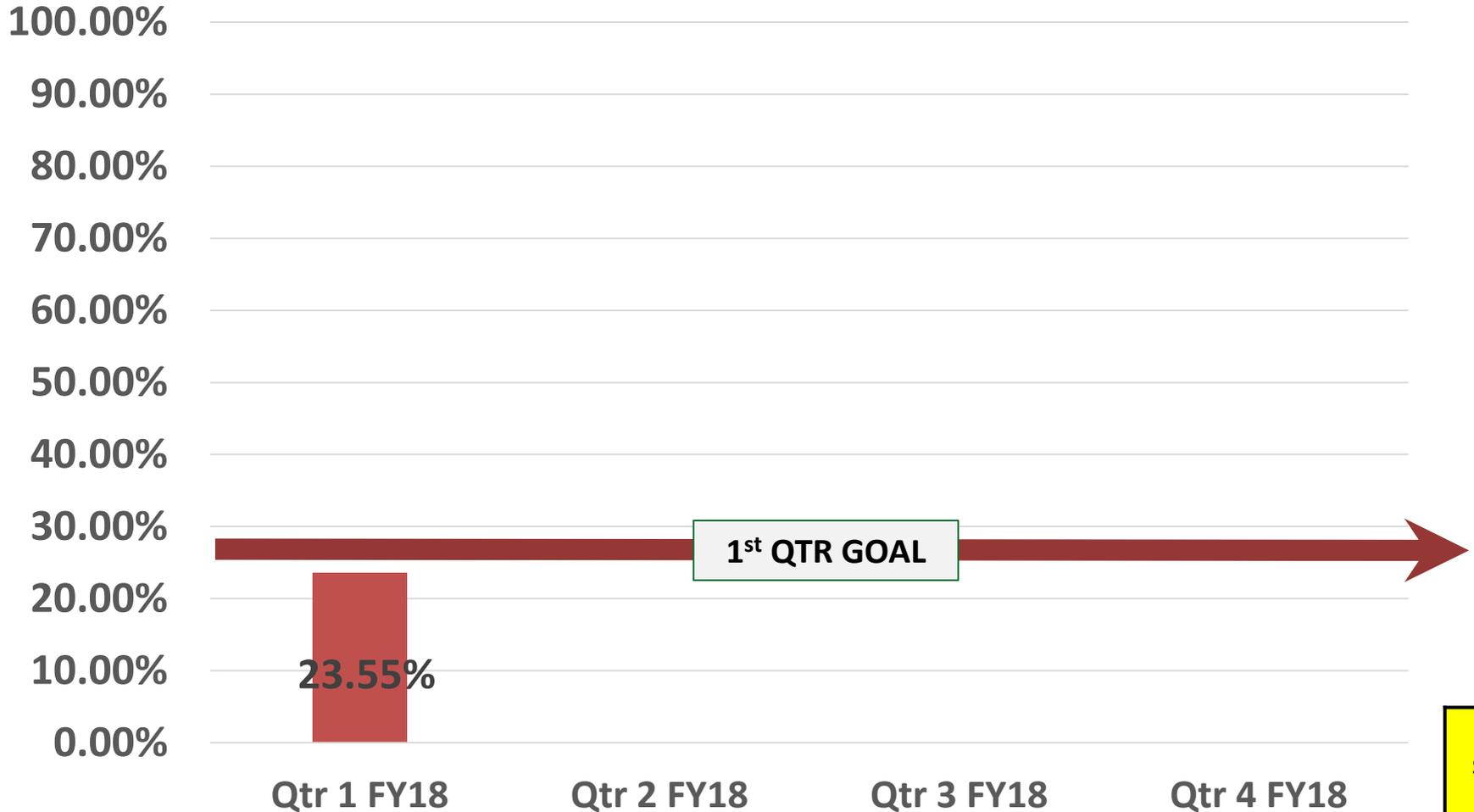
Lead
FIS

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 Project Task Cumulative Completion Average



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Recently Implemented – Currently in Test Phase:

- **Invoice – Purchase Order Management** – ARCHIBUS: Eliminates an intense excel spreadsheet with potential for errors. Provides a real time, date driven review of invoicing for all contracts including ITS and The AISLE Group (Classroom Support).
✓ *Timeline: **FY18 QTR 1 - Testing during QTR 2***

Code Reviews and Meetings with Environmental Health and Safety:

- PORTAL review meeting on three code subjects outlined in an Inspection Report from EH&S.
- FM – Police & Public Safety review document on one code subject.
- Student Union review meeting on egress code.
✓ *Timeline: **FY18 QTR 1 - FY18 QTR 4 – Work In Progress***

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
- Meet with Customers to help them understand our full set of processes. This may occur over the phone.

Facilities Management Strategic Planning Session – First Quarter FY 2018

Annual Goal
95%

QTR 1 Status
95.2%

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

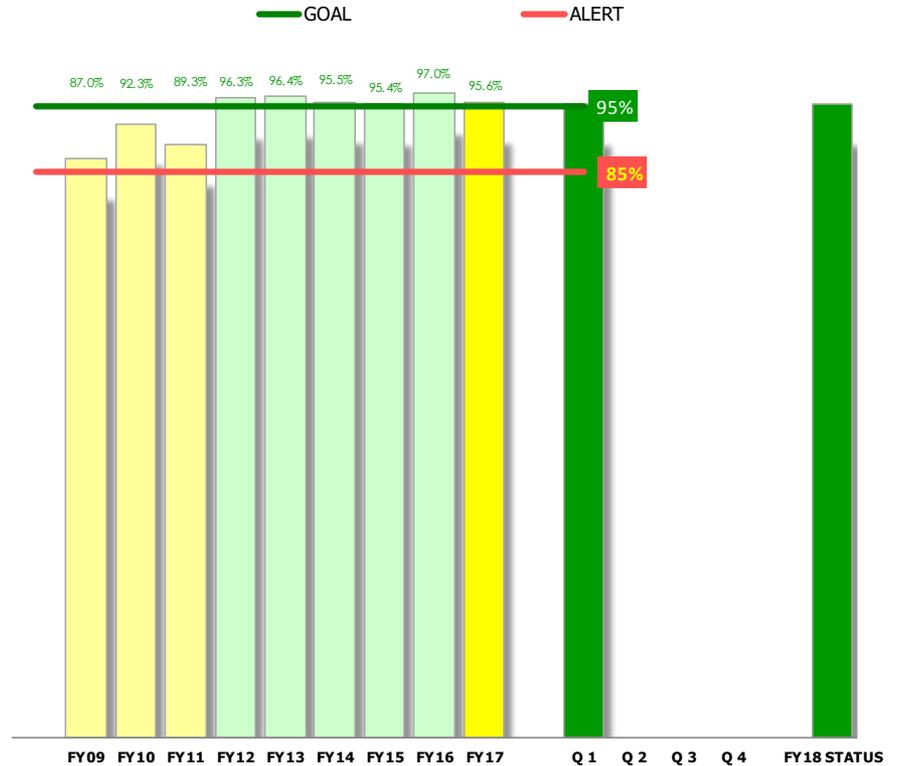
Balanced Scorecard Category: Internal Business Process

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)

FY 18

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%
FY17	205	196	9	95.6%
Q 1	21	20	1	95.2%
Q 2	0	0	0	0.0%
Q 3	0	0	0	0.0%
Q 4	0	0	0	0.0%
FY18 STATUS	21	20	1	95.2%



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 2018.

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 2018).
- Developed “Third Generation” CRDM – Forecasting reports for roofs (January 2018)

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

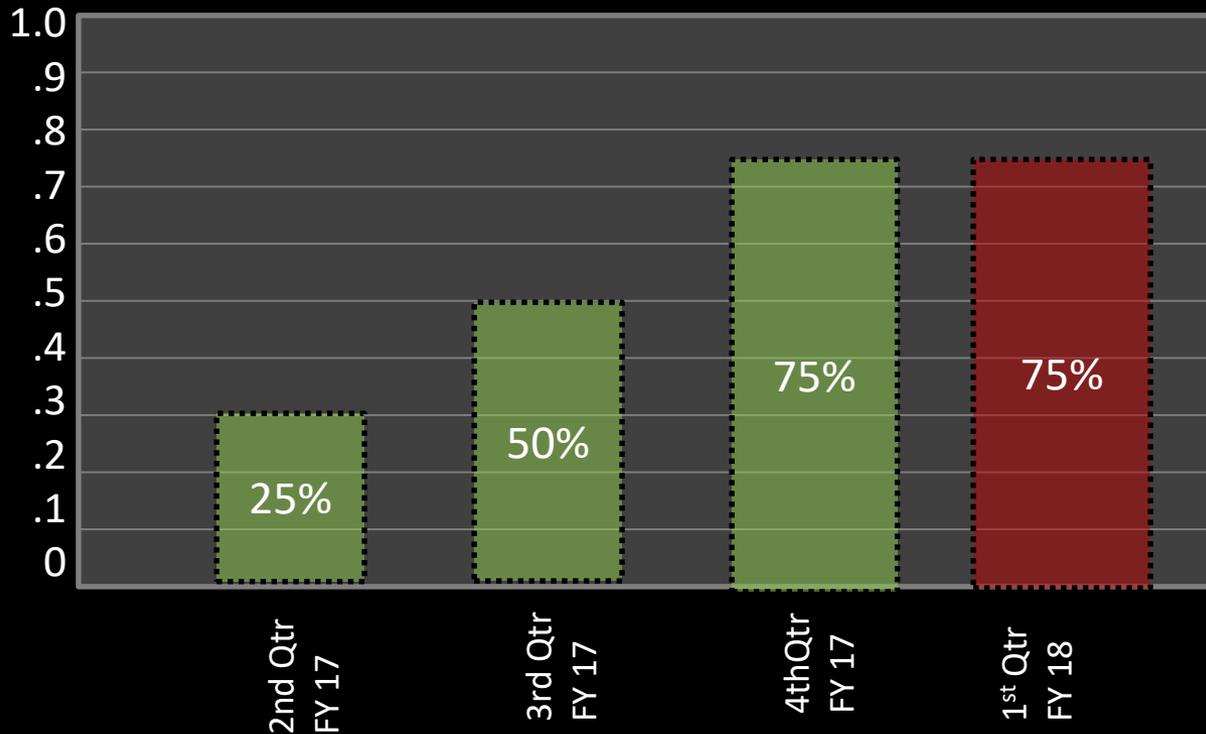
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2018.

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

- **Actions Planned:**
 - **Conduct annual physical audit of all campus space**
ON-GOING
 - **Develop Space Guidelines – incorporate in Space Management Policy**
COMPLETE March 2017
 - **Develop Metrics for Room Use Categories based on national standards**
COMPLETE March 2017
 - **Assess proposed space use for new construction and renovation projects to evaluate alignment with accepted metrics**
ON-GOING

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.

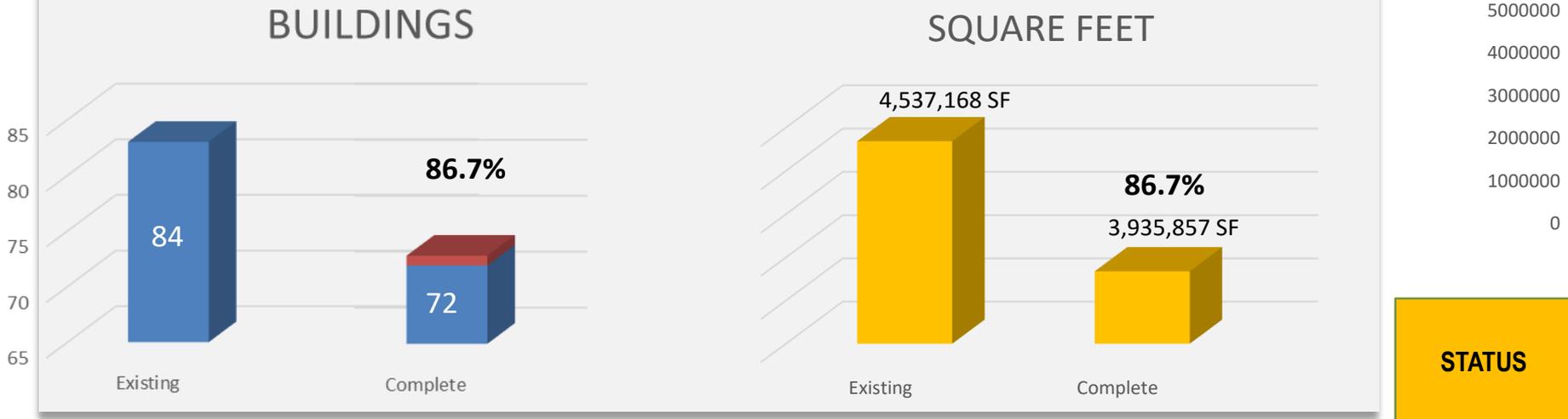
Measure: Measure Assignable Square Feet of allocated space compared to recommended guideline and metric.

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

• **Status**

- **Space Audit – target completion October 31, 2017**



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 - COMPLETE**

- **Space Guidelines – Appendix to the revised Space Policy**

University Policy 601.4, Integrated Space Management

SPACE GUIDELINES

<http://legal.uncc.edu/sites/legal.uncc.edu/files/media/UP-601.4-SupplementalProcedures.pdf>

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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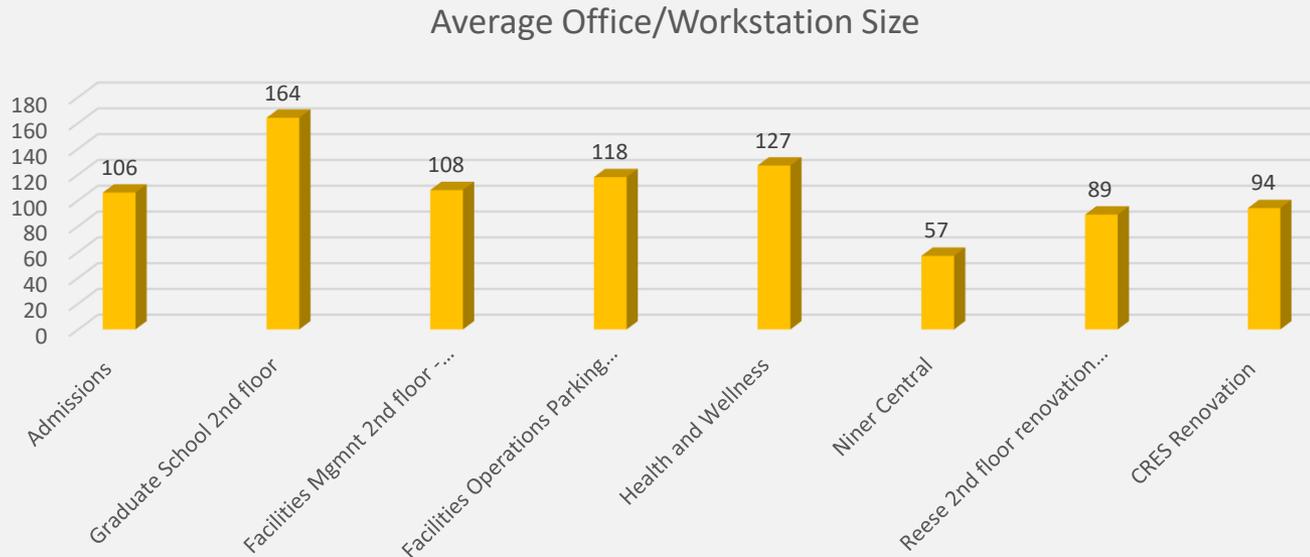
Measure: Measure Assignable Square Feet of allocated space compared to recommended guideline and metric.

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

- **Status**

- **Office Space 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.

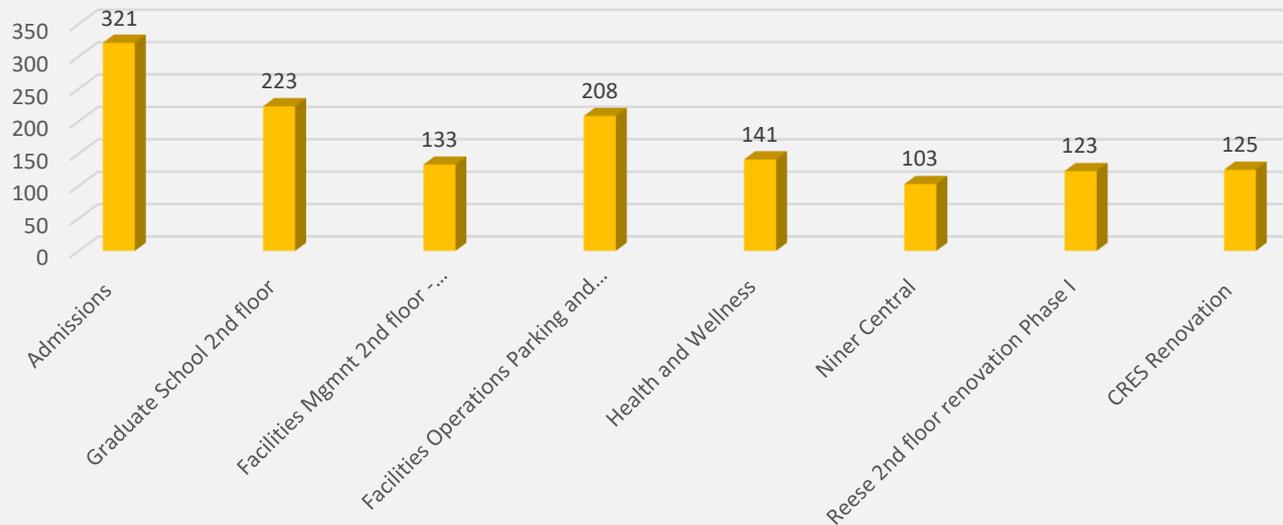
Lead: Space Management

Balanced Scorecard Category: Internal Business Process

• **Status**

○ **Office Space Metrics**

Assignable Square Feet/Person



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.

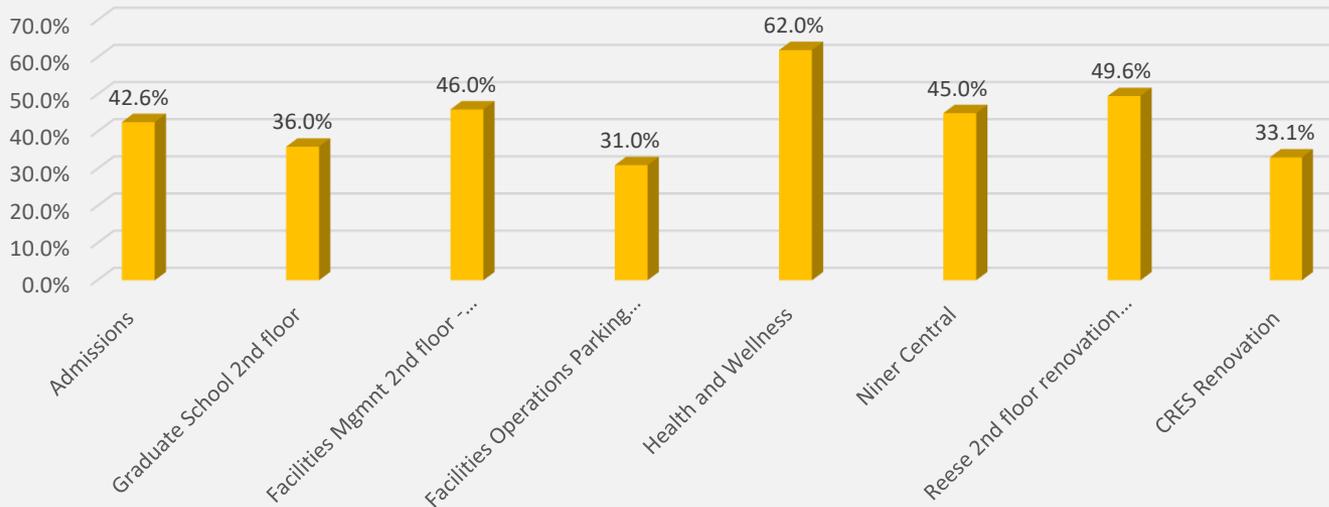
Lead: Space Management

Balanced Scorecard Category: Internal Business Process

• **Status**

○ **Office Space Metrics**

% of Support Space to Office Space



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**
 - **Complete studies to provide information/costs for future projects. (Library, Belk Gym/Women Swim team).**
 - **Continue to collaborate with Financial Services, the administration, and customers on the preparation of the next 5-Year Capital Plan (2021-2026).**

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

- Baseball Indoor Training, Softball Indoor Training, Sycamore Hall Renovation

Actions Planned

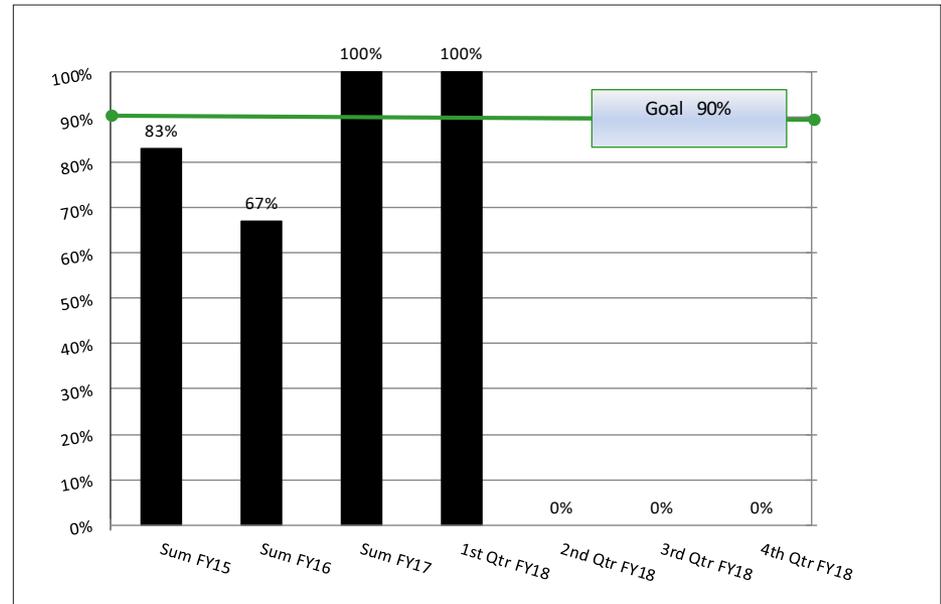
- Hire a new Director for Capital Projects

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 Interscope Plus
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 auth. in Interscope	Designer under contract w/in 120	Designer not under contract w/in 120	% Designers under contract
Summary FY-15	7	5	1	83%
Summary FY-16	6	4	2	67%
Summary FY-17	6	8	0	100%
1st Qtr. FY-18	2	2	0	100%
2nd Qtr. FY-18			0	0%
3rd Qtr. FY-18			0	0%
4th Qtr. FY-18			0	0%



Tactic Measurement for 1st Quarter is 100%

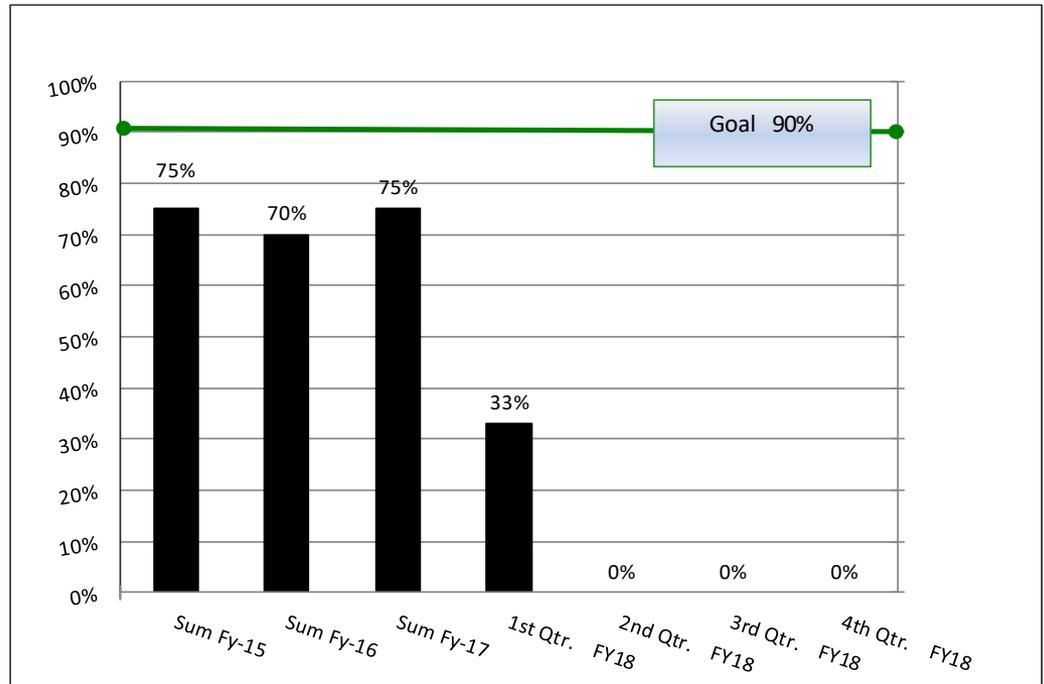
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.3 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-15	3	1	75%
Summary FY-16	7	3	70%
Summary FY-17	6	2	75%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18			%
3rd Qtr. FY-18			%
4th Qtr. FY-18			%



Tactic Measurement for 1st Quarter is 33%

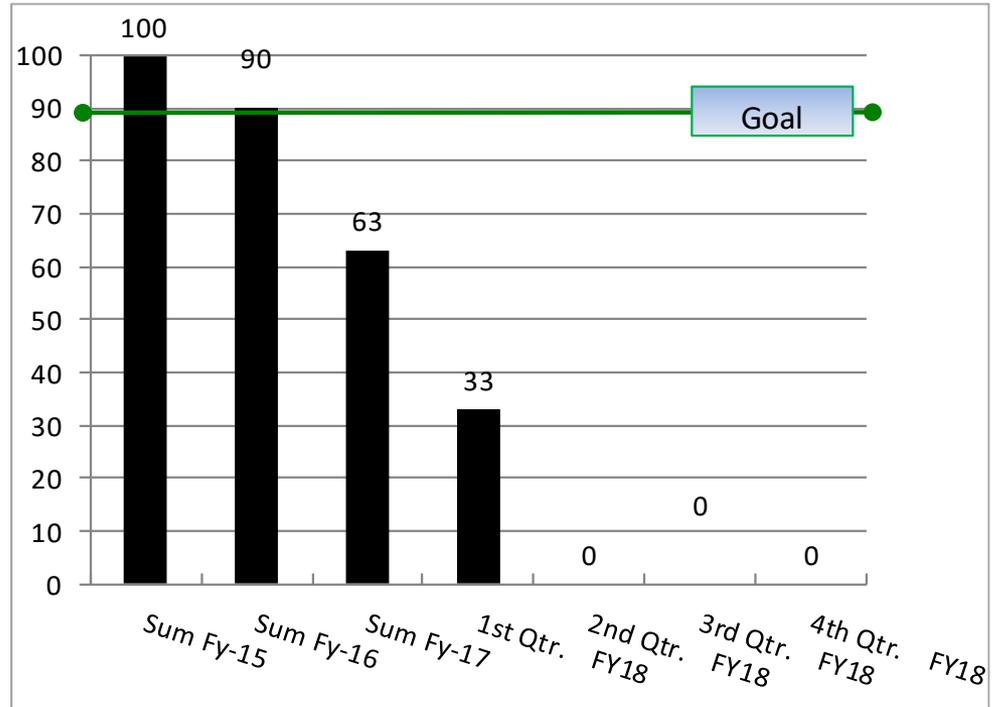
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-15	3	0	100%
Summary FY-16	9	1	90%
Summary FY-17	5	3	63%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18			%
3rd Qtr. FY-18			%
4th Qtr. FY-18			%



Tactic Measurement for 1st Quarter is 33%

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

- N/A
- 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
- Use Earned Value Management

Facilities Management Strategic Planning Session – 1st Quarter FY 2018

**Lead
Capital**

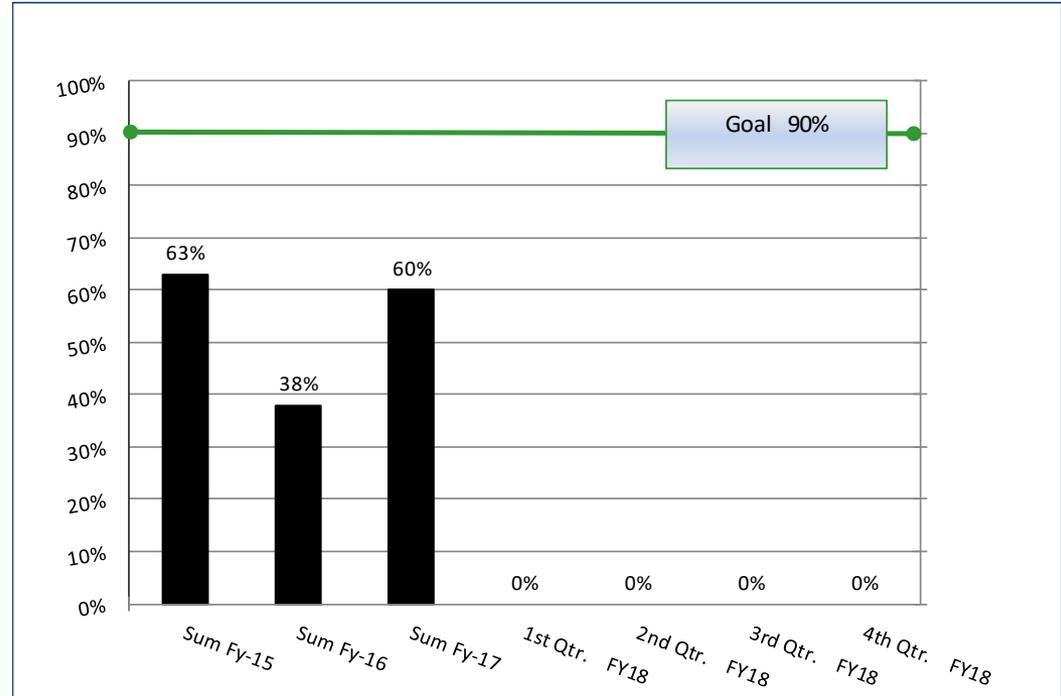
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-15	5	3	63%
Summary FY-16	3	5	38%
Summary FY-17	3	2	60%
1st Qtr. FY-18	0	0	%
2nd Qtr. FY-18	0	0	%
3rd Qtr. FY-18	0	0	%
4th Qtr. FY-18	0	0	%



Status

Tactic Measurement for 1st Quarter is N/A

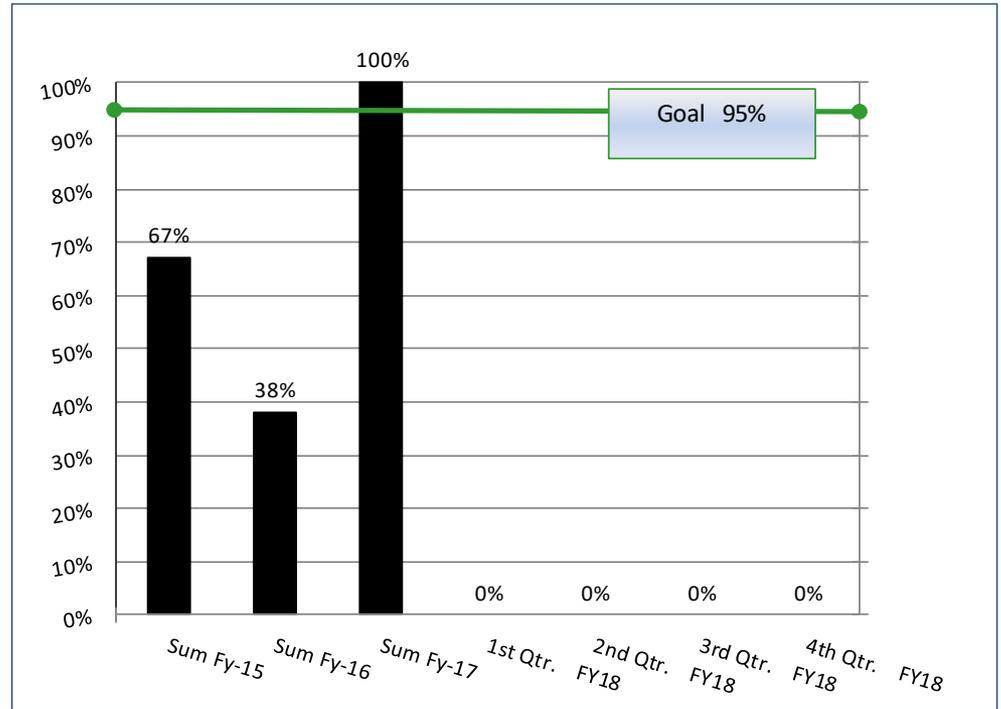
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-15	4	2	67%
Summary FY-16	3	5	38%
Summary FY-17	5	0	100%
1st Qtr. FY-18			%
2nd Qtr. FY-18			%
3rd Qtr. FY-18			%
4th Qtr. FY-18			%



Status

Tactic Measurement for 1st Quarter is N/A

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.8: Develop a comprehensive plan for strategic real estate acquisition (Action Plan only)

Lead: Real Estate

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- A. Other:** Collaborate with FBO to hire for (two) open positions for adequate staffing by end of calendar year 2017.

- B. Sales:** Process closing documents for Kennedy Estate sale by September 30, 2017.

- C. Sales:** On behalf of the Athletic Foundation, process closing documents for timeshare transfer-of-ownership by September 30, 2017.

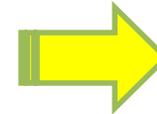
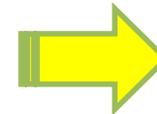
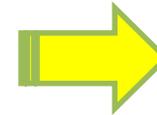
- D. Compliance:** Submit MOU for Niner Pantry house for signature from Academic Affairs by October 29, 2017 to have coordinate continued legal occupancy.

- E. Compliance:** Submit Request for Delegated Authority packet by December 9, 2017 to Property Review Committee and Chancellor in order to obtain authority to make real estate transactions at the university level.

- F. Acquisition:** Obtain an appraisal report for a potential property acquisition by December 31, 2017 (as first step of future plan to process closing documents by February 28, 2018).

In Progress

Completed



STATUS

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)
2. Continue monthly and annual PM service on generators
3. Implement Di-electric Oil Testing on transformers (2018)
4. Verification of steam system needs for critical areas – on-going
5. Setting up monthly coordination meetings with critical facility customers – October 2017
6. Began conversation with key customers on campus-wide Service Level Agreement (SLA) and Memorandum of Understanding (MOU)

Actions Completed

1. Hired a Critical Facilities Manager (August 2017)

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

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Online updates every four weeks. **On hold**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - **Inside UNC Charlotte** – Academic Complex Phase Two, Veterans Services receives Green Office certification, and Sustainability Week
- **Publicity documentation and analytics*:** Will continue to work with UComm and ITS on analytics; goal is to increase external media (in particular, trade publications) coverage.

Customer Communication Initiatives (interrelated):

- **Customer Facing technology Ongoing**
 - Facilities Notifications RSS feed on home page of FM web site continues to run smoothly
 - List of Projects and Schedules on the “Five-year Plan” site updated regularly; added rotating header to page effective June 23

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 UNC Charlotte Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Hire BAS Technicians; working with main HR (Oct 2017)
4. On-going discussions with FIS and vendors for SCADA (Supervisory Control and Data Acquisition) systems options
5. Develop Utilities Team and Retro Commissioning program
6. Develop and implement customer follow-up plan; updating survey customer service level and follow up (on-going)
7. Working with Capital; Retro-commissioning (Woodward and Grigg) (on-going)

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Hired Retro Commissioning Manager

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

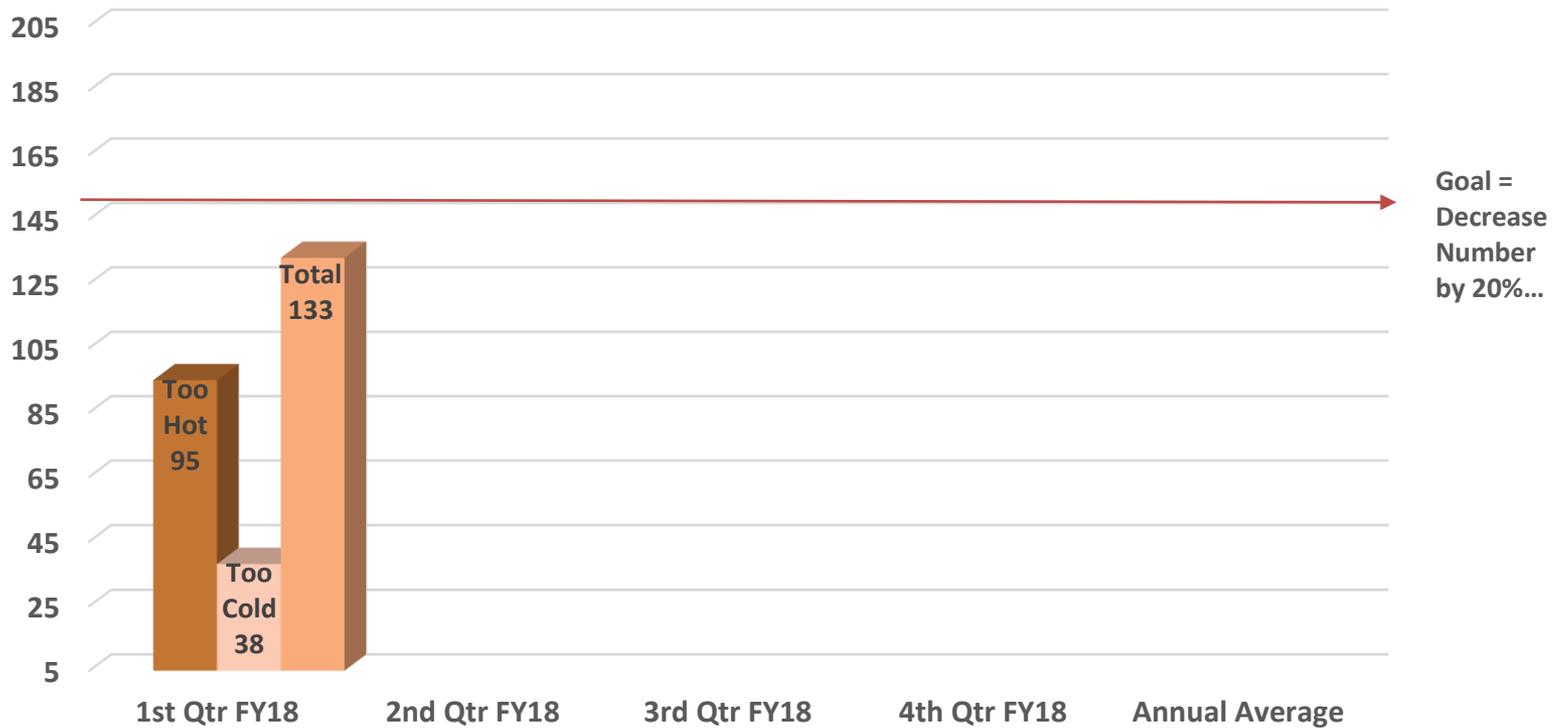
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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 2018

Annual Goal
90%

QTR 1 Status
100%

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

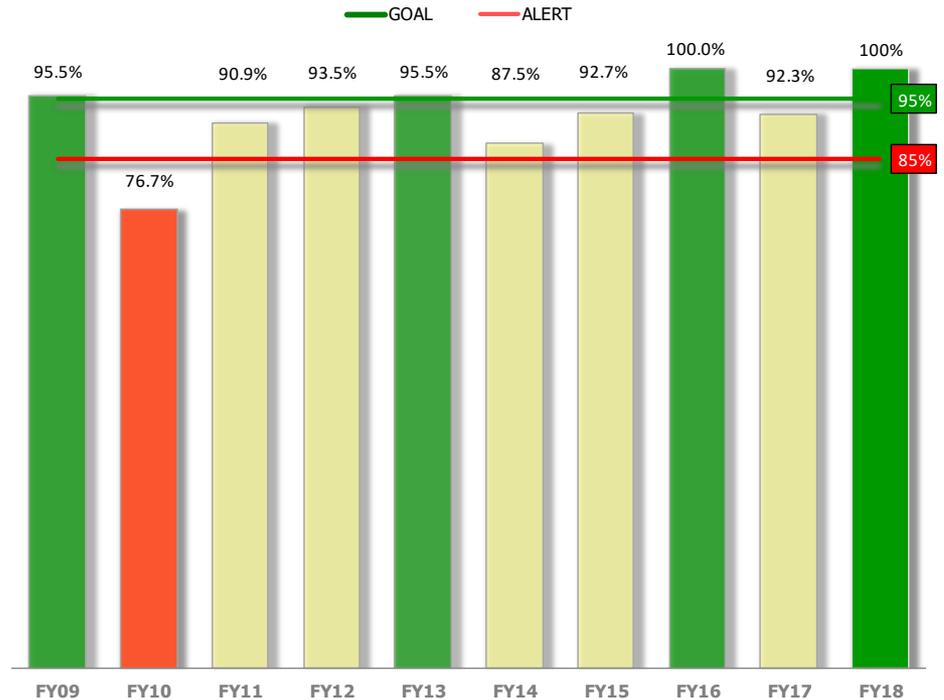
95% of Informal Project Customers More than Satisfied or Satisfied with services received

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	38	13	6	6	1	92.3%
FY18	0	3	2	1	0	100%

Q 1 | **20** | **3** | **2** | **1** | **0** | **100%**

Q 2
Q 3
Q 4

YEAR TO DATE | 20 | 3 | RESPONSE RATE - TOTAL | 15.0%



Customer Comment:

Example of One “More than Satisfied” Customer Comment:

The Project Coordinator did an outstanding job in keeping me up to date on issues and providing solutions to those issues. It was a pleasure to work with this Project Coordinator.

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

Special Projects:

- **Light Rail Coordination Committee** (member of the communications working group)
- **Digital Signage Steering Committee** (campus-wide initiative)
- **Campus Congestion, Construction, and Parking Communication Plan** (joint initiative with Christy Jackson and Lou Ann Lamb; Phase 1 completed May 31, Phase 2 completed August 31, Phase 3 (implementation underway)
- **(University) Crisis Communication Committee** (member of stakeholders group)
- **PaTS Communications Plan** (partnership with Parking and Transportation Services, Business Affairs, etc.)
- **Academic Complex Communication Plan** (implementation underway)
- **“Five-year Plan” External Communication Plan** (implementation underway)
- **“Five-year Plan” website** (continual updates to projects listing, other areas as needed)
- **SRAPPA Conference** – FM hosting (member of committee)
 - Logo design completed with Little Red Bird
 - Program booklet draft scheduled to begin October 9
- **Traffic communications committee** (joint initiative with University Communications):
 - Request guidance from AVC

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 December 2017

Recruitment Strategies:

- Exploring other venues for advertising position vacancies in order to increase pool size and diversity within the pool.
- Creating resource tools for Facilities Management hiring managers, to include:
 - a. Recruitment Process Manual
 - b. Best practice recruitment tools to use when creating a position description and job posting; looking to hire the best qualified candidate; selecting competencies and interview questions; and identifying common pitfalls.
- Monitoring budgeted vacancies to ensure that they do not reach the abolishment threshold; Work with FBO Director, University Budget Office and GA/OSBM.
- Working with main HR to receive EEOC reports on each filled position. This report will provide us with race, ethnicity, and gender data that will allow us to see how diverse our applicant pool for a filled position

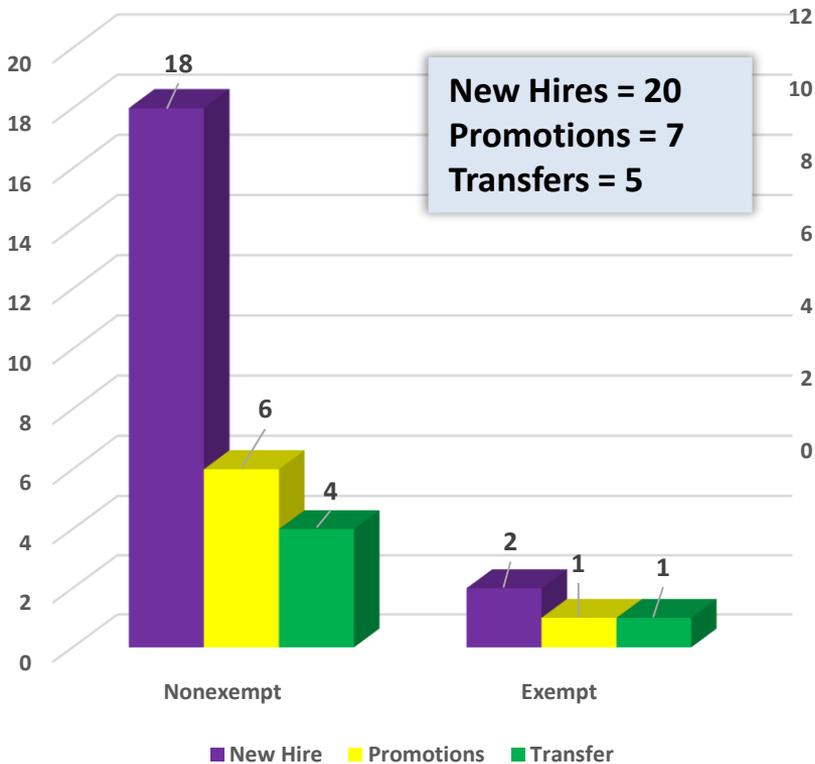
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

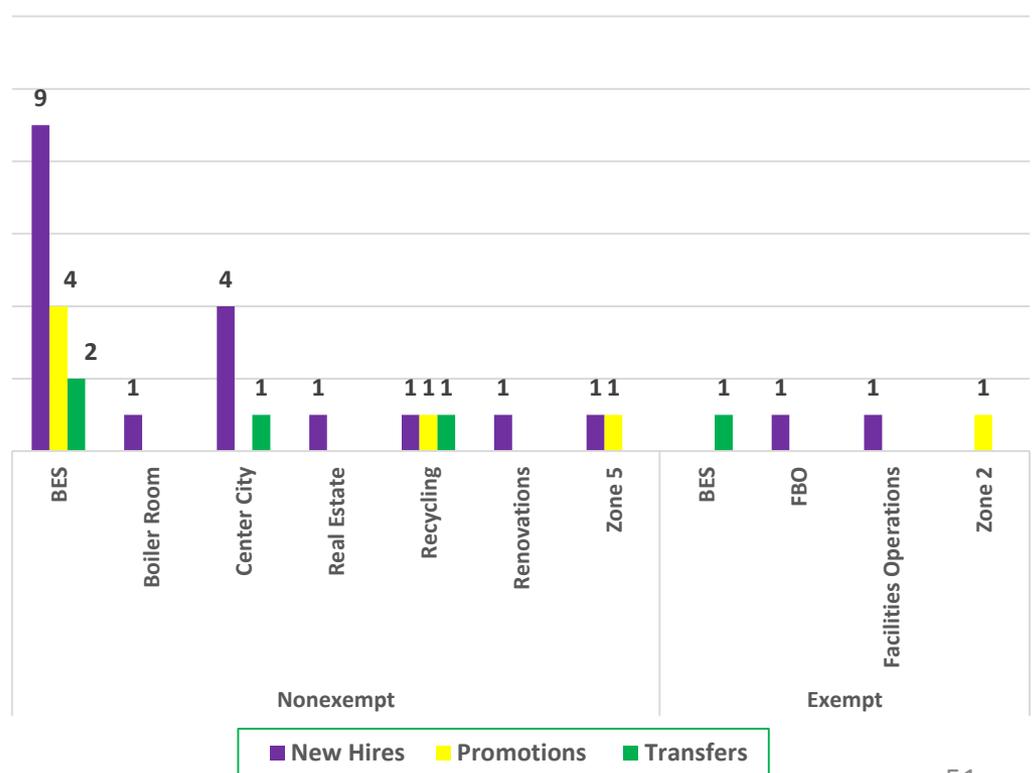
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotion 1st Quarter FY 2017



FM New Hires / Promotions per Department 1st Quarter FY 2018



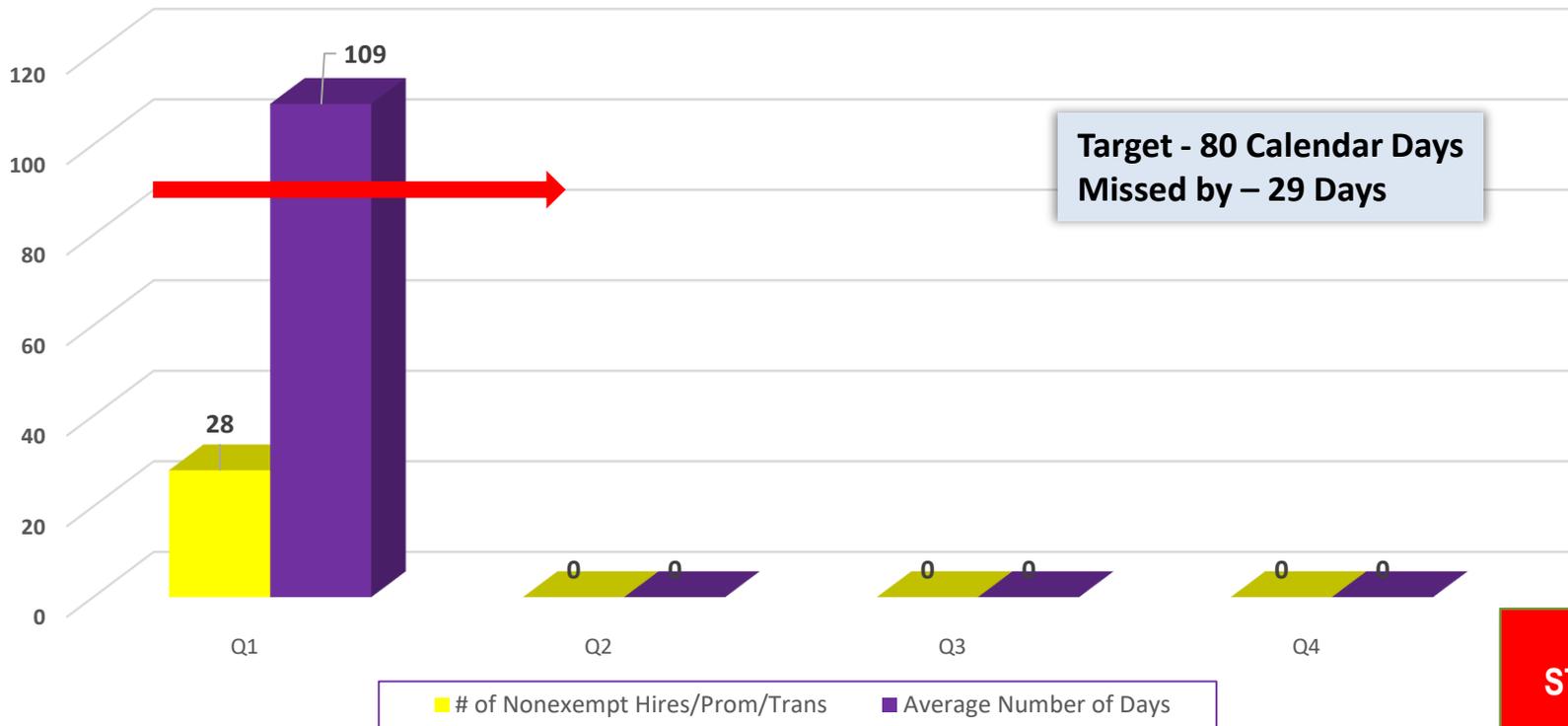
GOAL #4 Recruit, Develop and Retain Quality Employees

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 2018



STATUS

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

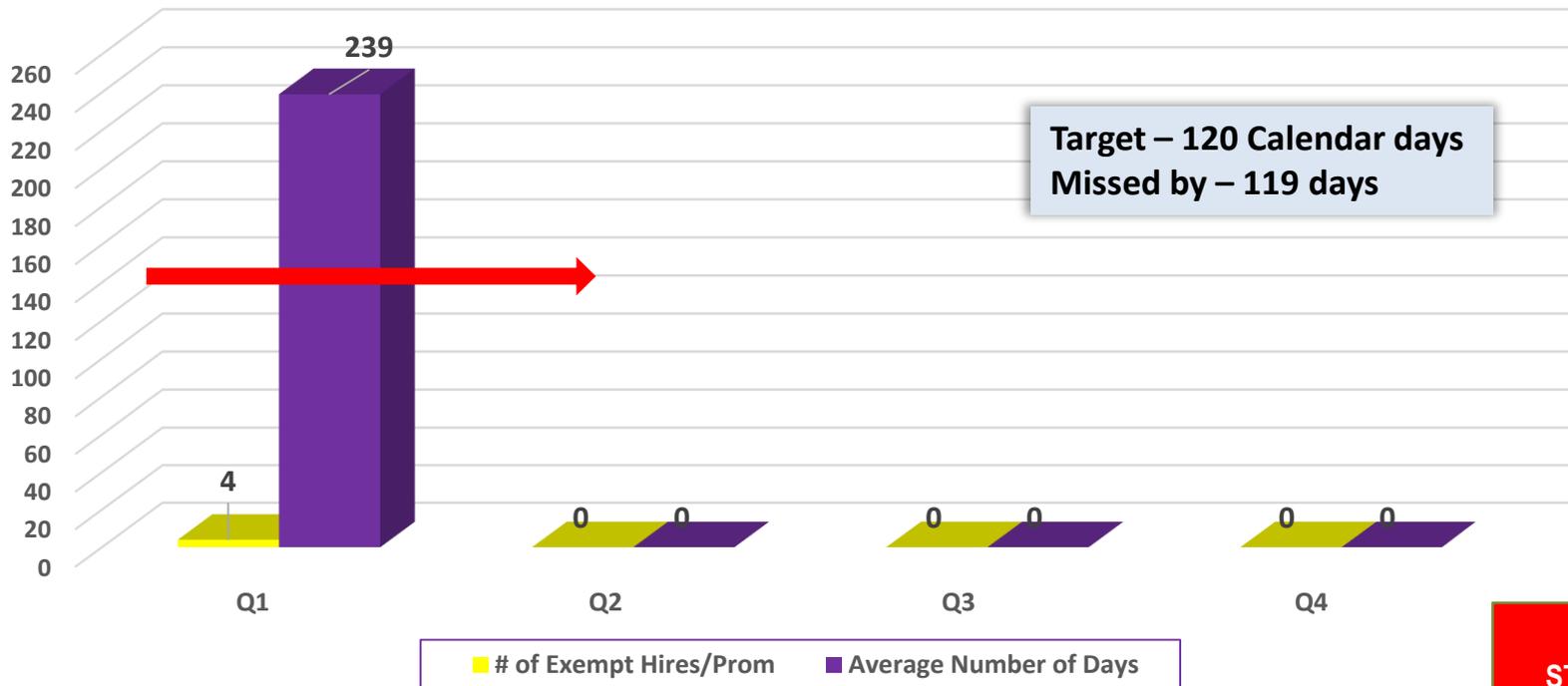
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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 2018



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 FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through December 2017

- Update on the 2017/2018 employee performance plans:
 - a. We have 12 outstanding performance plans remaining.
- Create and implement a Facilities Management standard onboarding process.
- Create a formal budget request process to be used by managers for requests outside of the of the yearly budget request cycle:
 - a. Create a budget request form to be approved by Facilities Management Human Resources, Finance, and AVC Offices.
 - b. Purpose to create a more efficient process that gathers all required information.
 - c. Process used for requests that include:
 - New Positions
 - Career Progressions
 - Reclassifications
- Succession Planning Part One, Research and Data Collection:
 - a. Research succession planning for facilities management industry.
 - b. Pull data to do projections on workforce demographics in one, three, and five years.

Facilities Management Strategic Planning Session - First Quarter FY 2018

GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

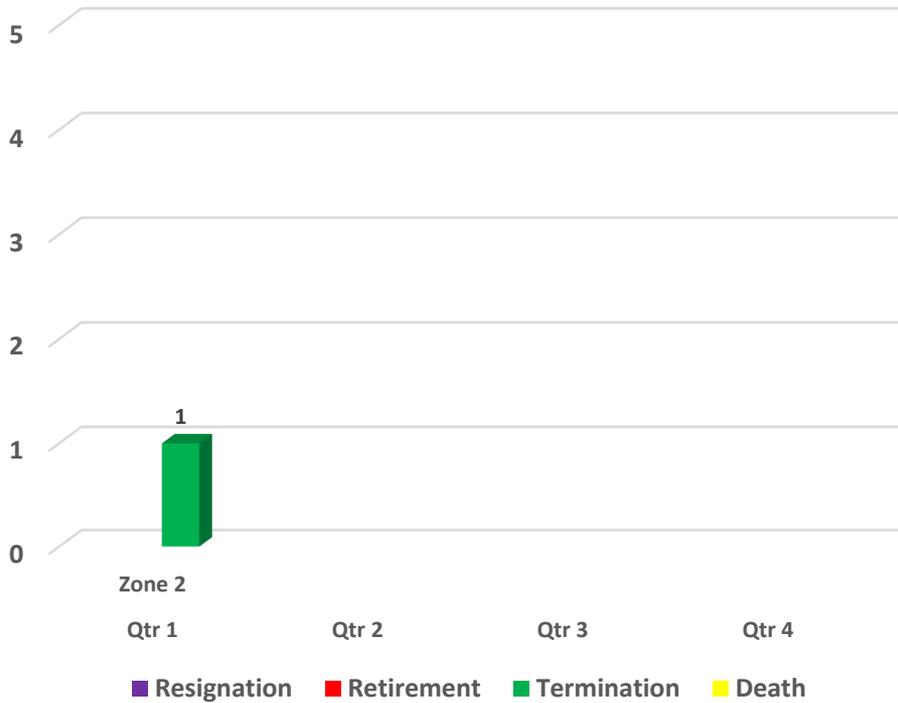
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

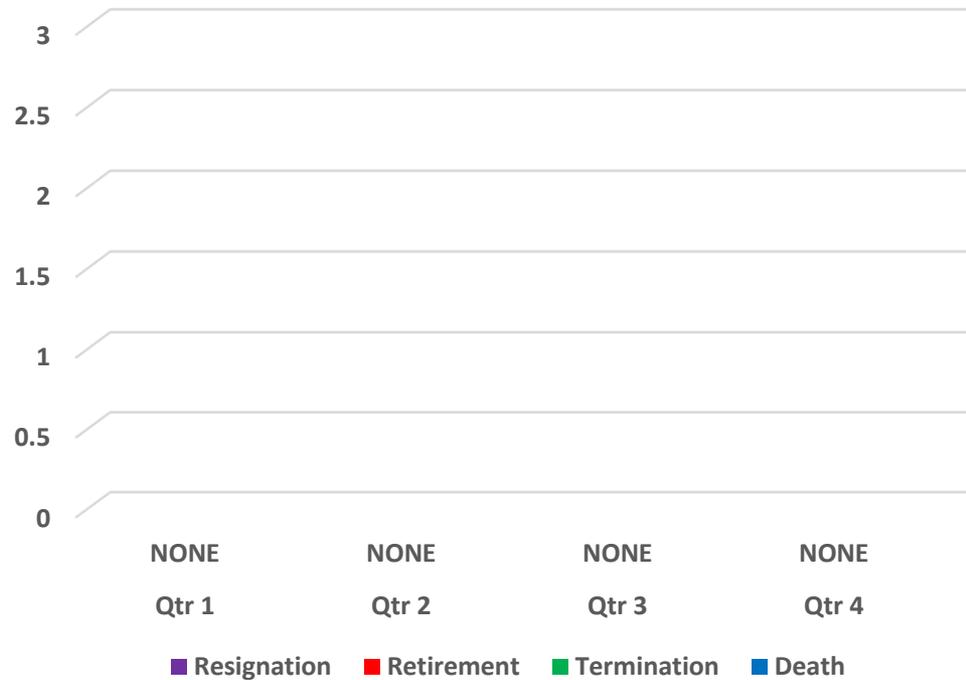
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations by Department During Probation
Nonexempt FY 2018



Separations by Department During Probation
Exempt (Salaried) FY 2018



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 2018 - Nonexempt



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

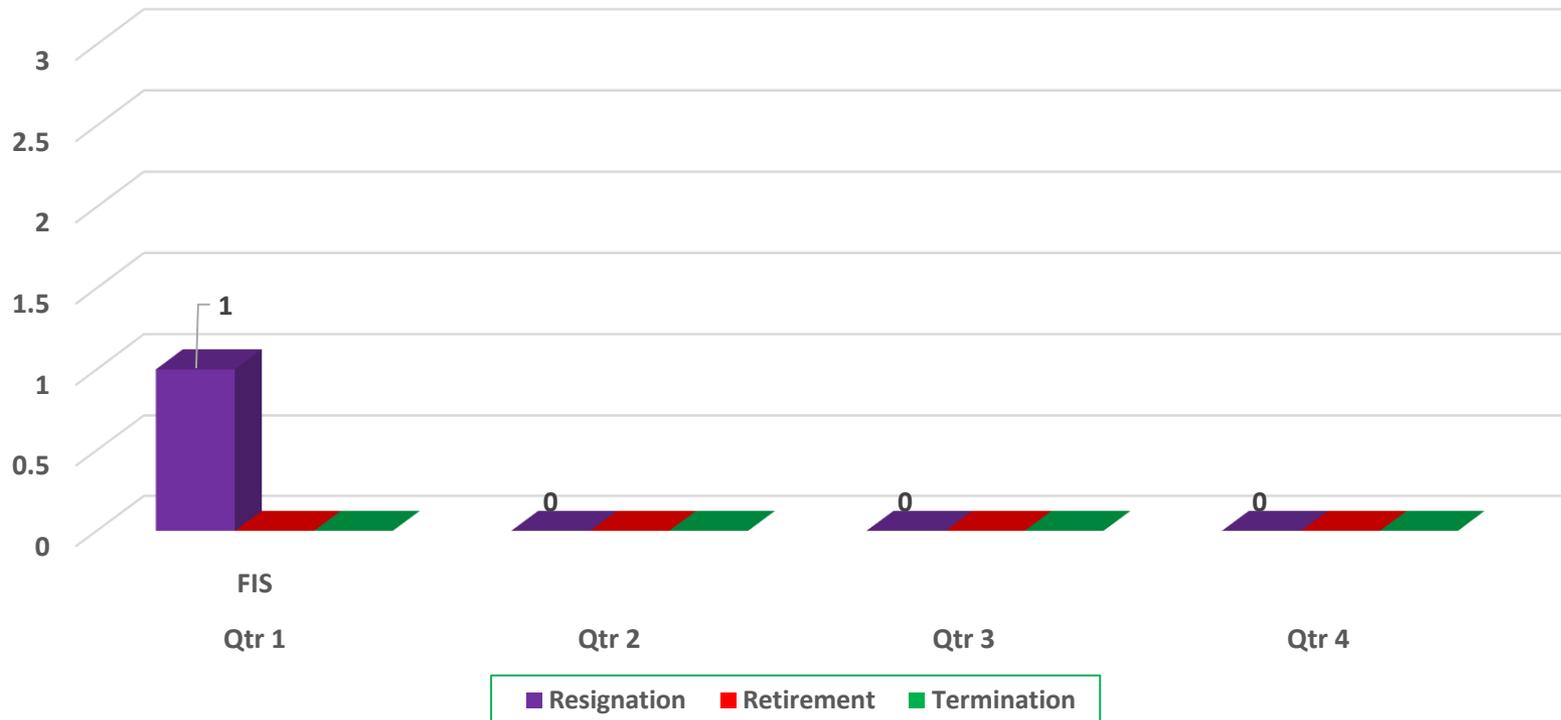
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2018 - 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
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Technical

- Maintenance & Reliability Management (Raleigh) October 2017
- Maintenance training (Topic TBD) 2018

Safety

- Supervisor Safety Talks Monthly
- LOTO training (EHS) Nov 2017
- Confined Space training (EHS) Nov 2017

Leadership

- APPA Leadership Academy – Level I March 2017
- APPA Leadership Academy – Levels 2-4 TBD 2018/2019
- APPA Supervisor Toolkit TBD 2018
- Discussions on Employee Management TBD 2018

Externally Driven Initiatives

- Computer training Spring 2018
- Niner Talent “Workplan” training Annual, 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

- Identify and source vendors for training delivery;
 - Areas of focus: Leadership, Technical, Administrative, Safety and Professional Development;
 - Encourage use of campus training providers – Campus HR / Skillport.
NOTE: some campus L&D courses now have a cost
- Ongoing initiatives with FO and BES&R Learning and Development coordinators on:
 - Improve computer literacy of FM employees (needed for NinerTalent STAKES, benefits enrollment, etc.)
 - Campus IT (Jennifer Hicks and/or Beth Rugg) will deliver the training
 - Looking for computer lab available for training
 - Reimagining the former FBO proposed “Gotcha” recognition program with BES&R.
- FM Apprenticeship Program in development for technical areas
 - Launch planned for Spring 2018
 - Electrician and HVAC apprentice positions to be recruited
 - Apprentice will participate in multiple year learning for the respective discipline

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

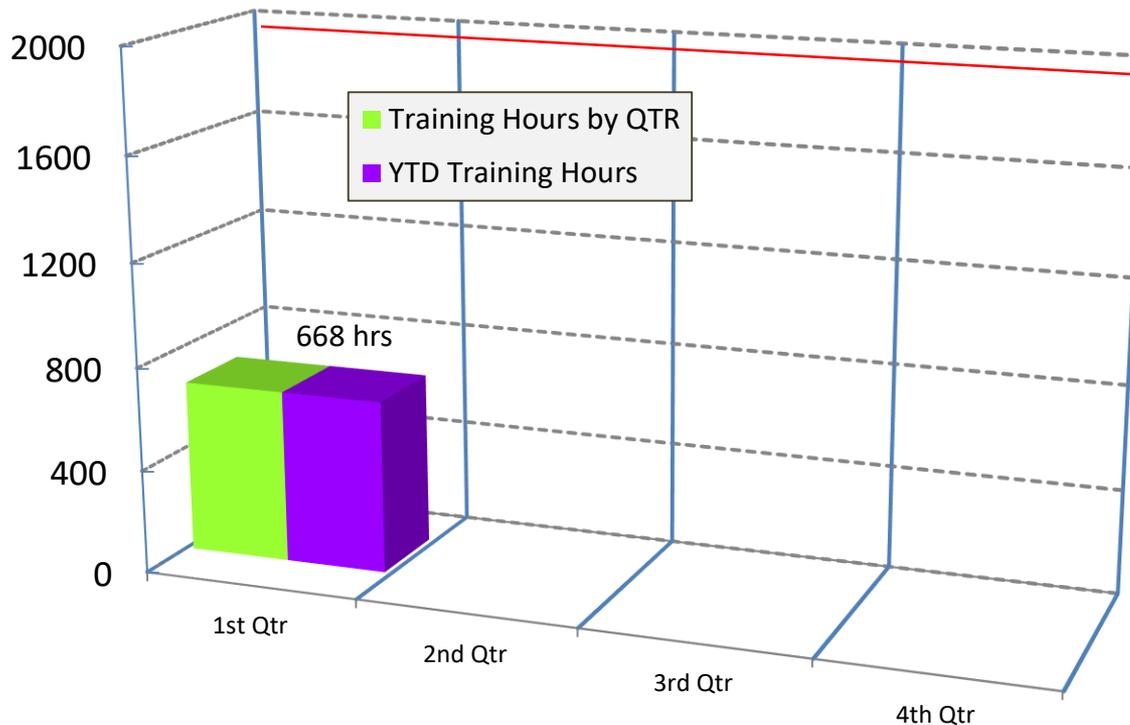
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 18

Training Hours for Supervisors & Managers by Quarter



← Annual Target

<u>FY 2018</u>	
Target - 1,960 hrs	
1 st Qtr. Target – 490 hrs	

Actual YTD	
668 hrs (34 %)	
Actual 1 st Qtr.	
668 hrs (136 %)	

Annual

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

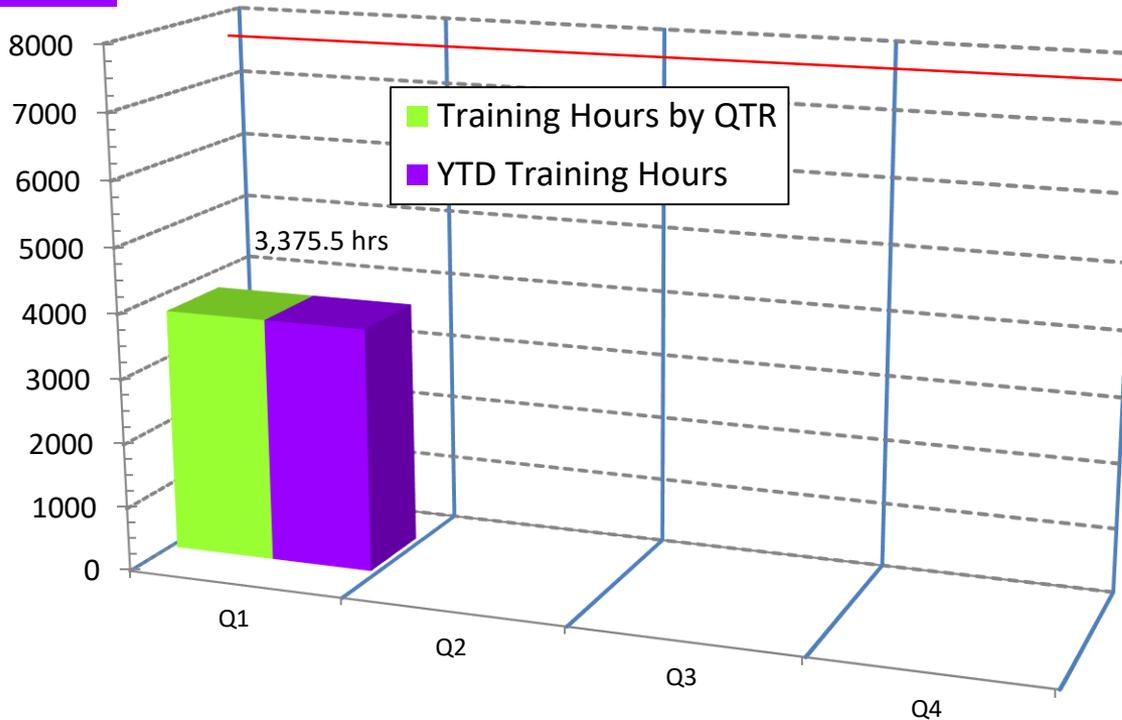
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 18

Training Hours for front line employees by Quarter

Training
Hours



Annual Target

FY 2018
Annual Target - 7,760 hrs
1 st Qtr. Target – 1,940 hrs

<i>Actual YTD</i>
3,375.5 hrs (49%)
<i>Actual 1st Qtr.</i>
3,375.5 hrs (174%)

Annual

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment

Tactic 4.3.1:	90% of Employees satisfied or very satisfied working in FM
Tactic 4.3.2:	87% of Employees satisfied or very satisfied in each unit of FM

Lead: Facilities Business Office

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Survey Logistics:

- Survey findings:
 - Report distributed May 2017;
 - Briefing to AVC-FM and directors – July 18, 2017;
 - Briefing to staff – 4th Quarter AEM (August)

- Next Steps:
 - Develop action plan to address issues identified in survey.

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

FIGURE 150: OVERALL, HOW SATISFIED ARE YOU WORKING IN THE FACILITIES MANAGEMENT DEPARTMENT (2011, 2013, AND 2017).

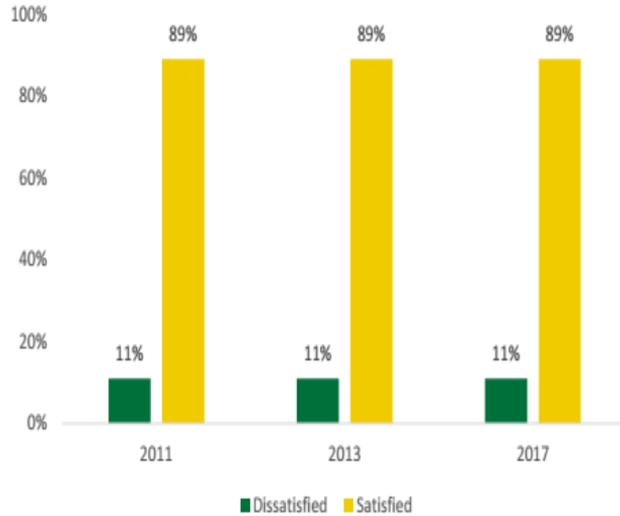
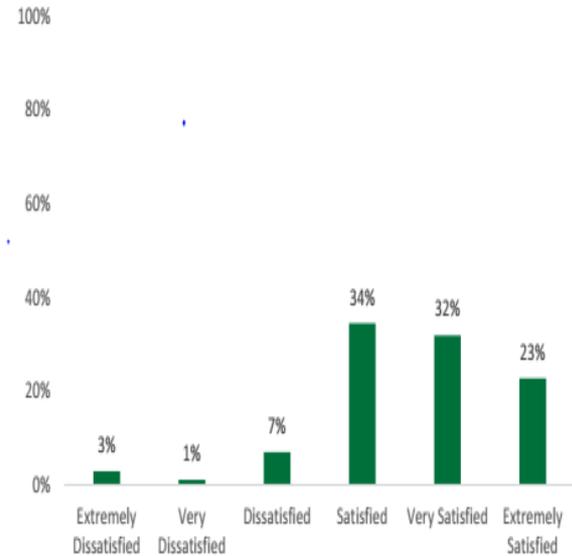


FIGURE 148: OVERALL, HOW SATISFIED ARE YOU WORKING IN THE FACILITIES MANAGEMENT DEPARTMENT?



GOAL #4 Recruit, Develop and Retain Quality Employees

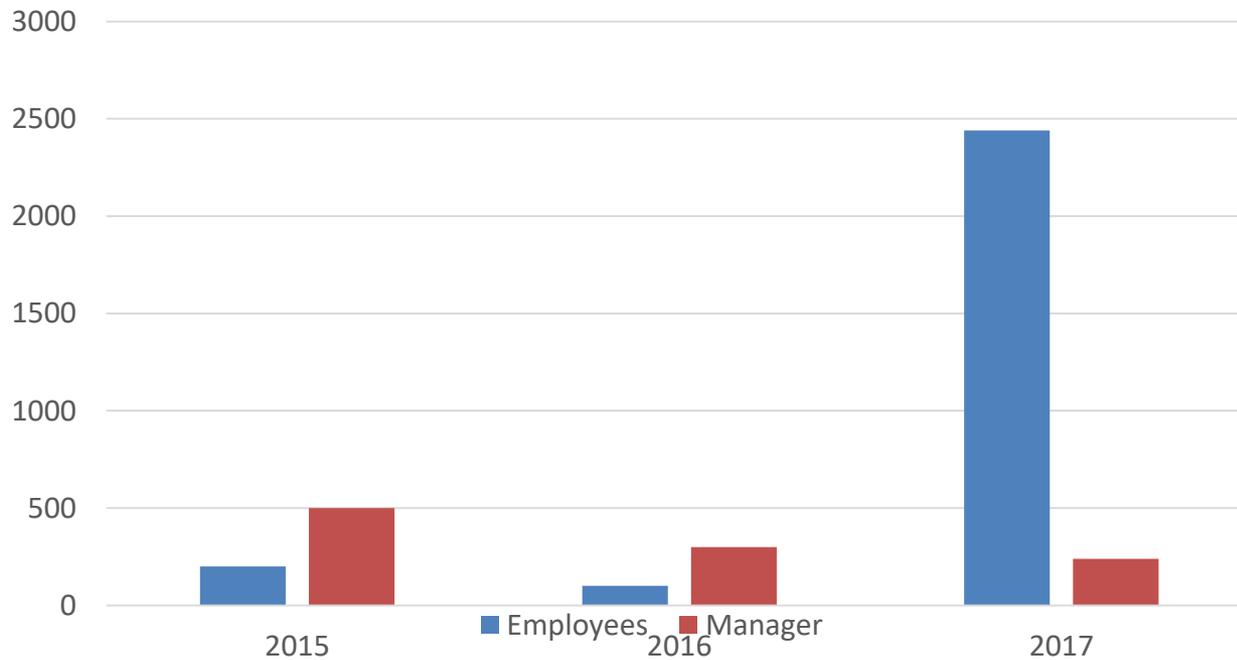
Objective 4.3: Create and Maintain a Quality Work Environment

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

Chart Title



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 FOR IMPROVEMENT

Efforts to reduce accidents:

1st Quarter Safety Training Hours – 1,635

- Near Miss reports campaign
 - Submissions have increased significantly
- Safety Training Taskforce (Collaborative initiative with EHS):
 - FM Training Calendar established listing safety training topics delivered by EHS
 - Discussions held on best way to report training;
 - Digital training records system developed by FM team (refinements ongoing)
- Safety Training
 - Lock Out-Tag Out training (EHS) Nov 14th
 - Confined Space training (EHS) Nov 28th
- Safety related activities:
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks (*12-monthly topics posted to website; coordinating topic selection with EHS*)
- Current Stats for Accident/Incident Totals (**CY17**)
 - Accidents - 25
 - Minor incidents – 2
 - Near Miss - 16

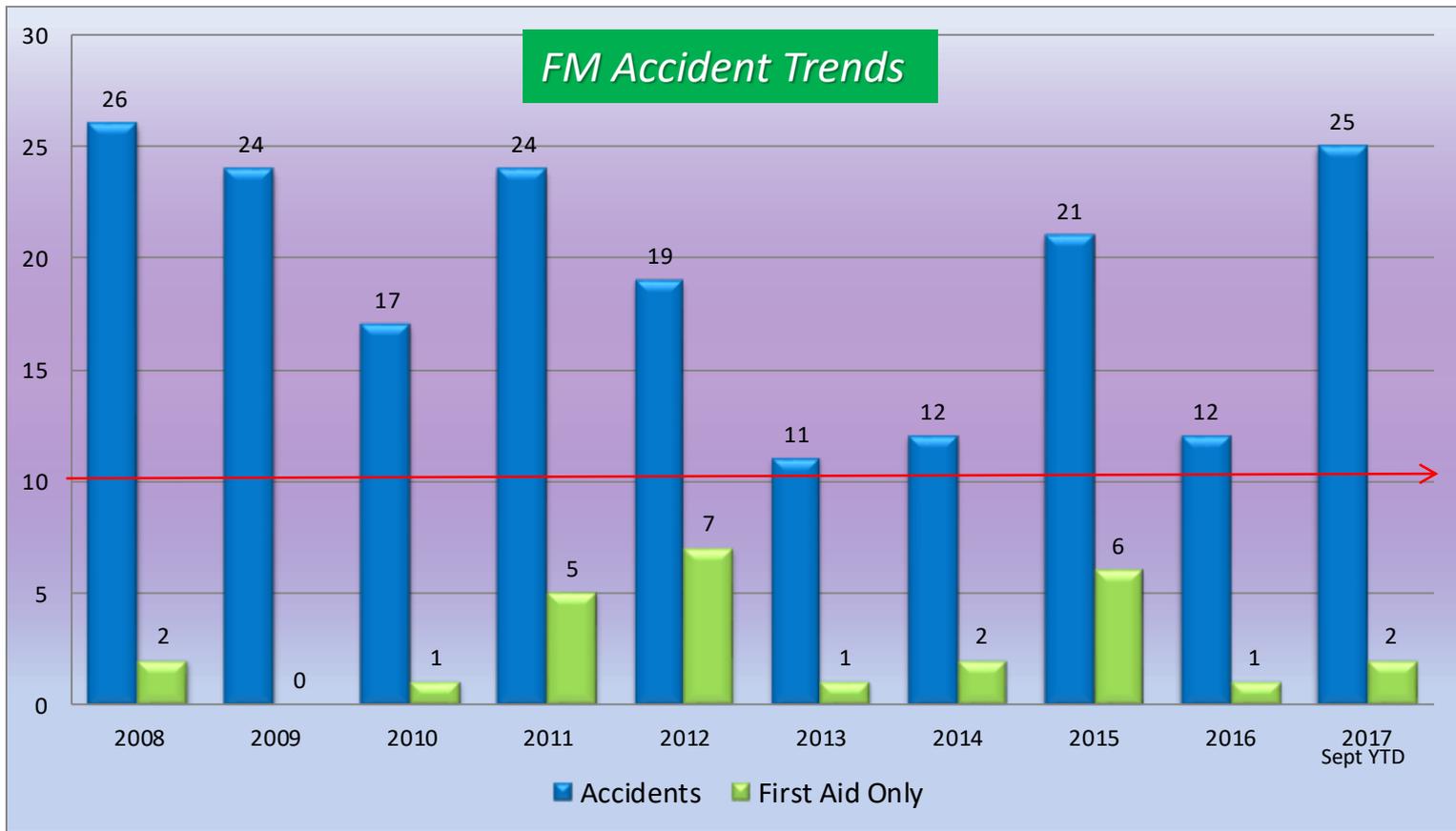
Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

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 2017
 Continuous Improvement
 Target ≤ 10

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

FM Academy

Action Item	Target Date
<ul style="list-style-type: none"> • Web Content Development with FM Communications Officer <ul style="list-style-type: none"> – New Digital training records system launched (see below) – Supervisor Safety Talk (SST) topics 2017 calendar published – Training vendor sourcing & selection (as needed/as funded) – Updates to website for upcoming L & D events 	Mar 2017
<ul style="list-style-type: none"> • Leadership – APPA leadership workshops <ul style="list-style-type: none"> – APPA Supervisor Toolkit – APPA Leadership Academy (Level 1 – proposed) – APPA Leadership Academy (Levels 2-4) 	August 2017 March 2018 TBD
<ul style="list-style-type: none"> • Digital Training Records System <ul style="list-style-type: none"> – FM team (Derberry, Franklin and Mullins) developed a Google Docs based records system: – System launch in Mar 2017; ongoing improvements in process – FM Training Calendar created for FM training sessions (shared with EHS) 	
<ul style="list-style-type: none"> • FM Apprenticeship Program <ul style="list-style-type: none"> – Schedule Skype meeting with UVA staff to see/discuss their program which is nationally recognized. (target date Oct/Nov) – Met with NCWorks Consultant to gain clarity on program registration and apprentice agreement documentation. – Expanded program start up to include HVAC positions <ul style="list-style-type: none"> • Develop HVAC job description for program – Begin ground work on apprenticeship program marketing plan with NiCole Lynch 	
<ul style="list-style-type: none"> • Learning & Development projects <ul style="list-style-type: none"> – Computer training for FM employees <ul style="list-style-type: none"> • Critical for Niner Stakes literacy, benefits enrollment, training record entry, etc. – Develop “Supervisor Training – Employee Management” session (3) 	Spring 2018 Spring 2018

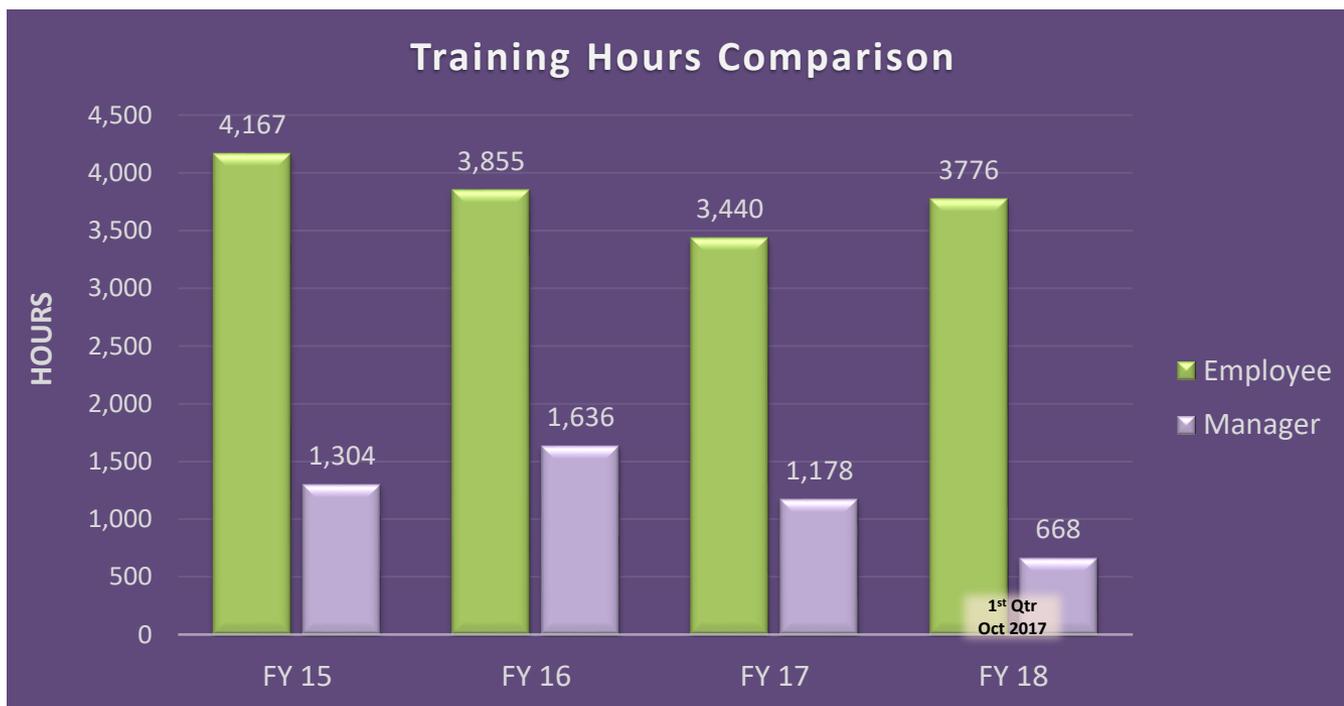
Facilities Management Strategic Planning Session – First Quarter FY 2018

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



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:

- End of Year Close-Out was successful for Capital, General and Institution Funds!
- All Institutional fund balances were in the black (Labor Services, NCRC, Fac. Reserve, Informal Projects, MFM, Playing Fields, Can Account). Labor Services and Informal Projects funds required extensive cash flow management efforts. New cash flow process with Design Services worked well.
- Budget calls for VCBA One-time funding, Recurring and Central Funds submitted on time. Expected to hear news late October.

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 each fiscal year;
- Encourage use of APPA grant and award program to supplement funding within FM. FBO has been awarded two mini grants for \$500/each.

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;
- New Cost Accountant, Yolanda Brown, has come on board:
 - Currently on-boarding to learn financial systems, etc.
 - Has begun analyzing informal projects fund.

FY 17 APPA and NACUBO Key Facilities Metrics Surveys:

- Data collection for FY 17 survey underway;
- Deadline date for data is October 31st.

Administrative Cost/GSF Analysis:

- Cost per GSF for administration – analysis on hold; awaiting cost accountant arrival.

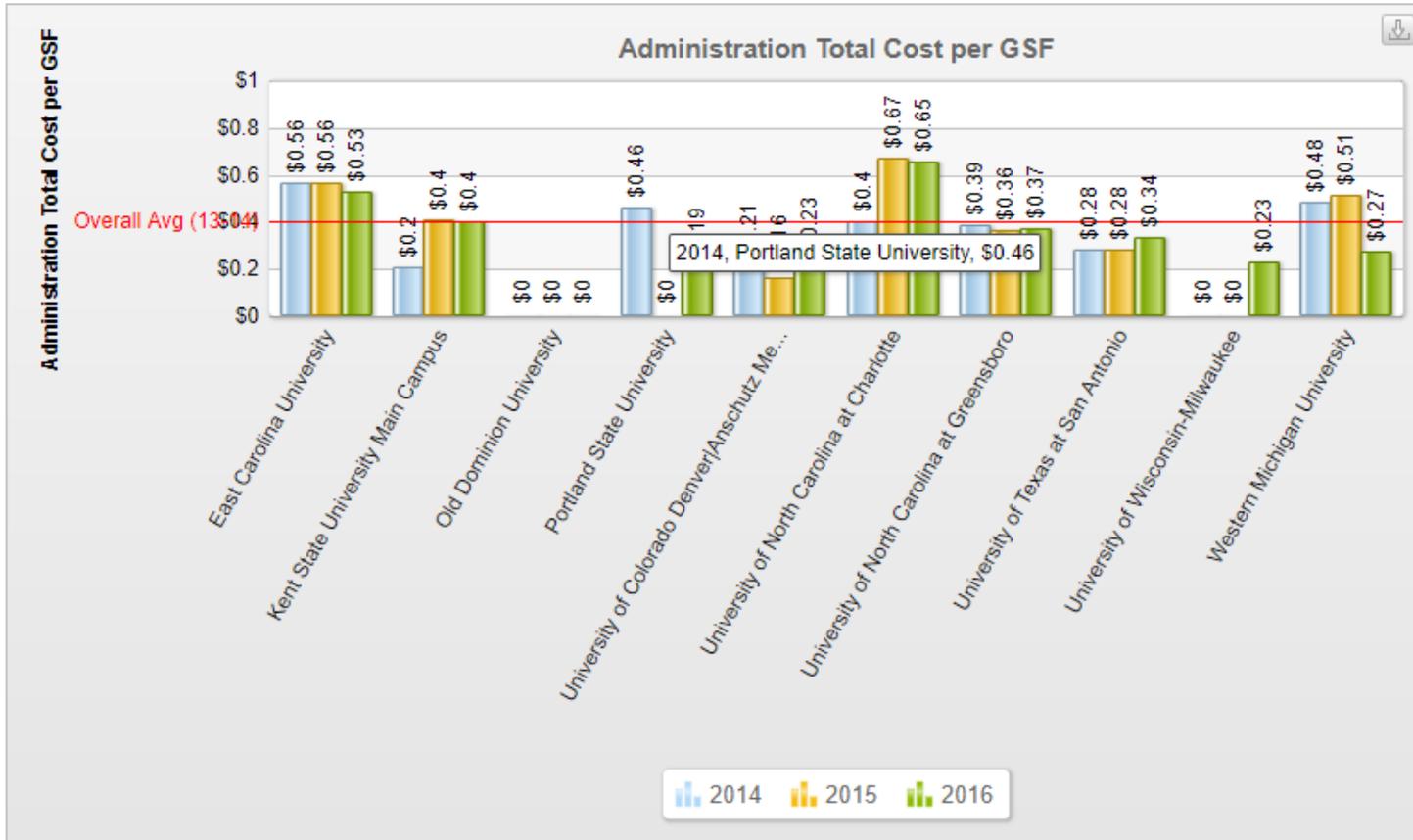
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3: Achieve Administrative cost/GSF ± 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. = \$0.5
 SRAPPA Avg = \$0.4
 Target = \$0.404 (-5%)
 UNC Charlotte = \$0.65

ANNUAL

GOAL #5 –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
 - Implement Temporary Floater Pool (8/2017)
- Actions Planned
 - Development of BES&R 5-year plan with budget projections (12/2017)
 - Implement team cleaning model throughout all BES zones (3/2022)
 - 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)
 - Developed Production Tracking tool based on attendance and staffing (Ongoing tracking)

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

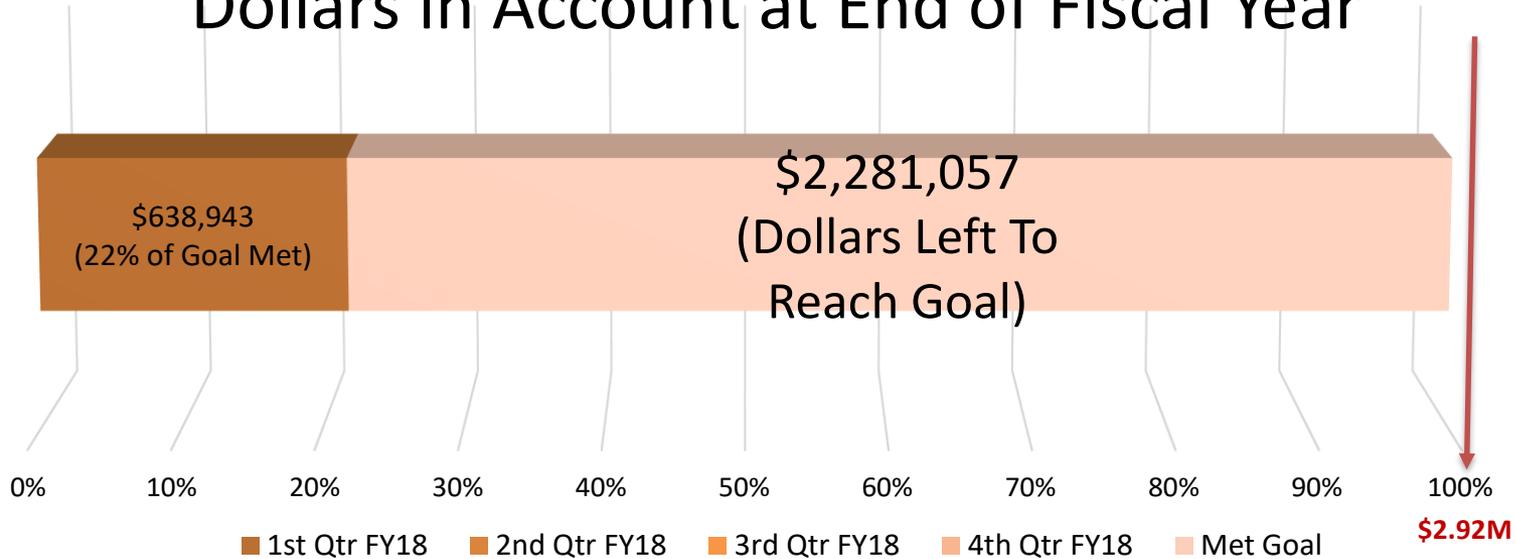
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

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 Quarter

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

- Had kickoff meeting with AVC-level staff to discuss consistent recycling practices throughout campus.
- Held spring events – Earth Day, Campus Cleanup, and assisted with Arbor Day Celebration.
- All technician positions are filled – we are almost fully staffed!
- Survived move-out – collected over 11,000 pounds of reusable materials for Salvation Army.
- Converted vacant office position to Recycling Project Manager – this position will initially focus on creating a campus-wide recycling education plan, and then will move on to other implementation projects.

4th Quarter Actions Planned

- Continue to work with other groups to develop consistency in recycling collections throughout campus (send out draft of design standards for everyone's review). (August)
- Prepare for Football season – training sessions, signage, work with Chartwells. (August & September)
- Interview for and fill our remaining vacancy – Recycling Project Manager. (posting closes in August)
- Work with HRL for a successful move-in. (August)
- Continue working with Design Services to complete the building that will replace our processing facility!! (Waiting on electricity and some small final items)



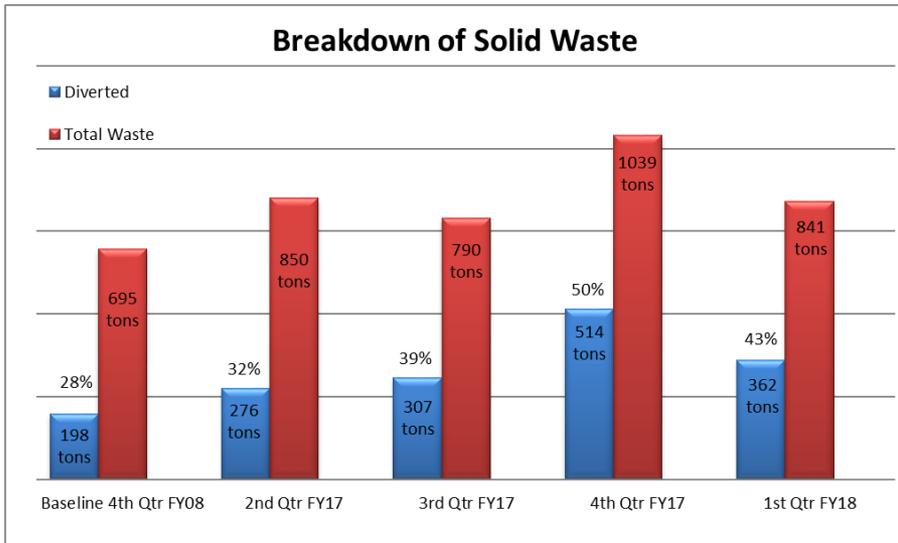
Tactic 5.2.2

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 gold rating on the Sustainability Tracking and Reporting System (STARS).

Measure: STARS points documented to achieve gold rating.

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Achieved STARS 2.0 Rating of Silver in October 2017**
- **Re-set goal: STARS 2.1 Gold by December 2018**
 - **Monthly meetings with Chartwells for Food Credits**
 - **Interns hired to assist**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Update 2010 Campus Sustainability Plan to include updating of 2012 Climate Action Plan.

Measure: Percent of Campus Sustainability Plan covered by approved implementation plans

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by June 2018**
 - **Contractor Report for Sustainability Plan Update Support (July 2017)**
 - **Executive Committee direction: Focus on meeting UNC Sustainability Policy**
 - **Integration of Sustainability Principles** (Admin, Teaching, Research, Engagement)
 - **Recycling & Waste Management** (Zero Waste)
 - **Environmentally Preferable Purchasing**
 - **Operations & Maintenance** (Air Quality/Comfort, Energy, Water, Materials)
 - **Design & Construction** (Air Quality/Comfort, Energy, Water, Materials)
 - **Master Planning** (Site Development, Infrastructure, Natural Resources, Community Impact)
 - **Transportation** (Plan for multi-modal and low carbon emission)
 - **Climate Change Mitigation and Renewable Energy** (by 2050)

STATUS

GOAL #5 – Promote Good Stewardship – First Quarter FY2018**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;
 - Belk Plaza Revitalization – 15% goal/**3.3% achieved**
 - Admissions & Visitors Center – 15% goal/**16% achieved**
- Challenge GCs to obtain 25% or better participation on CMAR projects – FOPS Complex (30% goal/**63% participation on ESP**)
- Review *Good Faith Effort* documentation for compliance
- Work with internal/external groups to identify skilled subcontractors – minority & non-minority firms
- Encourage firms to bid our work

GOAL #5 – Promote Good Stewardship

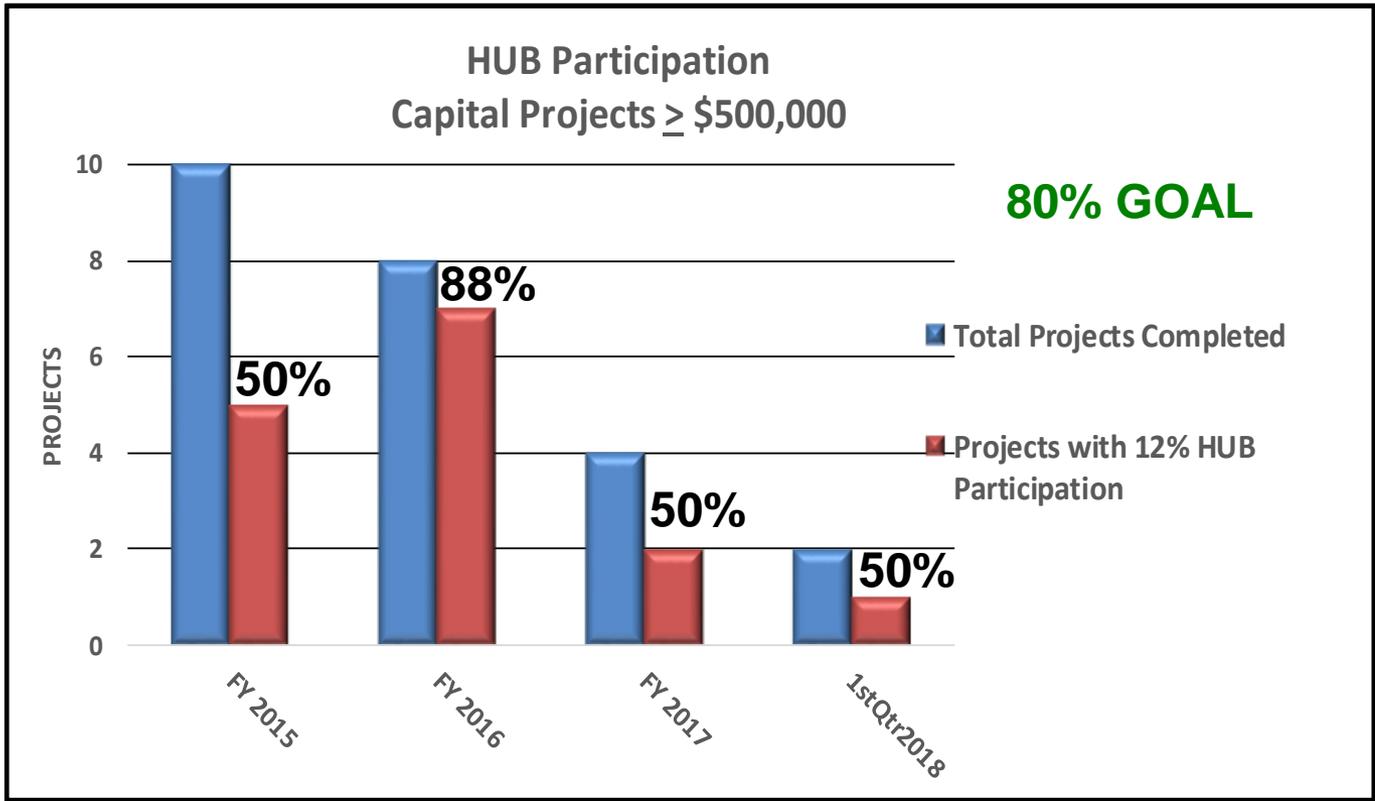
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



Campus Wide
Generators – 0%

Student Counseling
Center – 21%

STATUS

GOAL #5 – Promote Good Stewardship

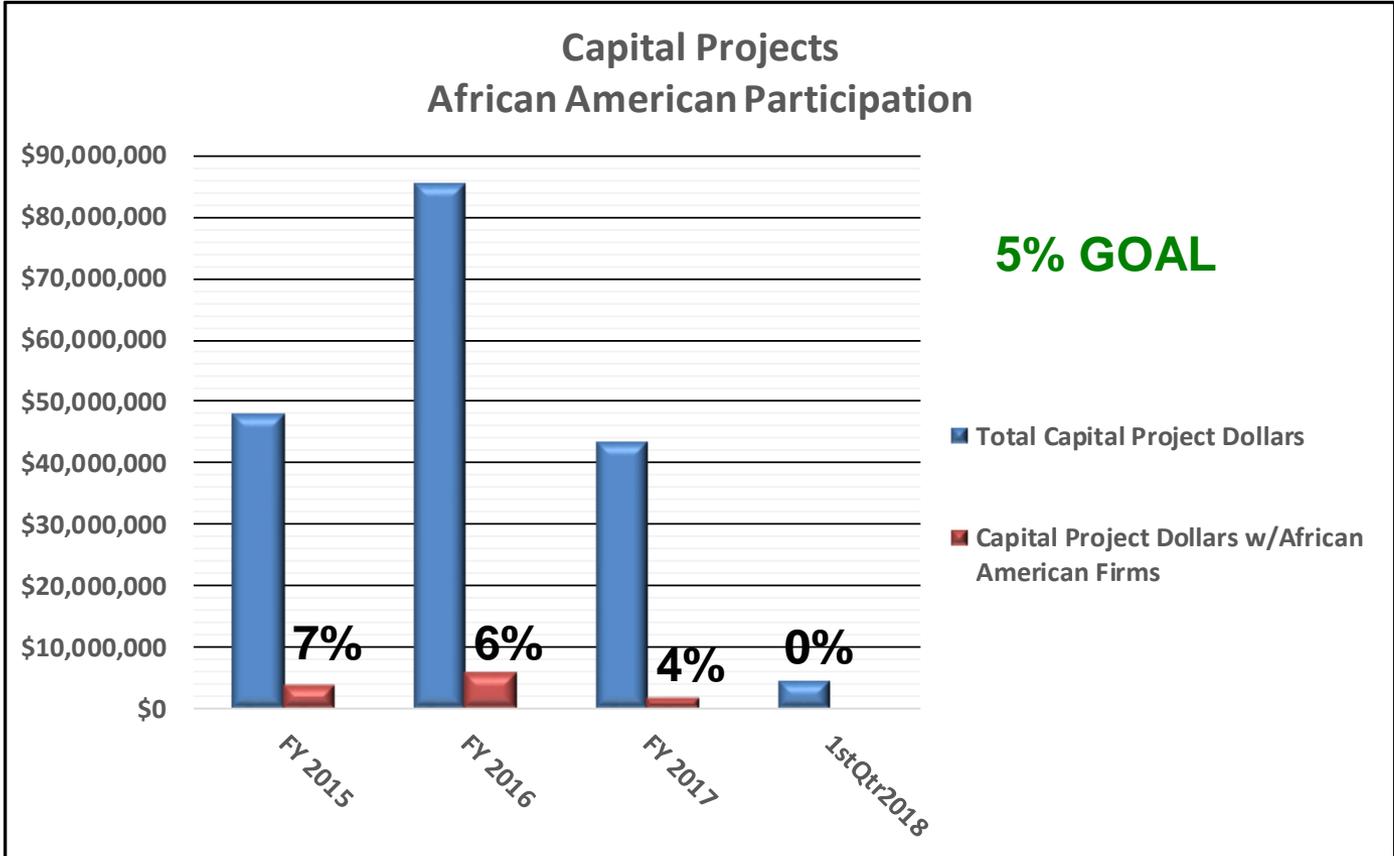
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

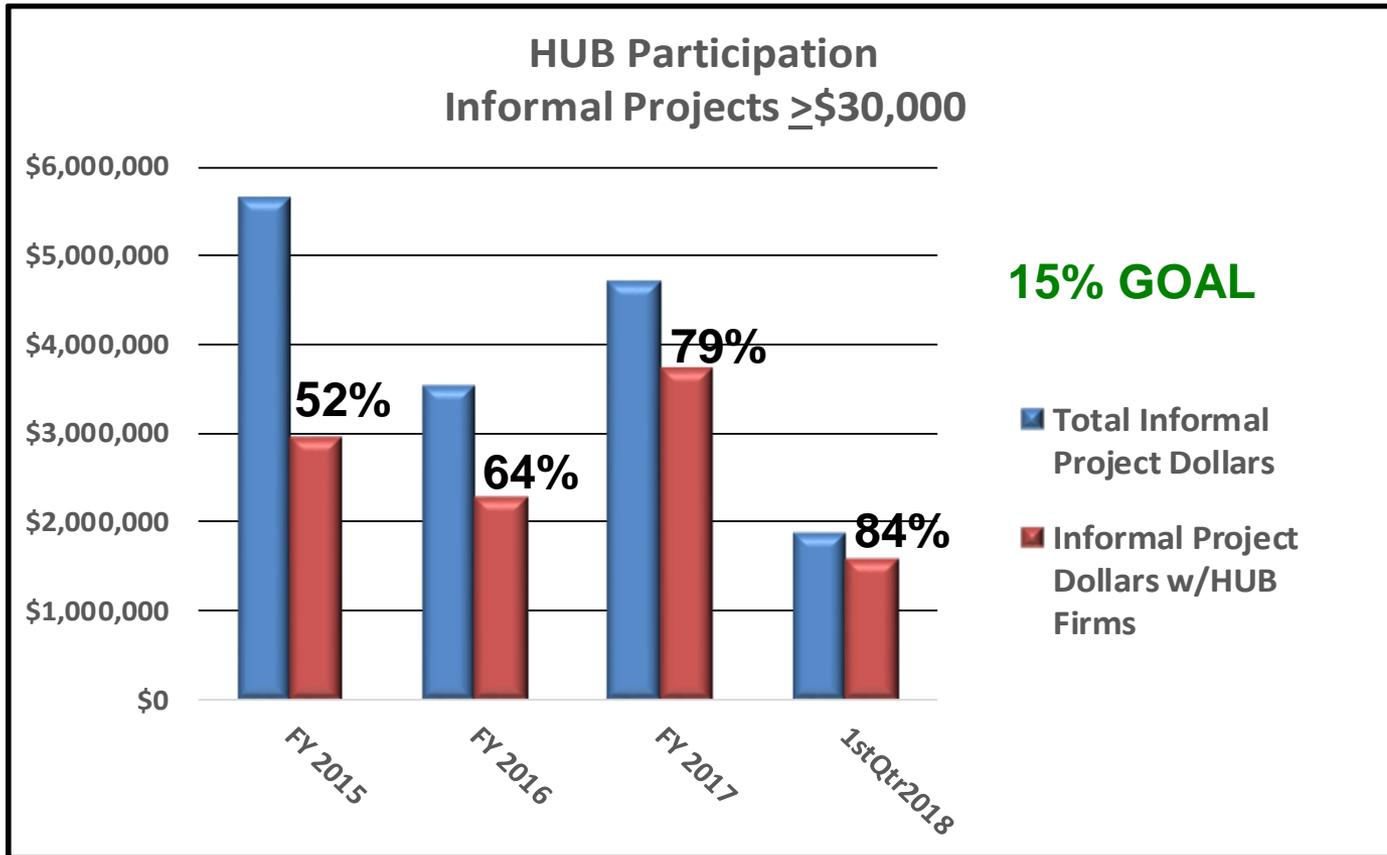
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

We met with seven local and active African American contractors covering several contracting specialties. We are requesting proposals for work effort related to their specialty on a variety of projects to include schedule and cost. We save and document each proposal within our project red folders and in a fiscal year spreadsheet. This is especially important when either schedule or cost dictates that we use a separate contractor or contracting method.

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 2018

Annual Goal
13%

QTR 1 Status
55.5%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

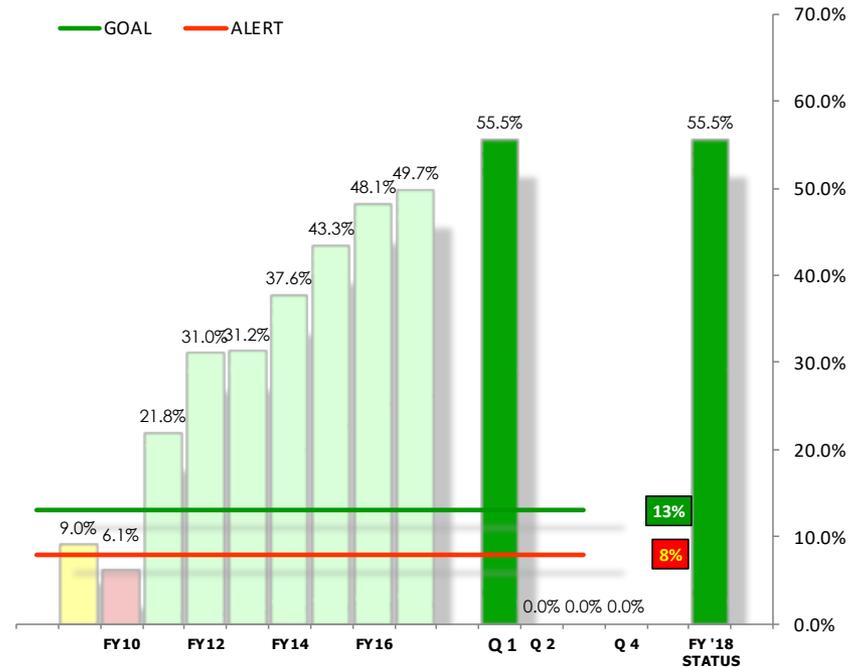
Tactic 5.4.4: 13% overall HUB participation on informal projects below \$30,000 including 3% African American
Measure: Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

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

13% Overall HUB Participation – Summary Graph

FY 18

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%
FY17	\$ 2,122,583	\$ 1,055,439	49.7%
Q 1	\$ 414,160	\$ 229,963	55.5%
Q 2	\$ -	\$ -	
Q 3	\$ -	\$ -	
Q 4	\$ -	\$ -	
FY '18 STATUS	\$ 414,160	\$ 229,963	55.5%



Facilities Management Strategic Planning Session – First Quarter FY 2018

Annual Goal
3%

QTR 1 Status
0.007 %

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

FY 18

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%
FY17	\$ 2,122,583	\$ 14,905	0.7%
Q 1	\$ 414,160	\$ 30	0.007%
Q 2	\$ -	\$ -	
Q 3	\$ -	\$ -	
Q 4	\$ -	\$ -	
FY '18 STATUS	\$ 414,160	\$ 30	0.007%

