



UNC CHARLOTTE

*Facilities Management*

## **Strategic Planning Session**

**Second Quarter – Fiscal Year 2014  
October – December 2013**

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



*...Creating a Campus of Distinction*



UNC CHARLOTTE

"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

# GOAL #1

Continuously Improve  
Operations of Campus

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

**Objective: 1.1: Improve Labor Availability**

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

## ACTION PLAN

- Actions Planned
  - 1 – Continue to stress accurate reporting and recording of employee’s time.
    - a) Meet with shop supervisor and PA’s to review.
    - b) Stress importance with all employees.
    - c) Get supervisors out “in the field”
    - d) Review white sheets in detail.
  - 2 – Get employees out of the shop.

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

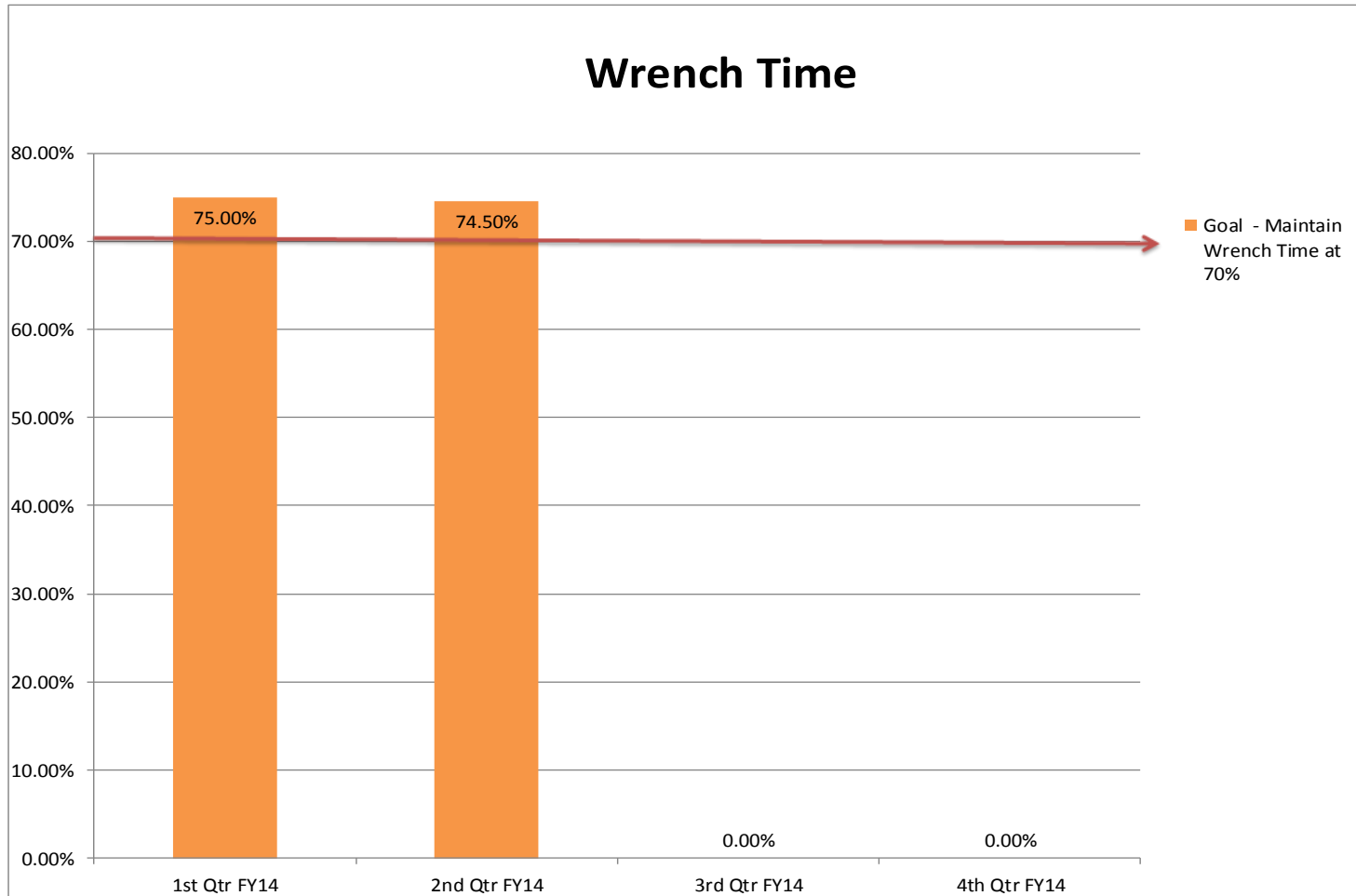
**Objective: 1.1: Improve Labor Availability**

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

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

**Lead:** Facilities Operations

**Balanced Scorecard Category:** Internal Business Process



STATUS

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

**Objective: 1.2: Improve Logistics Efficiency**

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

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

## ACTION PLAN

- Actions Planned

- 1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
- 2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
- 3 – Continue to monitor and reduce Requisition to PO processing time.
- 4 – Continue to send out daily reminders for approvals.
- 5 – Continue to push SDI Punch-out.

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

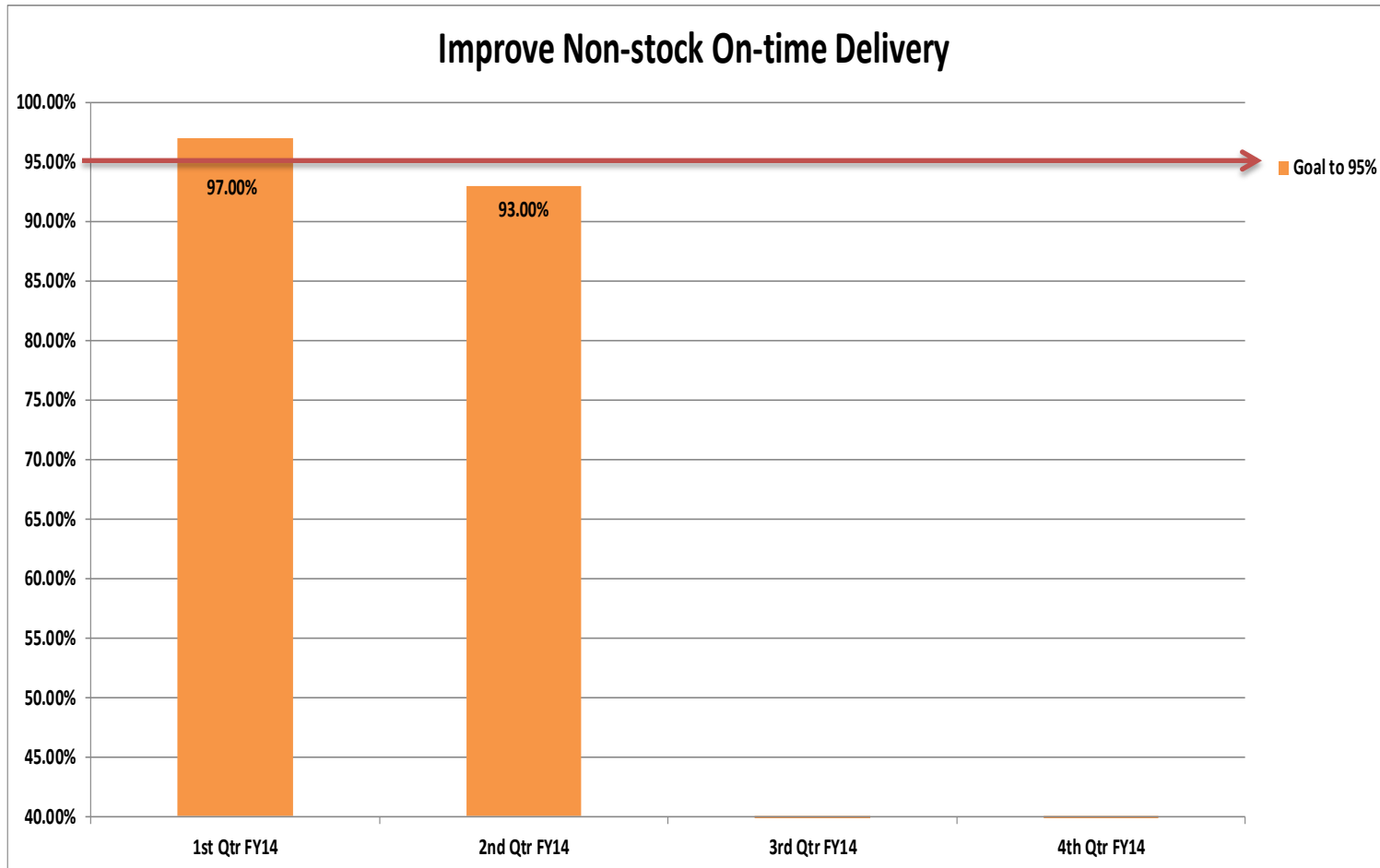
**Objective: 1.2: Improve Logistics Efficiency**

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

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process



STATUS

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

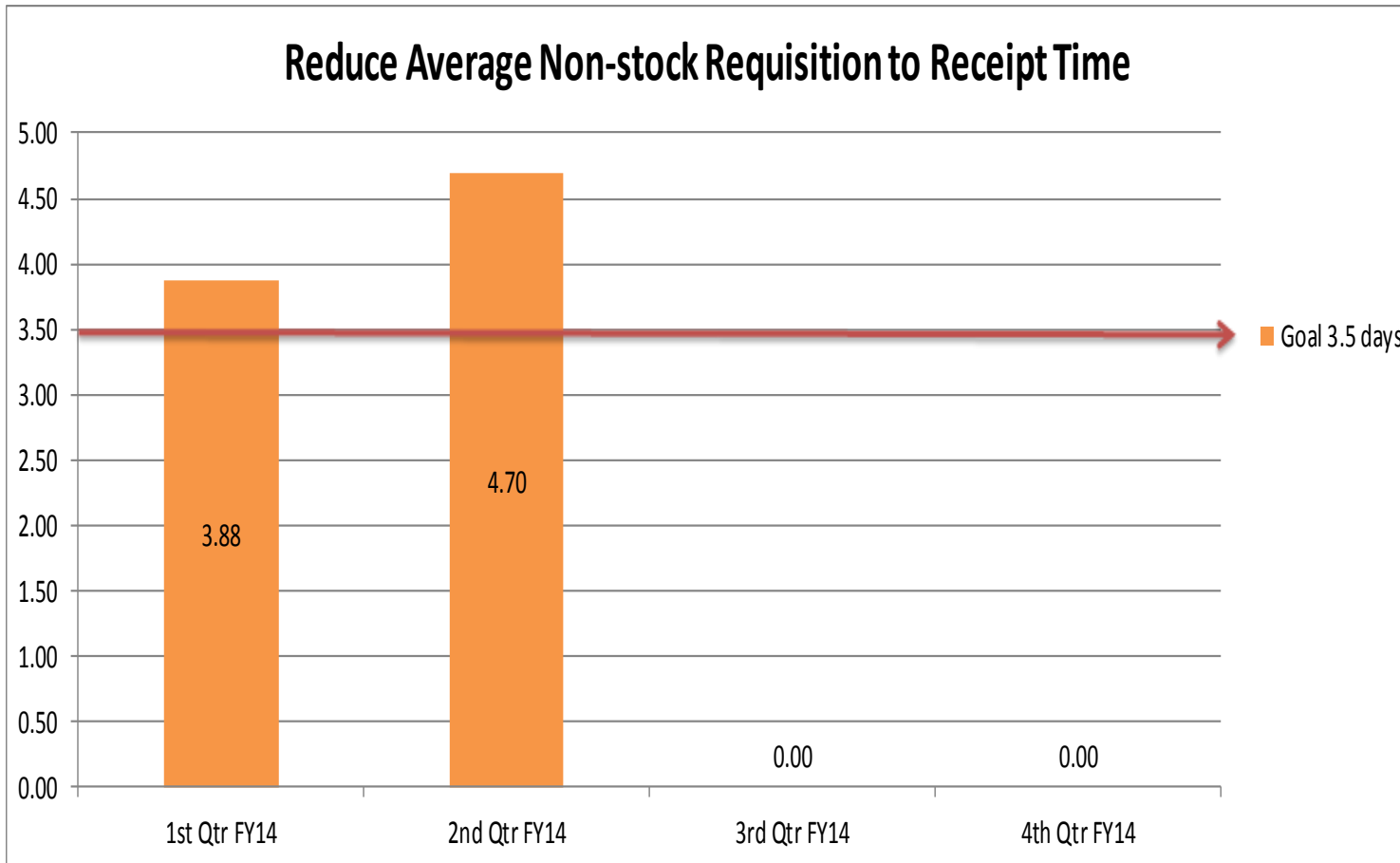
**Objective: 1.2: Improve Logistics Efficiency**

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

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process



**STATUS**

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

**Objective: 1.3: Improve Work Request Process**

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

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

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

## ACTION PLAN

- Actions Planned

1 – Continue to build PM Program to cover all equipment and buildings.

3 – Continue increasing predictive maintenance measures as funds permit.

4 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.

5 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

6 – UPA and Managers to monitor 14 day report; weekly meeting to review.



Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

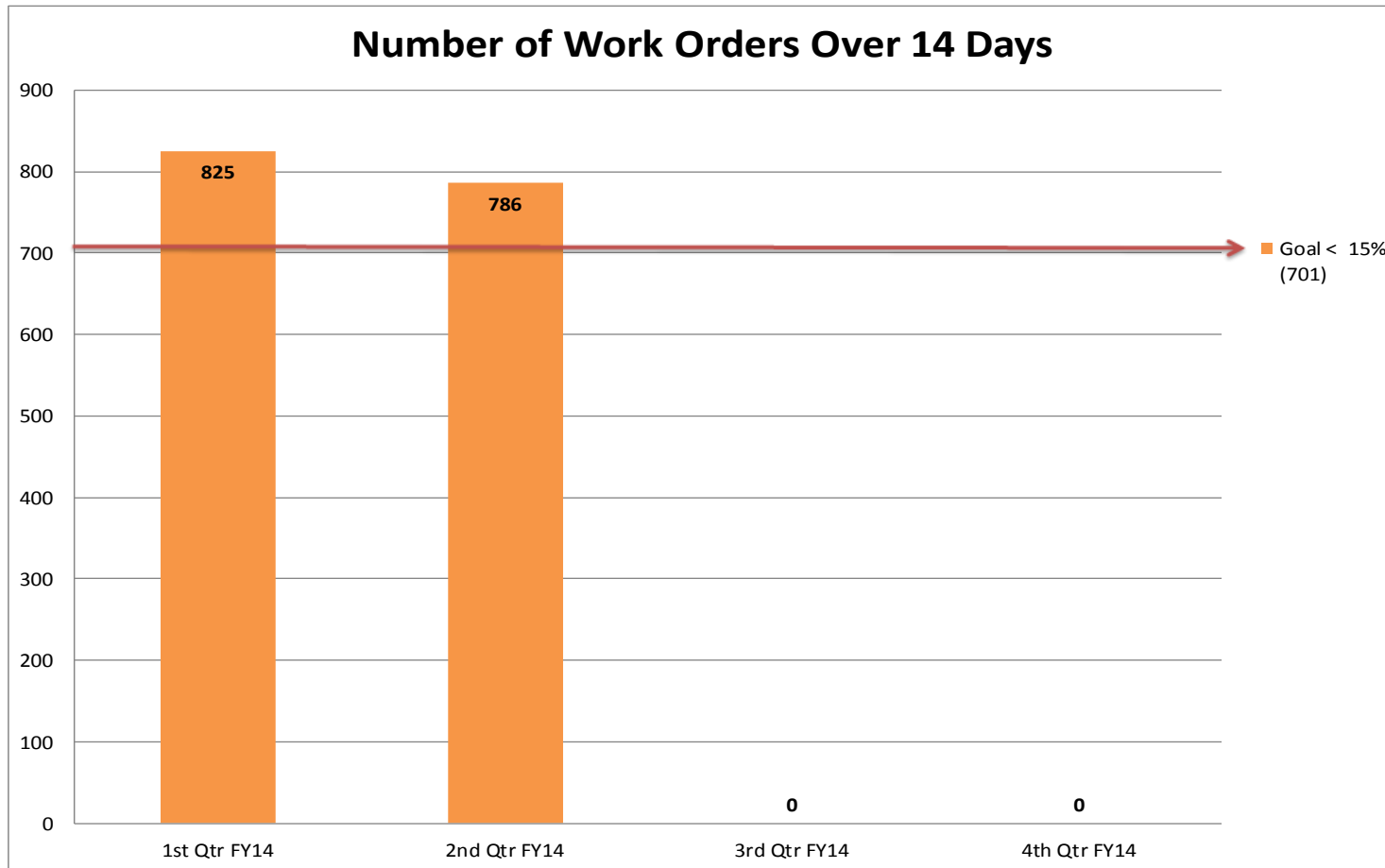
**Objective: 1.3: Improve Work Request Process**

**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**

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

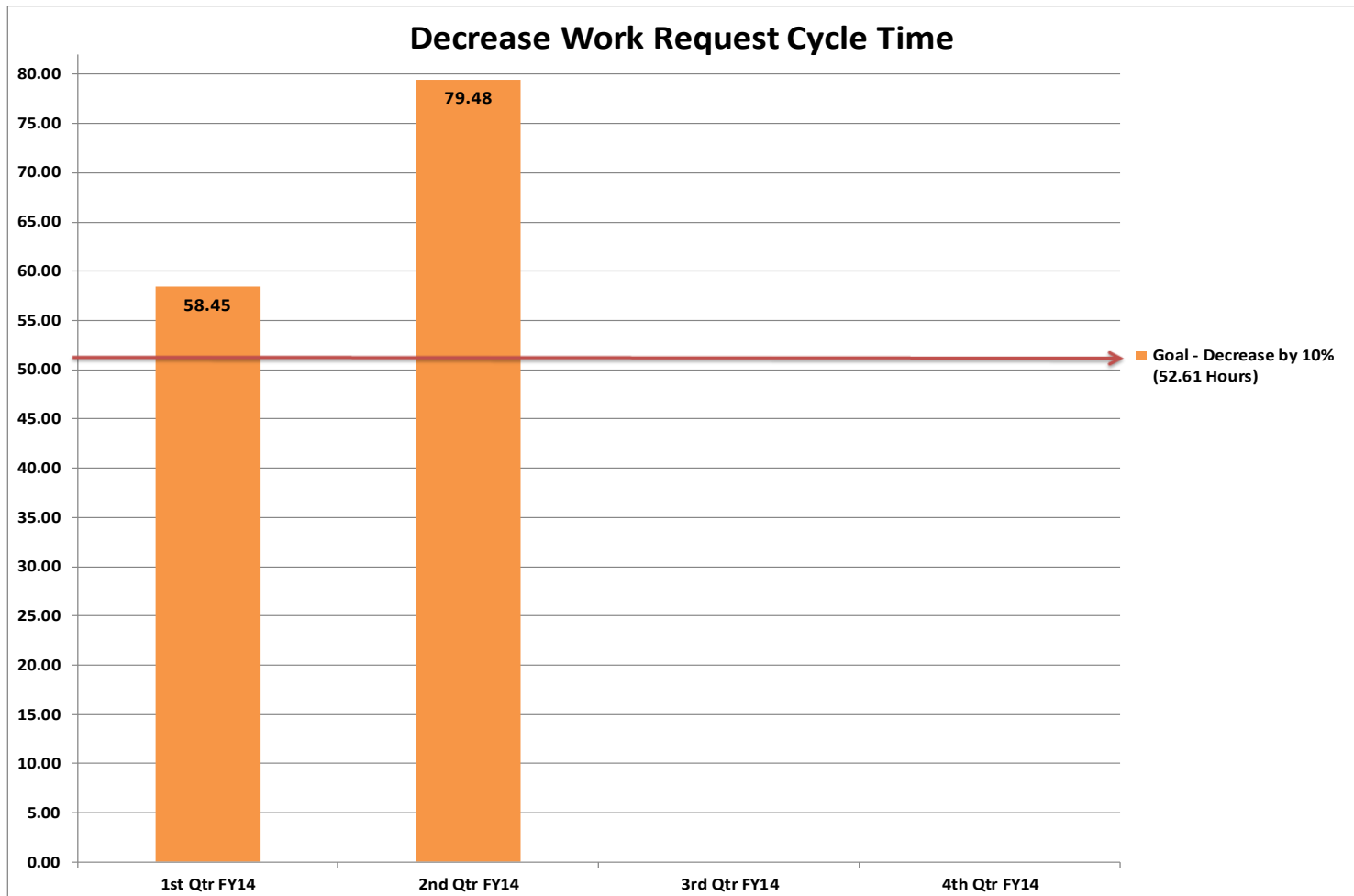
**Objective: 1.3: Improve Work Request Process**

**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



STATUS

## GOAL #1 – Continuously Improve Maintenance and Operations

**Objective: 1.1:** Improve BES Processes  
**Tactic 1.1.1:** Achieve APPA Level 2 in 98% of Buildings

Lead  
BES

### ACTION PLAN

- Actions Completed
  - Solomon Franklin attended Janitor University, “ManageMen” in Salt Lake City, Utah from October 7 – 11, 2013
  - BES Re-Org Study underway
  - All buildings not in renovation audited (self audit)
  - Changed chart to reflect summary data for last four quarters
  - Investigated CIMS/OS1 Certification (feasibility review)
  - Recommended outside audit of BES cleaning processes using OS1 and APPA Cleanliness Levels
- Actions Planned
  - Proceed with outside audit of BES cleaning processes using OS1 and APPA Cleanliness Levels
  - Tabling event at each building for BES reorganization, supervisors, managers, and BES office staff to meet all Building Liaisons by 12/31/14
  - Continue quarterly self audits
  - Survey In-state peers on Organizational Structure and shift schedule
  - Conference call with In-state peers

Lead  
BES

**GOAL #1 – Continuously Improve Operation of Campus Facilities**

**Objective: 1.4: Improve BES Processes**

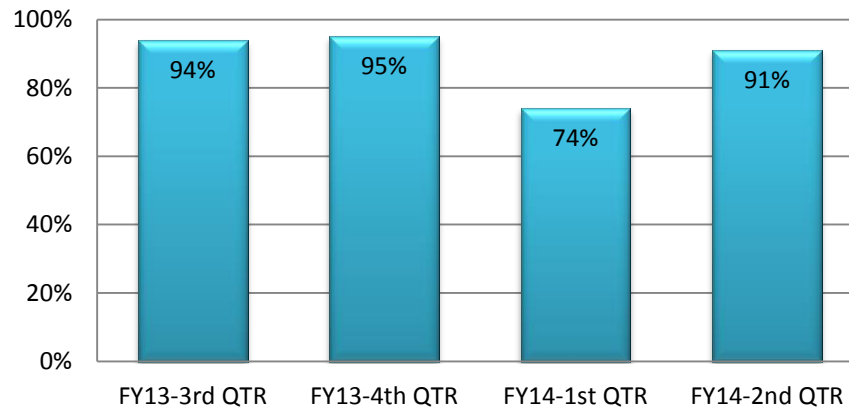
**Tactic 1.4.1:** Achieve APPA Level 2 in 98% of Buildings

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

**Balanced Scorecard Category:** Customer Perspective

**APPA LEVELS**

Percentage = 91%



**STATUS**

**GOAL #1 – Continuously Improve Operation of Campus Facilities**

**Objective: 1.5: Improve Facility Systems Reliability**

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

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

**Tactic: 1.5.3:** Fewer than 5 unscheduled outages per quarter

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

## ACTION PLAN

- Actions Planned

- 1 – Continue to inventory and update equipment lists.
- 2 – Complete conversion from old PM Module to new PM Module. UPA and Managers to monitor status.
- 2 – Closer monitoring of PM completions by Supervisors and Managers.
- 3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
- 4 – Prepare program for major equipment repairs and replacement.
- 5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
- 6 – Continue to monitor equipment; swiftly and accurately report outages.

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

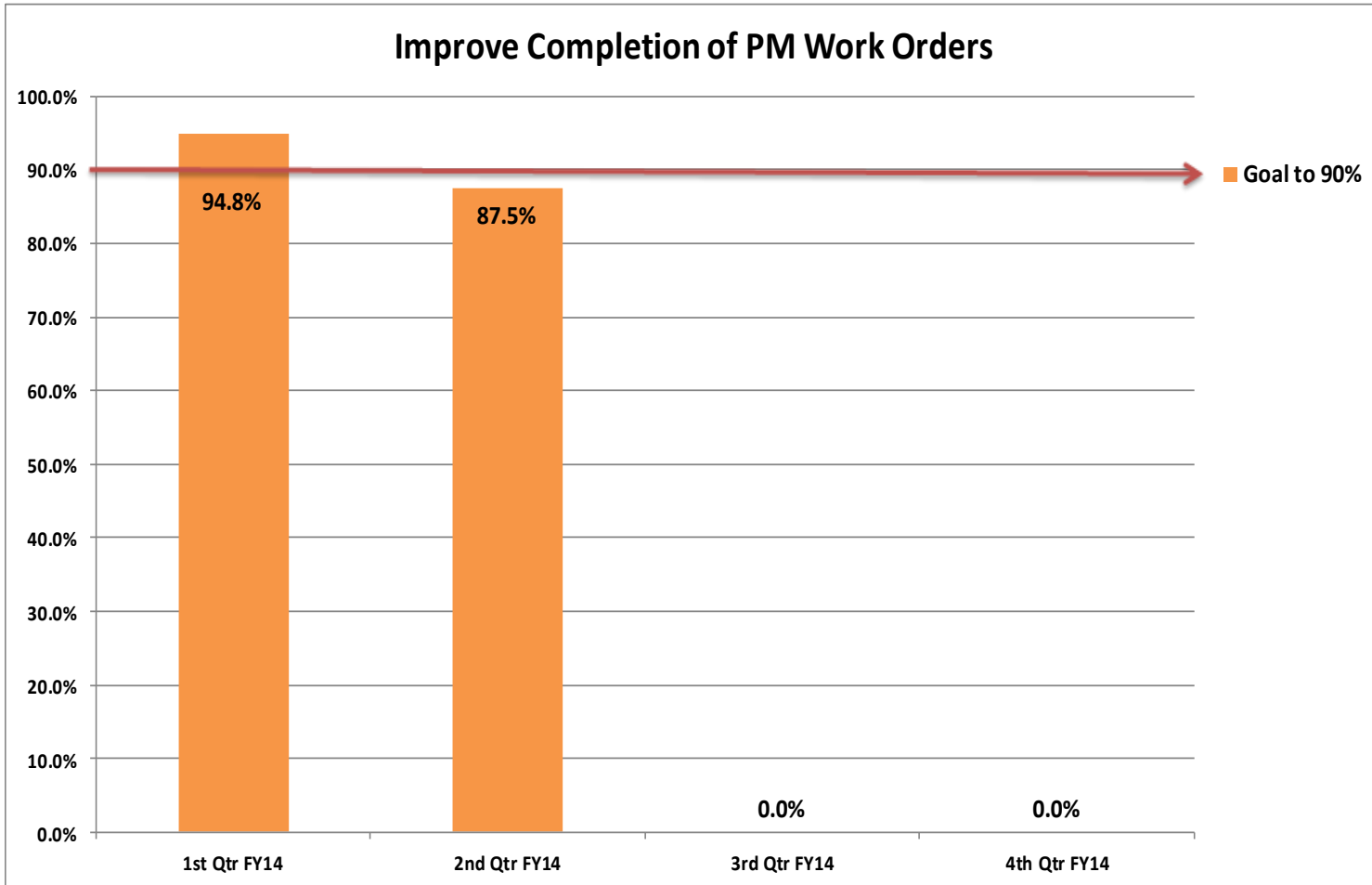
**Objective: 1.5: Improve Facility Systems Reliability**

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

**Measure:** Percentage of Preventative Maintenance Work Requests Completed (Completed divided by Total Completed + Cancelled + Rejected)

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process



**STATUS**

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

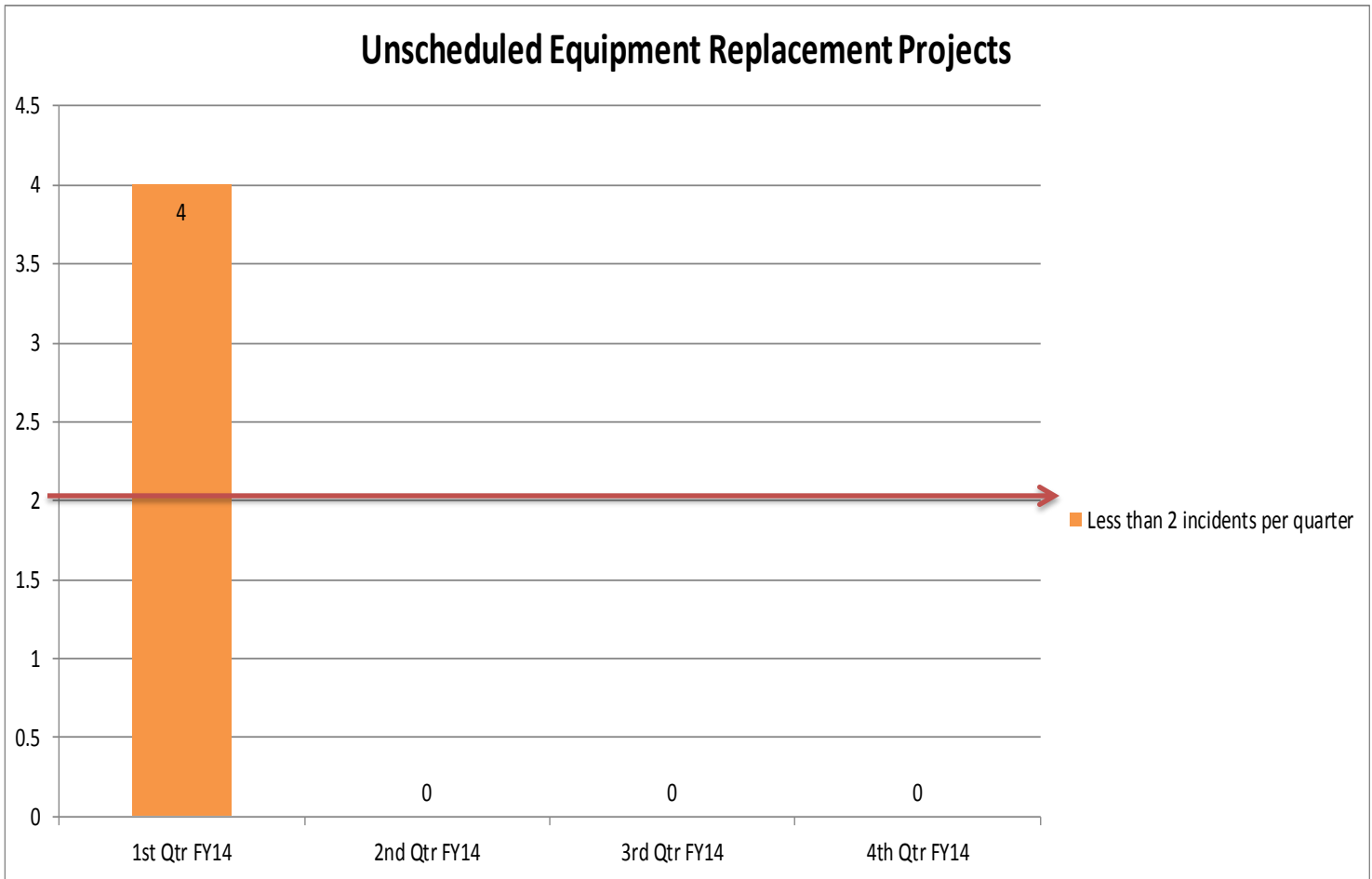
**Objective: 1.5: Improve Facility Systems Reliability**

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

**Measure:** Number of Unscheduled Equipment Replacement Projects

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process



STATUS

Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

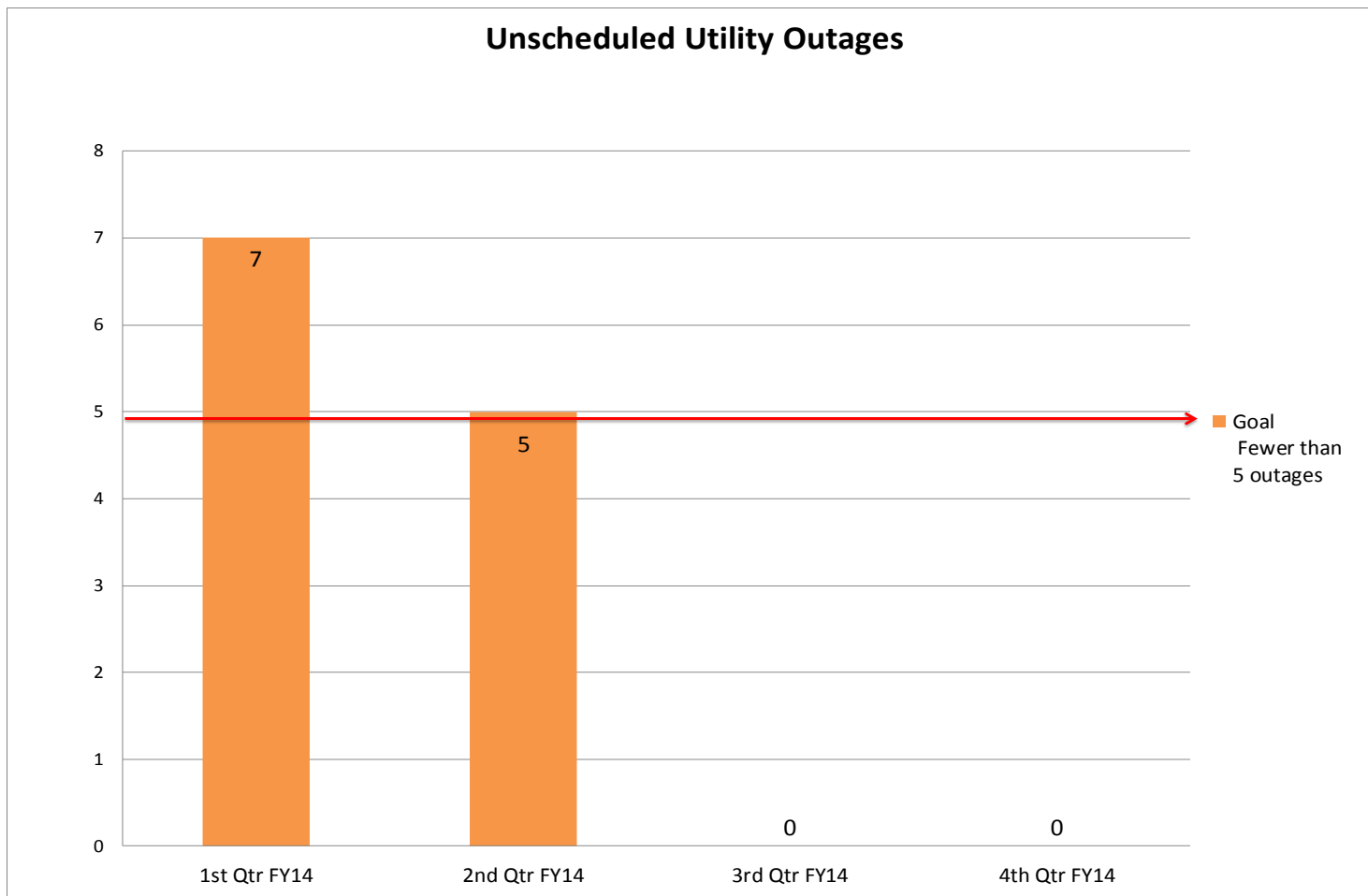
**Objective: 1.5: Improve Facility Systems Reliability**

**Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter**

**Measure: Number of Occurrences (Electric, Water, Sewer, HVAC, Roofs, Roads measured separately)**

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective



**STATUS**



Lead  
F. O.

**GOAL #1 – Continuously Improve Operations of Campus Facilities**

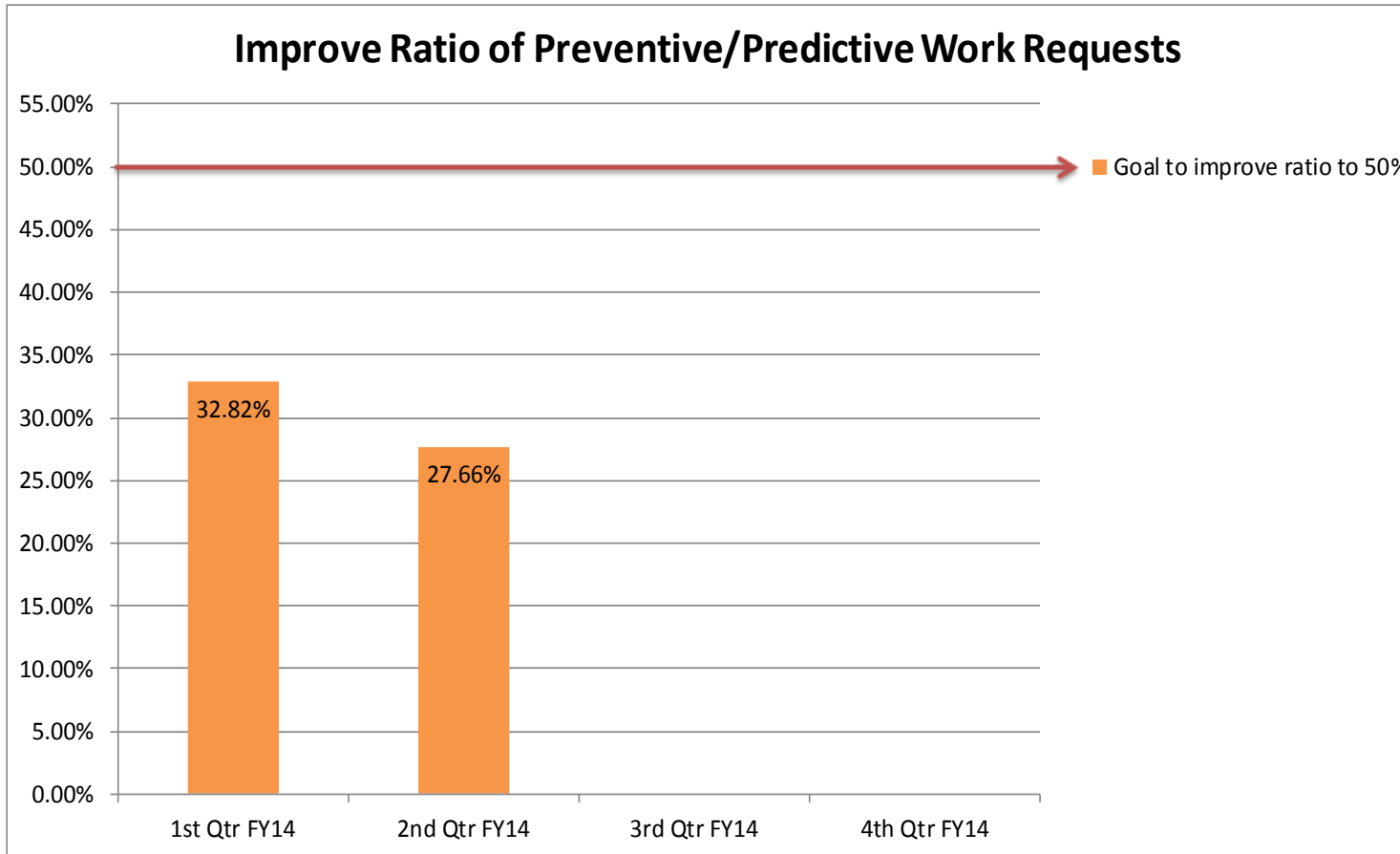
**Objective: 1.5: Improve Facility Systems Reliability**

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

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective



**STATUS**

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

-- Earl Nightingale,  
Motivational Speaker

## GOAL #2

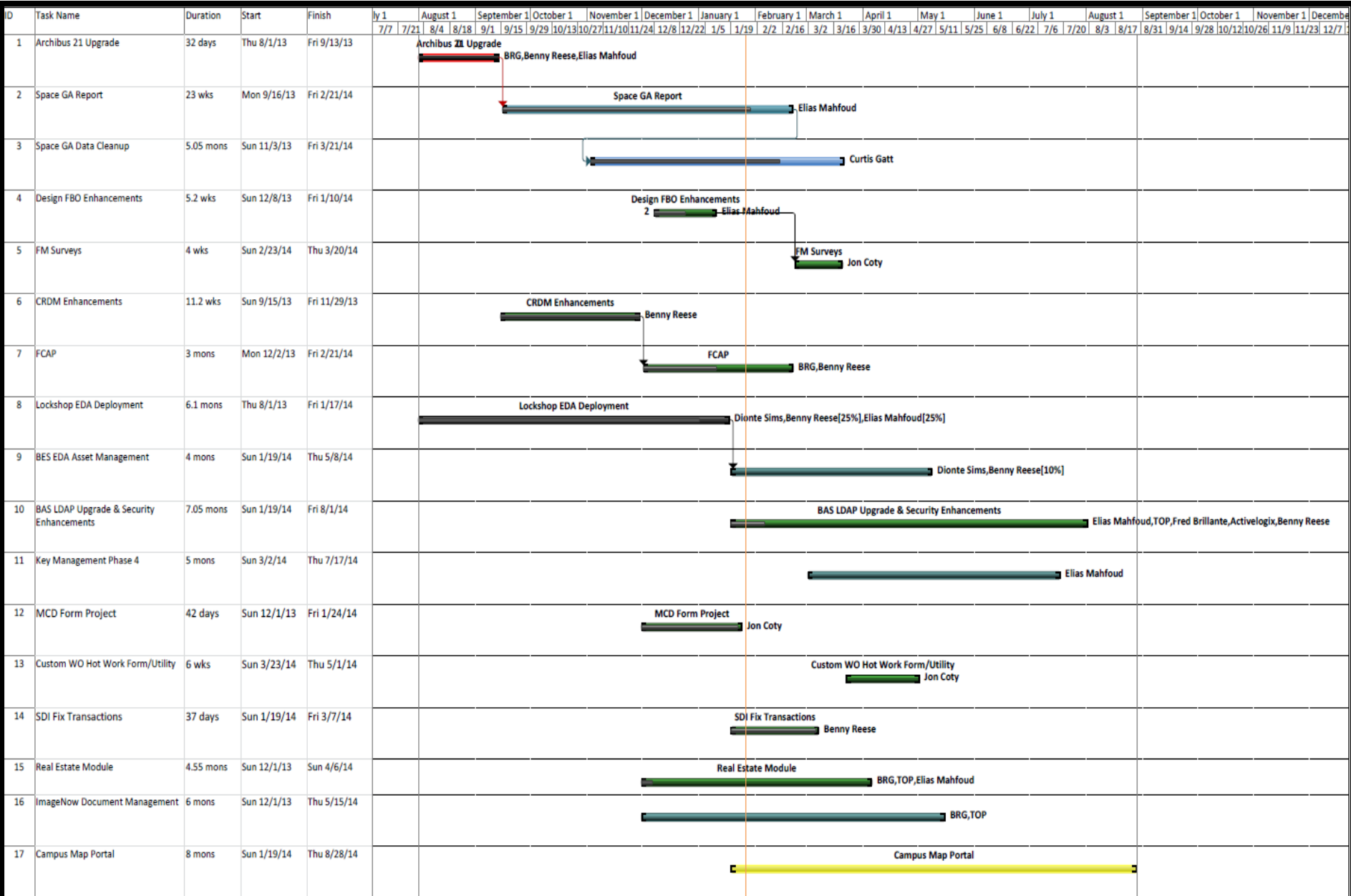
Create a Reliable and Sustainable  
Physical Infrastructure



# FM Prioritized Projects – FY14

1. ARCHIBUS Upgrade – **User Views/Reports Fixes In Process**
2. Space GA Reports – **In Process**
3. Space Data Clean Up – **Not Started**
4. Design & FBO Enhancements – **In Process**
5. FM Surveys – **Not Started**
6. ImageNOW Document Management – **In Process**
7. Real Estate Module – **In Process**
8. Facilities Condition Assessment Program (FCAP) – **In Process**
9. CRDM Enhancements – **In Process**
10. FBO Accounting Upgrades – **Not Started**
11. LockShop Enterprise Data Assistant (EDA) – **In Process**
12. BES Enterprise Data Assistant (EDA) Asset Management - **On Hold; Project will resume in February to**
13. BAS LDAP Upgrade & Security Enhancements – **Funding/POs Generated**
14. ARCHIBUS Key Management – **Not Started**
15. WO Hot Work Permit Form/Utility – **Not Started**
16. Campus Map Portal – **Not Started**

# FY 14 Project Schedule



Project: 2014 FIS ProjectsRev4  
Date: Mon 1/27/14

Task		Summary		External Milestone		Inactive Summary		Manual Summary Rollup		Finish-only
Split		Project Summary		Inactive Task		Manual Task		Manual Summary		Deadline
Milestone		External Tasks		Inactive Milestone		Duration-only		Start-only		Progress

## 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. Recruit and Hire GIS Developer position by March 2014, which will bring FIS staffing to 100%.
2. Finalize BAS upgrade/LDAP projects by June 6, 2014.
3. Launch FCAP module for FO testing & use by 28Feb2014.
4. Complete 100% of Testing for Lockshop EDA project by 28Feb2014.
5. First set of ARCHIBUS Training videos and new documentation to be available via Moodle April 1<sup>st</sup>.

Lead  
FIS

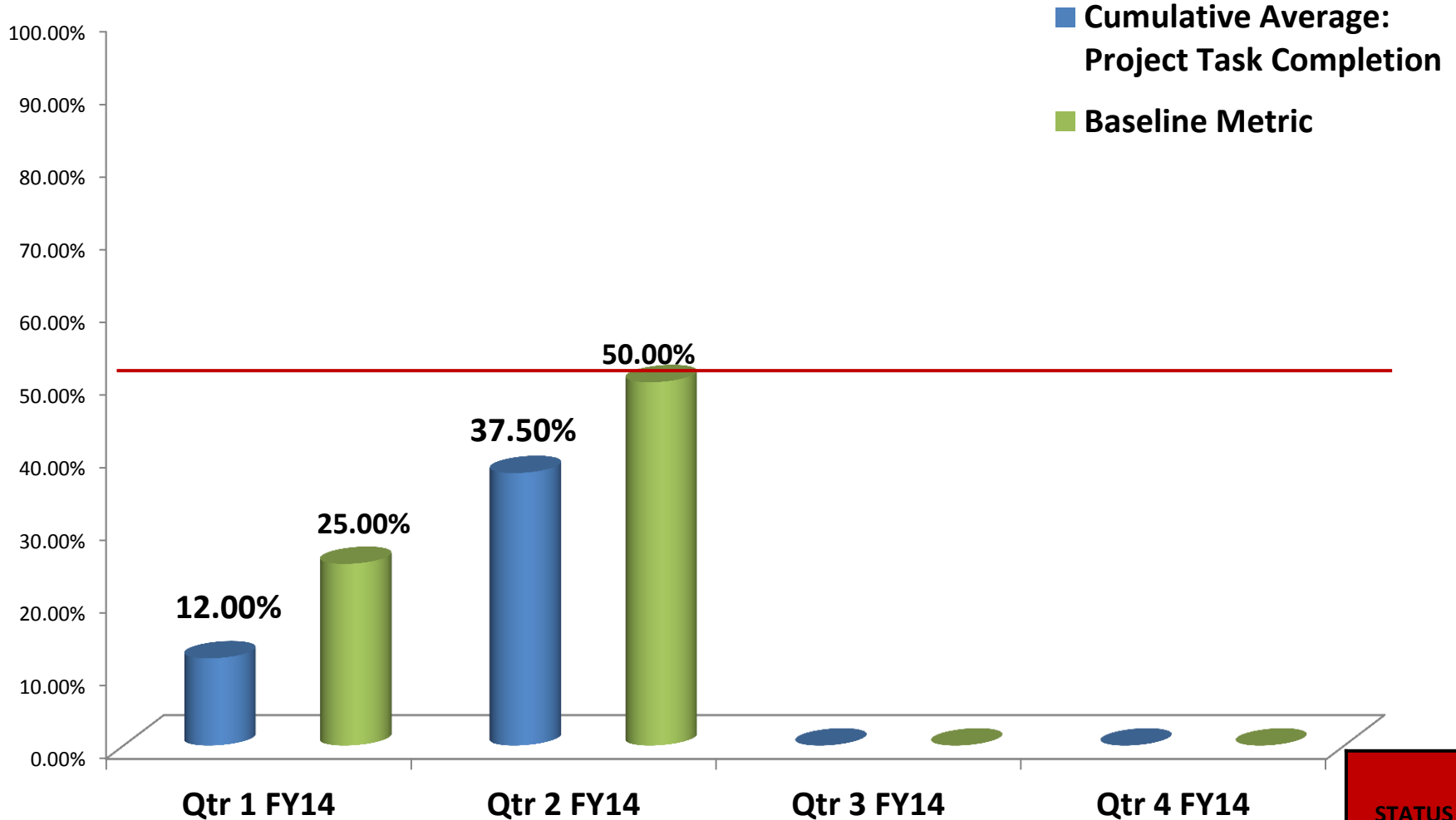
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

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

**Balanced Scorecard Category:** Internal Business Processes



STATUS

**Facilities Management Strategic Planning Session – Second Quarter FY 2014**

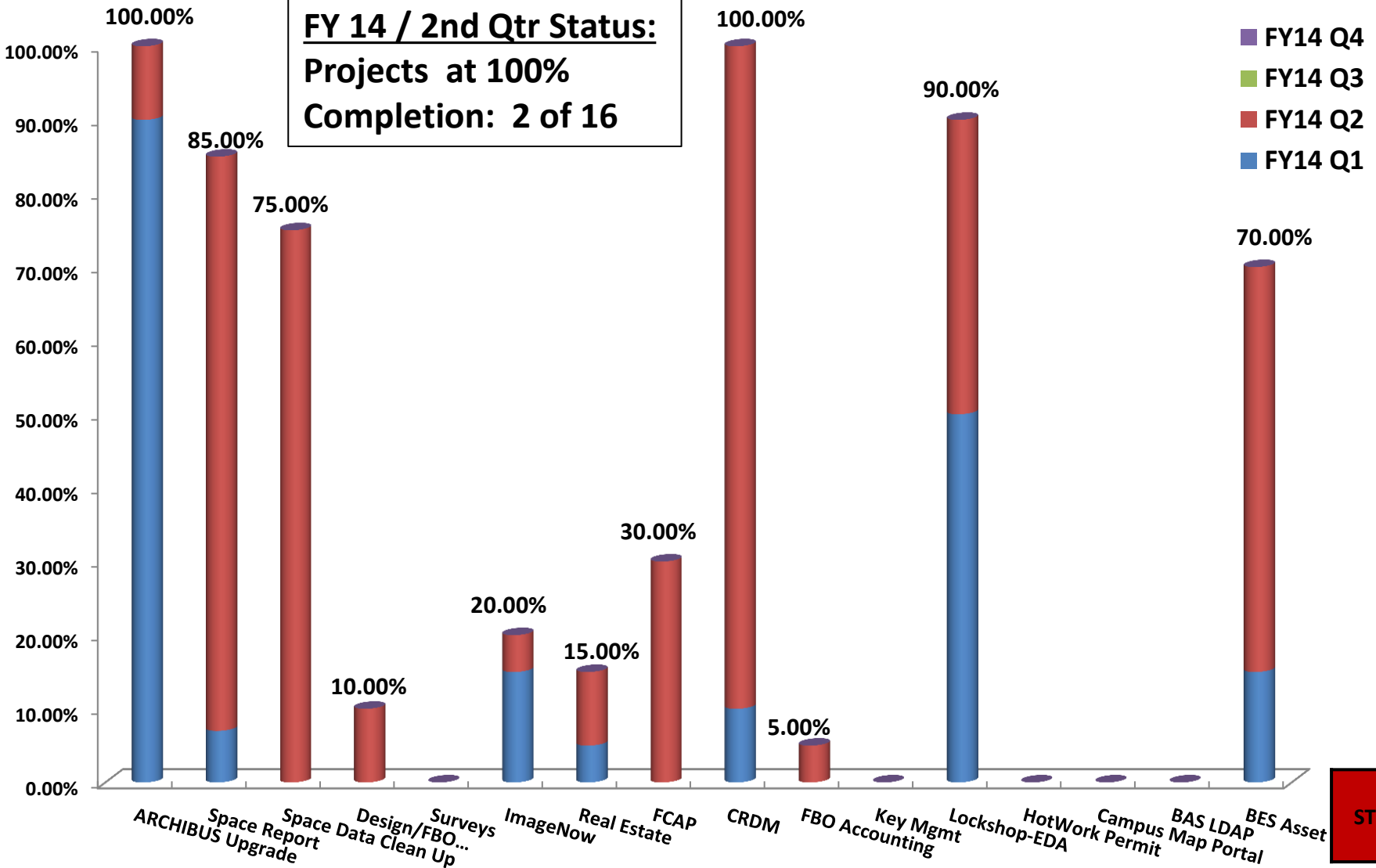
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology  
**Tactic:** 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan  
**Measure:** Percent Completion of Five-Year Technology Projects  
 Project Status Completion Percentage

Lead  
FIS

**Balanced Scorecard Category:** Internal Business Processes

**FY 14 / 2nd Qtr Status:**  
**Projects at 100%**  
**Completion: 2 of 16**



**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

<b>Tactic 2.2.1:</b>	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)		
<b>Measure:</b>	Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)		
<b>Tactic 2.2.2:</b>	Increase Project Capacity by 10 projects per year		
<b>Measure:</b>	Number of Projects Completed ( <b>Annual Goal</b> )	-	<b>Currently: HIDDEN</b>

**ACTION PLANS FOR IMPROVEMENT**

**New Improvements**

- **Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:**
  - ❑ Convert Scope & Budget to format in ARCHIBUS similar to Estimating Workbook – Including all Timeline and Audit documents.
    - *Timeline: FY14 QTR 3 - FY15 QTR 2*
  - ❑ Convert current Excel Purchase Requisition (PR) to ARCHIBUS PR, and Convert current Excel Timeline to MS Project style chart.
    - *Timeline: FY15 QTR 1 - FY15 QTR 4*
  - ❑ Link Project Folders to ARCHIBUS for document reviews and access.
    - *Timeline: FY15 QTR 1 - FY15 QTR 4*
- **Customer Orientation for Design Services Processes and ARCHIBUS Design Services Project Management:**
  - ❑ Customer meet and greet to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
    - *Timeline: FY15 QTR 1 - FY15 QTR 4*
  - ❑ Project Priority List to include new column designating “true” Customer.
    - *Timeline: FY15 QTR 1 - FY15 QTR 4*
- **Panel Board Worksheets:**
  - ❑ Implement master worksheets for electrical panels across campus as projects develop showing current and future panel loads and develop database allowing better decisions for future projects and maintenance on campus.
- **Develop and Implement new Customer Survey by end of 2nd QTR – FY15**

**Ongoing Improvements**

- **Continue ongoing efforts to assign Classroom Capacity and provide egress information per building:**



**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective: 2.2: Improve Informal Project Design and Construction Process**

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLANS FOR IMPROVEMENT**

**Ongoing Improvements**

- **Implement process updates based on four committee recommendations identified during 1st Quarter FY-2013:**
  1. Streamline Processes
  2. Under \$30K Contracts (**Complete**)
  3. Develop new Customer Survey
  4. Increase African American HUB usage
- **Continue ongoing efforts to assign Classroom Capacity and providing egress information per individual buildings:  
Driven by building and project needs.**

**IMPLEMENTED ACTIONS AND PLANS**

- Establish proven steps to beneficial occupancy via Customer and departmental meetings. **Ongoing.**
- Customer involvement with project Punch List process. **Ongoing**

**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective: 2.2: Improve Informal Project Design and Construction 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.)

**Balanced Scorecard Category:** Internal Business Process

**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
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
QTR 1	31	30	1	96.8%
QTR 2	45	42	3	93.3%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '14 STATUS</b>	76	72	4	94.7%

**GOAL  
95.0%**

**STATUS  
94.7%**

**GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure**

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

**Tactic 2.3.1:** Improve the Facilities Condition Index (FCI) for buildings on campus by 5% **NLT 06/15.**

**Measure:** Average Building FCI for campus

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Actions Planned:**
  - **Complete CRDM update including revision of SOP by May 2014.**
  - **Complete Phase 2, CRDM, for FCI capability (FIS) by October 2014.**
  - **Determine O/A Draft FCI of buildings by December 2014.**
  - **Recommend a plan/ prioritize projects to improve FCI by 5% by end of FY 2015 by March 2015.**

**STATUS**

**GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure**

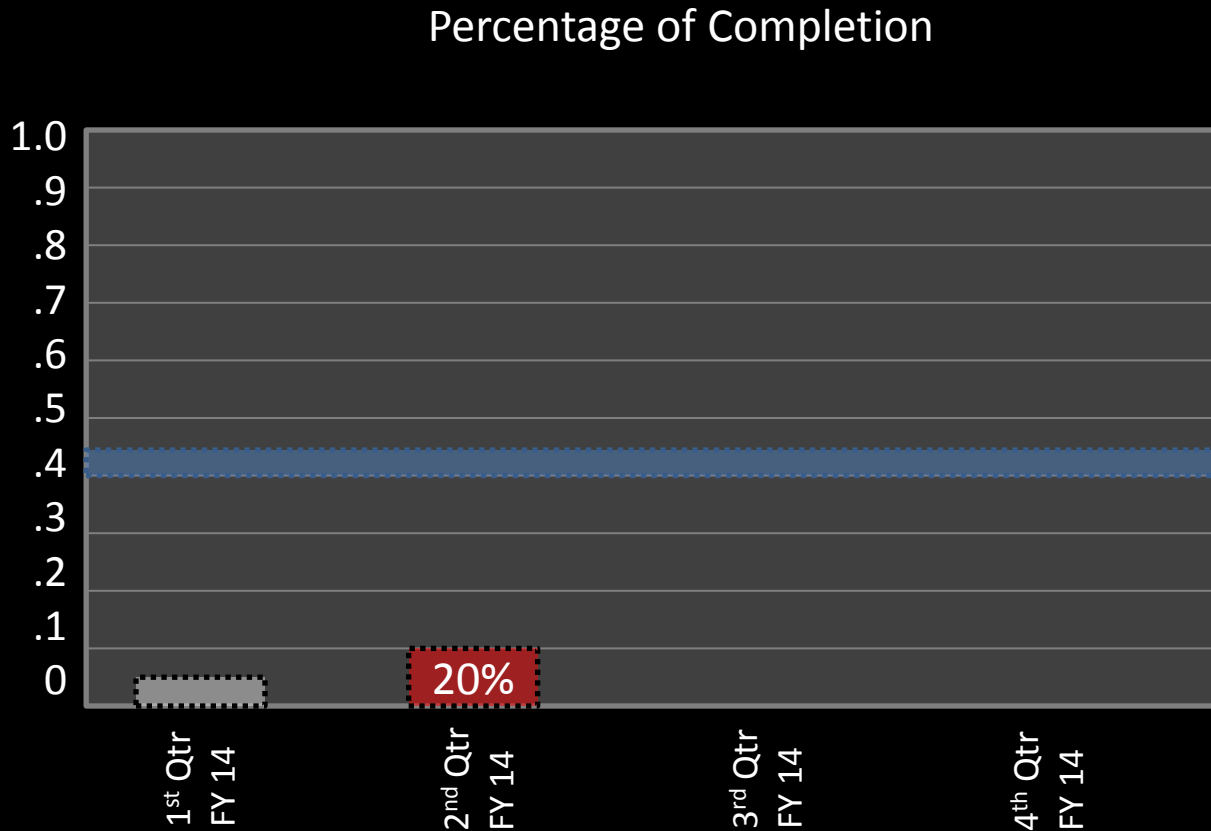
**Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program**

**Tactic 2.3.1:** Improve the Facilities Condition Index (FCI) for buildings on campus by 5% **NLT end of FY 15.**

**Measure:** Average Building FCI for campus

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process



Status

**GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.4: Improve Campus Space Planning and Utilization**

**Tactic 2.4.1:** 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT June 2015.**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Actions Planned:**
  - **Complete space allocations/ inventory by room category in ARCHIBUS.  
(Ongoing)**
  - **Compare inventory to standard and report % difference (Office inventory by June 2014; remainder by September 2014).**
  - **Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard  
by June 2015.**

**STATUS**

**GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.4: Improve Campus Space Planning and Utilization**

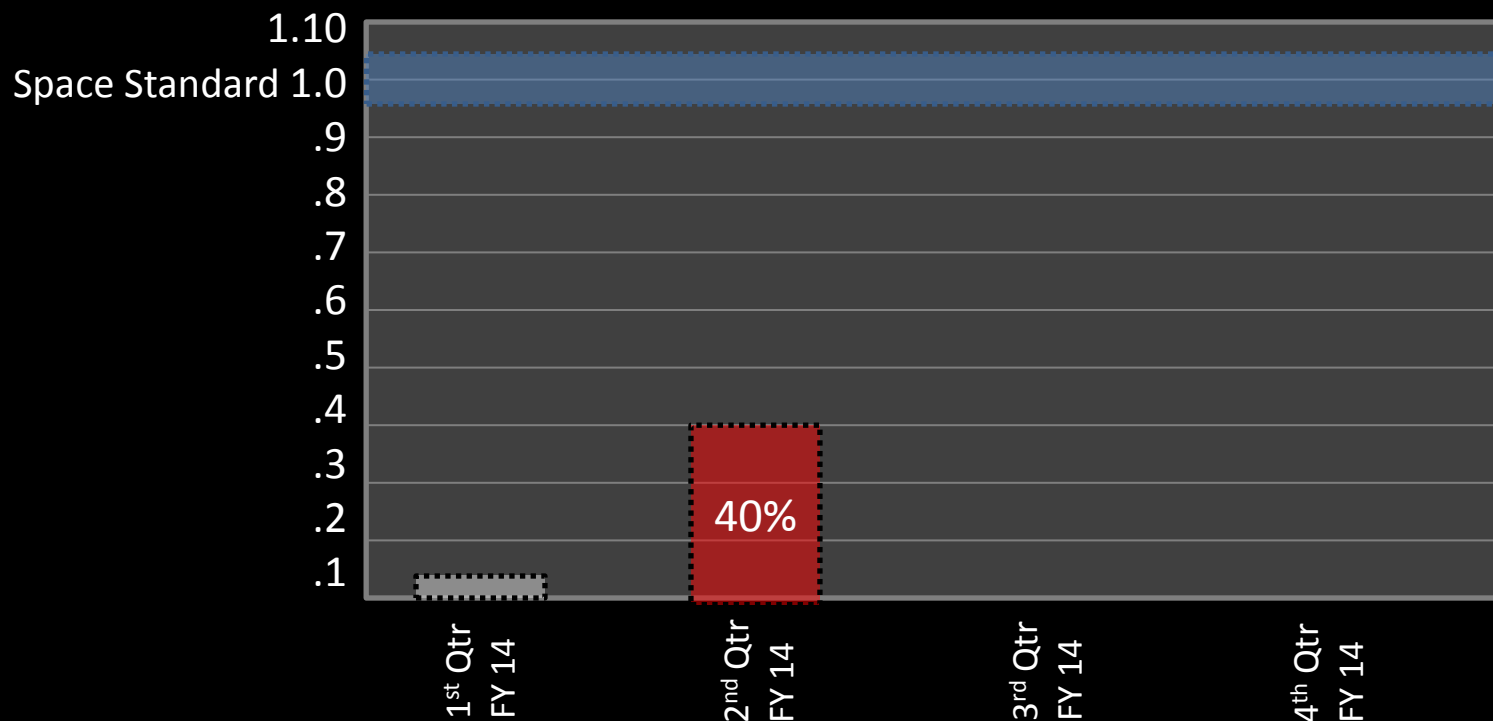
**Tactic 2.4.1:** 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of FY 15.**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

**GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.5: Improve the Capital Planning and Design Process**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Actions Planned:**
  - **Sustain current process of completing Operating Budget sheets for new projects (ongoing)**
  - **Support Capital, when required, with further study related to funding (ongoing)**

**STATUS**

## GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead  
Capital

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

### ACTION PLAN

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

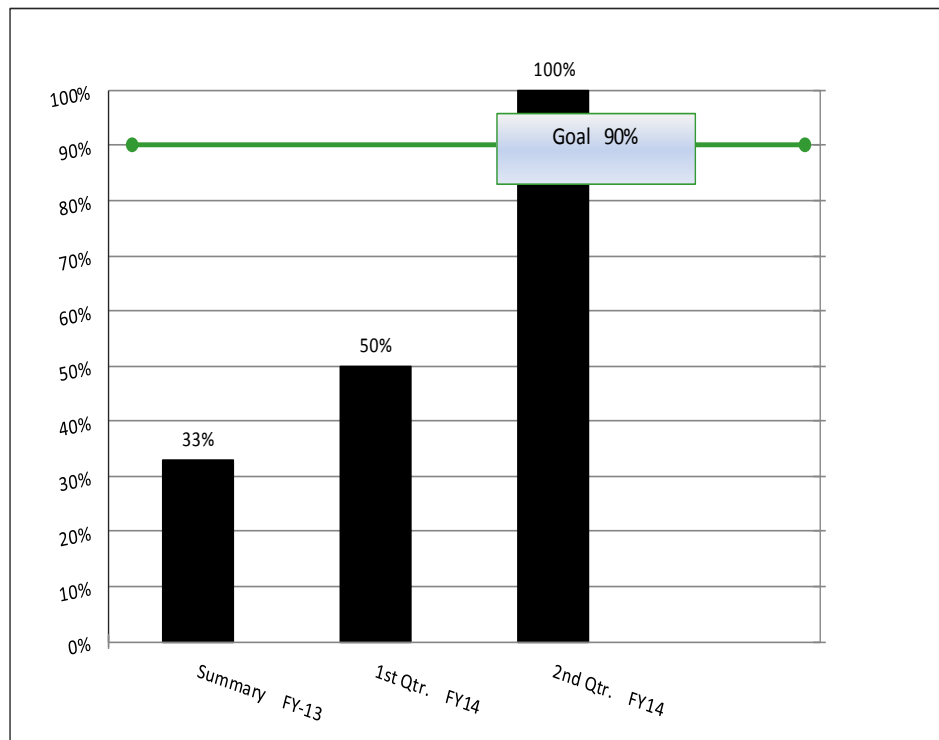


**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.5** Improve the Capital Planning and Design Process  
**Tactic 2.5.2** 90% of designers under contract within 120 days of the Project posting in CAPSTAT  
**Measure:** Percentage of designers under contract within 120 days.

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-13	14	3	6	33%
1st Qtr. FY-14	1	1	1	50%
2nd Qtr. FY-14	4	1	n/a	100%



Tactic Measurement for 2nd Quarter is 100%

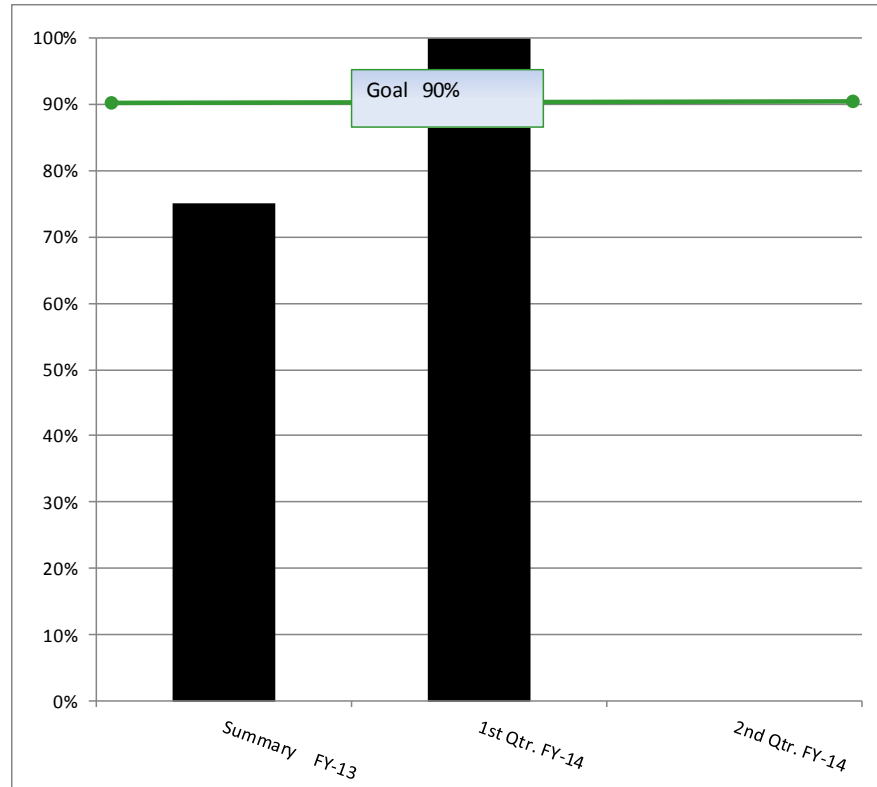
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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



Tactic Measurement for 2nd Quarter is N/A

**Facilities Management Strategic Planning Session – Second Quarter FY 2014**

**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

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 & Initial Contract	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
PORTAL	\$2,466,950	\$2,200,000	\$2,290,200	-10.8%	4.1%	0
RDH Renovation	\$1,742,048	\$1,981,410	\$1,987,410	13.7%	0.3%	0
Res. Hall Ph XII	\$3,400,667	\$2,733,245	\$2,778,245	-19.6%	1.6%	0
Res. Hall Ph. XIII	\$3,081,868	\$2,188,800	\$2,188,800	-29.0%	0.0%	1
Res. Hall Ph. XIV	\$2,641,144	\$0	\$0	0.0%	0.0%	0
RUP IV		\$385,000	\$484,162	0.0%	25.8%	0
Modular Office Bldg	\$60,440	\$72,620	\$72,620	20.2%	0.0%	1
Oak Hall Renovation	\$591,176	\$531,000	\$531,000	-10.2%	0.0%	1
Elm, Pine & Maple Reno.	\$908,068	\$0	\$0	0.0%	0.0%	0
Holshouser Hall Reno.	\$1,039,730	\$1,165,000	\$1,165,000	12.0%	0.0%	1
Sanford Hall Reno.	\$3,081,868	\$2,188,800	\$2,188,800	-29.0%	0.0%	1
Colvard Reno.	\$153,177	\$243,070	\$243,070	58.7%	0.0%	1
Kennedy 2nd Fl Reno.		\$104,127	\$104,127	#VALUE!	0.0%	1
Percentage of Projects within Design						54%

Tactic Measurement is 54%

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

**Status**

## GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead  
Capital

<b>Objective</b>	<b>2.6</b>	Improve the Capital Construction Process
<b>Tactic</b>	<b>2.6.1</b>	90% of capital construction Projects completed on time
	<b>2.6.2</b>	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

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

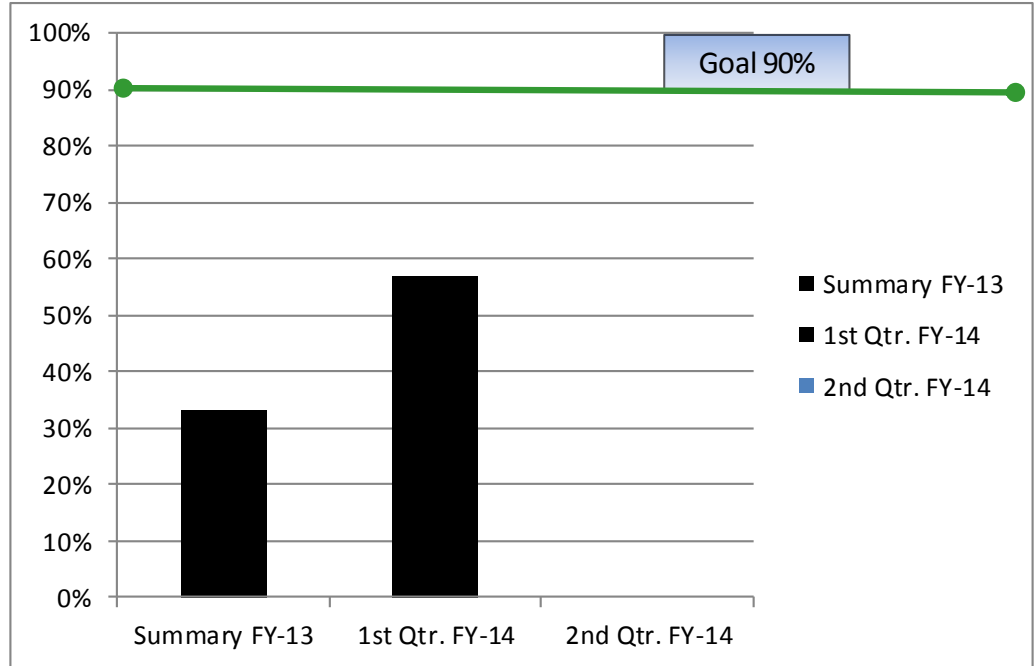
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.6** Improve the Capital Construction Process  
**Tactic 2.6.1** 90% of capital construction Projects completed on time

**Measure:** Percentage of construction projects completed on or before the contract completion date (CCD)

**Balanced Scorecard Category:** Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
1st Qtr. FY-14	4	3	57%
2nd Qtr. FY-14	0	0	N/A



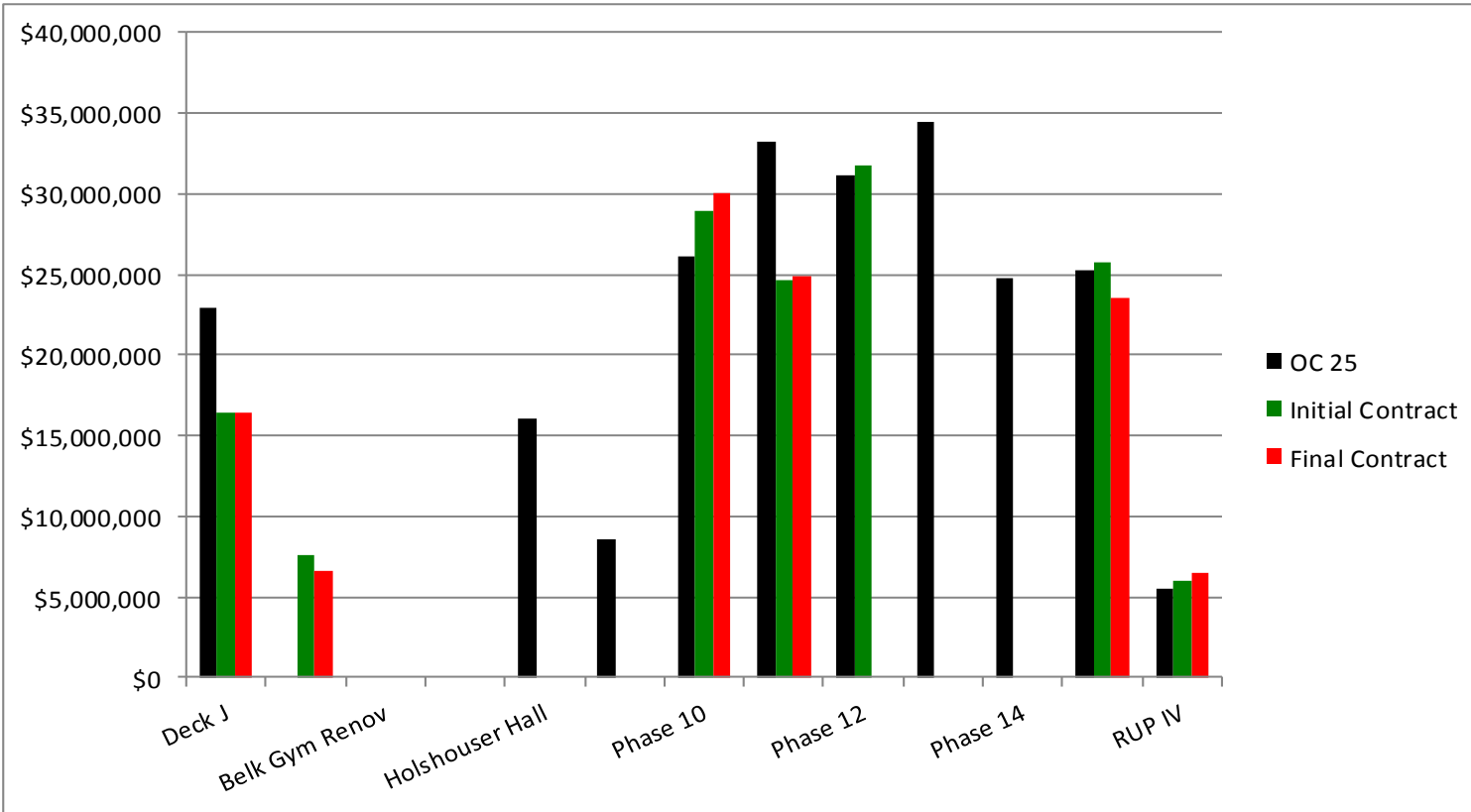
Tactic Measurement for 2<sup>nd</sup> Quarter is N/A

**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



Tactic is currently at 90.9%.  
 Goal is 95%

Status

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



UNC CHARLOTTE

“People don’t want to communicate with an organization or a computer.

They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction.”

- Theo Michelson, State Farm Insurance

## GOAL #3

Foster a Customer Focused Organization



**GOAL #3 Foster a Customer Focused Organization**

**Objective 3.1:** **Continuously improve customer service/satisfaction**

**Tactic 3.1.1:** Achieve overall FM customer satisfaction of 90%

**Measure:** Annual Customer Survey results: Percentage of customers agreeing or strongly agreeing with the statement: "Overall I am satisfied with the service I received from Facilities Management"

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN**

- **Customer Satisfaction Survey:** Preliminary discussions with the Urban Institute have begun to update and administer for FY 13-14. **Launches April 14, 2014; results available July, 2014**
  - Note: Reviewed new APPA survey November 2013 - does not meet FM annual survey needs. Total of nine questions.
- **Customer Service Handbook:** Update and remarket handbook. **Summer 2014**
- **FM External Communication Campaign:** Creating a Campus of Distinction. Multiple marketing channels. **Spring 2014**



**GOAL #3 – Foster a Customer Focused Organization**

**Objective: 3.1: Continuously improve customer service/satisfaction**

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

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

## ACTION PLAN

- Actions Planned

- 1 – Stay involved with performance of ESCO contract and ensure temperature policies are not sacrificed for energy conservation.
- 2 – Ensure that Zones are checking BAS and monitoring conditions.
- 3 – Continue to develop controls section and cross train with Zones.
- 4 – Continue to work with Capital to get buildings commissioned and retro commissioned.
- 5 – Ensure that we are following UNC Charlotte Temperature Control Policy.
- 6 – Work with customers; educate them on the policy and monitor complaints for accuracy.

Lead  
F. O.

**GOAL #3 – Foster a Customer Focused Organization**

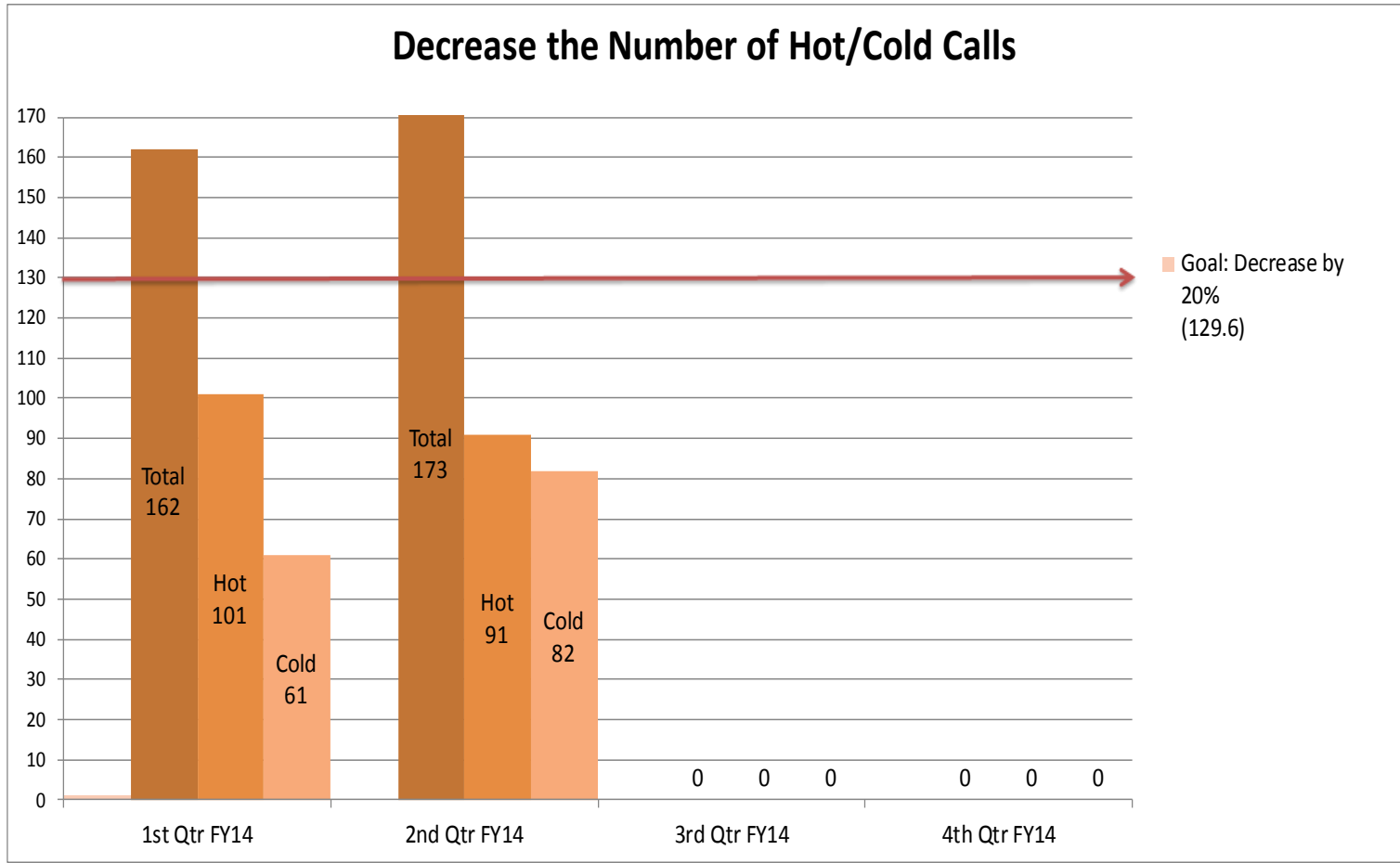
**Objective: 3.1: Continuously improve customer service/satisfaction**

**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



**STATUS**

**Facilities Management Strategic Planning Session – Second Quarter FY 2014**

**Lead  
F. O.**

**GOAL #3 – Foster a Customer Focused Organization**

**Objective: 3.1: Continuously improve customer service/satisfaction**

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

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

Working to create Survey

**STATUS**



UNC CHARLOTTE

"All growth depends upon activity.  
There is no development  
physically or intellectually without  
effort, and effort means work."

-- Calvin Coolidge,  
30th U.S. president

## GOAL #4

Recruit, Develop, and Retain  
Quality Employees



**GOAL #4 Recruit, Develop and Retain Quality Employees**

**Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion**

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

Vacancy time of no longer than 120 calendar days - Exempt

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- Continue to monitor position vacancies and hiring processes to ensure 6- month abolishment threshold is not reached. **(Ongoing)**
- Continue to develop resources that result in increased applicant pools. To date, we are posting our positions (as appropriate) on additional free websites such as: *Learn 4 Good, Central Piedmont Community College, The Latin American Coalition, and The Job Network*. This should result in creating a more diverse and qualified pool of applicants for referral and selection. **(Ongoing)**
- Ensuring all position descriptions/postings contains verbiage that request necessary communication skills, computer skills, English language comprehension skills and skills that demonstrate an employee’s ability to work/interact with others. **(Ongoing)**
- Monitor timeframe of applicant referral to interview to hire. Maintain communications with hiring supervisors requesting status updates. Provide assistance as needed and/or request to keep the process moving. **(Ongoing)**

**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

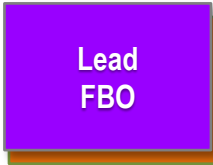
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- Ensure targeted selection methods are consistently utilized. **(Ongoing)**
- Provide assistance to hiring supervisors on appropriate verbiage when establishing selection and/or non-selection criteria in our postings and hiring proposals to ensure a quick turnaround on approvals of hiring proposals. **(Ongoing)**
- With the new 24-Month Probationary Period, continue to monitor separation data that allows us to report employee turnover during the probationary period. **(August 22, 2015)**

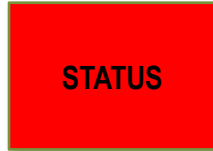
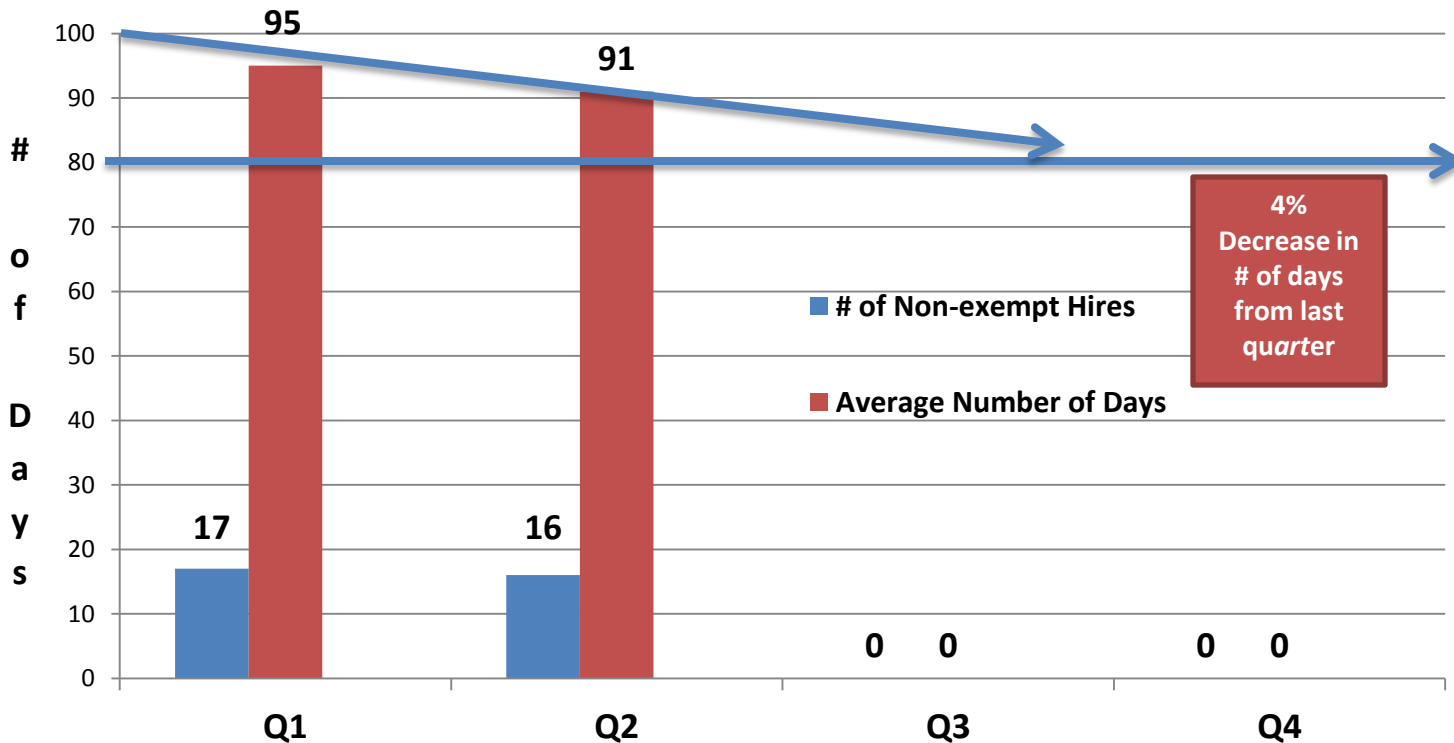


**GOAL #4 Recruit, Develop and Retain Quality Employees**

**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:** Internal Business Process

**Average Number of Days to Fill Non-exempt Vacancies**

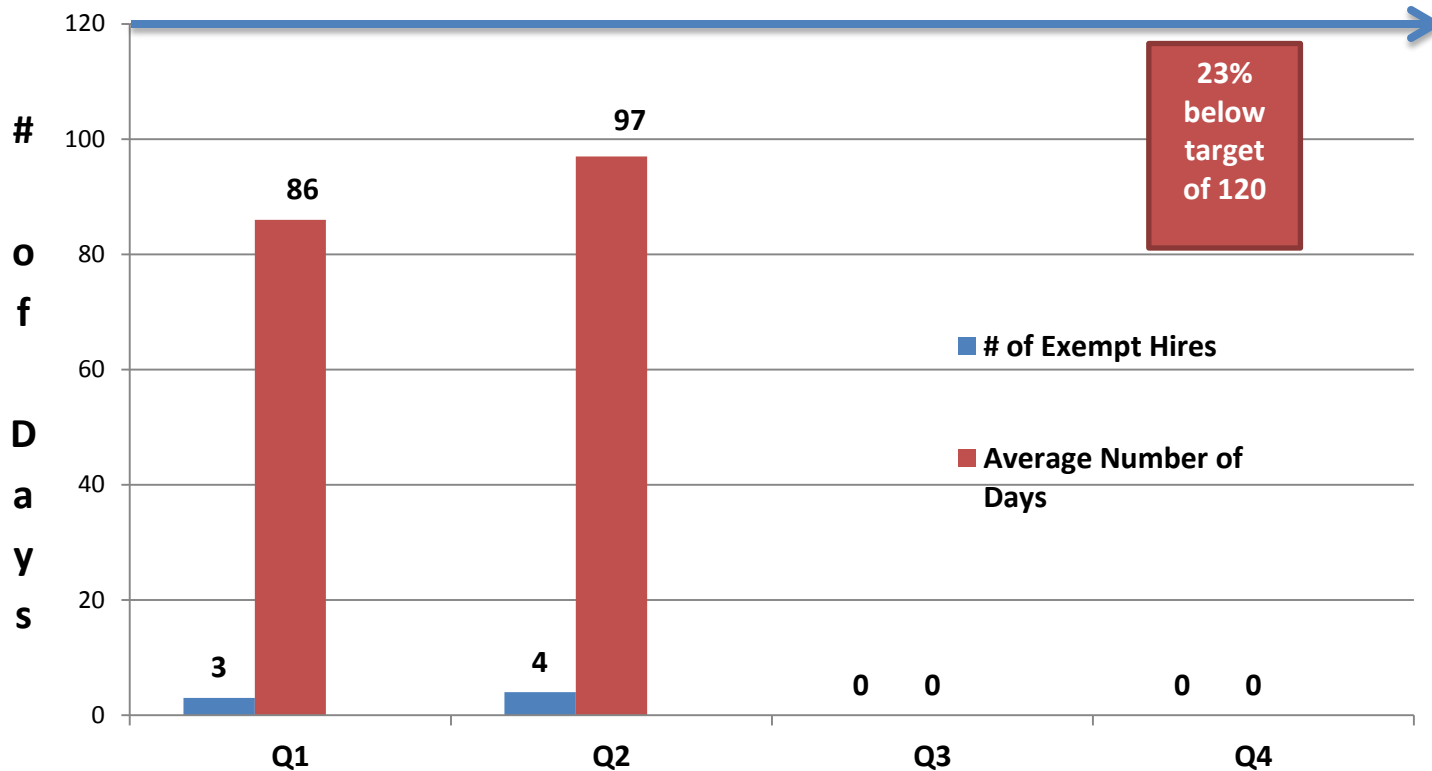


**GOAL #4 Recruit, Develop and Retain Quality Employees**

**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:** Internal Business Process

**Average Number of Days to Fill Exempt (Salaried) Vacancies**





Lead  
FBO

**GOAL #4 Recruit, Develop and Retain Quality Employees**

**Objective 4.1:** Recruit a Qualified Workforce in a Timely Fashion

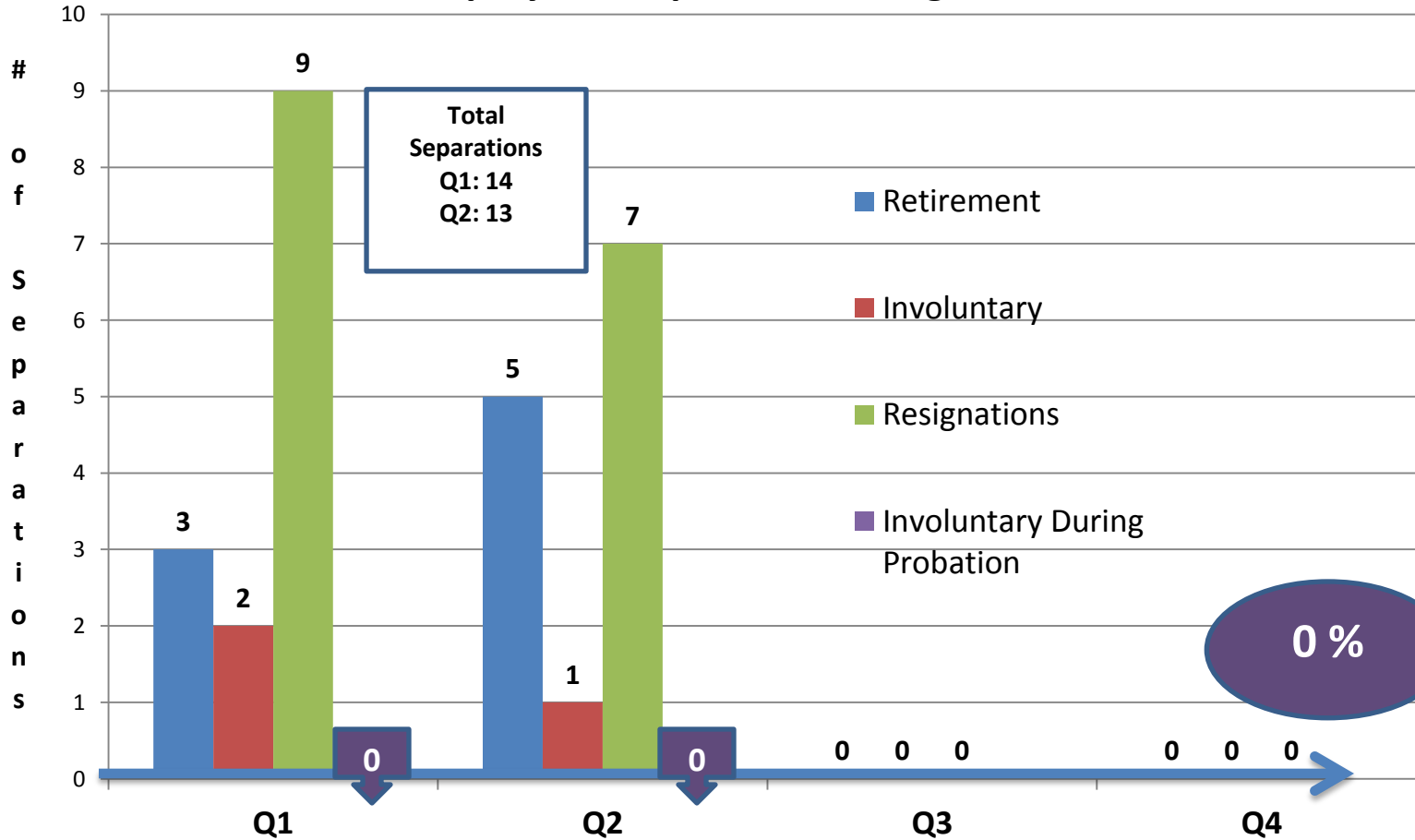
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

**Measure:** Percent Employees Terminated before end of probationary period

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Internal Business Process

**Employee's Separated During FY 14**



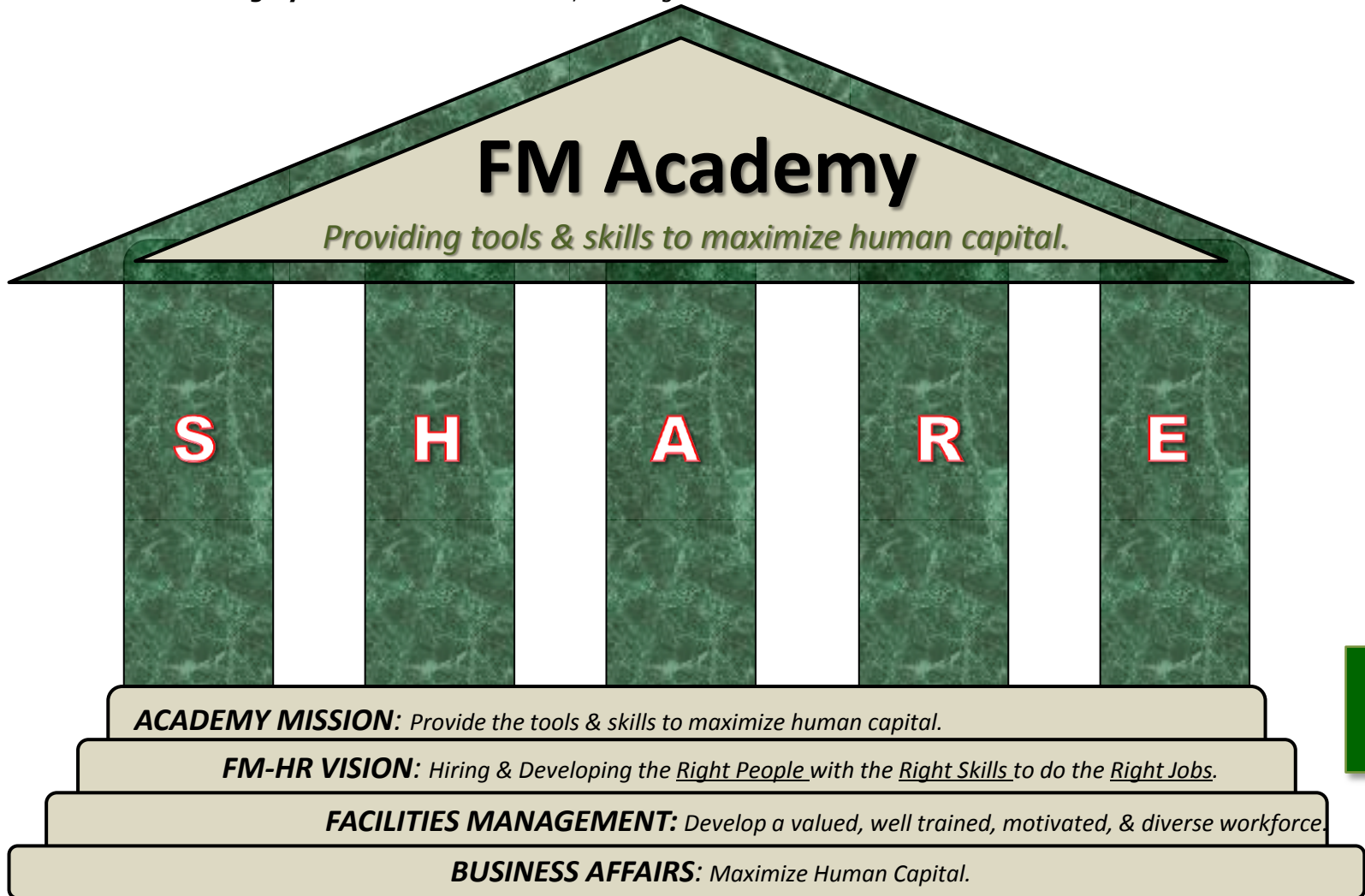
**STATUS**

Lead  
FBO

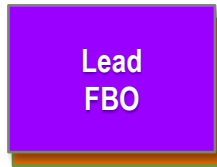
**GOAL #4 Recruit, Develop and Retain Quality Employees**

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

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



STATUS



**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**

**FM ACADEMY**

Action Item

FM Academy Development

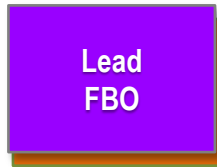
- Identify areas for development & align with FM Values
- Working with Facilities Operations to determine OSHA required training
- Researching Leadership development opportunities

Training Records Management

- Reminders to submit records
- Annual training targets (20 & 40 hours)

Needs Assessment/Training Opportunities

- Researching *Cultural* awareness & *Diversity* training
  - Vendor search
- Employee Relations
  - Training on disciplinary documentation - In development
- Administrative Developmental Matrix - Rolled out, February 2014
- HVAC Developmental Matrix - In development



**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**

**FM ACADEMY**

<u>Action Item</u>	<u>Completed</u>
--------------------	------------------

**TRAINING**

**Technical** (on-site delivery)

- VFD Training July 2013
- Pump Repair & Maintenance December 2013
- PLCs for Non-programmers February 2014
- EPA 608 Technician Certification Exam (TBD)

**“Mini-Series” training sessions** (partnership with Grainger)

- ARC Flash Awareness February 2013
- LED lighting September 2013
- FIRE STOP October 2013

**Safety Awareness**

- Supervisor Safety Talks Ongoing, monthly
- EH&S safety training EH&S website

**Leadership**

- Supervisor Forum Quarterly
- SRAPPA *Supervisor Toolkit* workshop (UNCC hosting) March 2014

Lead  
FBO

**GOAL #4 Recruit, Develop and Retain Quality Employees**

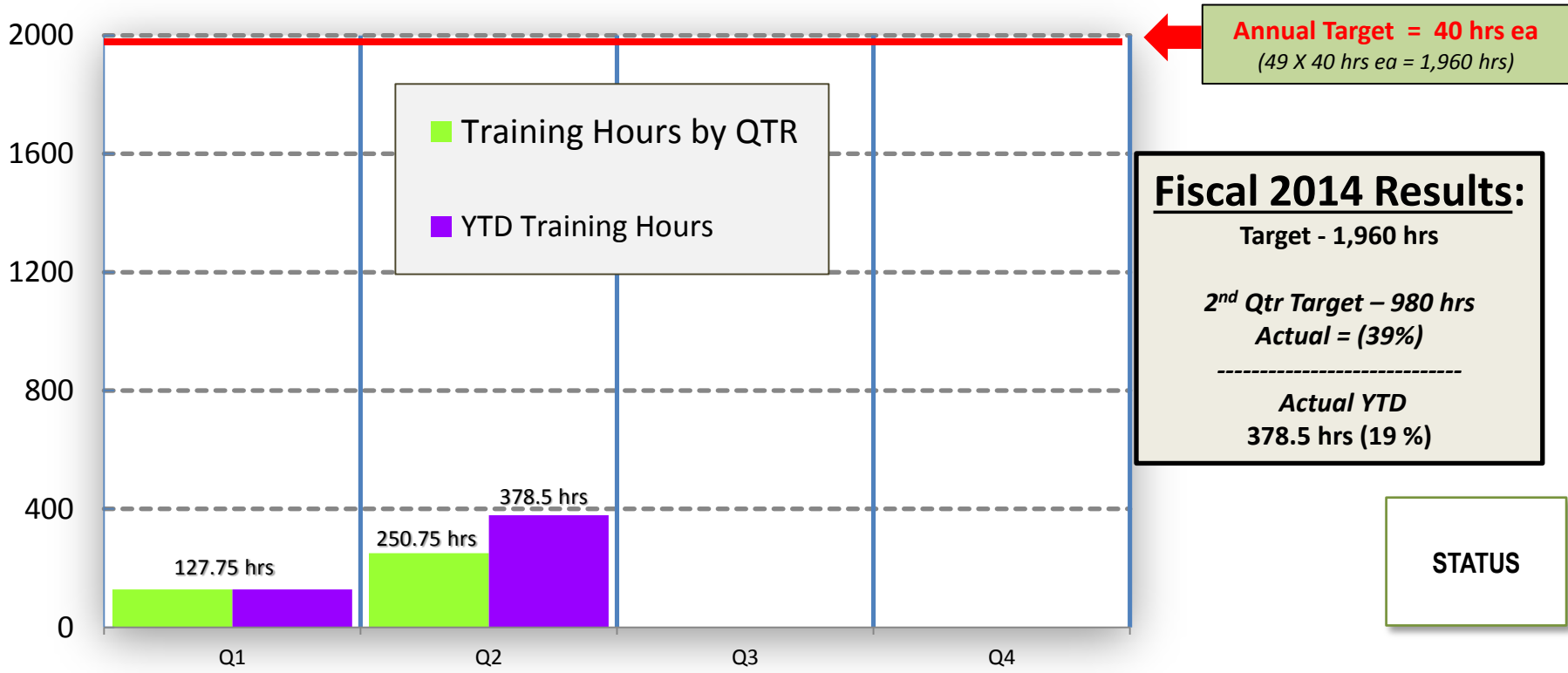
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year  
**Measure:** Average Hours of Training completed by Supervisors and Managers

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

Training  
Hours

**FY 14**

*Training Hours for Supervisors & Managers by Quarter*



**GOAL #4 Recruit, Develop and Retain Quality Employees**

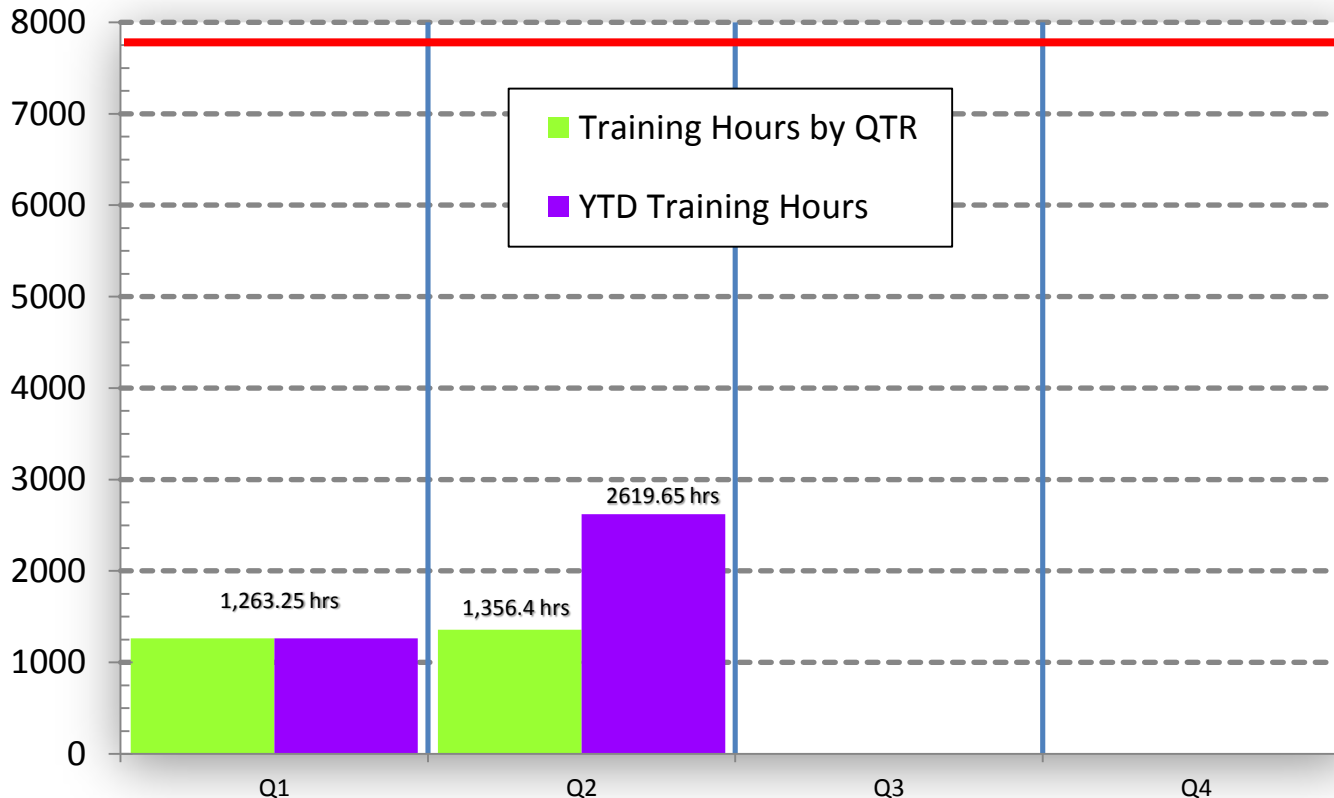
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.2:** Increase Employee Training to **20 hours/year**  
**Measure:** Average Hours of Training completed by front line employees

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

Training  
Hours

**FY 14**

*Training Hours for front line employees by Quarter*



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

**Fiscal 2014 Results:**  
 Annual Target- 7,760 hrs  
 2<sup>nd</sup> Qtr Target - 3,880 hrs  
 Actual = 2,619.65 hrs (68%)  
 -----  
 Actual YTD  
 2,619.65 hrs (34 %)

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**

Actions Planned:

- Directors should receive a copy for their review and for use in the development of action items – *March 2014*.
- Improve practice instituted in November 2013 of meeting with BES and FO leadership to develop schedules for their respective units to take survey at the UI computer lab – *November 2014*.
- Provide BES and FO with advance materials to present to their teams to show how the survey will be administered. This may include screenshots or a sample question and answer format – *November 2014*.

**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

- Ongoing safety related activities to foster continuous awareness
  - Supervisor Safety Talks
  - FM Safety Fair
  - Safety Slogan Contest
- Accident/Incident review for 2013
  - Accidents down 42% from 2012
  - Minor incidents down 86% from 2012
- Mandatory compliance training (OSHA)
  - F/O reviewing training needed
  - Reporting of training activities to be sent to FM-HR Staff Dev. Specialist

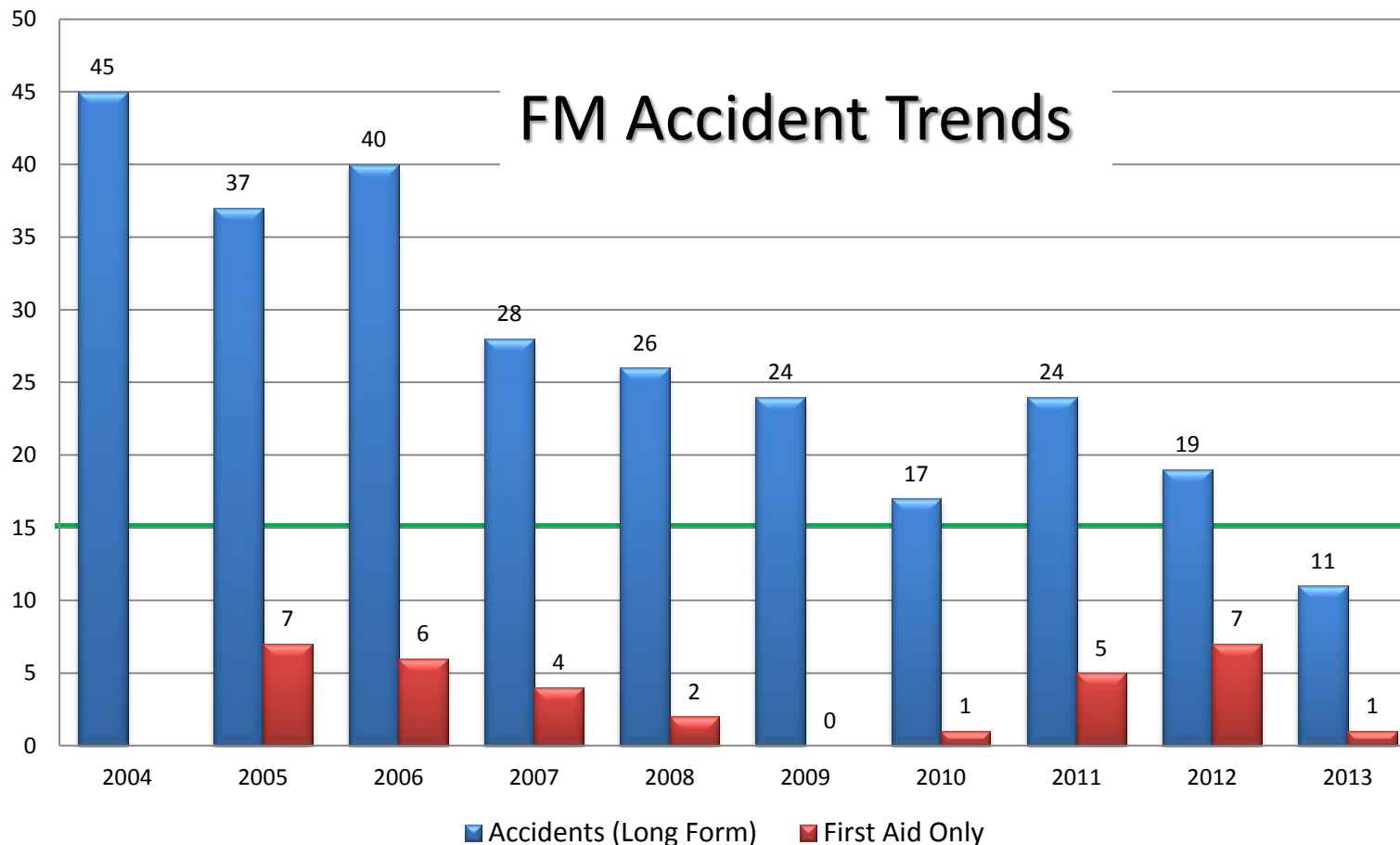


Lead  
FM Wide

**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



Target  
≤15

STATUS



**GOAL #4 Recruit, Develop and Retain Quality Employees**

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

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

*FO studying required training and reporting structure*



**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**

- Further development of FM Academy
  - Marketing Strategy
  - Content Development
  - Vendor Selection and Delivery
  
- HVAC Matrix Development – F/O will recommend matrix team members and development work to begin in Feb



UNC CHARLOTTE

"The more positive you are when you think and work toward your goals, the faster you achieve them."

-- Brian Tracy, Speaker, Author, Consultant

## GOAL #5

Promote Good Stewardship



**GOAL #5 Promote Good Stewardship**

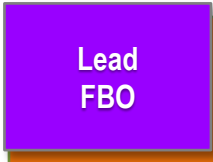
- Objective 5.1:** **Promote Fiscal Responsibility**  
**Tactic 5.1.1:** 100% of financial accounts within budget  
**Tactic 5.1.2:** Increase Supplemental Funding to the Department by 10% annually  
**Tactic 5.1.3:** Achieve Administrative cost/GSF  $\pm$  5% of APPA Average for Peer Institutions

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN**

- Result for the following submission is as follows:
  - NCAPPA Award for FM’s Recognition Program – Award request supported by AVC and submitted; expect response in January 2014.
- FY 2013 APPA Facilities Performance Indicators Survey was submitted on time. The BETA report is expected to be available in late January/February, with the final report published in March 2014.
- Recruitment for a new Procurement/Grants Specialist will begin in January 2014.



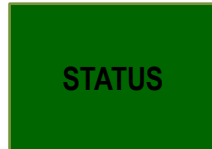
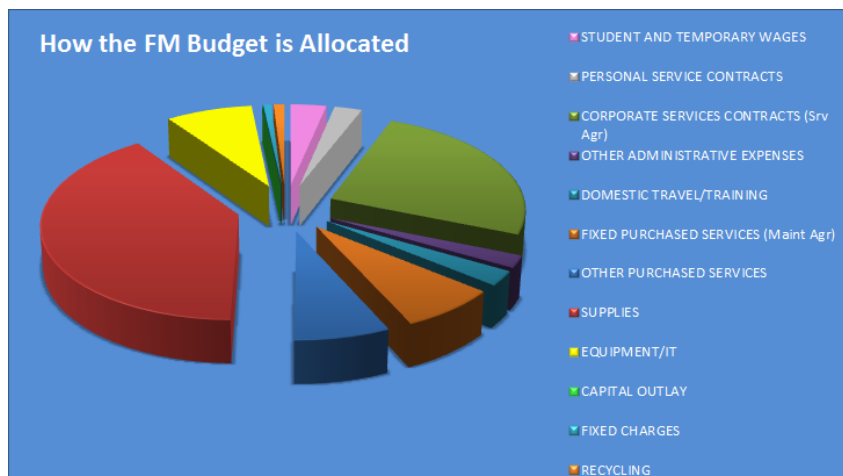
**GOAL #5 Promote Good Stewardship**

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

**Lead:** Facilities Business Office  
**Balanced Scorecard Category:** Financial Perspective

**FACILITIES MANAGEMENT OPERATIONS: December 31, 2013**

ACCOUNT DESCRIPTION	2013-14 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
OVERTIME AND PREMIUM PAY	\$ 310,000	7%	\$ -	\$ 310,000	\$ 310,000	\$ -	\$ - F
STUDENT AND TEMPORARY WAGES	\$ 131,500	3%	\$ 49,079	\$ -	\$ 49,079	\$ 82,421	\$ 82,421 F
PERSONAL SERVICE CONTRACTS	\$ 101,500	2%	\$ 1,852	\$ 3,053	\$ 4,905	\$ 96,595	\$ 96,595 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 997,363	23%	\$ 295,062	\$ 329,541	\$ 624,604	\$ 372,760	\$ 372,760 F
OTHER ADMINISTRATIVE EXPENSES	\$ 83,000	2%	\$ 10,602	\$ -	\$ 10,602	\$ 72,398	\$ 72,398 F
DOMESTIC TRAVEL/TRAINING	\$ 100,000	2%	\$ 34,336	\$ -	\$ 34,336	\$ 65,664	\$ 65,664 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 290,274	7%	\$ 90,032	\$ 88,600	\$ 178,633	\$ 111,642	\$ 111,642 F
OTHER PURCHASED SERVICES	\$ 277,950	7%	\$ 61,339	\$ 21,355	\$ 82,694	\$ 195,256	\$ 195,256 F
SUPPLIES	\$ 1,579,411	37%	\$ 364,220	\$ 68,852	\$ 433,072	\$ 1,146,339	\$ 1,146,339 F
EQUIPMENT/IT	\$ 315,700	7%	\$ 103,461	\$ 7	\$ 103,468	\$ 212,232	\$ 212,232 F
CAPITAL OUTLAY	\$ -	0%	\$ -	\$ -	\$ -	\$ -	\$ - F
FIXED CHARGES	\$ 28,430	1%	\$ 1,904	\$ 658	\$ 2,562	\$ 25,868	\$ 25,868 F
RECYCLING	\$ 39,695	1%	\$ 13,432	\$ 4,136	\$ 17,568	\$ 22,127	\$ 22,127 F

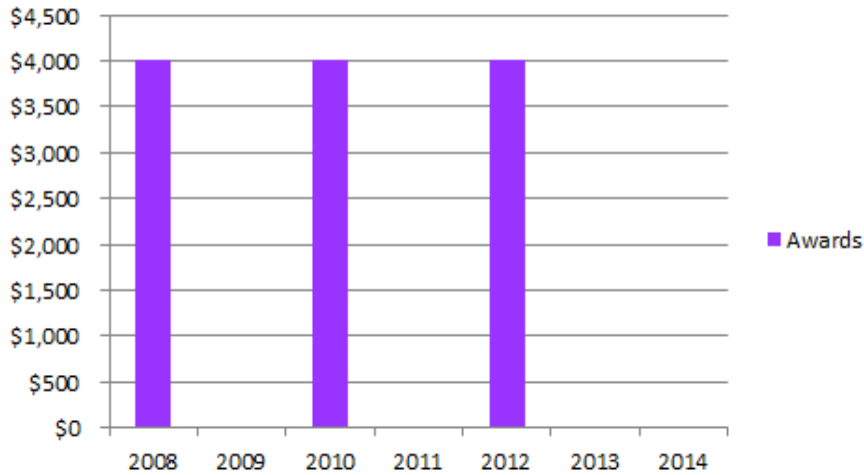


**GOAL #5 Promote Good Stewardship**

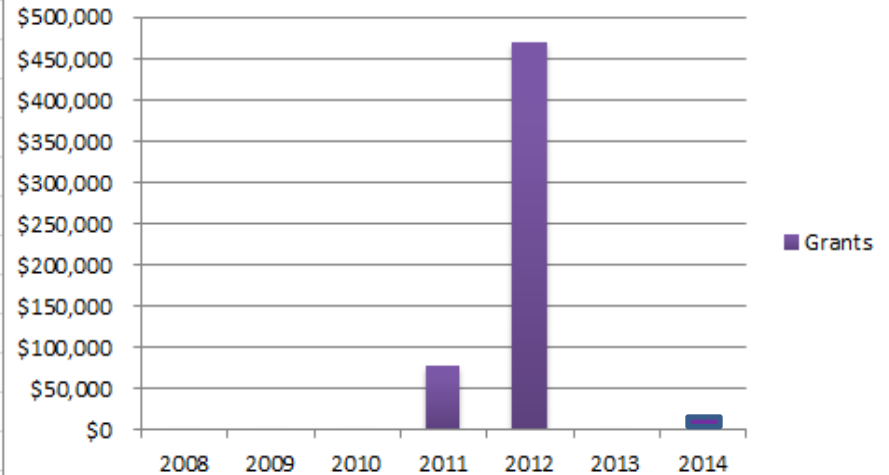
**Objective 5.1:** Promote Fiscal Responsibility  
**Tactic 5.1.2:** Increase Supplemental Funding to the Department by 10% annually  
**Measure:** Percent increase in supplemental funding

**Lead:** Facilities Business Office  
**Balanced Scorecard Category:** Financial Perspective

**Awards**



**Grants**



**GOAL #5 Promote Good Stewardship**

**Objective 5.1:**

**Promote Fiscal Responsibility**

**Tactic 5.1.3:**

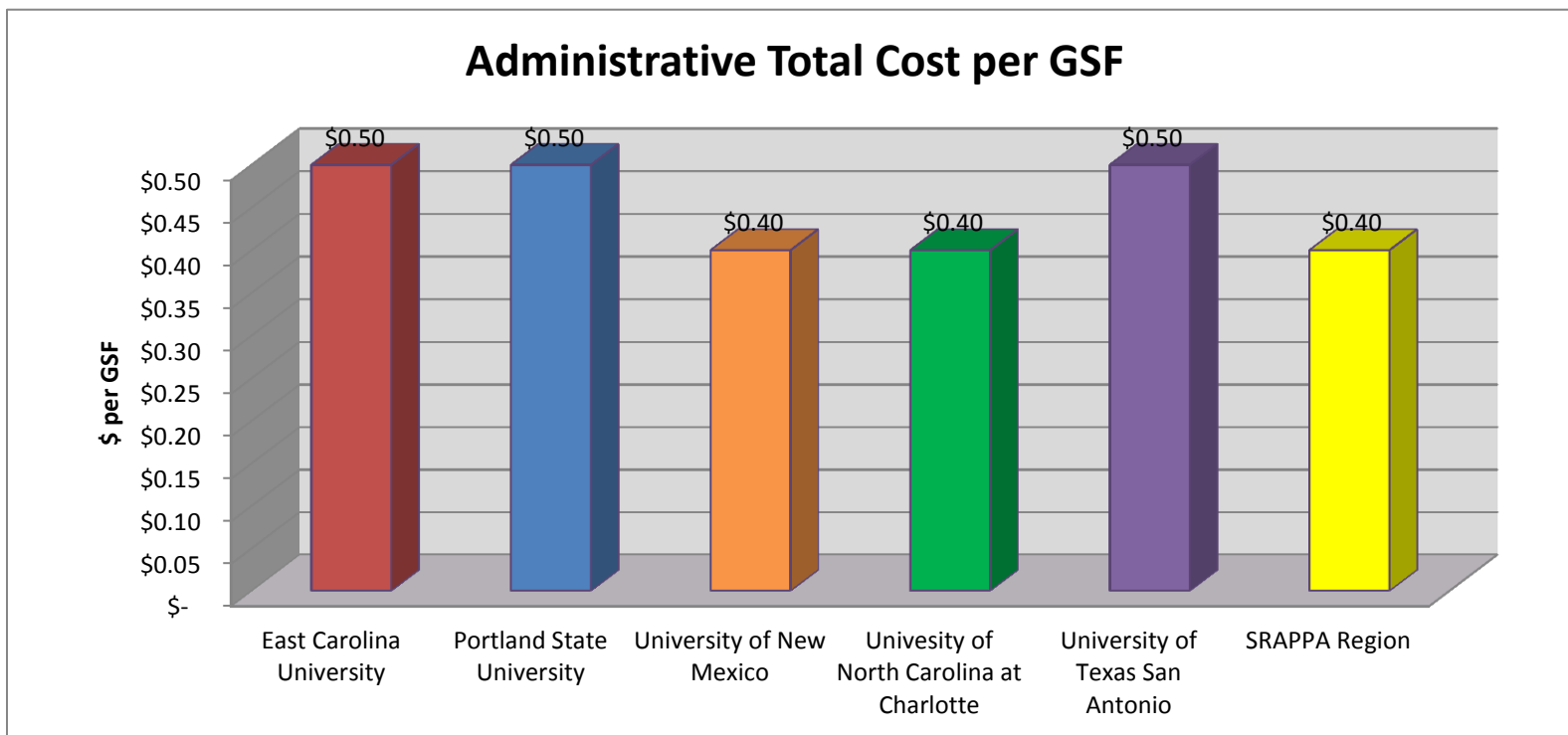
Achieve Administrative cost/GSF  $\pm$  5% of APPA Average for Peer Institutions

**Measure:**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective



UNC Charlotte Admin Cost/GSF = \$0.40  
 SRAPPA Region Average = \$0.40  
 Peer Institution Average = \$0.475  
 Target = \$0.45125



## 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 Complete
  - Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
  - Requested one-time funds for supply chain management project
  - Installed hand dryers in Fretwell for pilot study
- Actions Planned
  - February paper use count in Fretwell
  - Hand dryer survey (of building occupants) in Fretwell
  - Consider developing a BES strategic dashboard that tracks cost, quality, and process data points over time
  - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
  - Supply chain management improvements (funding requested)

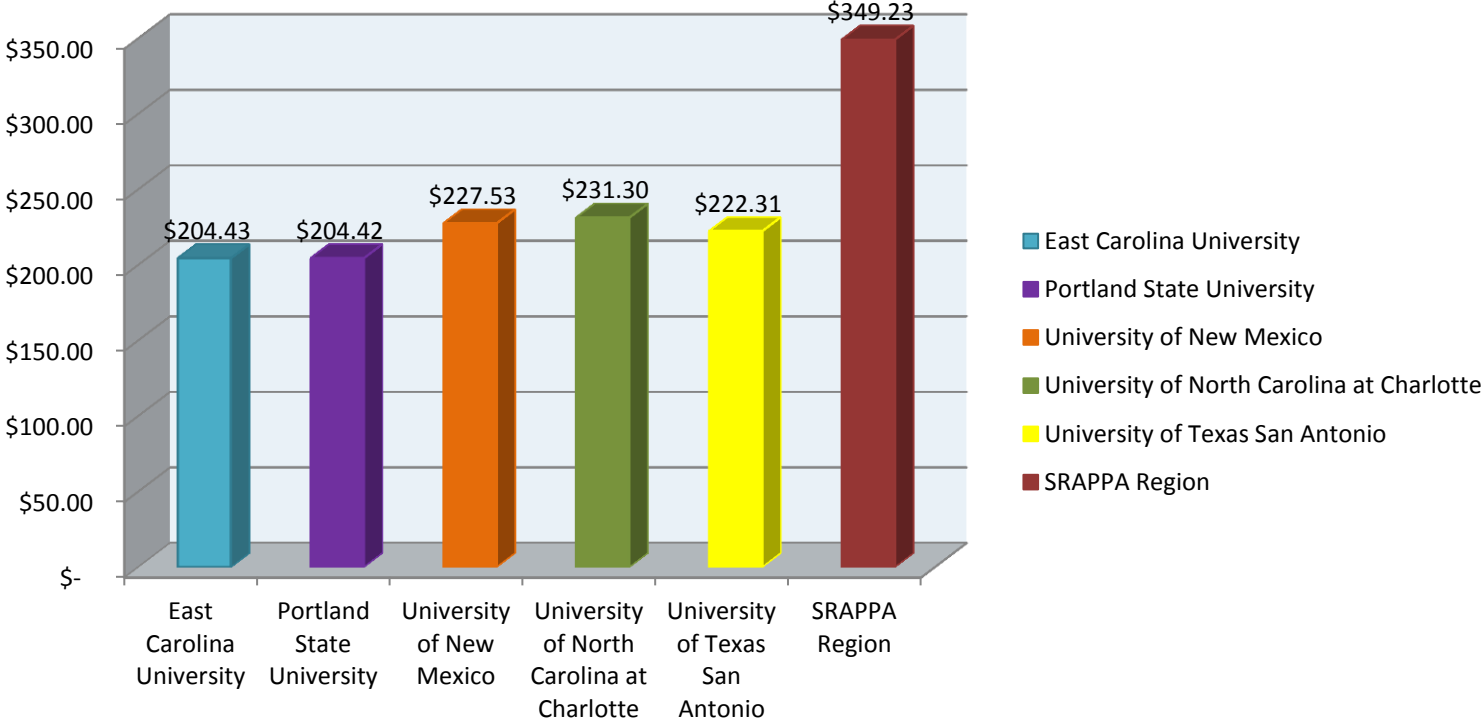
**Facilities Management Strategic Planning Session – Second Quarter FY 2014**

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1:** Promote Fiscal Responsibility  
**Tactic 5.1.4** Achieve Custodial Costs/Student FTE ± 5% of APPA Average for Peer Institutions  
**Measure:** Administrative cost/GSF from annual APPA Facilities Performance Indicators Report.  
**Measure:** Custodial Costs/Student FTE from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

**Balanced Scorecard Category:** Financial Perspective

**Custodial-Total Cost/Student FTE**



Avg. cost/student = \$217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

**STATUS**

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

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

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

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

## ACTION PLAN

- Actions Planned
  - 1 – Make sure that data submitted is correct.
  - 2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
  - 3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
  - 4 – Continue to track Labor Services accounts with FO Leadership and work closely with FBO to improve processes.

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

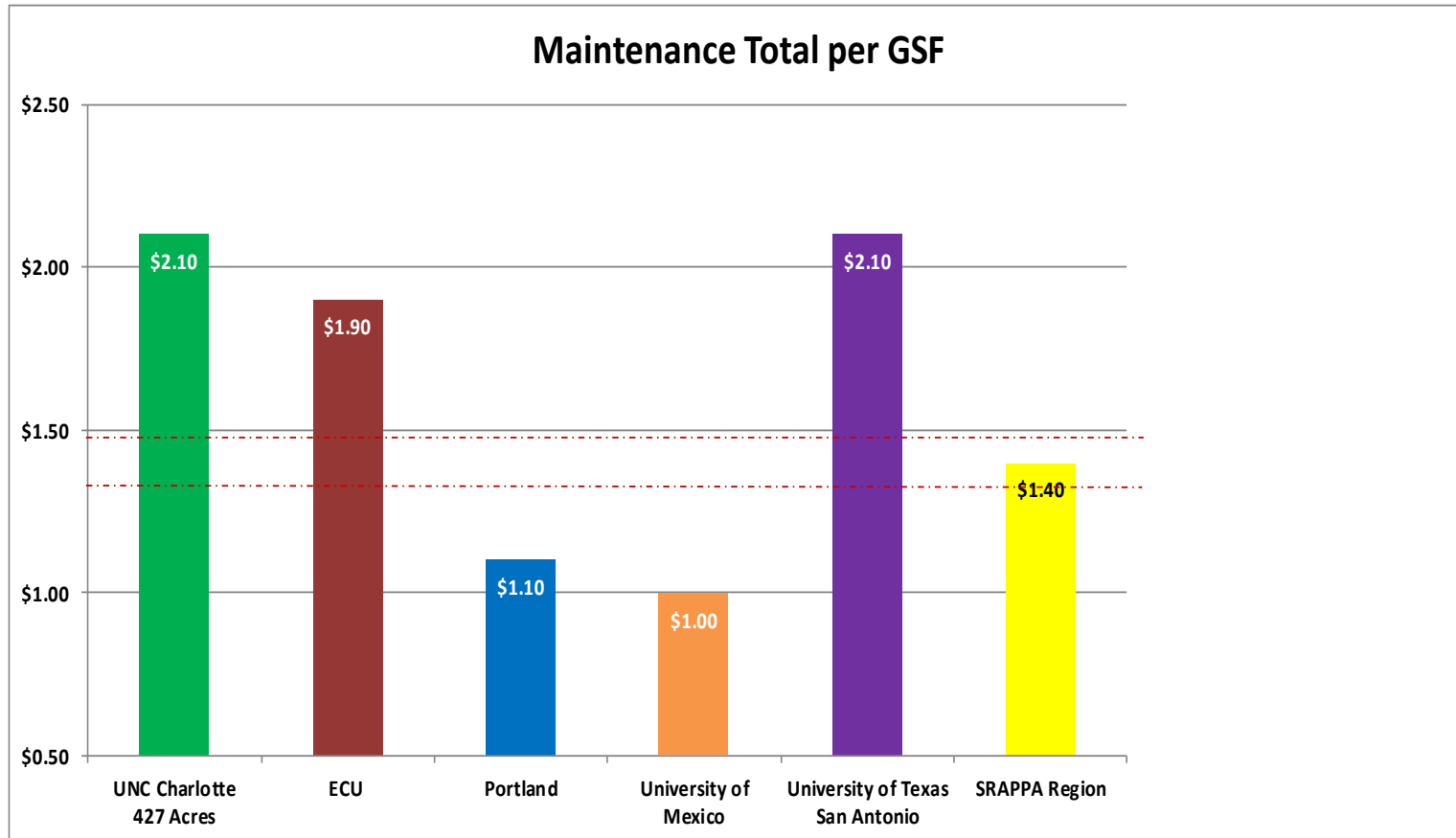
**Objective: 5.1: Promote Fiscal Responsibility**

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

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective



STATUS

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

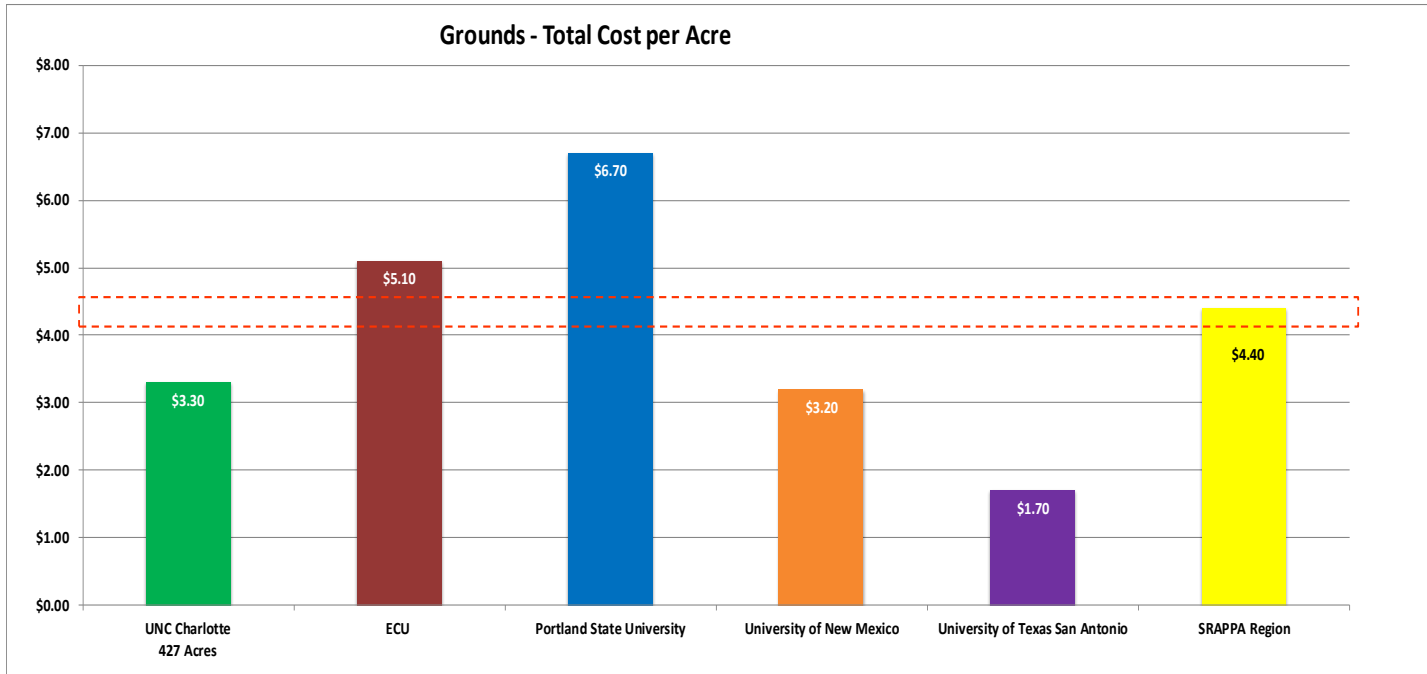
**Objective: 5.1:** Promote Fiscal Responsibility

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

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective



STATUS

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

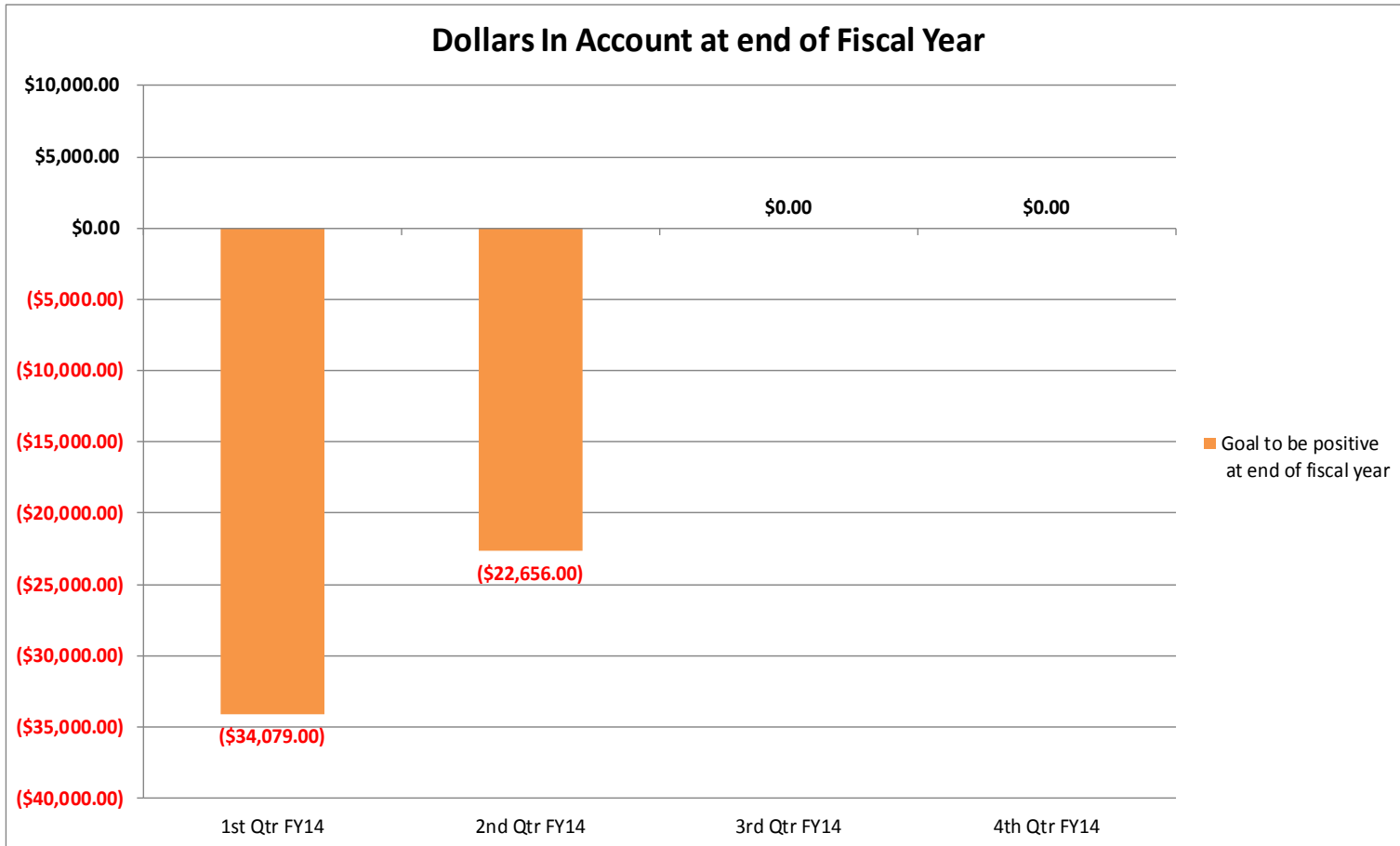
**Objective: 5.1: Promote Fiscal Responsibility**

**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



**STATUS**

## GOAL #5 – Promote Good Stewardship

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



# ACTION PLAN

- **Waste Reduction and Recycling**
  - Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
  - Continue zero waste efforts at final football game; begin working on changes and adjustments for next season.
- **C & D**
  - Continue collecting/tracking recycling information and acting as resource for contractors.



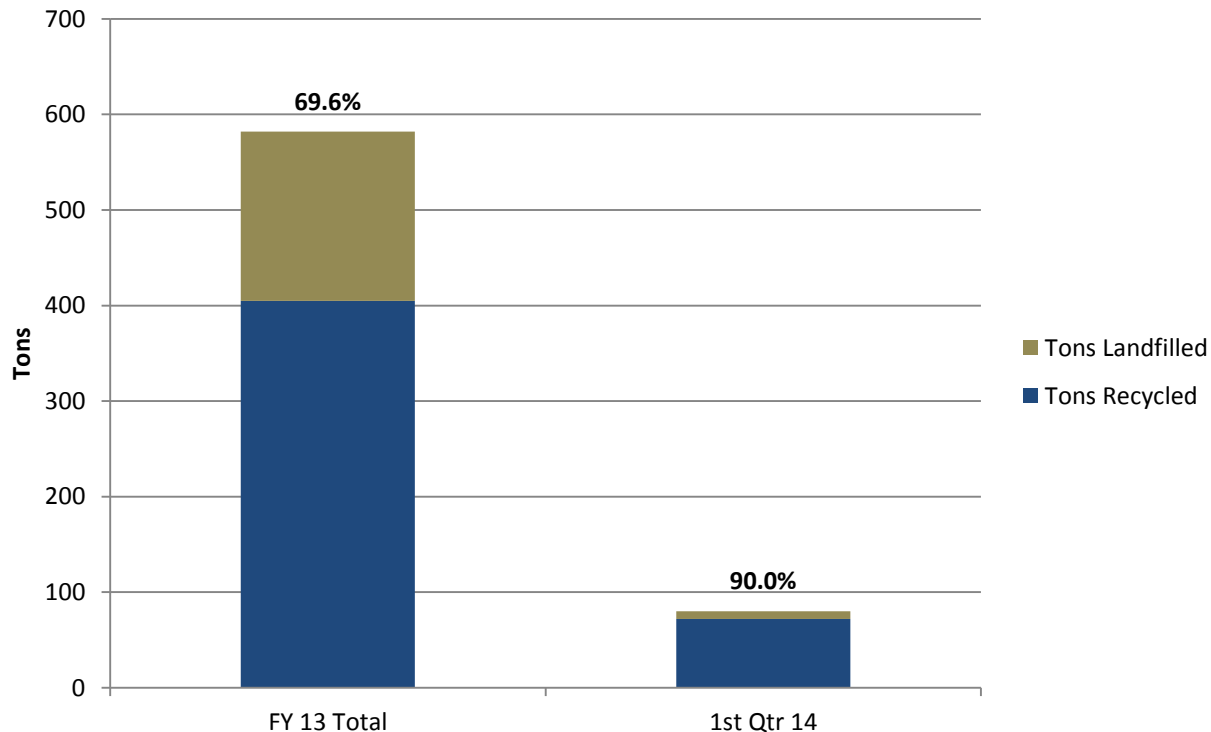
**GOAL #5 – Promote Good Stewardship**

**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 Capital Projects





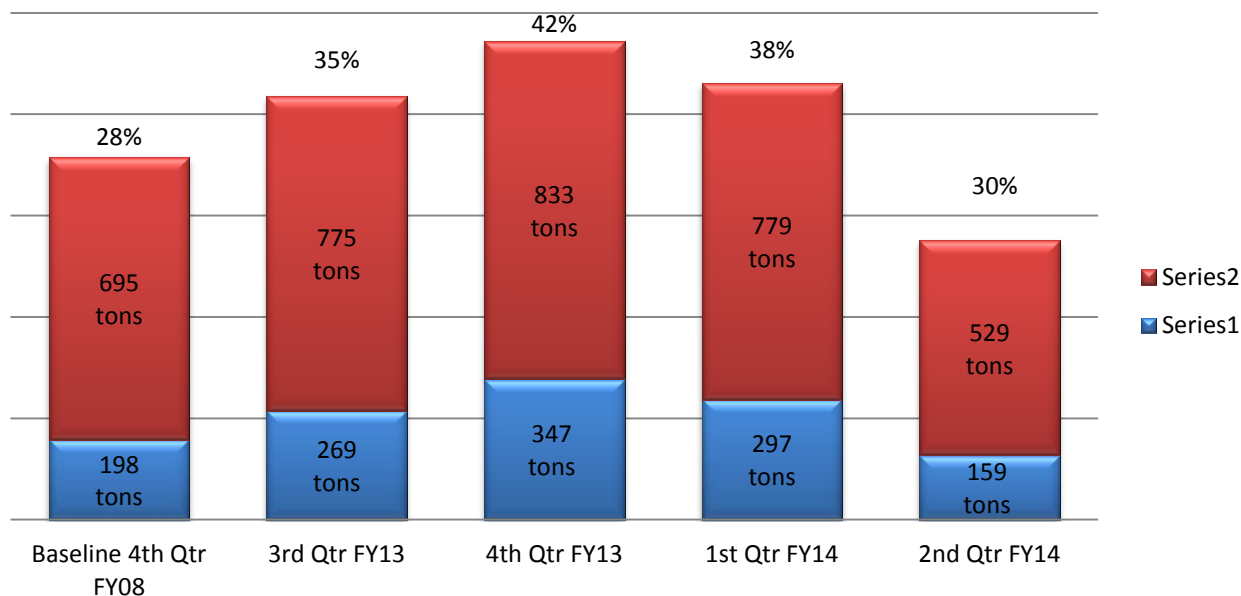


**GOAL #5 – Promote Good Stewardship**

**Objective 5.2** Develop a Sustainable Campus  
**Tactic 5.2.2** Increase Percent of Solid Waste diversion on Campus to 45% by 2018  
**Measure:** Pounds of solid waste recycled, composted and reused annually divided by total solid waste

**Balanced Scorecard Category:** Innovation and Learning Perspective

**Breakdown of Solid Waste**



**GOAL #5 – Promote Good Stewardship**

**Objective: 5.2: Develop a Sustainable Campus**

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

**Measure:** STARS points to achieve bronze rating

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Innovation and Learning Perspective

**ACTION PLAN**

- **Achieve Bronze Rating for STARS by end of FY 15**
  - **Inventory STARS points and estimate current score and gaps by May 2014.**
  - **Draft plan to earn further credits to achieve Bronze rating by July 2014.**
  - **Document performance-based STARS credits (50%) by Oct. 2014.**
  - **Document descriptive/policy-based STARS Credits (50%) by January 2015.**
  - **File for rating in March 2015.**

**STATUS**

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.2: Develop a Sustainable Campus**

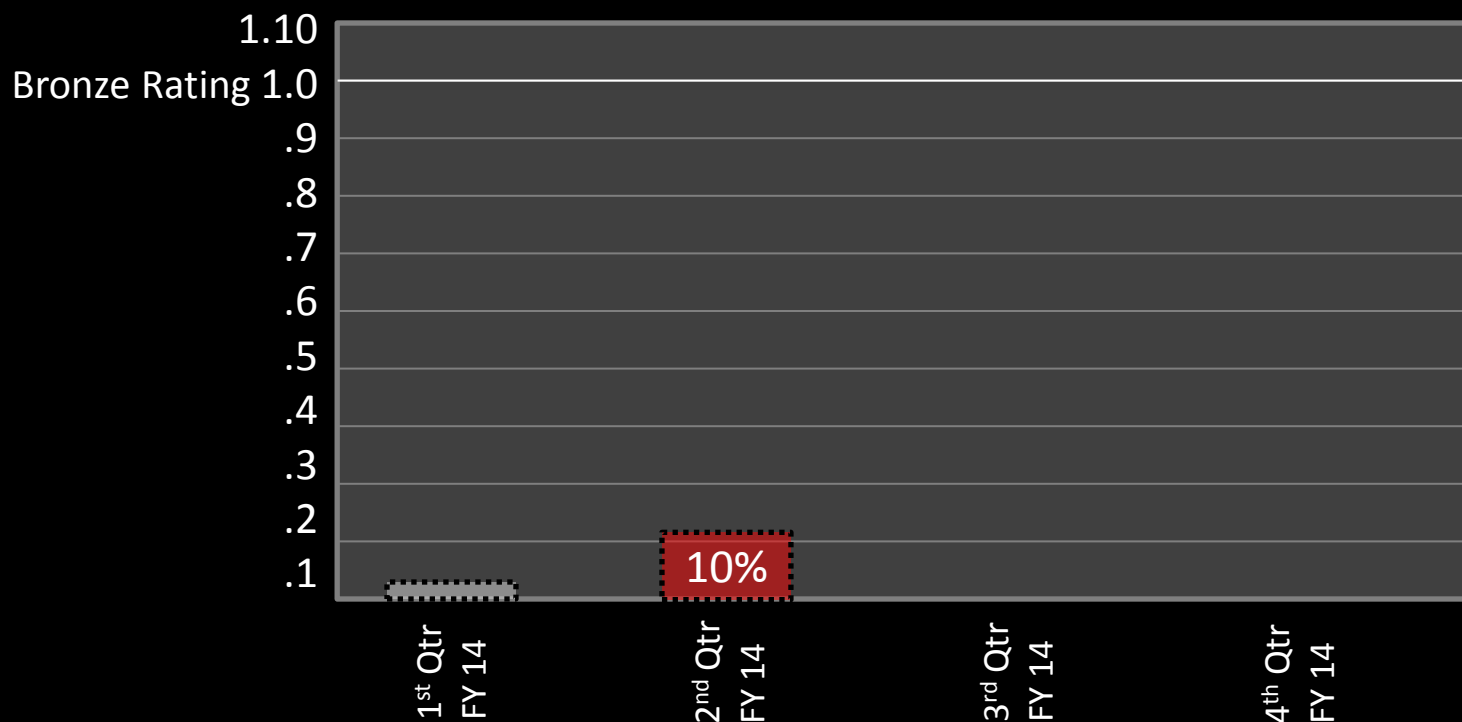
**Tactic 5.2.3:** Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) **NLT end of FY 15.**

**Measure:** STARS points to achieve bronze rating

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Innovation and Learning Perspective

Percentage of Completion



Status

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.2: Develop a Sustainable Campus**

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

**Measure:** Percent of Campus Sustainability Plan best practices implemented

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Innovation and Learning Perspective

**ACTION PLAN**

- **Implement 60% of Recommended Sustainability Best Practices by end of FY 15.**
  - **Derive a list of Best Practices derived from Sustainability Plan and Climate Action Plans by March 2014.**
  - **Assess listed Best Practices for implementation stage and needs by May 2014.**
  - **Draft plan to implement 60% of Best Practices in <1 year by July 2014.**
  - **Draft plan to implement 90% of Best Practices in <5 years by December 2014.**
  - **Document all fully implemented Best Practices by May 2015.**

**STATUS**

**GOAL #5 – Promote Good Stewardship**

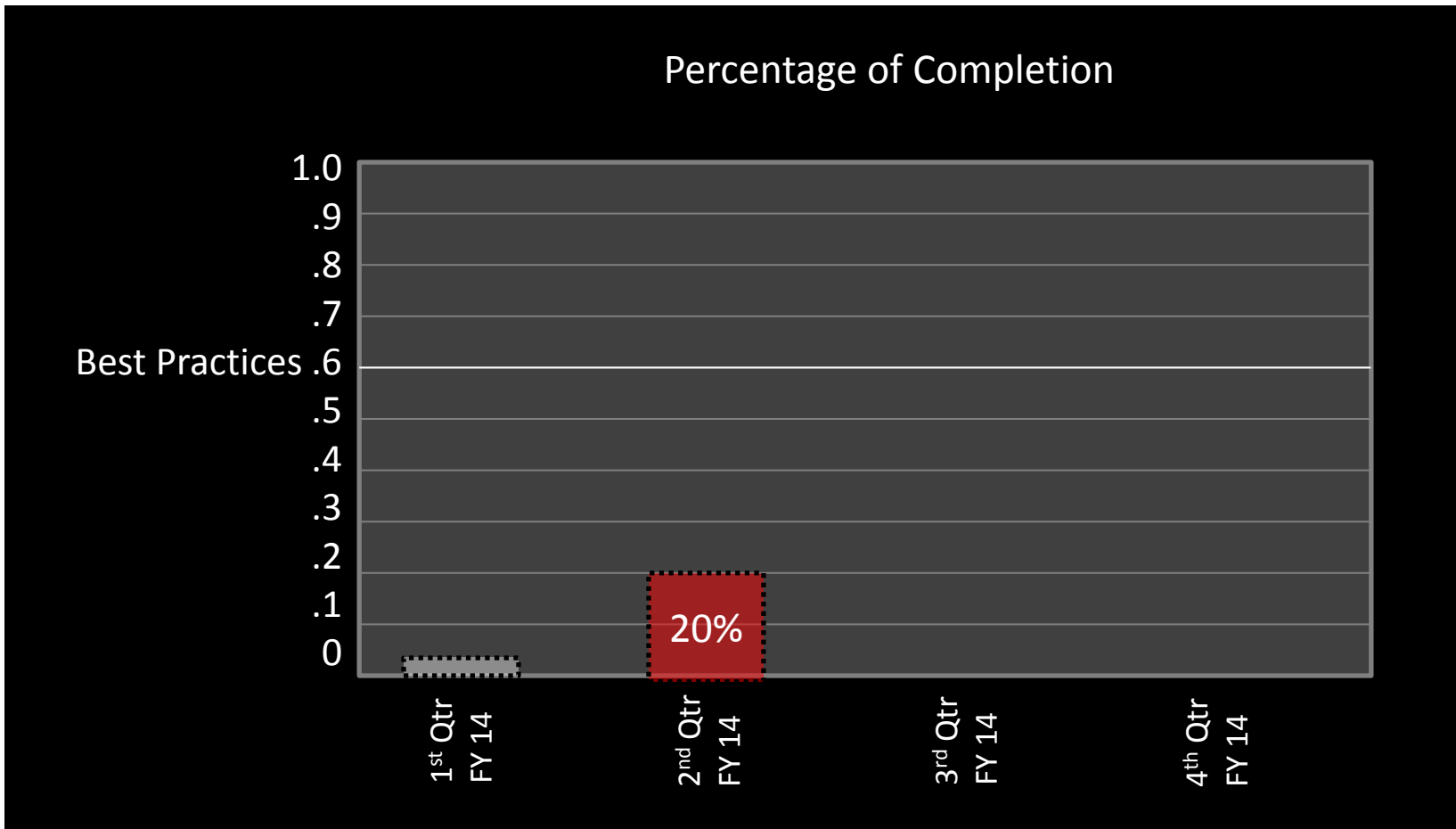
**Objective: 5.2: Develop a Sustainable Campus**

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

**Measure:** Percent of Campus Sustainability Plan best practices implemented

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Innovation and Learning Perspective



Status

## GOAL #5 – Promote Good Stewardship

<b>Objective</b>	<b>5.3</b>	Conserve Natural Resources
<b>Tactics</b>	<b>5.3.1</b>	Decrease Energy Usage 30% by FY2015

Lead  
Capital

### ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Performance Contract in construction
  - Will reduce campus consumption by another 4%
- System Wide Lighting Performance Contract - scheduled to go into construction April 2014
- SAC Energy Upgrade
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED

Lead  
Capital

**GOAL #5 – Promote Good Stewardship**

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

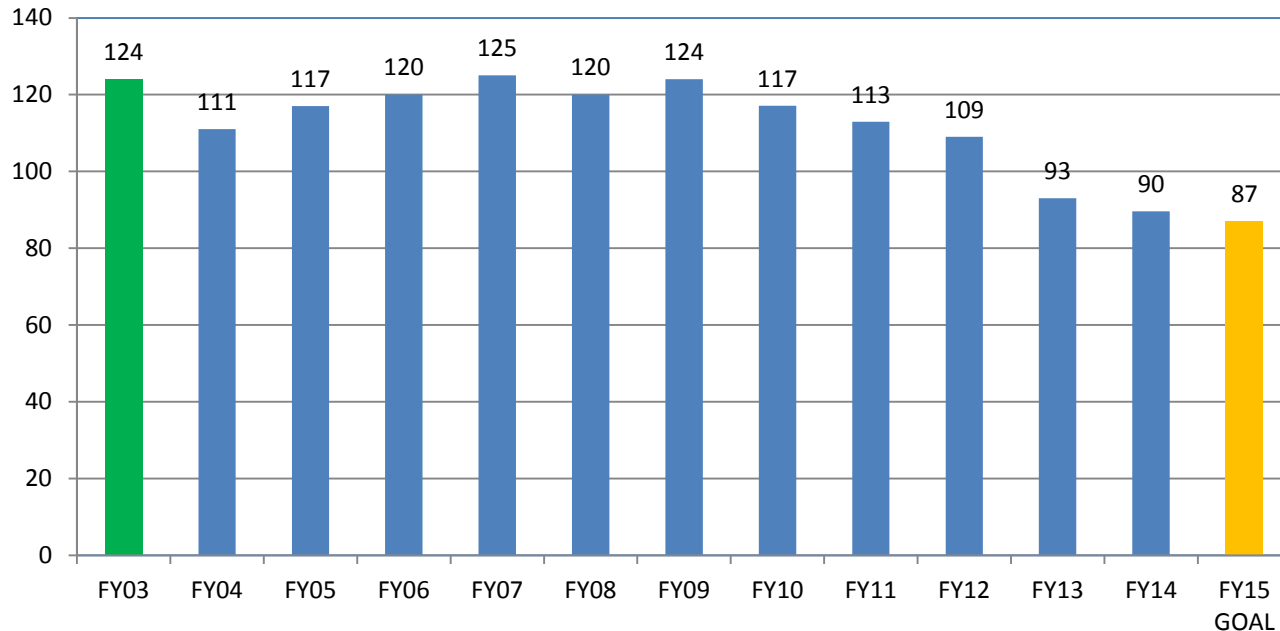
**Measure:** BTUs/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

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

STATUS

**CAMPUS ENERGY USAGE**  
**Kbtu/GSF**



**GOAL #5 – Promote Good Stewardship**

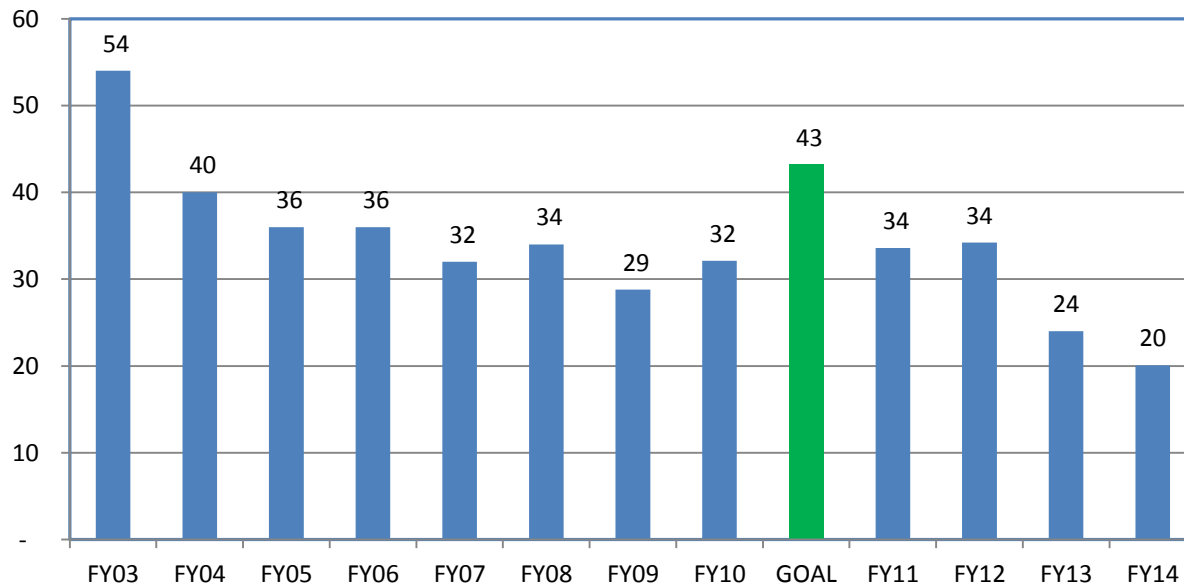
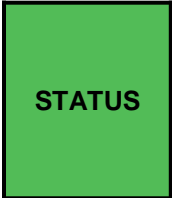
**Objective** 5.3 Conserve Natural Resources  
**Tactics** 5.3.2 Decrease Water Usage by 20% by FY2010

**Measure:** Gallons/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

*Still need to reduce water usage to help preserve valuable resources*

Goal 43 Gal/GSF  
Actual 20 Gal/GSF





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

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

**Tactic 5.4.2:** 5% African American Participation on Capital Projects

## **ACTION PLAN**

- Establish project specific HUB participation goals – ongoing
- Identify scopes of work applicable to HUB availability - ongoing
- Provide contact information for certified HUB firms that can bid scopes of work - ongoing
- Develop guidance for doing business with UNC Charlotte - ongoing
- Establish procedures for reviewing Good Faith Efforts documentation – completed
- Review Good Faith Efforts documentation for compliance before awarding 1<sup>st</sup> tier subcontractor contracts – ongoing
- Conduct/participate in events promoting education and outreach for HUB firms
  - Construction Meet & Greet – March 5, 2014
  - Opportunities 2014 – March 10, 2014

**GOAL #5 – Promote Good Stewardship**

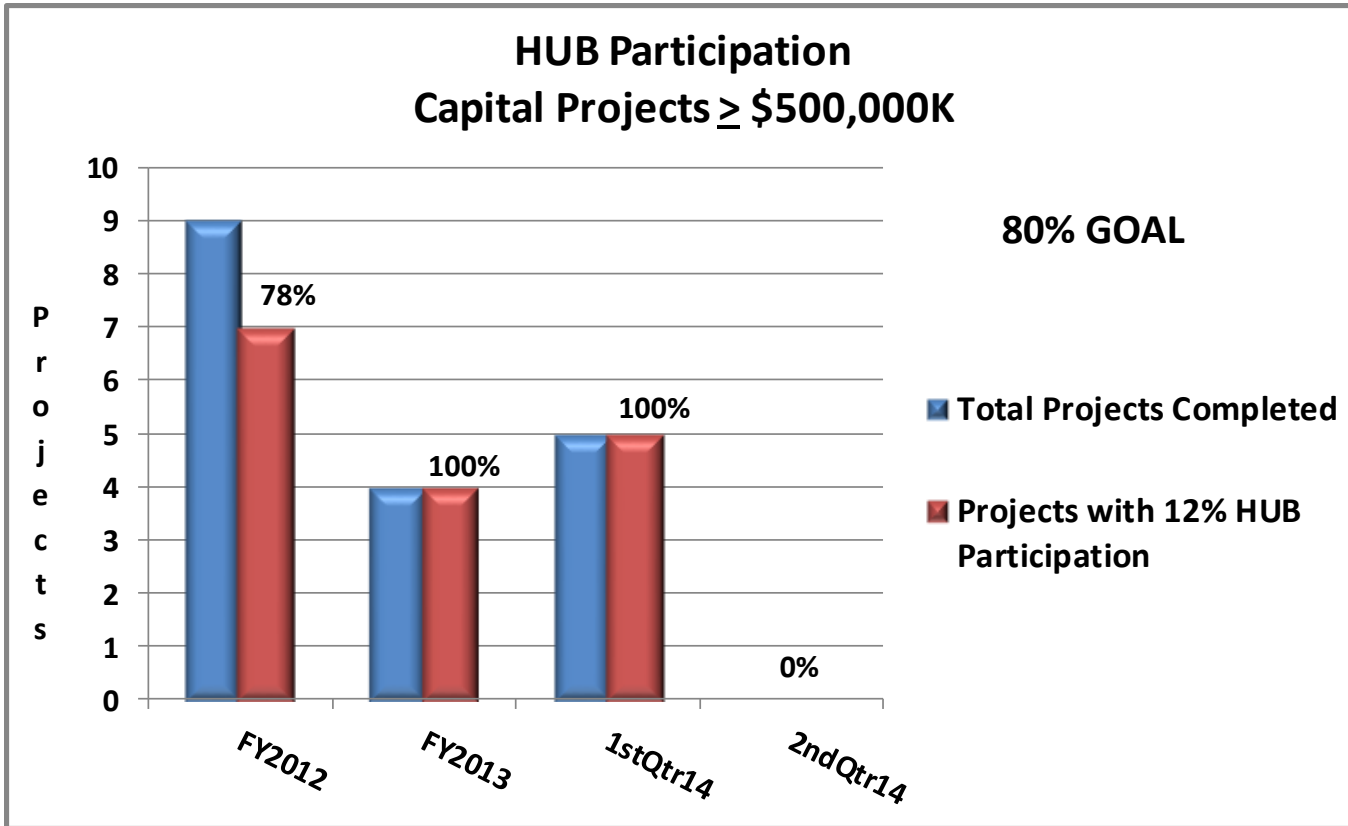
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



STATUS

**GOAL #5 – Promote Good Stewardship**

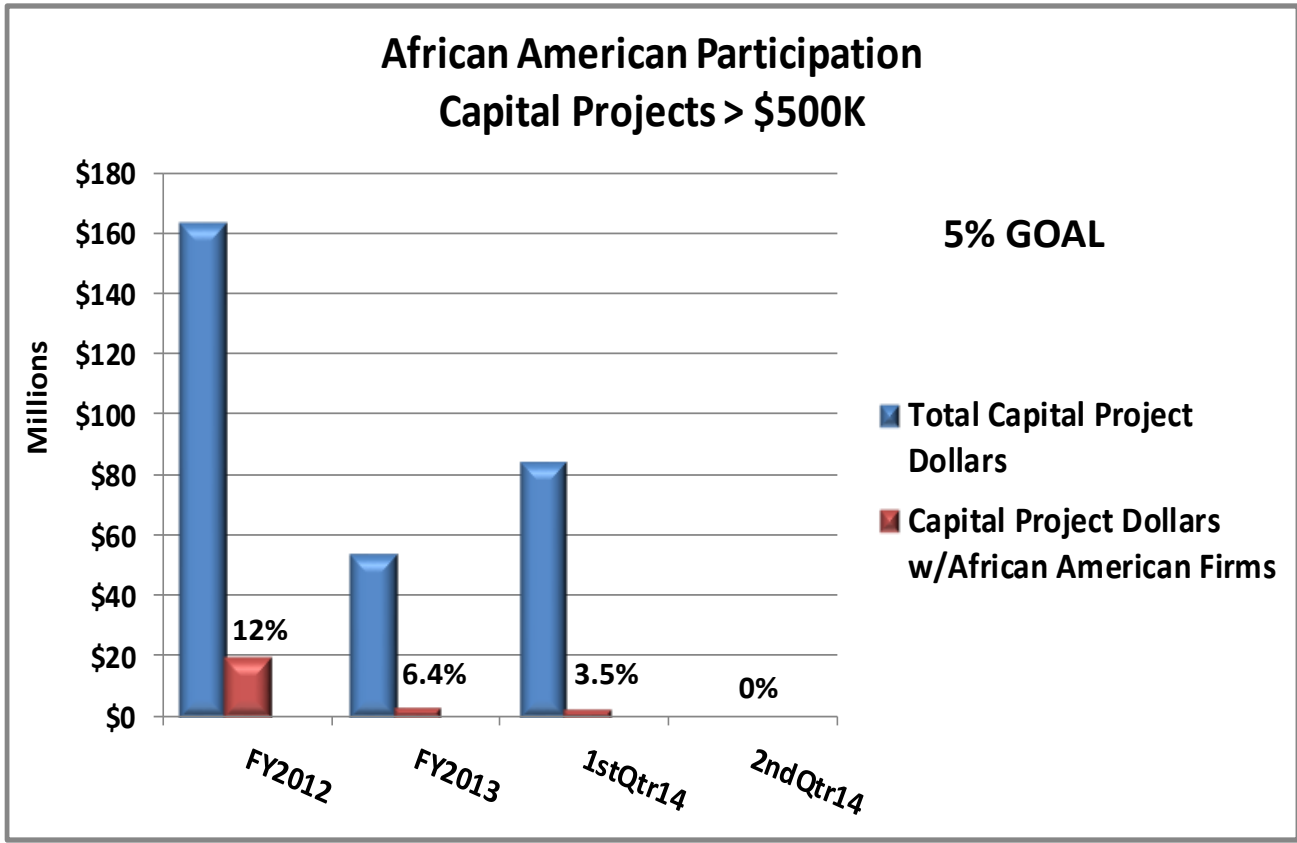
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**Tactic 5.4.2:** 5% African American Participation on Capital Projects

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



STATUS

**GOAL #5 – Promote Good Stewardship**

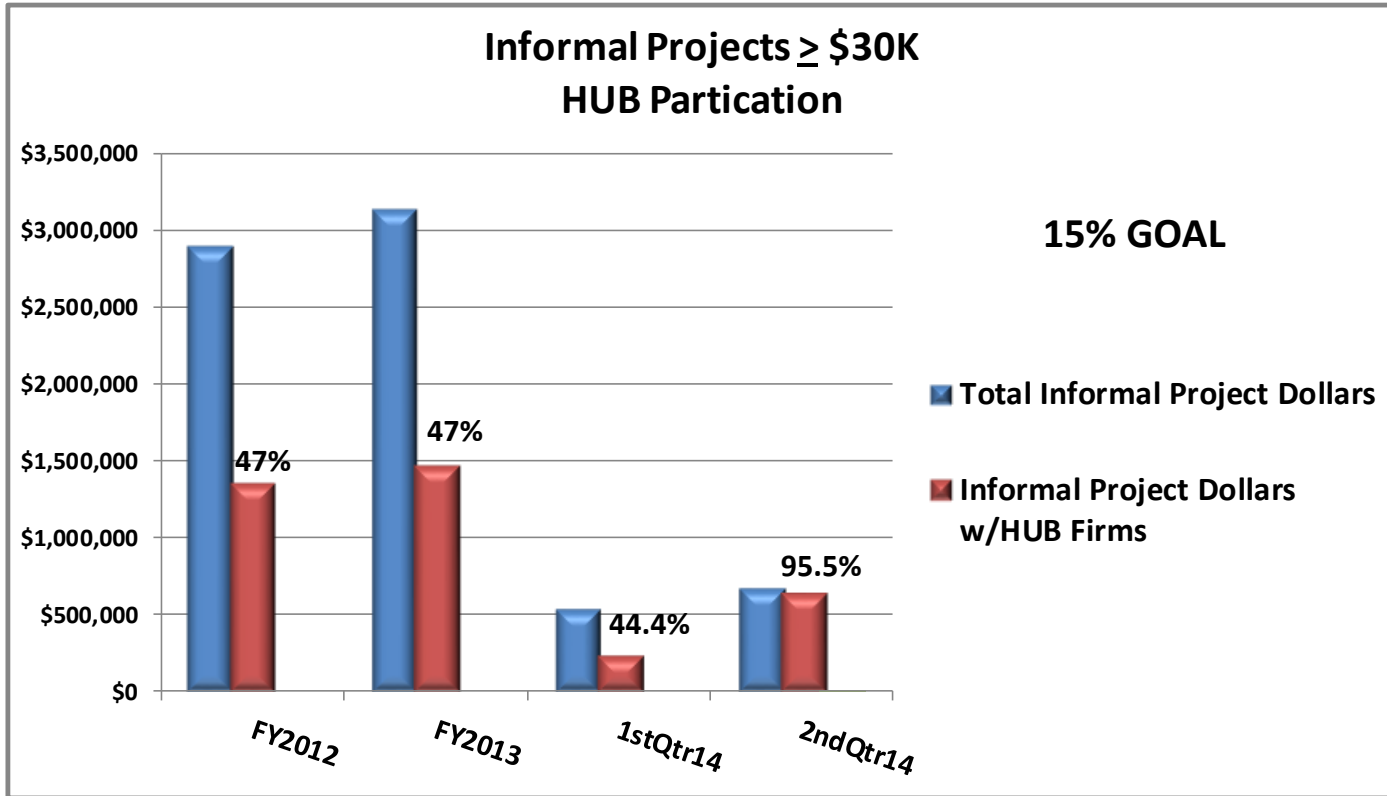
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



**STATUS**

**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

**ACTION PLANS FOR IMPROVEMENT**

- [Design Services' HUB participation improvement is currently focused on African American contractors & vendors.](#)

**IMPLEMENTED ACTIONS AND PLANS**

- [All Coordinators are encouraged to reach out to new vendors for work on our Under \\$30K projects - Ongoing.](#)
  - Project Coordinators review and discuss at our Design Services weekly Tuesday morning meetings.
  - Amanda acts as advisor for other Coordinators; providing new vendor contacts as they are vetted.
- [Continue to refine HUB reporting information for Strategic Planning - Ongoing.](#)
- [Continue to work with FIS on reports for extracting project data from ARCHIBUS - Ongoing.](#)

**GOAL #5 – Promote Good Stewardship**

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

**Tactic 5.4.4:** 13% overall HUB participation on informal projects below \$30,000 including 3% African American

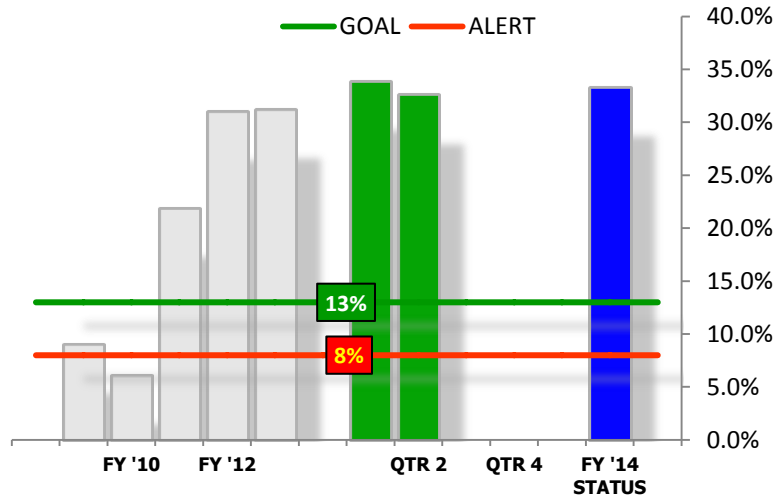
**Measure:** Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
QTR 1	\$ 601,826	\$ 203,778	<b>33.9%</b>
QTR 2	\$ 446,800	\$ 145,623	<b>32.6%</b>
QTR 3	\$ -	\$ -	<b>0.0%</b>
QTR 4	\$ -	\$ -	<b>0.0%</b>
<b>FY '14 STATUS</b>	<b>\$ 1,048,626</b>	<b>\$ 349,401</b>	<b>33.3%</b>



**GOAL  
13.0%**

**STATUS  
33.3%**

# Facilities Management Strategic Planning Session – Second Quarter FY 2014

**Lead  
Design Services**

## GOAL #5 – Promote Good Stewardship

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

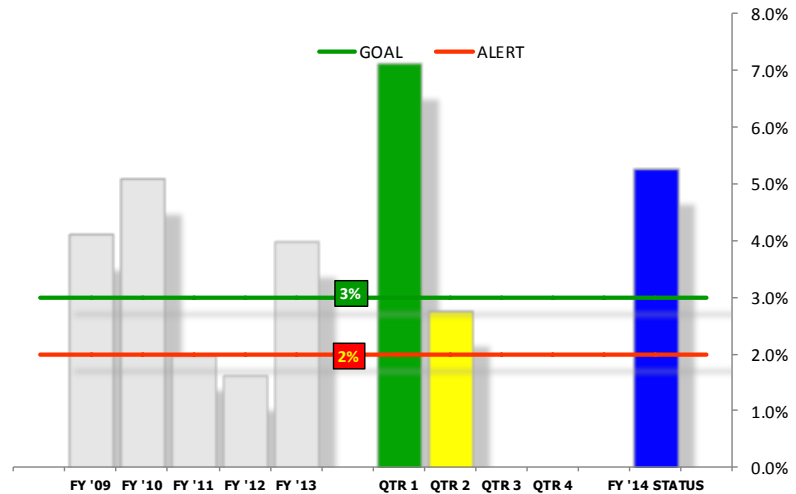
**Tactic 5.4.5:** 3% African American participation on Informal projects below \$30,000

**Measure:** Total African American contract dollars divided by Total Contract Dollars

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
QTR 1	\$ 601,826	\$42,900.00	<b>7.1%</b>
QTR 2	\$ 446,800	\$12,325.00	<b>2.8%</b>
QTR 3	\$ -	\$ -	<b>0.0%</b>
QTR 4	\$ -	\$ -	<b>0.0%</b>
<b>FY '14 STATUS</b>	<b>\$ 1,048,626</b>	<b>\$ 55,225</b>	<b>5.3%</b>



**GOAL  
3.0%**

**STATUS  
5.3%**