



**Facilities Management  
Quarterly Strategic Planning Session  
January 30, 2015**

**Second Quarter – Fiscal Year 2015  
October - December 2014**

**AGENDA**

**Three Facilities Challenges: A Status Report – Phil Jones**

**Campus Interactive Map – Fred Brillante**

**Strategic Planning Metrics and Actions Plans**

**Special Presentation: Department Demographics – Melanie Witherspoon**

**Employee Satisfaction Survey Action Plans**

**Look Ahead – Phil Jones**

*...Creating a Campus of Distinction*





UNC CHARLOTTE

*Facilities Management*

## **Strategic Planning Session**

**Second Quarter – Fiscal Year 2015  
October – December 2014**

### **Facilities Management's Goals**

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

*...Creating a Campus of Distinction*



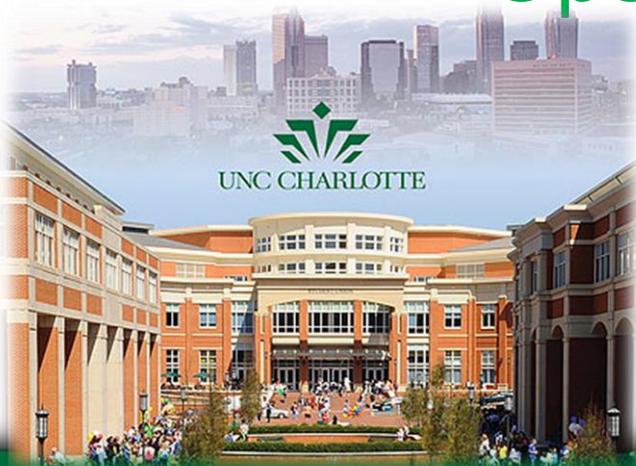
UNC CHARLOTTE

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

-- Harold Geneen, industrialist

# GOAL #1

Continuously Improve  
Operations of Campus



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

**Objective: 1.1: Improve Labor Availability**

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

## ACTION PLAN

### Actions Planned

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

Lead  
F. O.

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

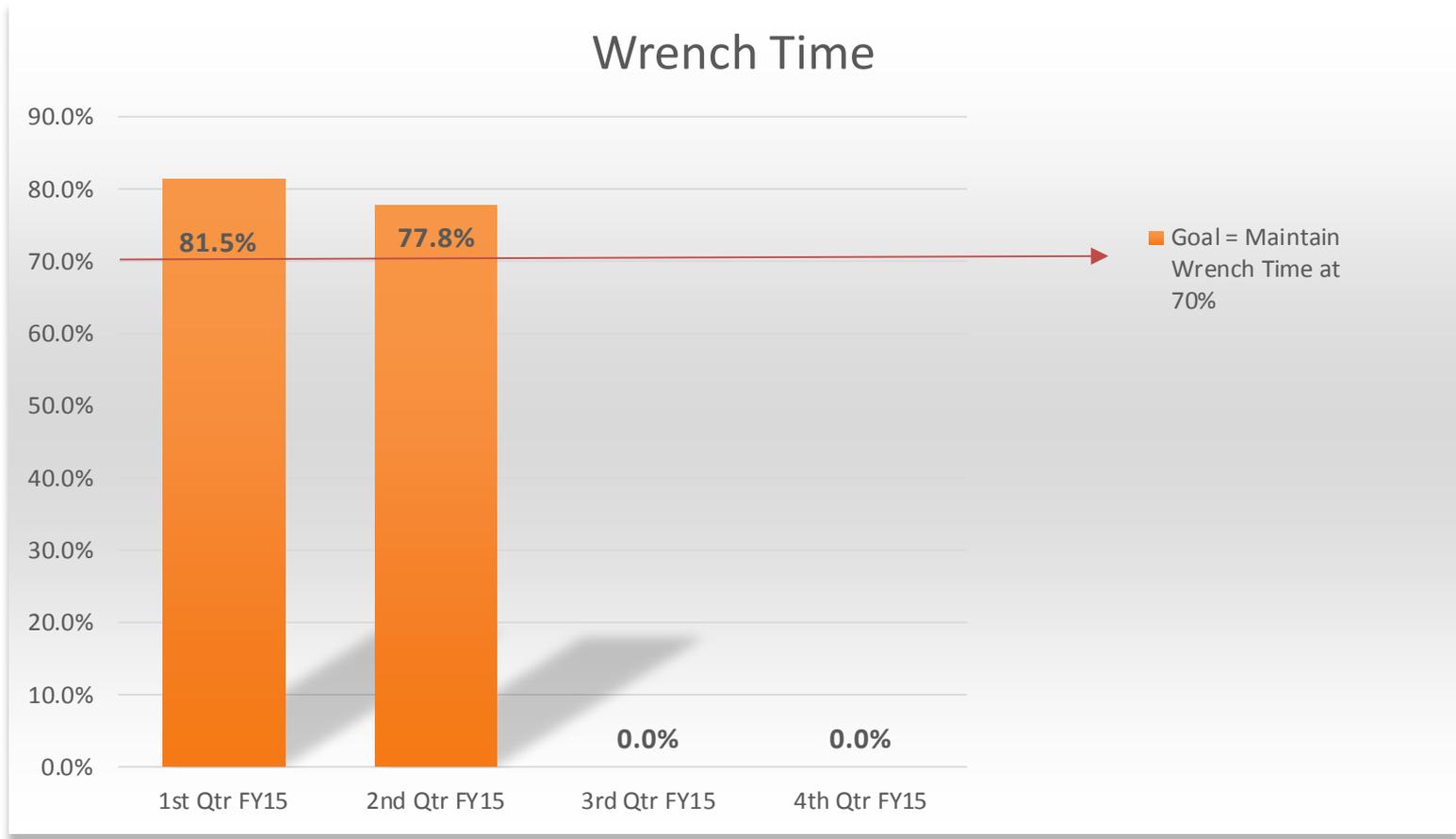
**Objective: 1.1: Improve Labor Availability**

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

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

**Lead:** Facilities Operations

**Balanced Scorecard Category:** Internal Business Process



STATUS

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

**Objective: 1.2: Improve Logistics Efficiency**

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

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

## ACTION PLAN

### Actions Planned

- 1 – Weekly review of items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
- 2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
- 3 – Send out daily email reminders for approvers (Supervisors, Admins and Managers)
- 4 - Monitor the req to PO processing time and discuss weekly.

### Actions Completed

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

Lead  
F. O.

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

**Objective: 1.2: Improve Logistics Efficiency**

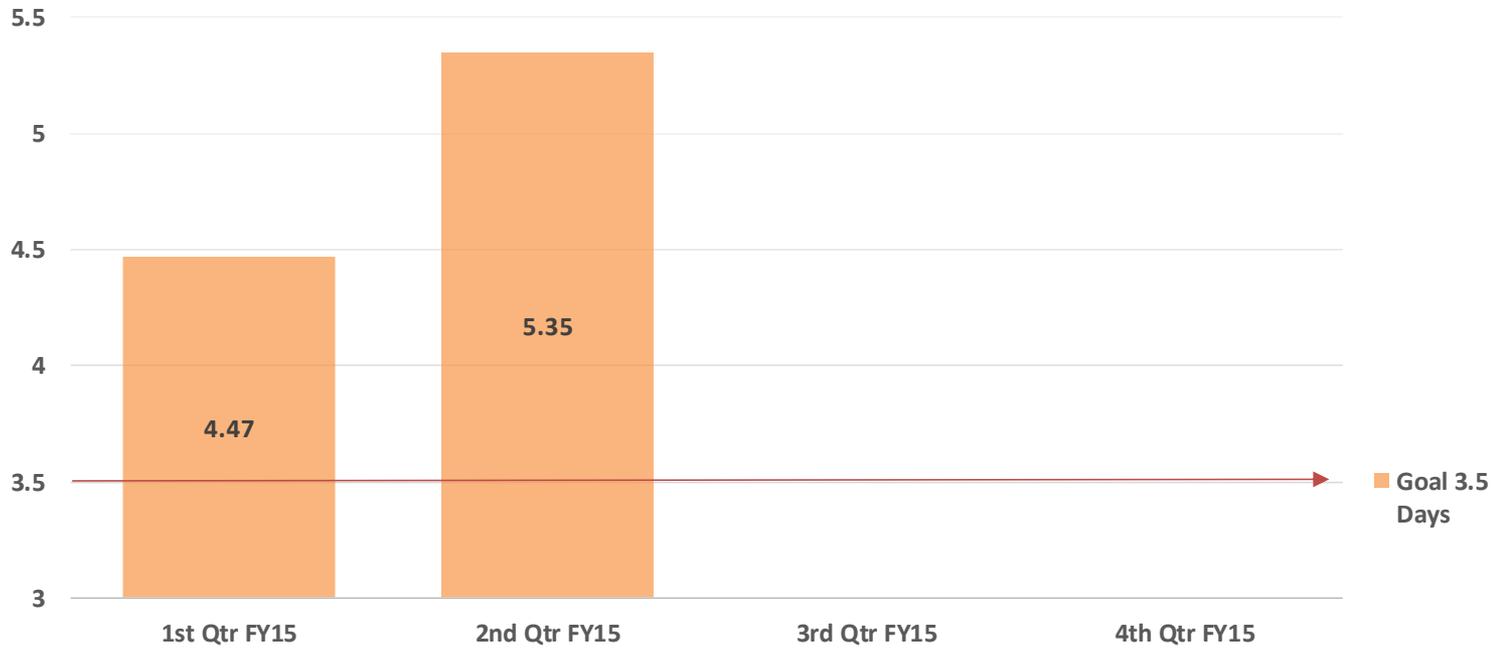
**Tactic: 1.2.2:** Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

### REDUCE AVERAGE NON-STOCK REQUISITION TO RECEIPT TIME



STATUS

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

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

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

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

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

## ACTION PLAN

### Actions Planned

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

Lead  
F. O.

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

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

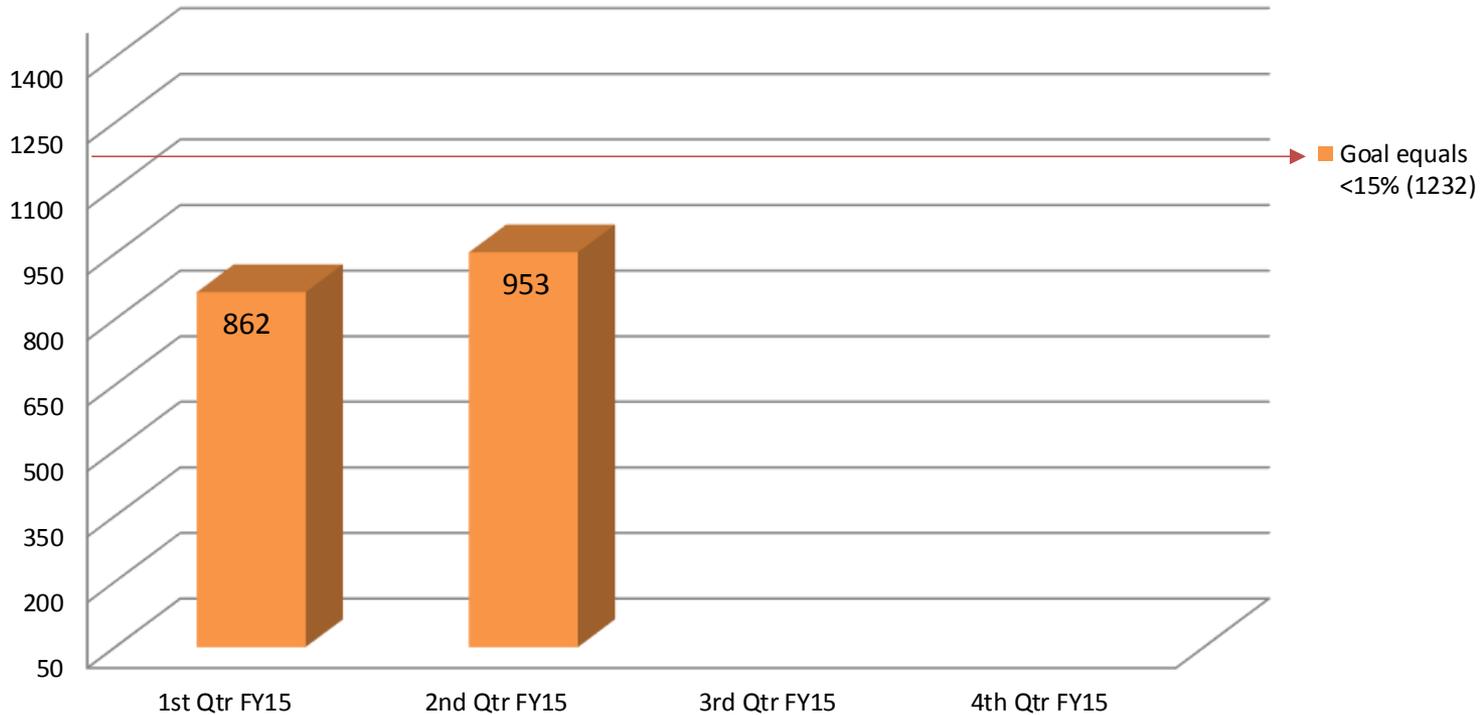
**Tactic: 1.3.1:** Decrease Number of Work Orders Over 14 Days Old by 15%

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

## Number of Work Orders Over 14 Days



STATUS

Lead  
F. O.

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

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

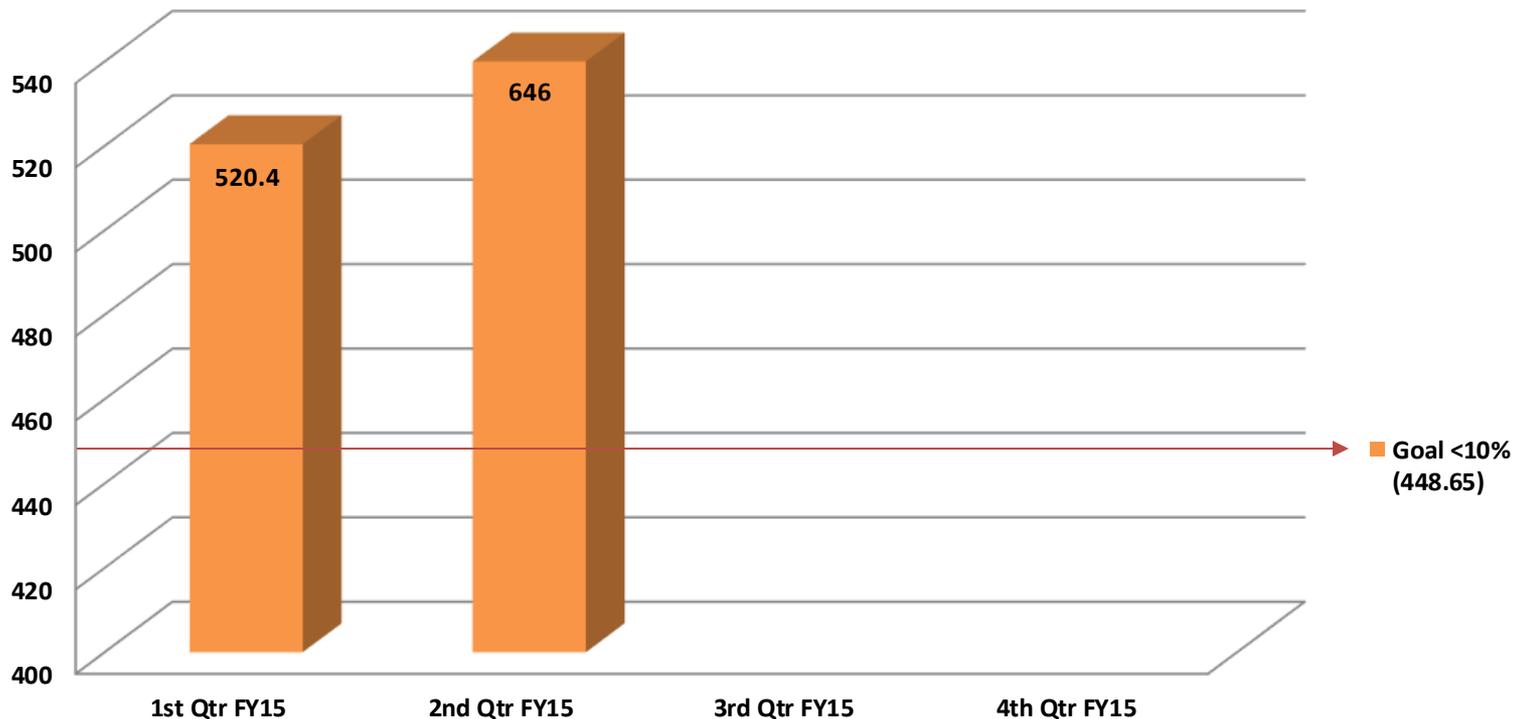
**Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Decrease Work Request Cycle Time



STATUS

## GOAL #1 – Continuously Improve Maintenance and Operations

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

Lead  
BES

### ACTION PLAN

- Actions Completed
  - BES Lead Technicians identified (11/2014)
  - Determined Zone and Shift assignments for all technicians and informed all BES Technicians of new assignments (12/2014)
  - Conducted (OS1) volunteer meeting and Pilot Building walk-through (11/2014)
  - Conducted interviews for Recycling Coordinator position (1/2015)
  
- Actions Planned
  - Develop new task cards for all BES Zones (3/1/15)
  - Conduct (OS1) Boot Camp and begin (OS1) Pilot in Friday building (end of FY14-FY15)
  - Continue Re-engineering implementation planning meetings thru (3/1/15)
  - Review and continue quarterly self audits (3/1/15)

## Facilities Management Strategic Planning Session – Second Quarter FY 2015

Lead  
BES

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

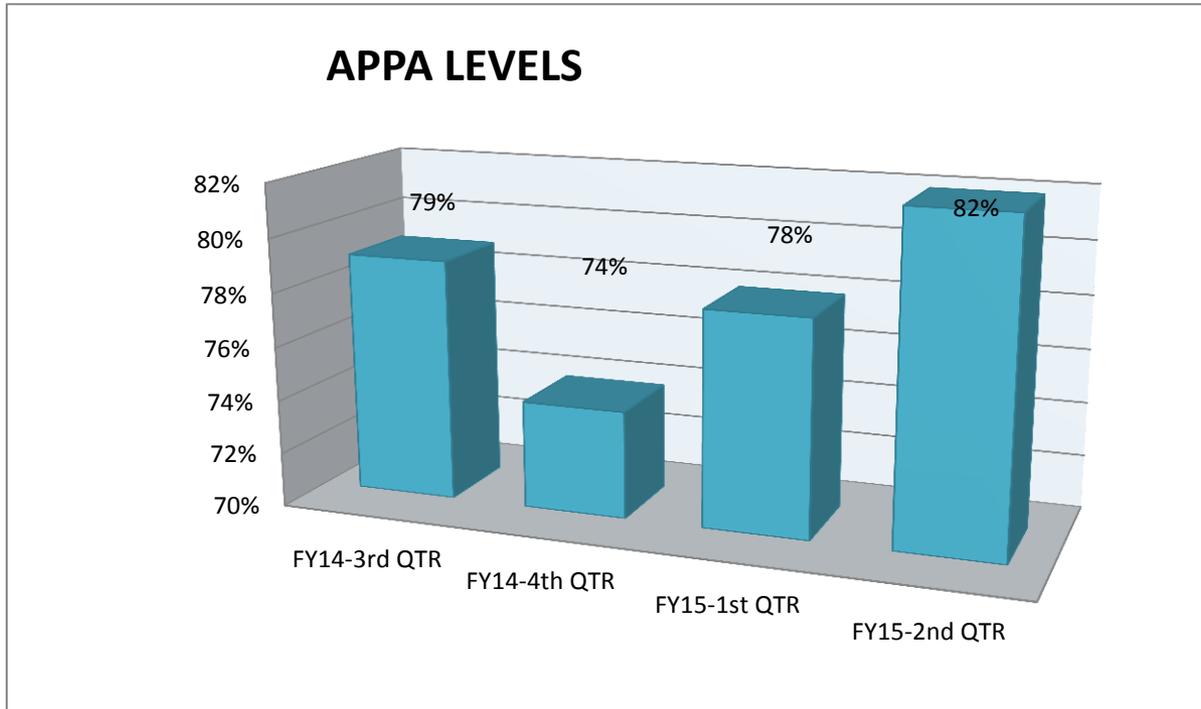
**Objective: 1.4:** Improve BES Processes

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

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

**Lead:** Building Environmental Services

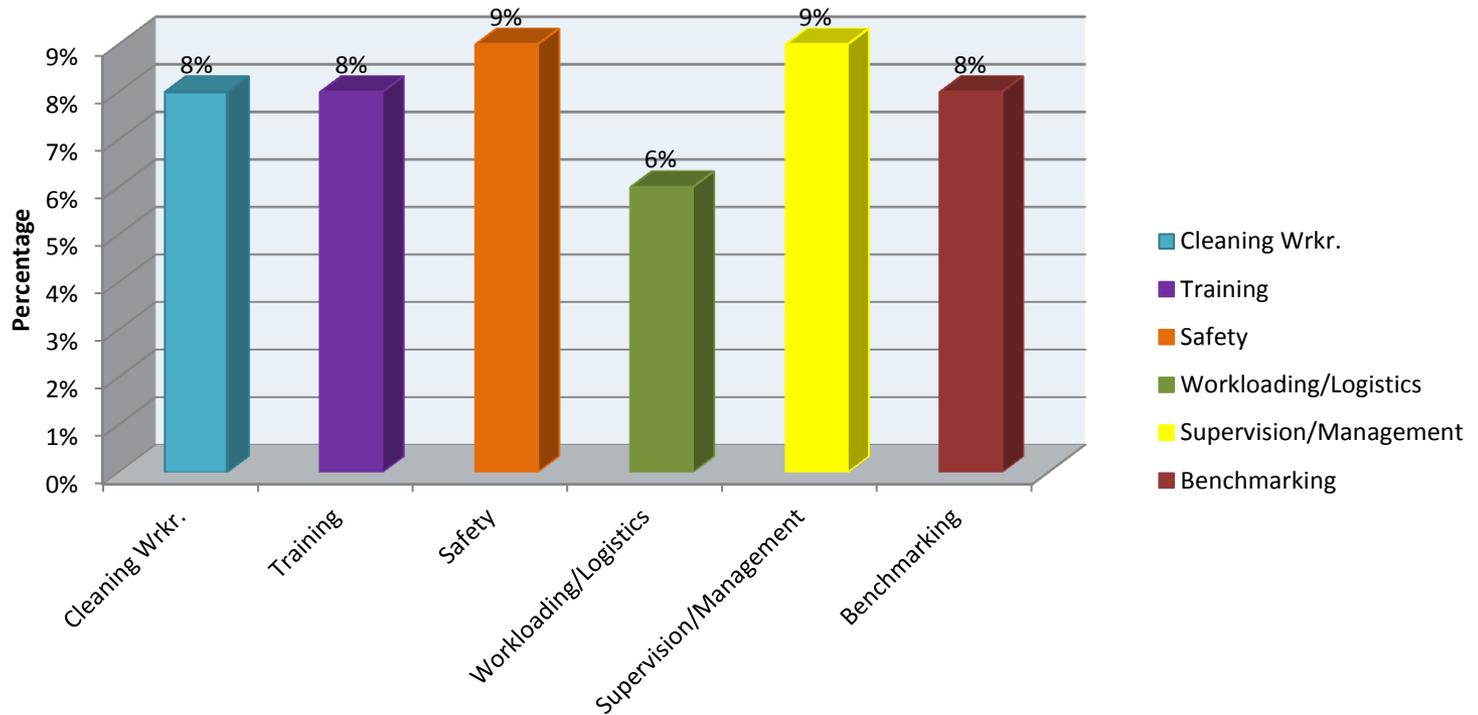
**Balanced Scorecard Category:** Customer Perspective

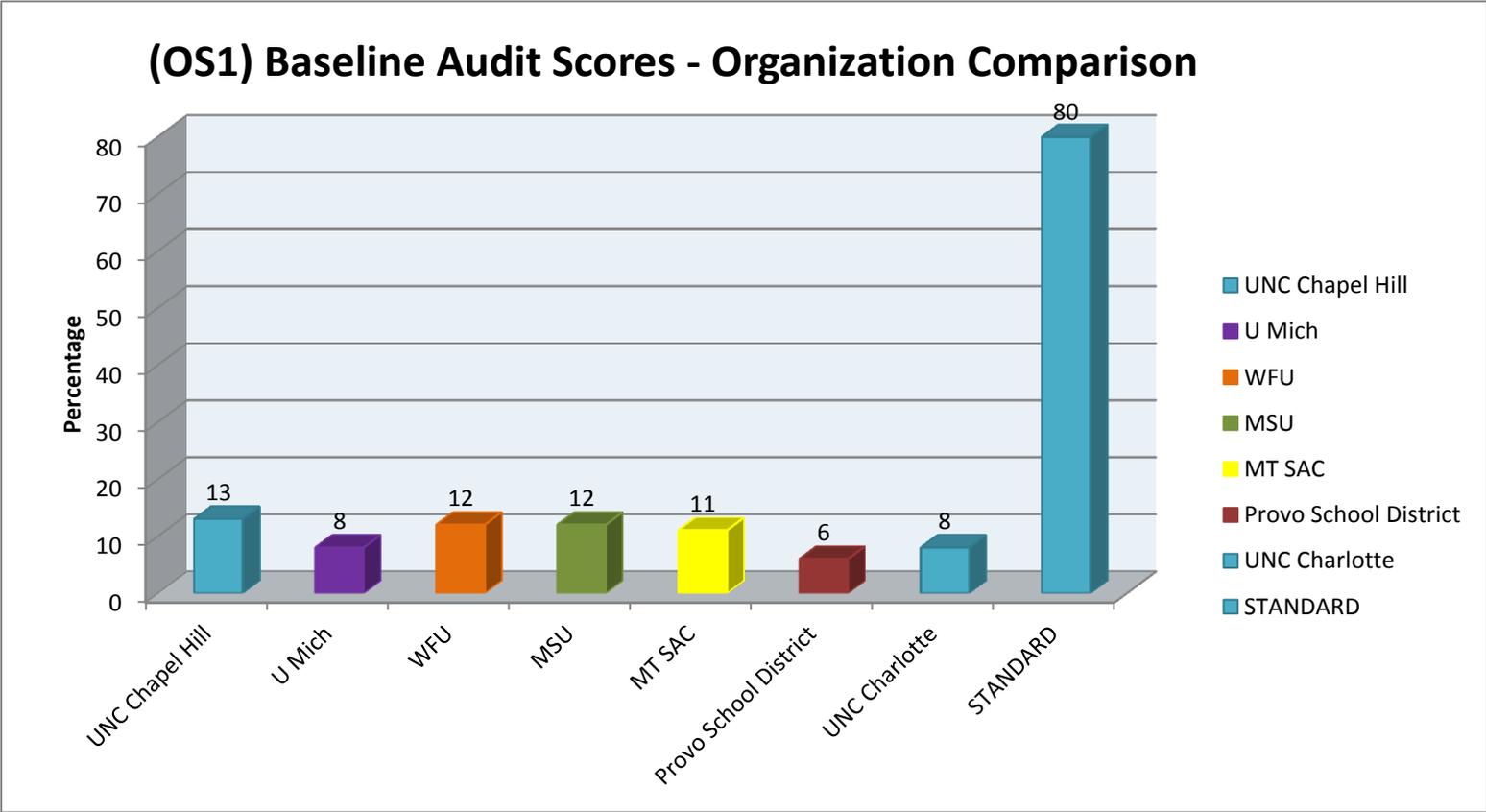


Percentage = 82%

STATUS

### (OS1) Baseline Audit Scores - Job Category





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

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

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

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

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

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

## ACTION PLAN

### Actions Planned

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

Lead  
F. O.

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

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

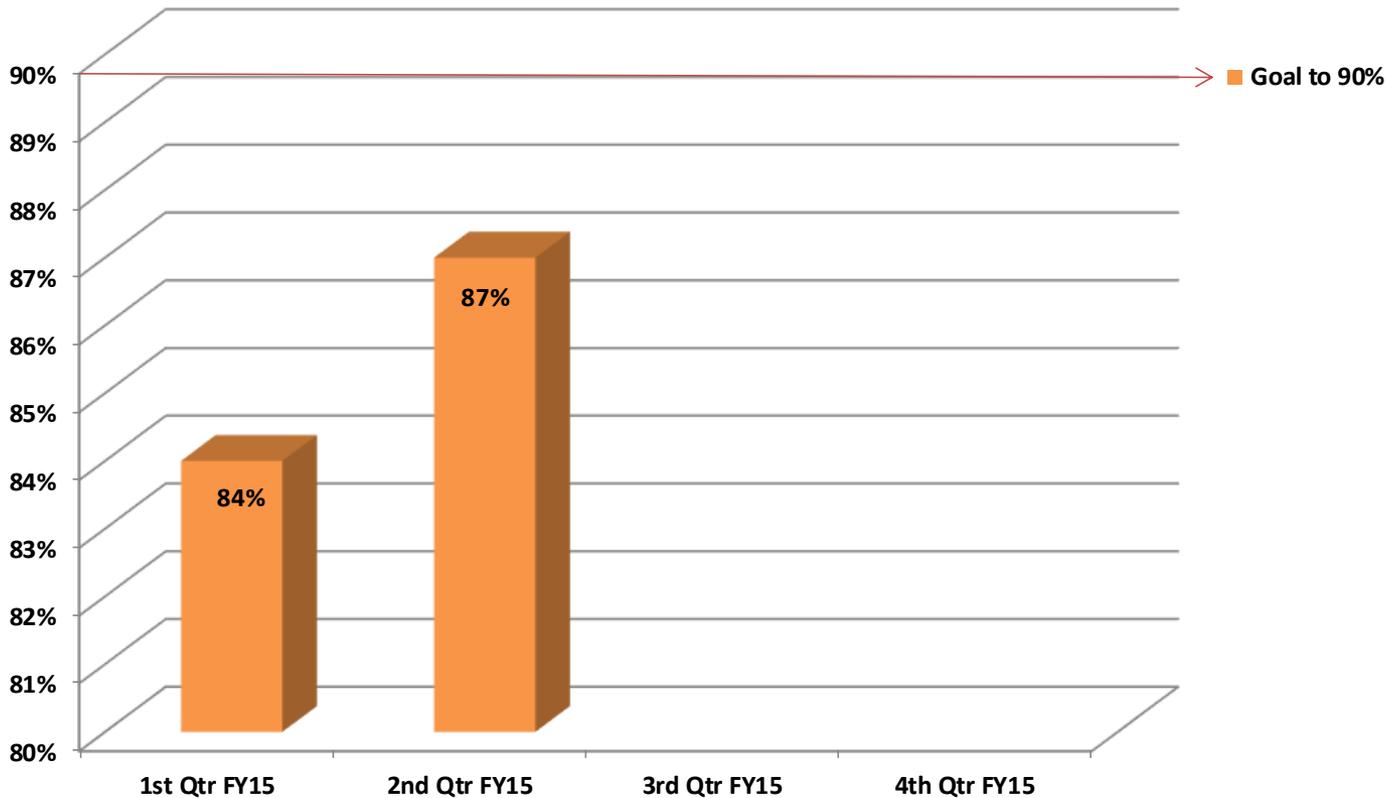
**Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%**

**Measure: Percentage of Preventive Maintenance Work Requests Completed**

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

### Improve Completion of PM Work Orders



STATUS

Lead  
F. O.

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

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

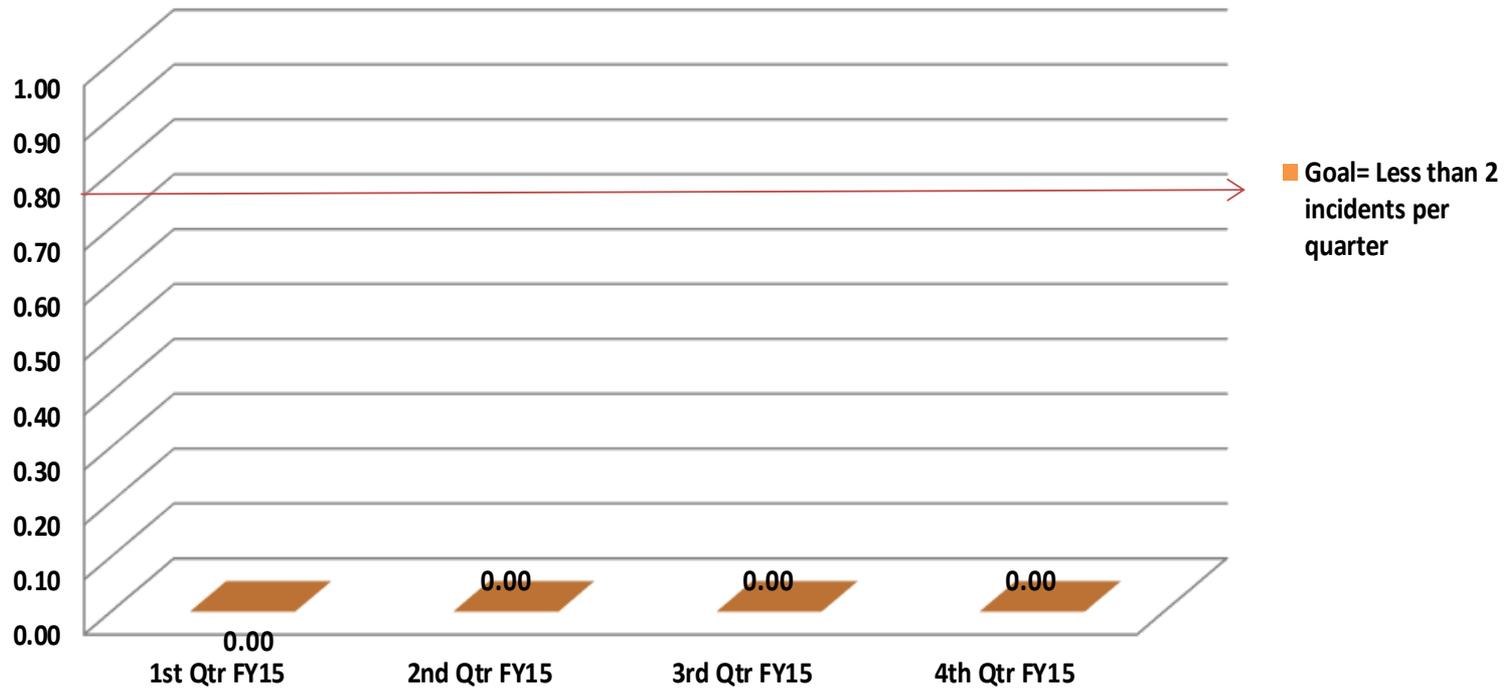
**Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

## Unscheduled Equipment Replacement Projects



STATUS

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

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

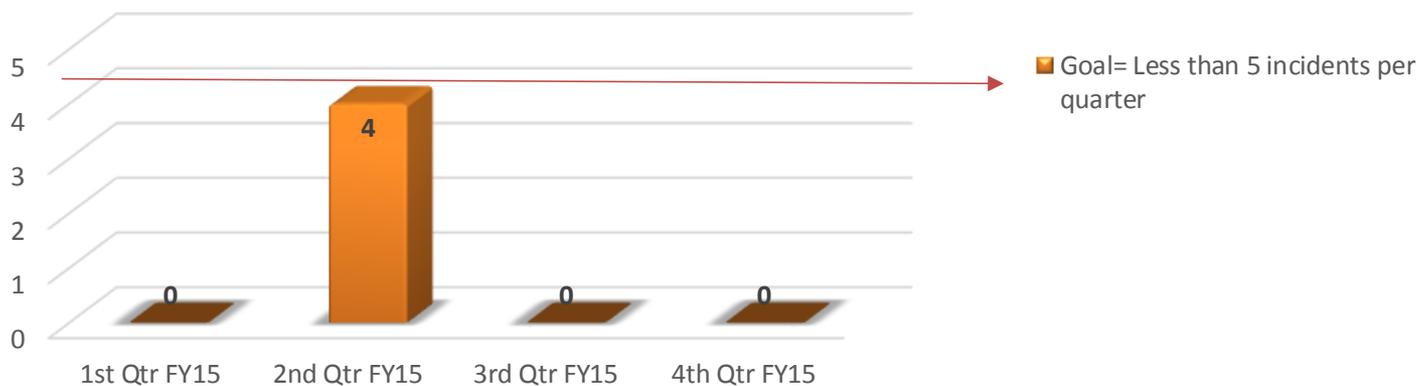
**Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Unscheduled Outages



Lead  
F. O.

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

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

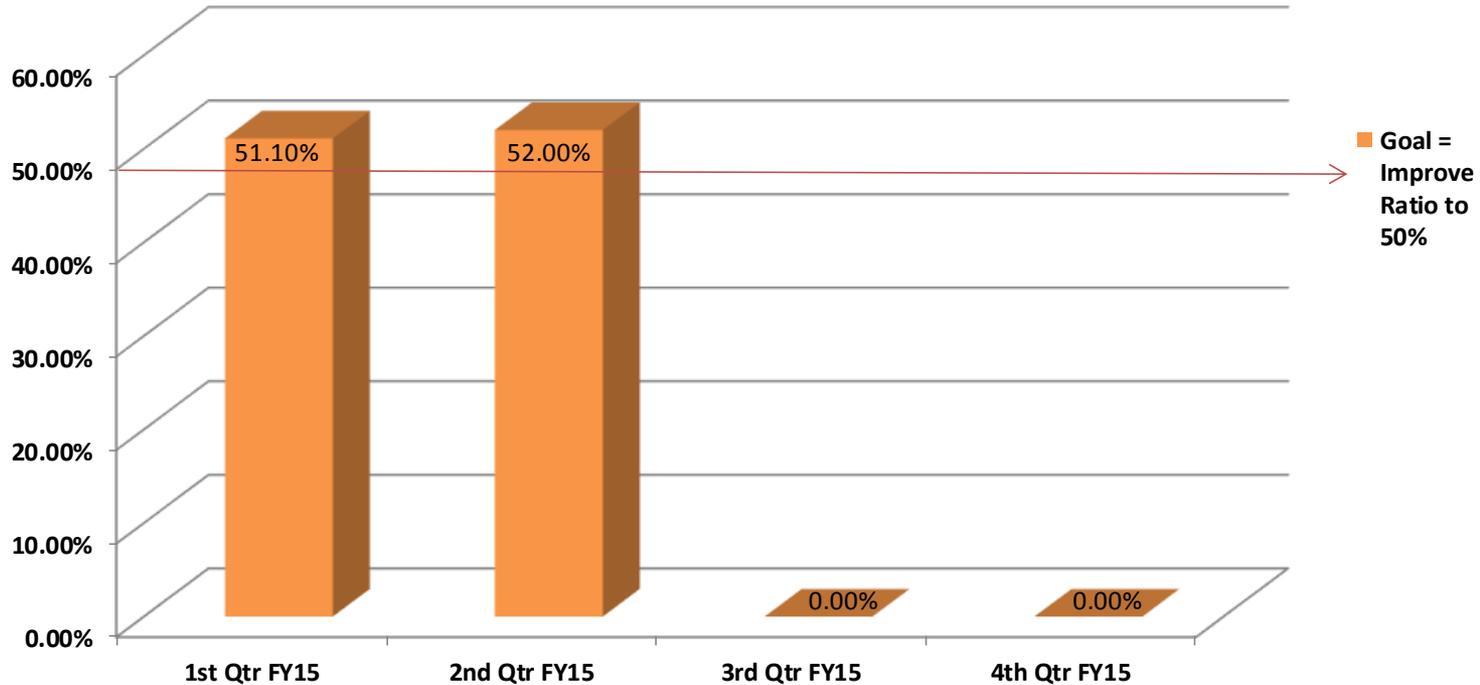
**Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Improve Ratio of Preventive/Predictive Work Requests



STATUS

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

-- Earl Nightingale,  
Motivational Speaker

## GOAL #2

Create a Reliable and Sustainable  
Physical Infrastructure



# FM Prioritized Projects – FY15

1. **Campus Map** – **Roll over from FY14**; Estimated Completion Jun 2015
2. **Access and Key Management** – **Roll over from FY14**; Estimated Completion Feb 2014
3. **Space Audit, Approvals and Occupancy** – Estimated Completion May 2015
4. **BES ReOrg** – Completion March 2015
5. **ARCHIBUS 21.3 Upgrade** – Estimated Completion Jan 2015
6. **Capital Projects Requests and BANNER Integration** - Estimated Completion Apr 2014
7. **CRDM Parent Child** – Estimated Completion Jun 2015
8. **BAS Niagara 3.8 Upgrade** – Estimated Completion Jun 2015
9. **ImageNOW (Archive drawings)** – **Roll over from FY14**; Estimated Completion Feb 2015
10. **FO Craftsperson Timesheet/Whiteboard/Split Fund PM** – Estimated Completion Jan 2015
11. **Project Billing Console** – Estimated Completion Mar 2015
12. **Design Services Phase 2 Requests** – Estimated Completion Date Jun 2015
13. **BES EDA Asset Mgmt** - **Roll over from FY14**; Estimated Completion Dec 2014
14. **WO Hot /Utility Form** – **Roll over from FY14**; Estimated Completion Dec 2014
15. **ARCHIBUS Mobile Proof of Concept** – Estimated Completion Feb 2015
16. **Mobile Equipment Survey** – Estimated Completion Mar 2015
17. **Mobile Space Inventory** - Estimated Completion Apr 2015
18. **Mobile Map Utilities Field Units** - Estimated Completion Jun 2015

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

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

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

Lead  
FIS

### **ACTION PLAN**

#### **Actions Planned:**

1. Hire temporary Survey Technician position by Feb 28, 2015.
2. Hire vacant Mobile Technology position by April 30, 2015.
3. Complete/Finalize Campus Map review changes and officially “Go Live” by March 2015.
4. Complete ARCHIBUS 21.3 upgrade by April 15, 2015.
5. Begin Capital Upgrades and BANNER Integration Project by March 15, 2015.
6. Begin Archive Drawing data upload to ImageNOW production database by Feb. 1, 2015.
7. Complete BES Manager/Supervisor Training by March 2015.

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

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

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

Lead  
FIS

### ACTION PLAN

#### Actions Completed:

1. Completed BES Re-Org System Changes.
2. Completed development of New FO Utility Form for FO.
3. Finalized testing and went live with Beginner Work Request Customer role online training module.
4. Completed Facilities Operations Craftsperson Timesheet and Whiteboard/Schedule test views for FO Pilot testing.
5. Completed Split-Funded Preventive Maintenance functionality for Facilities Operations.
6. Completed 1<sup>st</sup> phase and testing for FM Print Server Transition project.

Lead  
FIS

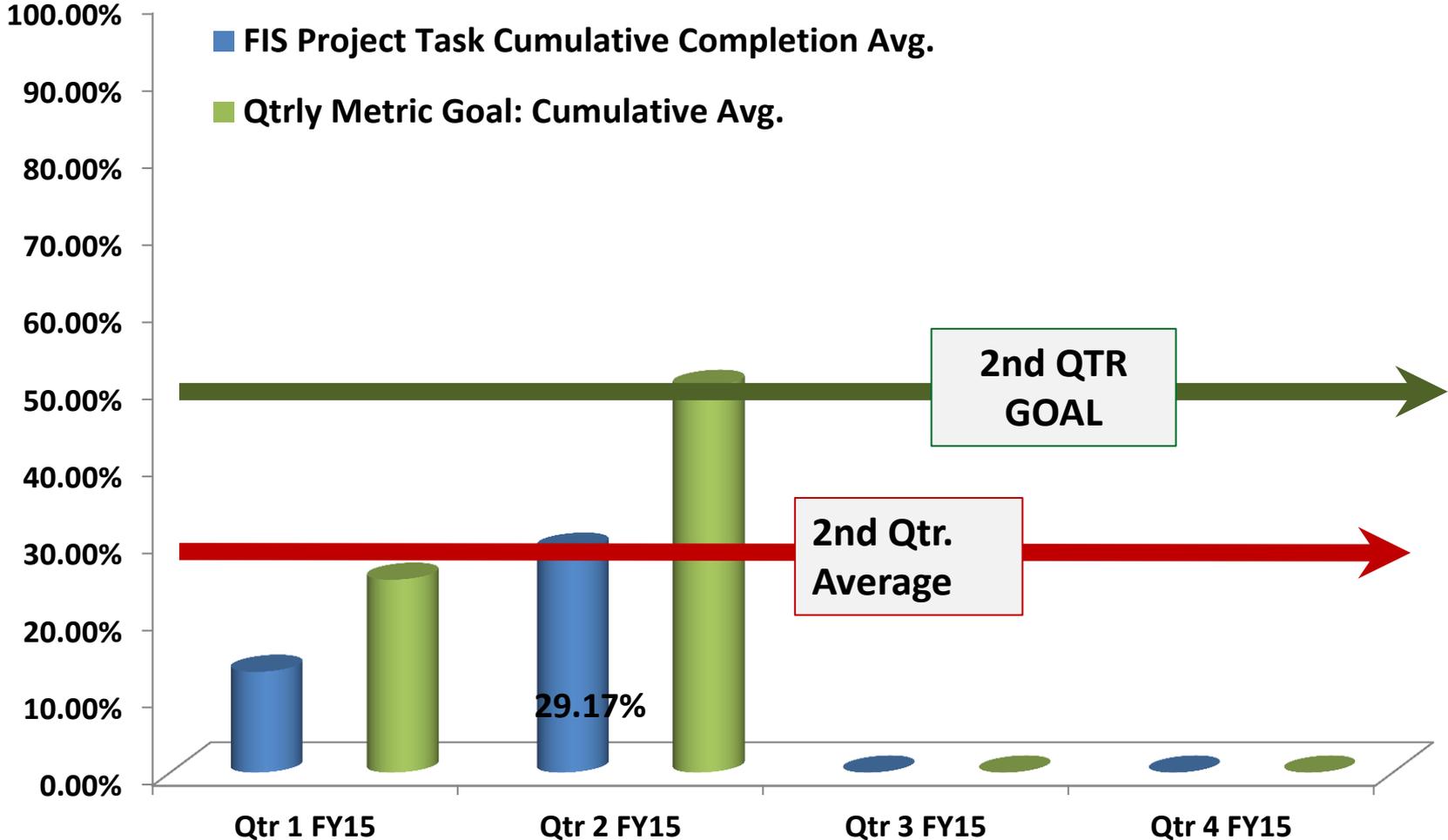
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**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 2015**

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

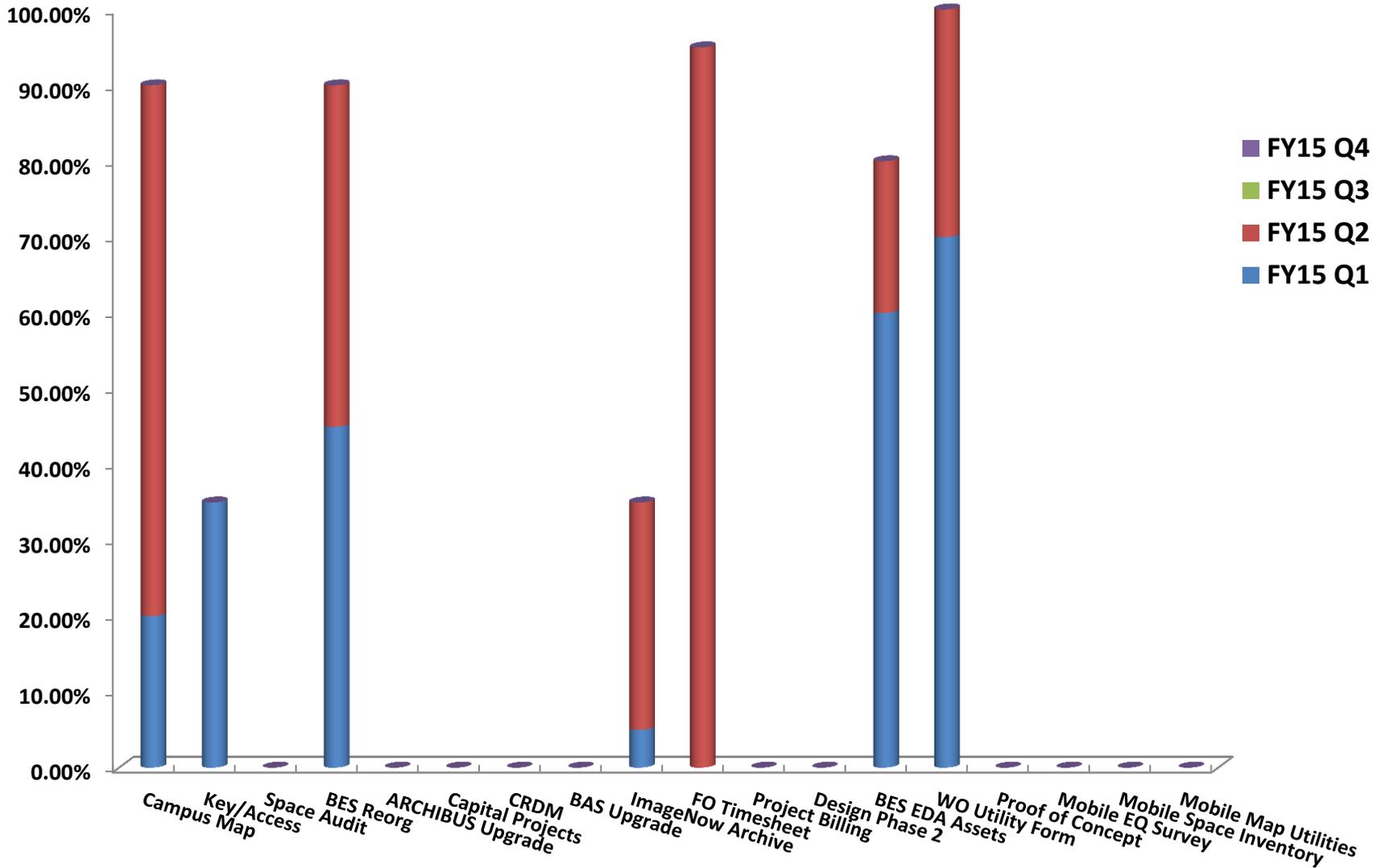
**Objective:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

**Lead FIS**

**Balanced Scorecard Category:** Internal Business Processes



**STATUS**

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

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

<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>	Review Project Capacity - Goal 250 projects per year.
<b>Measure:</b>	Number of Projects Completed (Annual Goal)

**ACTION PLANS FOR IMPROVEMENT**

NEW IMPROVEMENTS

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

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

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

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.  
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4*

ONGOING IMPROVEMENTS

- Continue ongoing efforts on Classroom Capacity and ADA egress information per building.

**GOAL**  
95.0%

**STATUS**  
96.4%

**Lead**  
Design Services

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

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

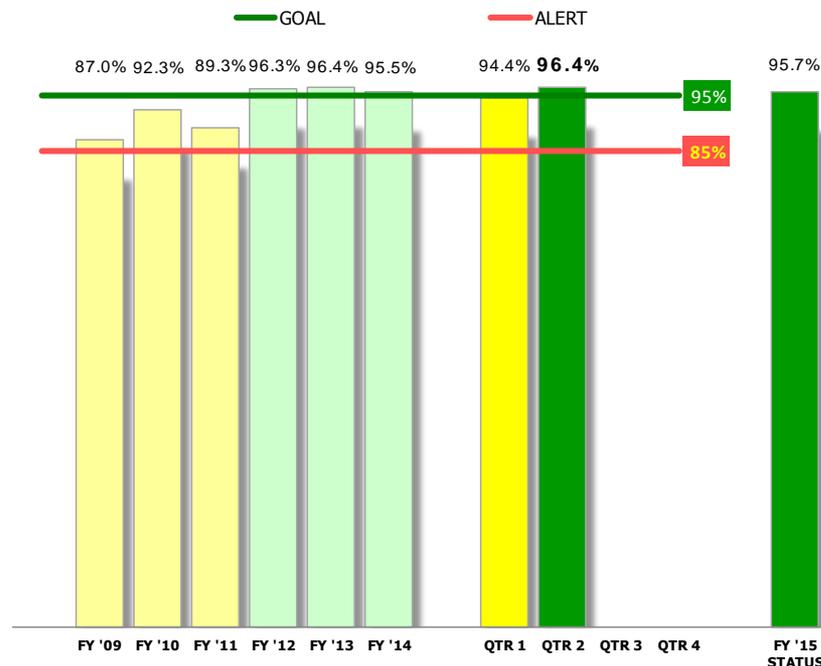
**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

**Tactic 2.2.1:** 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)  
**Measure:** Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

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

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
FY '14	221	211	10	95.5%
QTR 1	18	17	1	94.4%
QTR 2	28	27	1	96.4%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '15 STATUS</b>	46	44	2	<b>95.7%</b>



**Facilities Management Strategic Planning Session – Second Quarter FY 2015**

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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Actions Planned:**
  - **Determine O/A FCI of buildings (Live data available with FCAP updates ongoing) by end of January 2015**
  - **Re-start CRDM process by launching map and Master List – obtain feedback**
  - **Conduct campus customer meetings in January 2015**
  - **Conduct Committee review meetings in January & May 2015**
  - **Recommend a plan/ prioritize projects to improve FCI by 5% by July 2015.**

**STATUS**

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

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

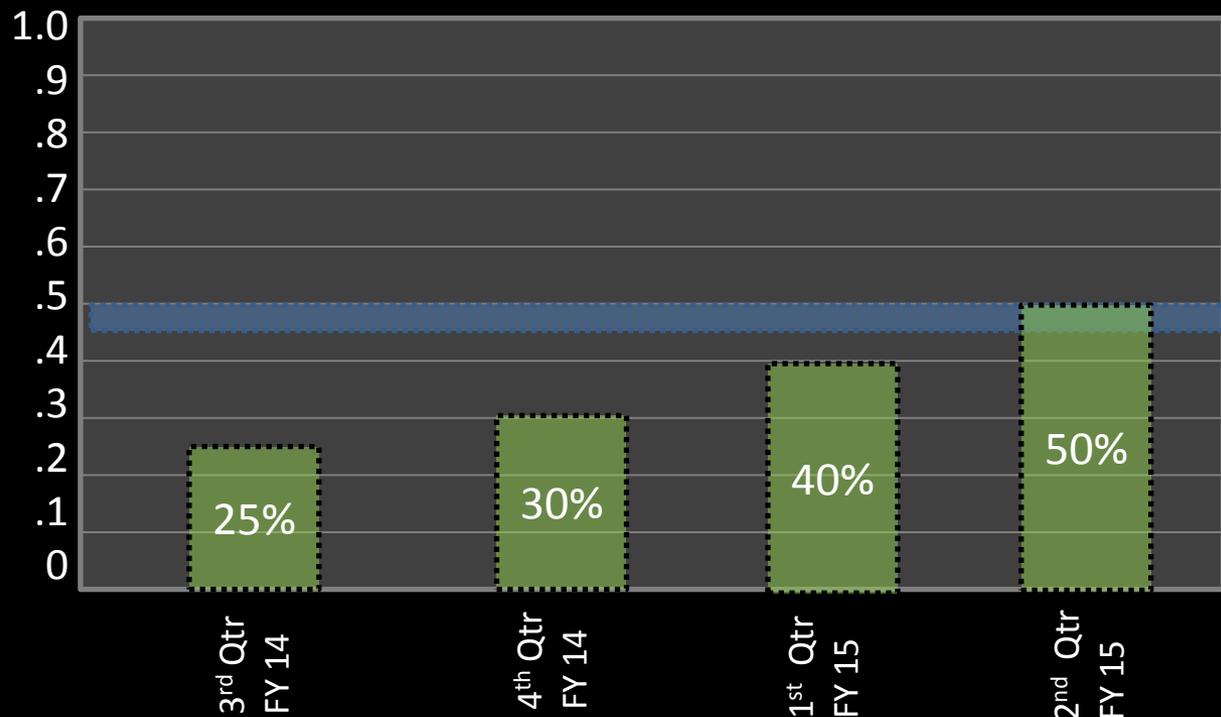
**Tactic 2.3.1:** Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - Recommendation **NLT July 2015.**

**Measure:** Average Building FCI for campus

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

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

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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

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

**STATUS**

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

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

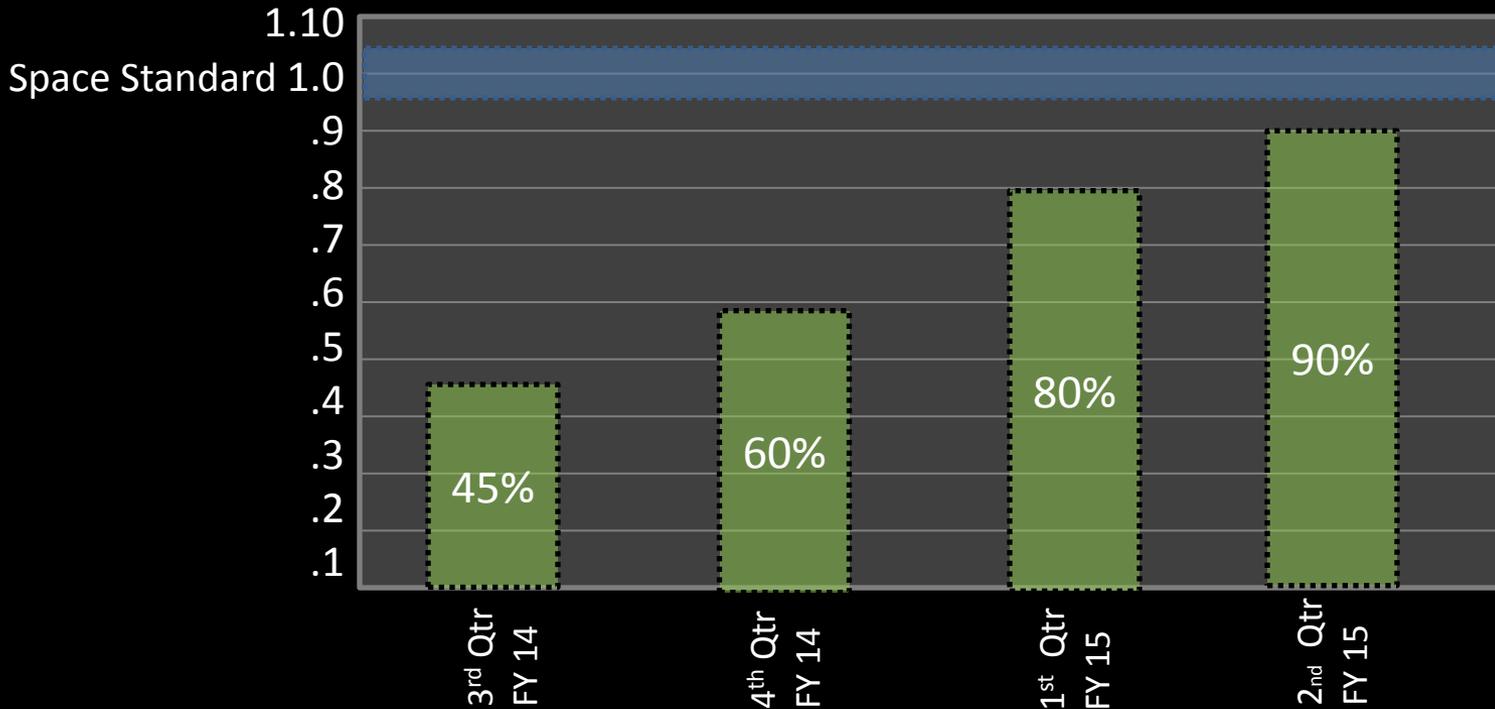
**Tactic 2.4.1:** 90% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of July 15.**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

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

**STATUS**

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

Lead  
Capital

<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

### Actions Completed

- CID 2—Elevator Upgrades
- CID 2—Outdoor Events Shelter
- CID 2—SAC Chiller

### Actions Planned

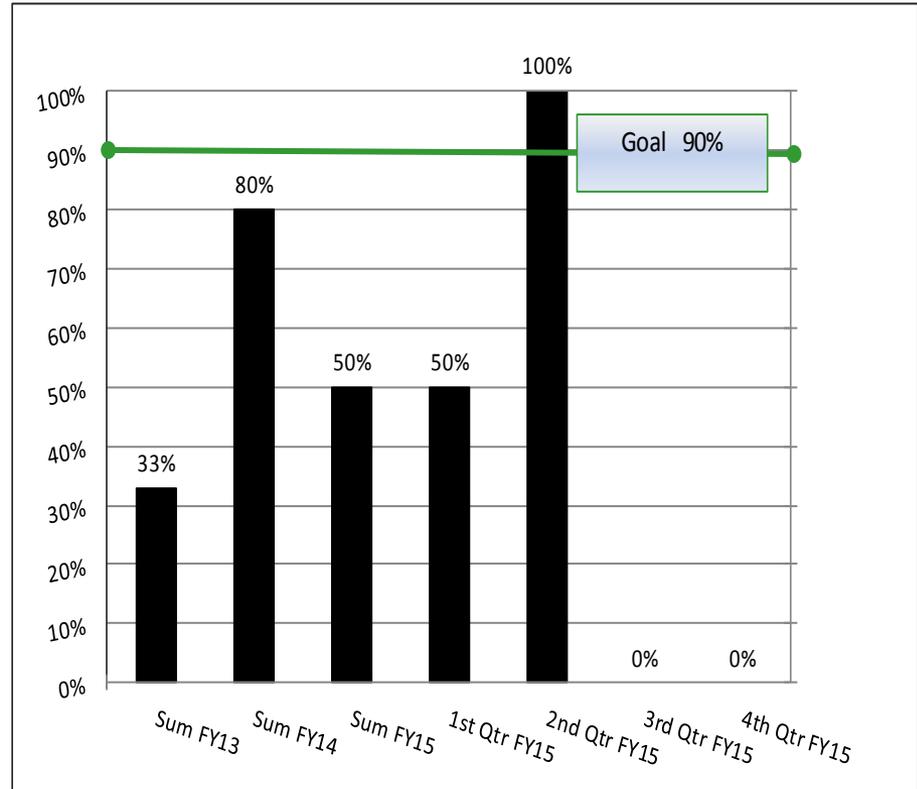
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules – accurate, used weekly by PMs & CMs
- PMs print project budget / financial sheets. Have them on hand for all design meetings. PMs must know their project authorization, current source of funding, available balances.
- Develop a standardized design meeting agenda and make budget, contingency, scope creep, and design production schedule required topics for updating the project team.
- Report monthly to AVC FM status of changes relating to designer fees, scope creep, schedule misses, etc..
- Protect contingency limit uses for unforeseen conditions, inflation

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

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

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract w/in 120 days	Designer not under contract w/in 120 days	% Designers under contract w/in
Summary FY-13	14	3	6	33%
Summary FY-14	7	4	1	80%
Summary FY-15	1	1	1	50%
1st Qtr. FY-15	1	1	1	50%
2nd Qtr. FY-15	4	3	0	100%
3rd Qtr. FY-15	0	0	0	n/a
4th Qtr. FY-15	0	0	0	n/a



Tactic Measurement for 2<sup>nd</sup> Quarter is 100%  
 Year to Date is 75%

**Facilities Management Strategic Planning Session – Second Quarter FY 2015**

**Lead Capital**

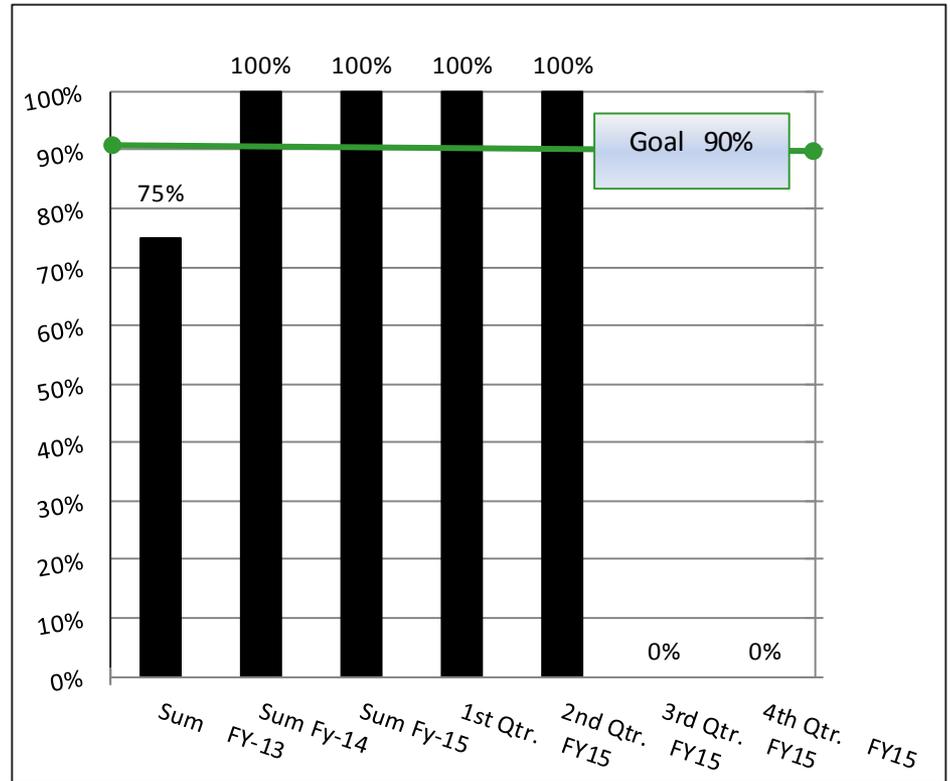
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

**Measure:** Percentage of designs completed on or before the original completion time

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled	#not completed by scheduled time	% Designs complete by completion time
Summary FY-13	3	1	75%
Summary FY-14	8	0	100%
Summary FY-15	1	0	100%
1st Qtr. FY-15	1	0	100%
2nd Qtr. FY-15	1	0	100%
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 2<sup>nd</sup> Quarter is 100%

**Status**

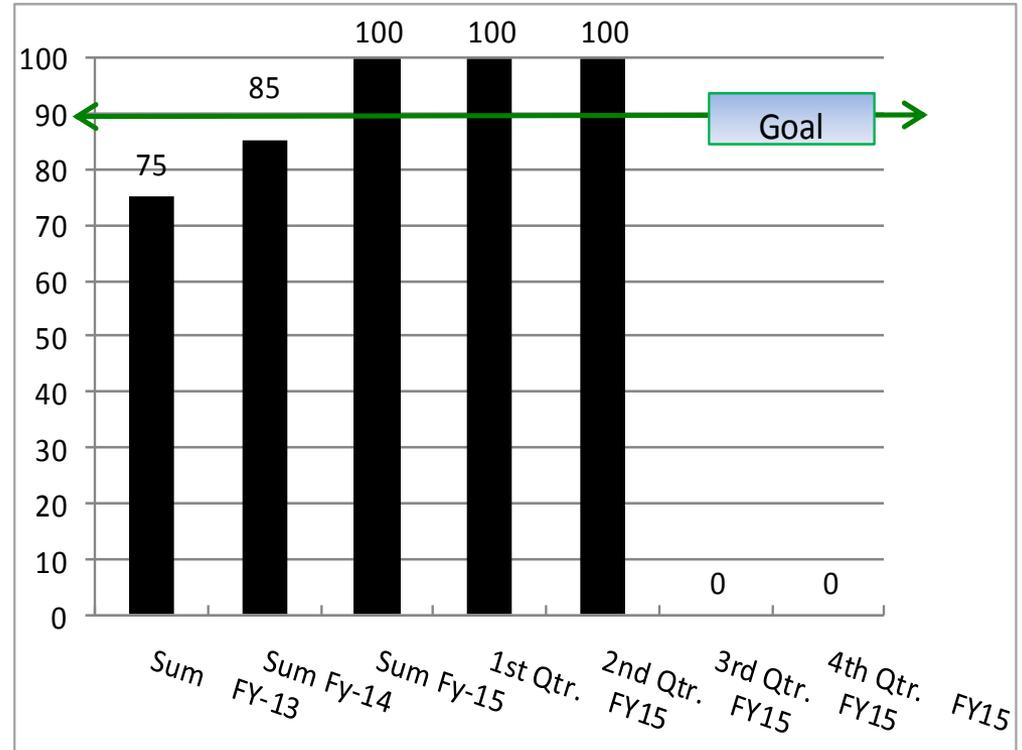
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**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
Summary FY-13	3	1	75%
Summary FY-14	6	1	85%
Summary FY-15	1	0	100%
1st Qtr. FY-15	1	0	100%
2nd Qtr. FY-15	0	1	100%
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 2<sup>nd</sup> Quarter is 100%

## 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

#### Actions Complete

- Campus Roof Replacements (King, Fretwell, Counseling Center, Barnard, Garinger)(+44 days)
- Cone Plaza (+290 Days)

#### 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
-

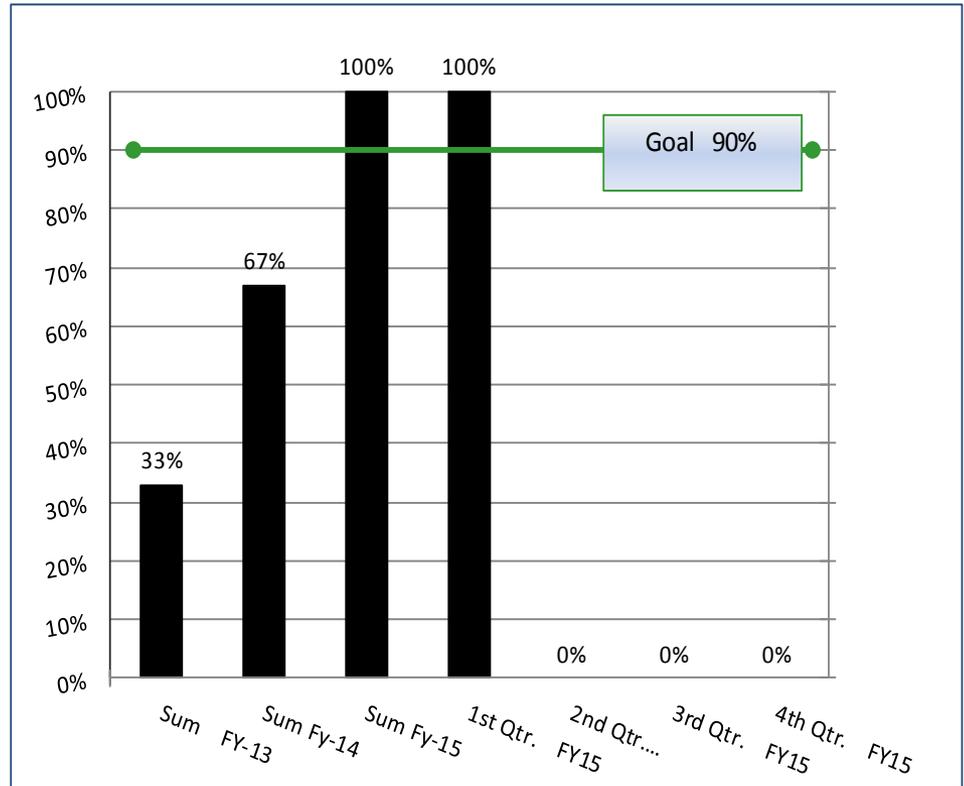
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

**Balanced Scorecard Category:** Customer Perspective

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



Tactic Measurement for 2<sup>nd</sup> Quarter is 0%

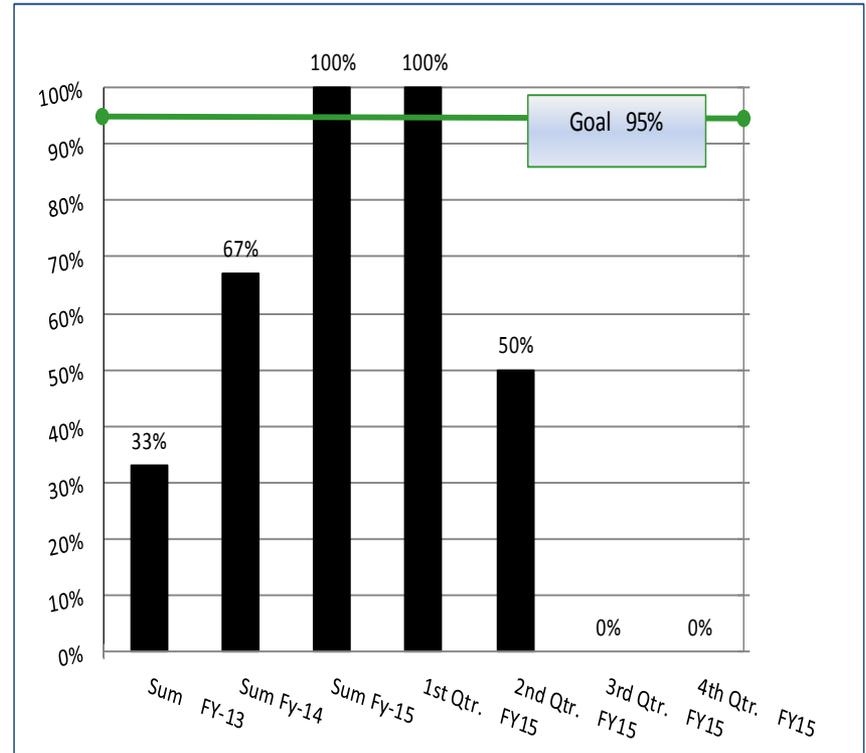
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

**Measure:** Percentage of projects completed within the original contract amount or GMP plus 3% (contingency).

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	2	0	100%
1st Qtr. FY-15	2	2	100%
2nd Qtr. FY-15	1	1	50%
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 2<sup>nd</sup> Quarter is 50%



UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

## GOAL #3

Foster a Customer Focused Organization



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

**Objective 3.1:**

**Continuously improve customer service/satisfaction**

**Tactic 3.1.1:**

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

**Measure:**

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

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN**

**Customer Survey**

- Customer interview feedback to be shared with Directors **Spring 2015**
  - Questions will relate to how FM can help customers get their work done better and/or faster
  - **Ask feedback for following scenario: a customer service center entering and managing work requests**
- Action plans, based on interviews and 2014 Customer Survey to be developed by Directors. **Tent. date July 1 or as directed by AVC**
- Next Urban Institute survey projected: **FY 2016**

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

**Objective 3.1:**

**Continuously improve customer service/satisfaction**

**Tactic 3.1.1:**

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

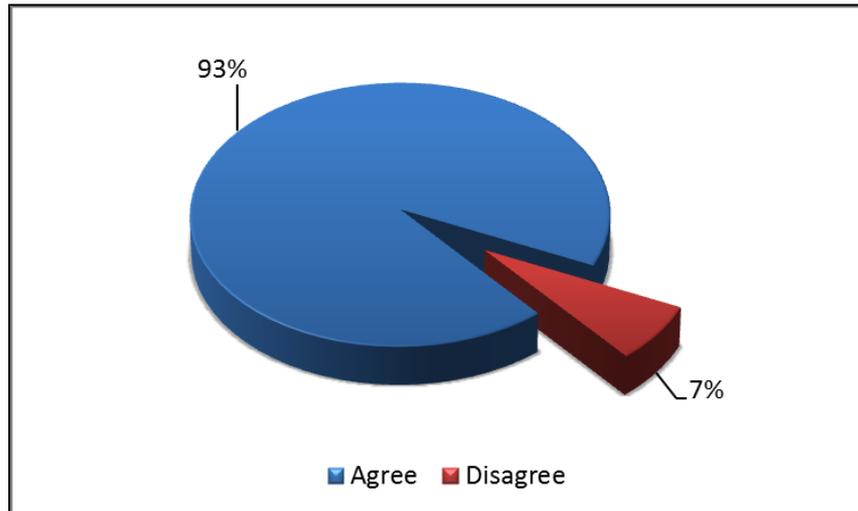
**Measure:**

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

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

**2014 Survey Overall Satisfaction: 93%**



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

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

**Lead:** Design Services

**Balanced Scorecard Category:** Customer Perspective

**Tactic 3.1.3:** 90% of Informal Project Customers are satisfied or very satisfied  
**Measure:** Results from Project Customer Questionnaire

## ACTION AND PLANS FOR IMPROVEMENT

### Archibus - Design Services Customer Survey:

- Over the first two quarters of survey results all have been more than satisfied:  
We received 9 surveys out of 45 issued – 20% Return.  
We need more returns of issued surveys.
- Work with Customers to request responses:  
Customer may not want to have their name tied to a negative survey.  
One on one meetings or phone conversations with high use Customers without Project Coordinator may generate more responses.

## IMPLEMENTED ACTIONS AND PLANS

### Archibus - Design Services Customer Survey:

- Customer responses via Lime-Survey – Success to date.
- Project Priority List includes new column designating “true” Project Customer:  
Allows Survey to be sent to correct Customer.

STATUS

# Facilities Management Strategic Planning Session – Second Quarter FY 2015

<b>GOAL</b> 90.0%	<b>STATUS</b> 100.0%	<b>Lead</b> Design Services
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## GOAL #3 – Foster a Customer Focused Organization

### Objective: 3.1: Continuously Improve Customer Service and Satisfaction

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

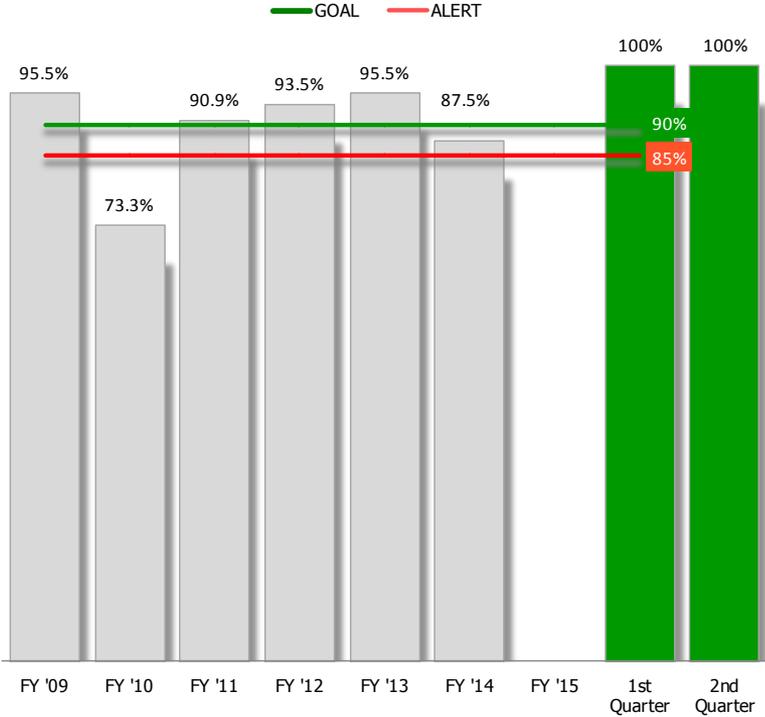
**Measure:** Results from Project Related Customer Surveys

**Lead:** Design Services

**Balanced Scorecard Category:** Customer Perspective

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

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY '09		22	18	3	0	95.5%
FY '10		30	17	5	0	73.3%
FY '11		33	24	6	2	90.9%
FY '12		31	27	2	0	93.5%
FY '13		22	18	3	0	95.5%
FY '14		24	19	2	0	87.5%
<b>FY '15</b>						
<i>1st Quarter</i>	27	5	5	0	0	100%
<b>2nd Quarter</b>	<b>18</b>	<b>4</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>100%</b>
<i>3rd Quarter</i>						
<i>4th Quarter</i>						



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

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

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

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

## ACTION PLAN

### Actions Planned

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

### Actions Completed

- 1 - Implemented daily monitoring of temperatures using BAS and field verification. Continue to develop controls section and cross train with Zones.
- 2 - Work with other FM team members to establish a communication plan for temperature related building issues; communicate this plan no later than 1 August 2014 and update as needed.
- 3 - Include Energy Manager in Bi-Weekly Operations' meetings.
- 4 - Implemented Customer Satisfaction Survey.

Lead  
F. O.

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

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

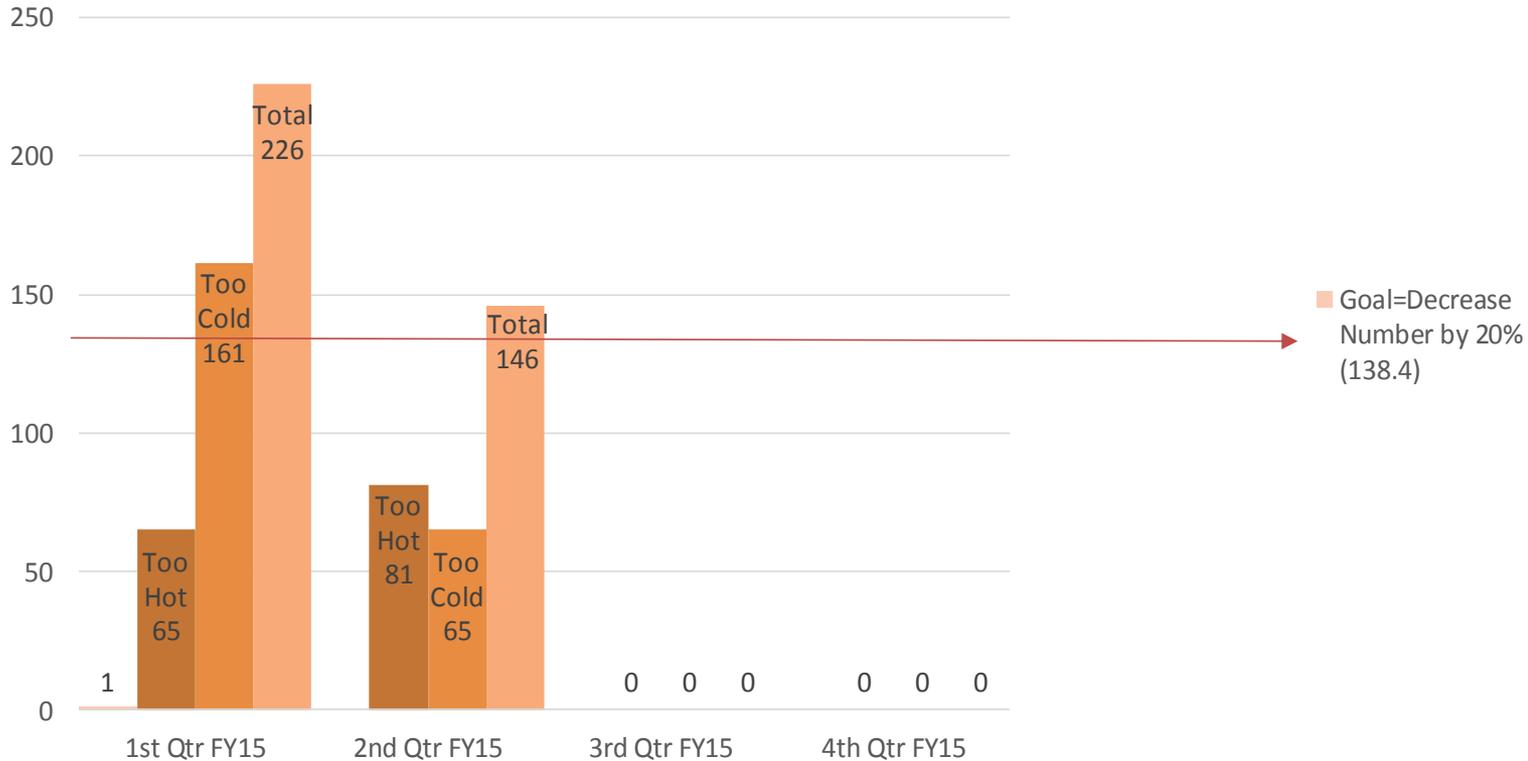
**Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%**

**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**

Lead  
F. O.

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

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

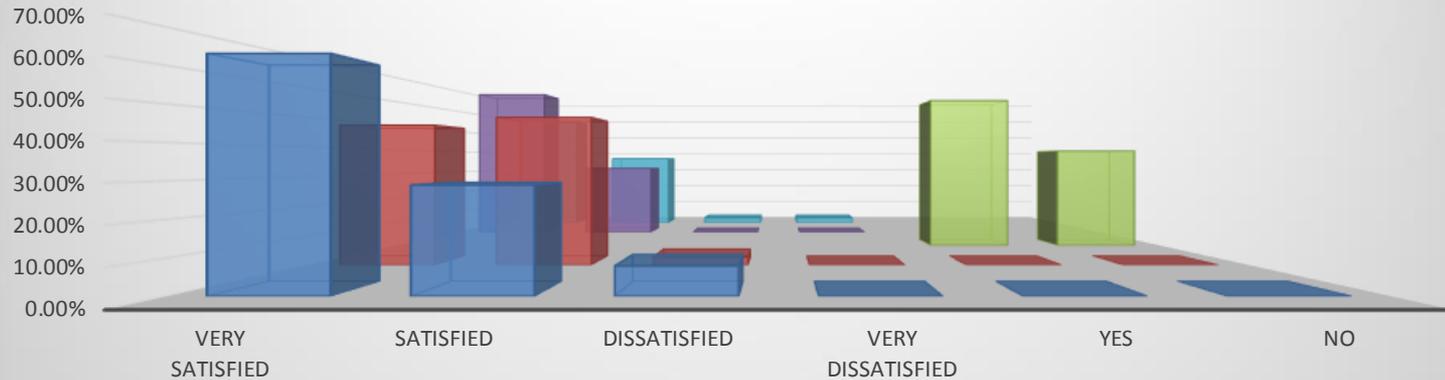
**Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Improve Customer Service Satisfaction



	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Yes	No
How satisfied were you with the time it takes for Fac Ops staff to respond to you issue?	63.16%	28.95%	7.89%	0.00%	0	0
How satisfied were you with the resolution of your issue or concern?	47.37%	50.00%	2.63%	0.00%	0	0
Was there follow-up? Yes/No					60.53%	39.47%
How satisfied were you with our staff's courteousness and professionalism?	68.42%	31.58%	0.00%	0.00%		
How satisfied were you with your overall experience?	57.89%	36.84%	2.63%	2.63%		

**STATUS**

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

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

**Lead:** Facilities Business Office - Communications  
**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN**

**Publicity/Public Relations:**

- **Campus Construction Reports\*:** Goal to prepare and distribute approx. every six weeks. **Feb. 16 week**
- **Press Releases:** Write and distribute through several media channels. Continual through **June 30, 2015**
  - Clean fuel grants, energy savings, Aperture sculpture, etc.
- **Publicity documentation and analytics\*:** Will report annually. Next is **summer, 2015**

**Internal Communications:**

- **Intranet** Begin content review and user feedback. *(note: level 0 security information)* **Spring 2015**
- **Regularly scheduled communications meetings** with BES and Operations
  - Bimonthly meetings for both
- **Focus group meeting facilitator** for employee communications survey review. Group participants being identified.
  - Meeting: **March, 2015**; Completion and results: **April, 2015**
- **Workshops\*:** Expand FM audience and subject materials **Through June 30, 2015**

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

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

**Lead:** Facilities Business Office - Communications  
**Balanced Scorecard Category:** Customer Perspective

## ACTION PLAN

**Customer Communication Initiatives (interrelated):**

- **Launch 2<sup>nd</sup> customer feedback interviews Winter 2015**
  - Share results with Directors **Spring 2015**
  - Results will assist with customer survey action plans to be developed by Directors **Tent. date July 1 or as directed by AVC**
- **External Marketing Campaign\*:** “Creating A Campus of Distinction”
  - Signage launch **Winter 2015**
  - Solicit feedback/input from Directors **Spring 2015**
  - Execute campaign tactics (testimonials, LCD signage, website, etc.) **Spring/Summer 2015**
- **SOP review, development Winter/Spring 2015**
- **Customer Handbook\* update, launch and remarket; digital and print Spring 2015**
- **Website and QA\* Spring/Summer 2015**
  - Review web comm. key QA issues/reminders
  - Review requested pages from different units for content/QA
  - User testing
- **Customer Facing technology Spring 2015**
  - Communication plans and user testing assistance with Campus Map and CRDM report

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

**Lead:** Facilities Business Office - Communications

**Balanced Scorecard Category:** Customer Perspective

## ACTION PLAN

### Special Projects:

- **Sustainability Magazine Launch w/o Feb 2**
  - Final editing & proof completed; reviewed by Jones, Dubois and Hardin
  - Limited print to occur in Feb/Mar.
- **Traffic communications committee (joint partnership with U. Communications):** Research, write and provide upcoming and current campus and perimeter traffic/transportation-related projects to campus stakeholders.
  - Quarterly e-newsletter, articles, announcements, etc. **Varying dates through June 30.**
- **Editing/writing award submissions.** As requested
  - Campus Tree USA Designation/Award: Submitted Dec. 2014; anticipated response March 2015. Communication plan will be developed and launched inline with Arbor Day if award won. **April 2015.**
- **Presentation assistance** as requested
- **Communication Plans:** BES and Operations key announcements, FIS new campus map, CRDM program, customer handbook **Spring and Summer, 2015, depending on assignment**
- **Personnel:** Temporary position request submitted through FY 15 budget process **Spring 2015**
  - \*\* = Areas where position would assist to help meet timeframes and deliverables.



UNC CHARLOTTE

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

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

## GOAL #4

Recruit, Develop, and Retain  
Quality Employees



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

- Objective 4.1:** **Recruit a Qualified Workforce in a Timely Fashion**  
**Tactic 4.1.1:** Vacancy time of no longer than 80 calendar days – Nonexempt  
Vacancy time of no longer than 120 calendar days - Exempt  
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

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

**ACTION PLAN**

1. Increase the pool of qualified applicants. **As appropriate through June 30, 2015**
2. Ensure a qualified diverse applicant pool. **As appropriate through June 30, 2015**
3. Ensure efficiency in processing position vacancies and position management activities. **As appropriate through June 30, 2015**
4. Ensure FM maintains current on budgeted positions. **As appropriate through June 30, 2015**
5. Monitor and reporting of separation data. **August 22, 2015**
6. Increase/improve efficiency with Main HR in processing HRMS actions. **As appropriate through June 30, 2015**
7. Provide additional HR-related support and assistance to FM units. **January, 2016.**

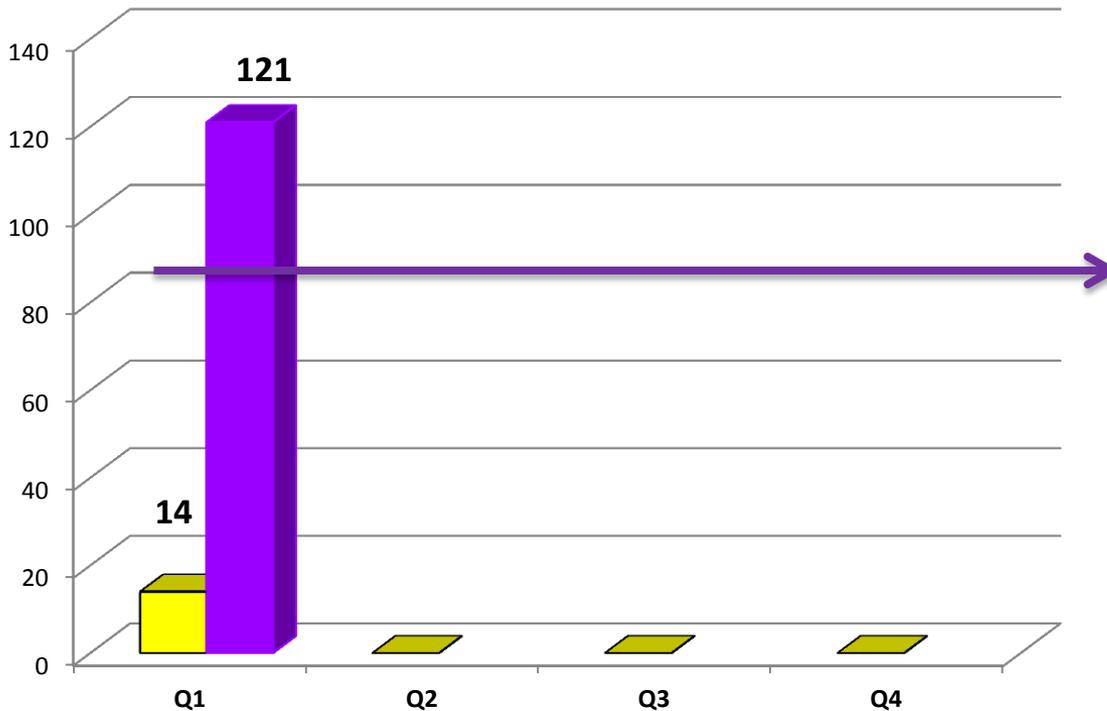
Lead  
FBO

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

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

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

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



Target:  
80 days or less  
  
Actual:

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

**STATUS**

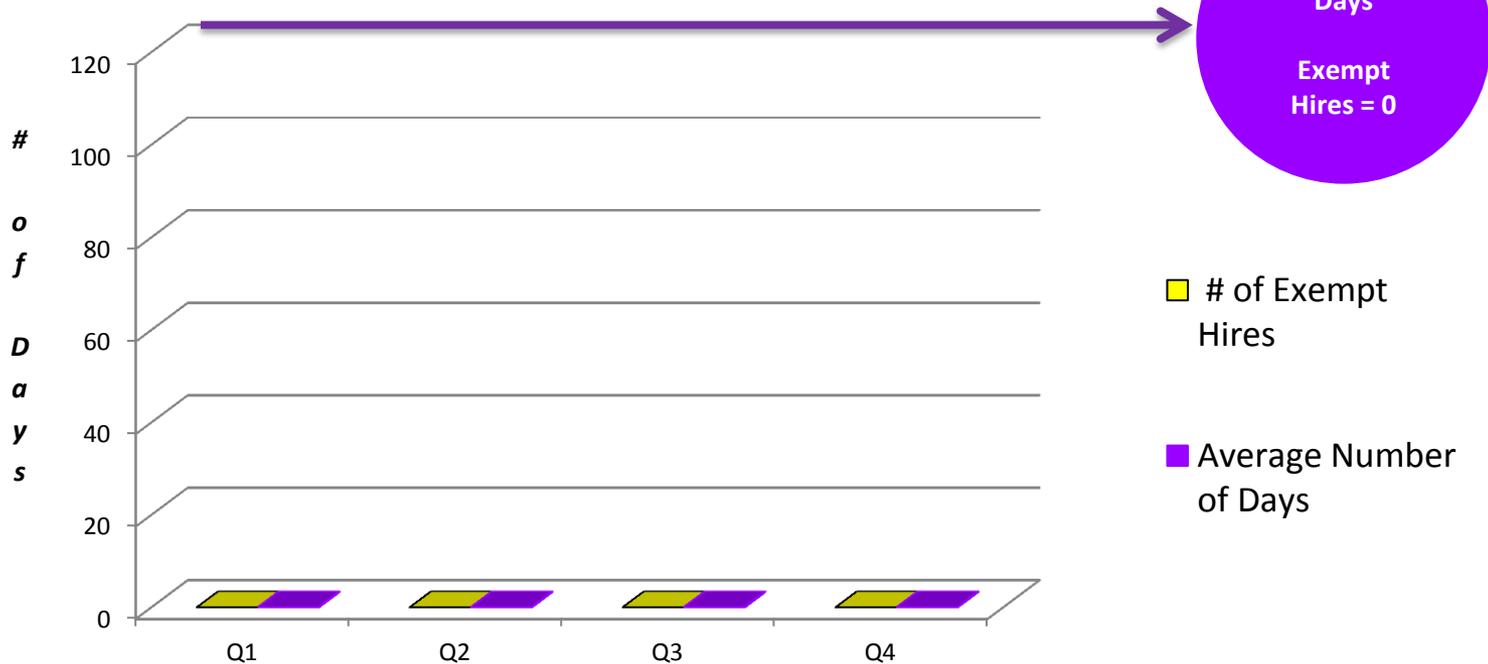
Lead  
FBO

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

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

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

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



**STATUS**

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

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

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

**Measure:**

Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

## ACTION PLAN

### Recruitment / Retention thru 06/30/15

- **Ensure all new hiring supervisors attend “targeted selection” training.** There are many steps in recruitment. Interviewing and reference verifications are essential practices that help eliminate problem performers from being hired.

### Culture of engagement

- Increase employee awareness regarding (their) access to HRMS Started July, 2014 and ongoing (Position Description - Work Plan Performance Evaluation

### Professional Development

- **Learning & Development Coordinator meeting with Units on training.** Supervisor’s responsibility to provide training and development opportunities for employees.

### Position description

- **Ensure position descriptions and competencies up to date.** Accurate position description, classification and salary are crucial to effective management. All new hires, transferred employees, promotions receive an updated position description.

### Mentioning

- Good relations with employees prevent many disciplinary situations from beginning or worsening.

### Employee Relations thru 06/30/15

#### Discipline

- Closely tied to performance management process.
- Not an independent event - part of a larger process.
- Difficult to argue that an employee should be dismissed for performance when he/she has three years of “outstanding performance management ratings on file

#### Documentation

- Roadmap that shows how us how we got to a certain stage in the discipline process.
- Why document...
- Selective and unreliable memory
- Grievance or lawsuit

#### If you didn’t document it, then it didn’t happen!

#### Supervisors Need to Know

- SPA Employee Grievance Policy - effective 5/1/2014
- The 3 causes for disciplinary action
- Unsatisfactory job performance
- Unacceptable personal conduct
- Grossly inefficient performance
- Steps in the progressive discipline process

Lead  
FBO

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

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

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

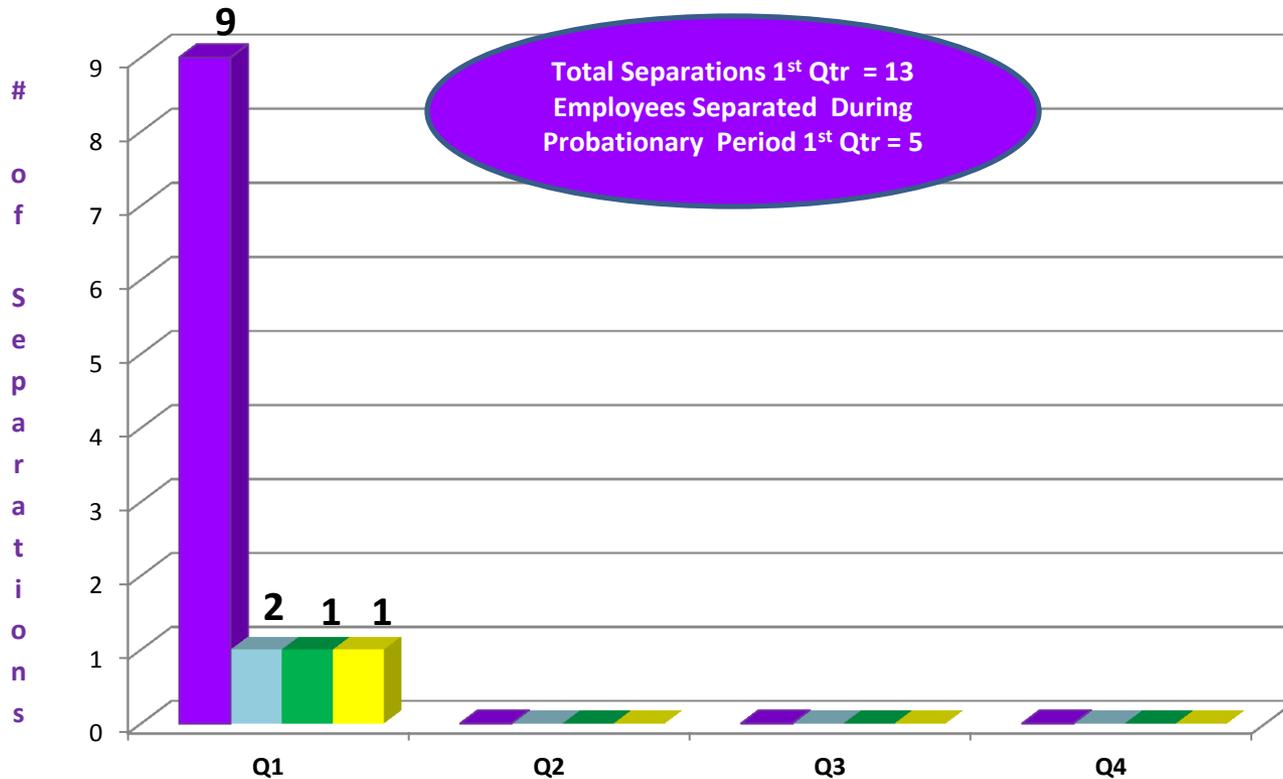
**Measure:** Percent Employees Terminated before end of probationary period

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**Employee's Separated During 1<sup>st</sup> Quarter  
FY 2015**

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



- RESIGNATIONS
- INVOLUNTARY
- RETIREMENT
- DEATH

STATUS

Lead  
FBO

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

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

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

FM ACADEMY

**ACTION PLAN**

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

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

**Objective 4.2:**

**Improve Workforce Development**

**Tactic 4.2.1:**

Increase Supervisor/Manager Training to 40 hours/year

**Tactic 4.2.2:**

Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office

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

## ACTION PLAN

- Met with each director to discuss staff learning & development needs for FY 15.
- Biweekly attendance at F/O staff meetings for timely information exchange on training, licensure, etc.
- Monthly meetings with BES/R Education Coordinator to discuss upcoming plans, new strategies, etc.
- Developing relationship with consultant Joanna Roop on future training opportunities.
  - Reviewed DDI courses and requested list of potential deliverables. - Fall 2014
  - Schedule meeting with consultant to discuss course details – January 2015
  - Developing new Cultural IQ course; Details to be presented to AVC - January 2015
- FM-HR continuing to develop FM Academy **“Lending Library”** to provide learning resources for FM employees.
  - Developing check-out procedures – February 2015
  - Determine best feasible location to house materials – March 2015

Lead  
FBO

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

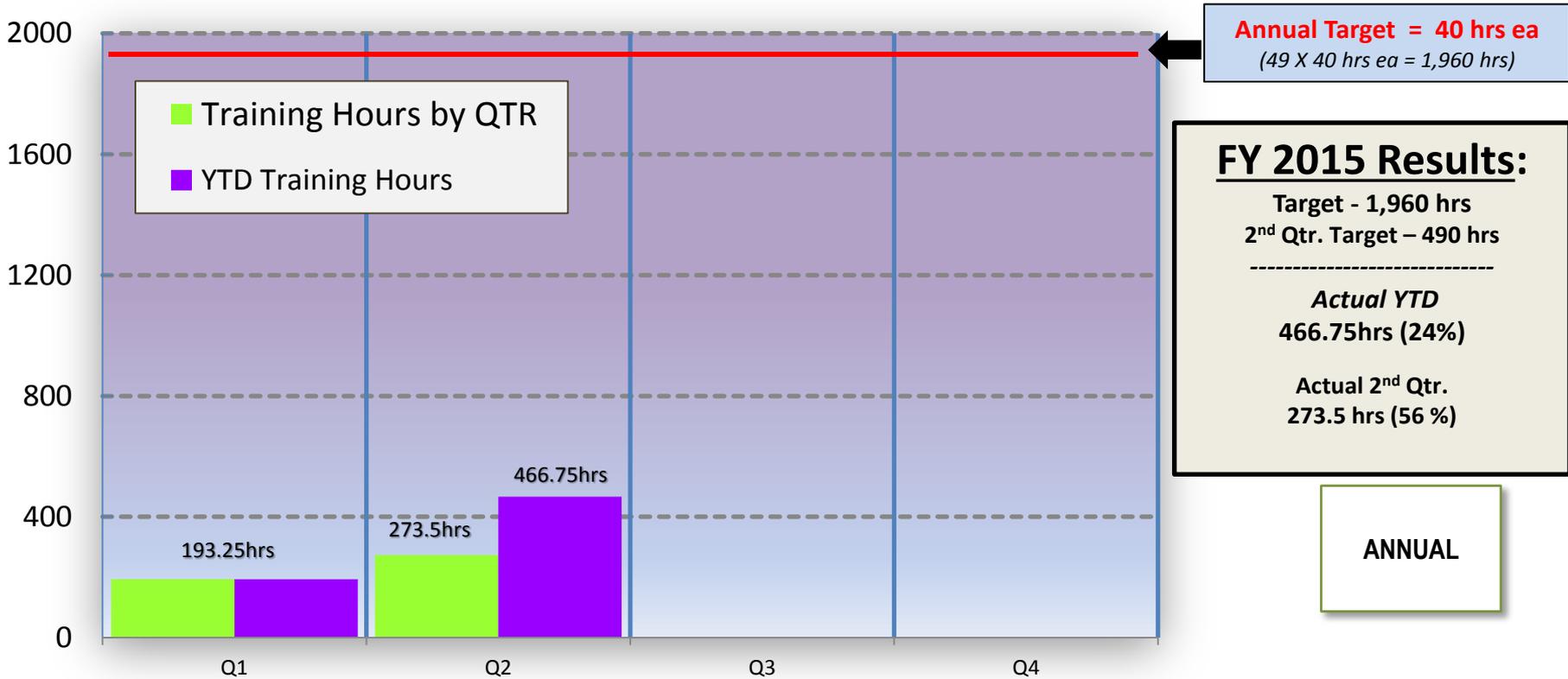
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year  
**Measure:** Average Hours of Training completed by Supervisors and Managers

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

Training  
Hours

**FY 15**

*Training Hours for Supervisors & Managers by Quarter*



Lead  
FBO

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

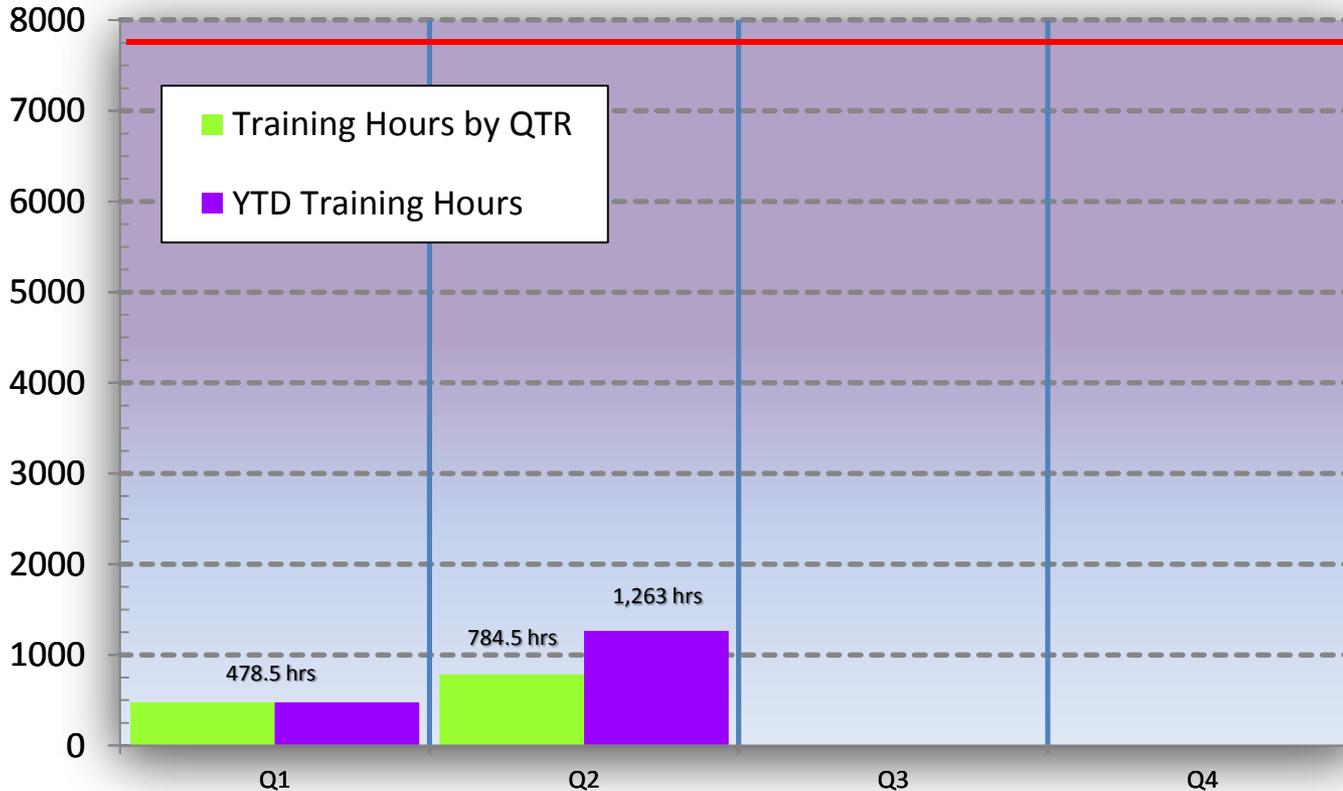
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.2:** Increase Employee Training to **20 hours/year**  
**Measure:** Average Hours of Training completed by front line employees

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

Training  
Hours

**FY 15**

*Training Hours for front line employees by Quarter*



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

**Fiscal 2015 Results:**

Annual Target - 7,760 hrs  
 2<sup>nd</sup> Qtr. Target - 1,940 hrs

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*Actual YTD*  
 1,263 hrs (16.3 %)

*Actual 2<sup>nd</sup> Qtr.*  
 784.5 hrs (40.4 %)

ANNUAL

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

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN**

**Survey Results and Data Review:**

- Directors developing actionable items based on survey feedback for report out - **Fall 2014**;
- Demographic data provided by HR – every two weeks; Frequencies and crosstabulations of the data have been performed and shared with AVC-FM; will be shared with leadership- **Winter 2015**

**Survey Logistics:**

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – **Summer 2015**
  - Creation of a survey focus group consisting of non-supervisory employees from each of the major depts. to provide feedback on the questions as currently presented – i.e., are the questions clearly phrased for understanding, are we asking the right questions, etc. approved by AVC-FM 01/20/15
  - Focus group members to be notified in February 2015; Work/meetings anticipated to begin in March 2015 with a proposed 3 week maximum time commitment by members;
- Next survey to be administered in October/November 2015.

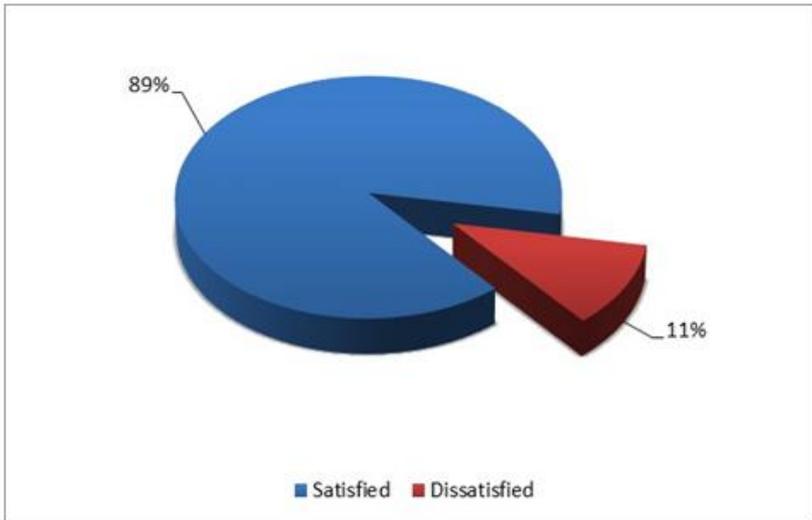
**GOAL #4 Recruit, Develop and Retain Quality Employees**

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

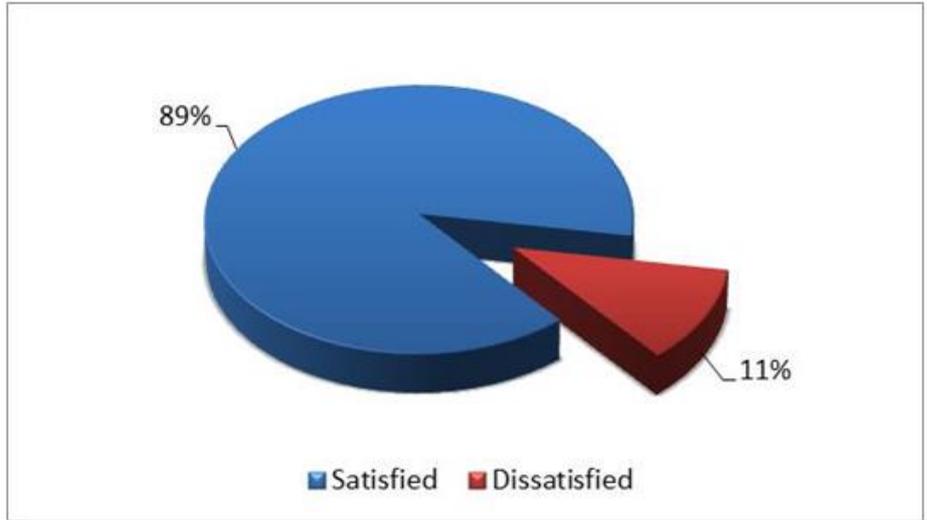
**Lead:** Facilities Business Office  
**Balanced Scorecard Category:** Customer Perspective

FY 2014 Annual Satisfaction: 89%

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



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

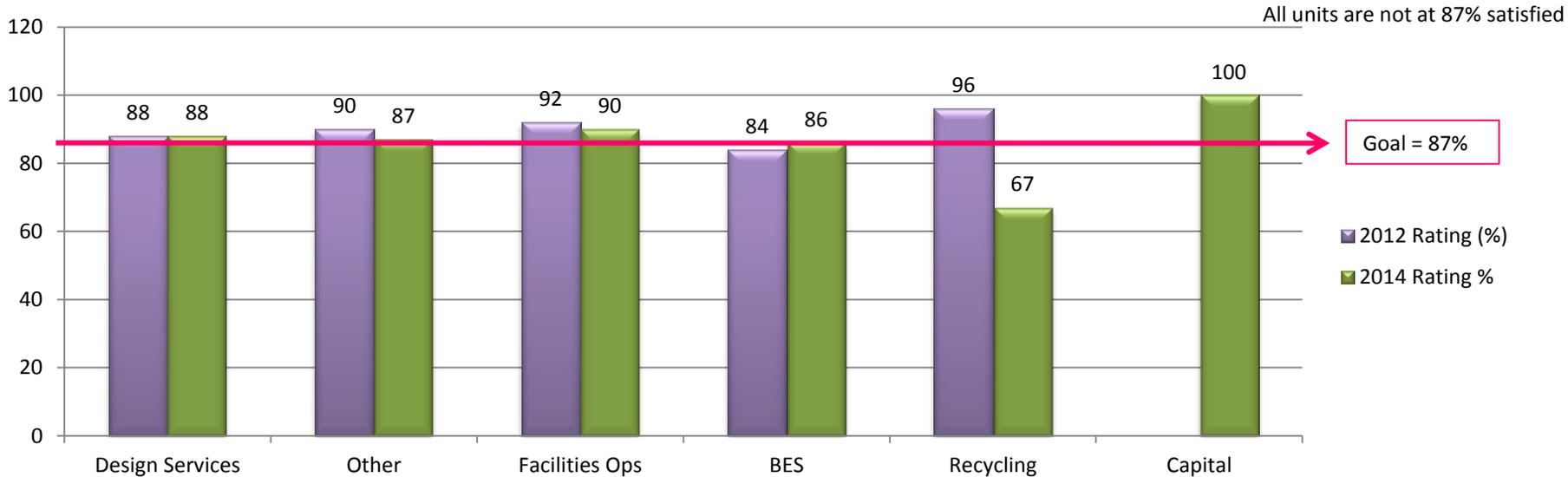


**GOAL #4 Recruit, Develop and Retain Quality Employees**

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

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

**Unit Customer Satisfaction Survey FY Rating Comparison (%)**



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

**STATUS**

Lead  
FM Wide

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

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

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

**FM ACADEMY**

**ACTION PLAN**

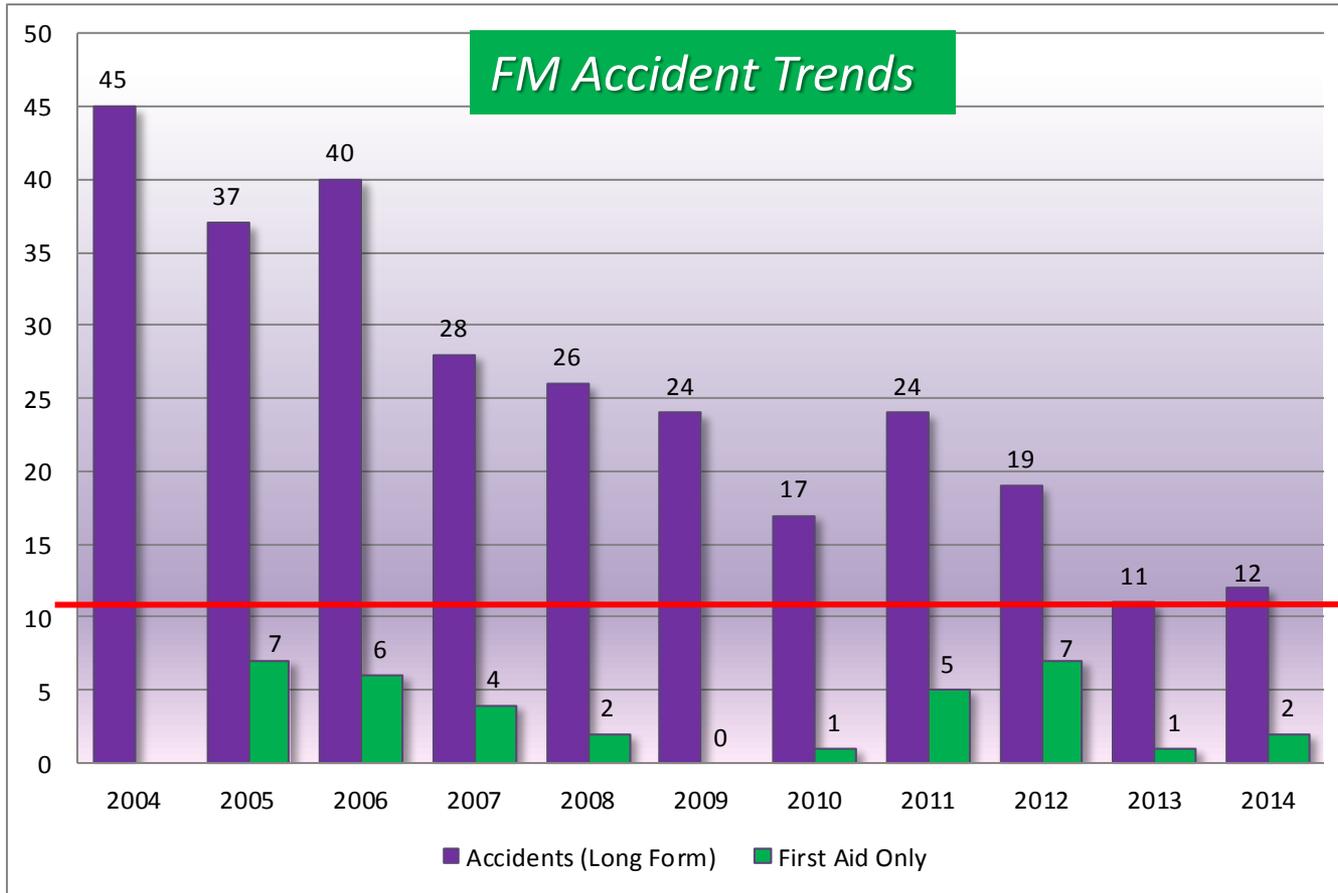
Action Item	Target Date
<ul style="list-style-type: none"> <li>• Safety related activities                             <ul style="list-style-type: none"> <li>• Supervisor Safety Talks</li> <li>• FM Safety Fair</li> <li>• Safety Slogan Contest, <i>New Slogan 7/2014 – “<u>Start Safe, Work Safe, Finish Safe</u>”</i></li> <li>• CPR/1<sup>st</sup> Aid training</li> </ul> </li> </ul>	<p>Monthly</p> <p>May 2015</p> <p>July 2015</p> <p>Jan 2015</p>
<ul style="list-style-type: none"> <li>• Accident/Incident totals YTD (calendar year)                             <ul style="list-style-type: none"> <li>• Accidents - 12</li> <li>• Minor incidents - 2</li> </ul> </li> </ul>	<p>2014 year end</p> <p>2014 year end</p>
<ul style="list-style-type: none"> <li>• Compliance training (OSHA)                             <ul style="list-style-type: none"> <li>• <b>Confined Space</b> training</li> <li>• <b>Electrical Safety</b> training</li> <li>• FM-HR, Risk Mgmt. and EHS to meet to discuss requirements</li> <li>• Process Review Project                                     <ol style="list-style-type: none"> <li>1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc.</li> <li>2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD</li> </ol> </li> </ul> </li> <li>• All training records sent to FM-HR Staff Dev. Specialist</li> </ul>	<p>Dec 2014</p> <p>Jan 2015</p> <p>Oct 2015</p> <p>Ongoing</p> <p>Continuous</p>

Lead  
FM Wide

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

**Objective 4.4: Improve Employee Safety**  
**Tactic 4.4.1:** Reduce the number of reportable accidents by 20%  
**Measure:** Number of Reportable Accidents (Measured by Calendar Year)

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



2013 = 11 accidents  
 Target 20% Reduction = 9  
 2014 = 12 accidents

2014 Target ≤ 9

**STATUS**

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

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

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

ANNUAL

**ACTION PLAN**

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

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

**Compliance Training**

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

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

**Objective 4.5: Improve Workforce Performance (Action Plan Only)**

**Lead:** Facilities Business Office

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

**ACTION PLAN**

Action Item	Target Date
<ul style="list-style-type: none"> <li>• Continued development of FM Academy                             <ul style="list-style-type: none"> <li>– Marketing Strategy &amp; Website Development</li> <li>– Content Development</li> <li>– Vendor Selection and Delivery</li> </ul> </li> </ul>	<p>Jan 2015</p> <p>Jan 2015</p> <p>As Needed/As Funded</p>
<ul style="list-style-type: none"> <li>• HVAC Developmental Matrix completed</li> </ul>	<p>Dec 2014</p>
<ul style="list-style-type: none"> <li>• Targeted Selection Training</li> <li>• Boiler Operation, Maintenance &amp; Safety</li> <li>• Computer Training for BES</li> <li>• “First Time Manager/Supervisor” Training</li> <li>• Hosting APPA Leadership Academy (Level one)</li> </ul>	<p>Dec 2014</p> <p>Jan 2015</p> <p>Feb 2015</p> <p>Feb 2015</p> <p>Apr/May 2015</p>



UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

## GOAL #5

Promote Good Stewardship



**GOAL #5 Promote Good Stewardship**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN**

**Finance/Budget:**

- Continue periodic review of Labor Services;
- Develop Budget Memo and Instructions for FY 15-16; Obtain approval from AVC-FM – 1/14/15; Distribute packages to Directors NLT 01/20/15; Add new concept of two-year budget request cycle (Personnel only) this FY;
- Conduct mid-year budget review with BES Director (1/21/15) and FO Leadership (1/22/15); Implement monthly budget review with BES beginning February 2015 through June 2015; Continue current monthly meetings with FO Director through June 2015;

**Supplemental Grant/Award Funding:**

- NC State Energy Office Grant for Electric Stations; \$13K in matching funds set aside for grant; Awaiting final expenditure plan details to determine if set aside can be reallocated; February 2015?;
- Campus Tree USA Designation/Award Submittal; Submitted Dec. 31, 2014 (on-time) – Anticipated notification March 2015;
- Developed award submittal for innovative/effective practices: Submitted on-time (11/30/14; Anticipated notification March 2015;
- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2015;

**GOAL #5 Promote Good Stewardship**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN**

**Cost Accounting:**

- Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2015
  - Improve org code usage – July 2014 and July 2015, on-going when possible; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org; Home Org completed for KRONOS pilot; other areas to be addressed; Pay/Funding org actions currently in PeopleAdmin to be processed;
  - Understanding the impact of personnel decisions on budget – on-going through-out FY.
  - Implement budget revision process through June 30, 2015.
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - **1<sup>st</sup> of each month;**
- Requested an entry-level accountant position for FY 15 to assist in this area – **July 2014;**
- Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no upfront oversight by FBO (i.e., ARCHIBUS NR work orders); increase monitoring efforts **July 1, 2014 thru June 30, 2015** close out.

**GOAL #5 Promote Good Stewardship**

**Objective 5.1:**

**Promote Fiscal Responsibility**

**Tactic 5.1.3:**

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

**Measure:**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN**

**FY 14 APPA Survey:**

- APPA Survey submitted on-time (12/14);
- New NACUBO survey added– responses submitted on-time (12/14);
- Survey results anticipated March 2015;
- Preparations for data gathering process to begin Summer 2015.

## 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
  - Installation of new Von Drehle paper towel dispensers in Administrative and Academic buildings
  - Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
- Actions Planned
  - Complete supply chain management project in McEniry (one-time funds)
  - Make recommendation to continue or stop hand dryer installations
  - Develop 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

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

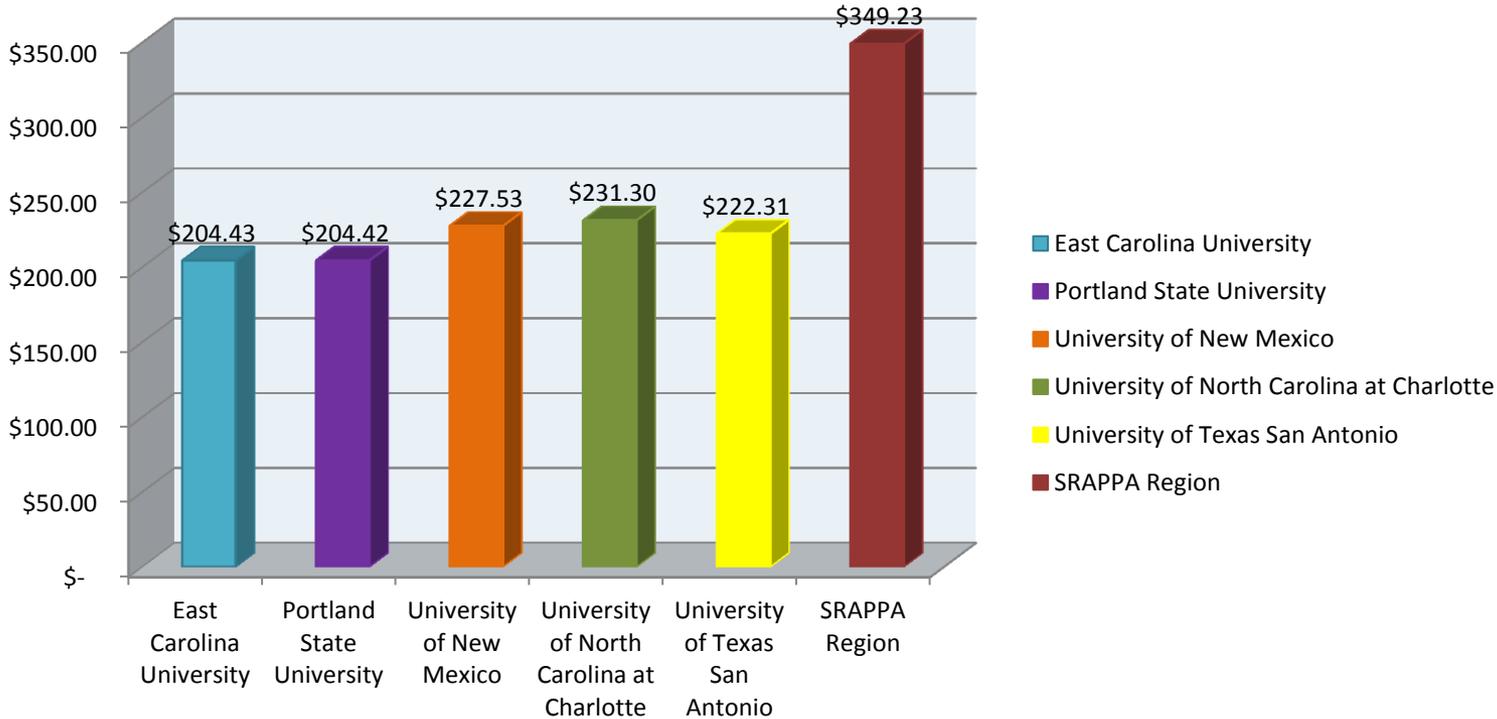
**GOAL #5 –Promote Good Stewardship**

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

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

**Balanced Scorecard Category:** Financial Perspective

**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 – Establish guidelines for qualifying reimbursable vs non-reimbursable work requests

(To Charge or Not To Charge) by 28 November 2014.

2 – Weekly review of Facilities Operations Labor pool before going outside for additional staff support.

3 – Monthly review of Labor Services accounts with FBO to identify gaps and improve processes.

### Actions Completed

1 - Identify opportunities to expand reimbursable work in an effort to support labor services funds Nov2014

2 - Realign the labor services positions to ensure maximum utilization of resources by Jan 2015

3 – Monthly review of Labor Services accounts with FBO to identify gaps and improve processes.

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

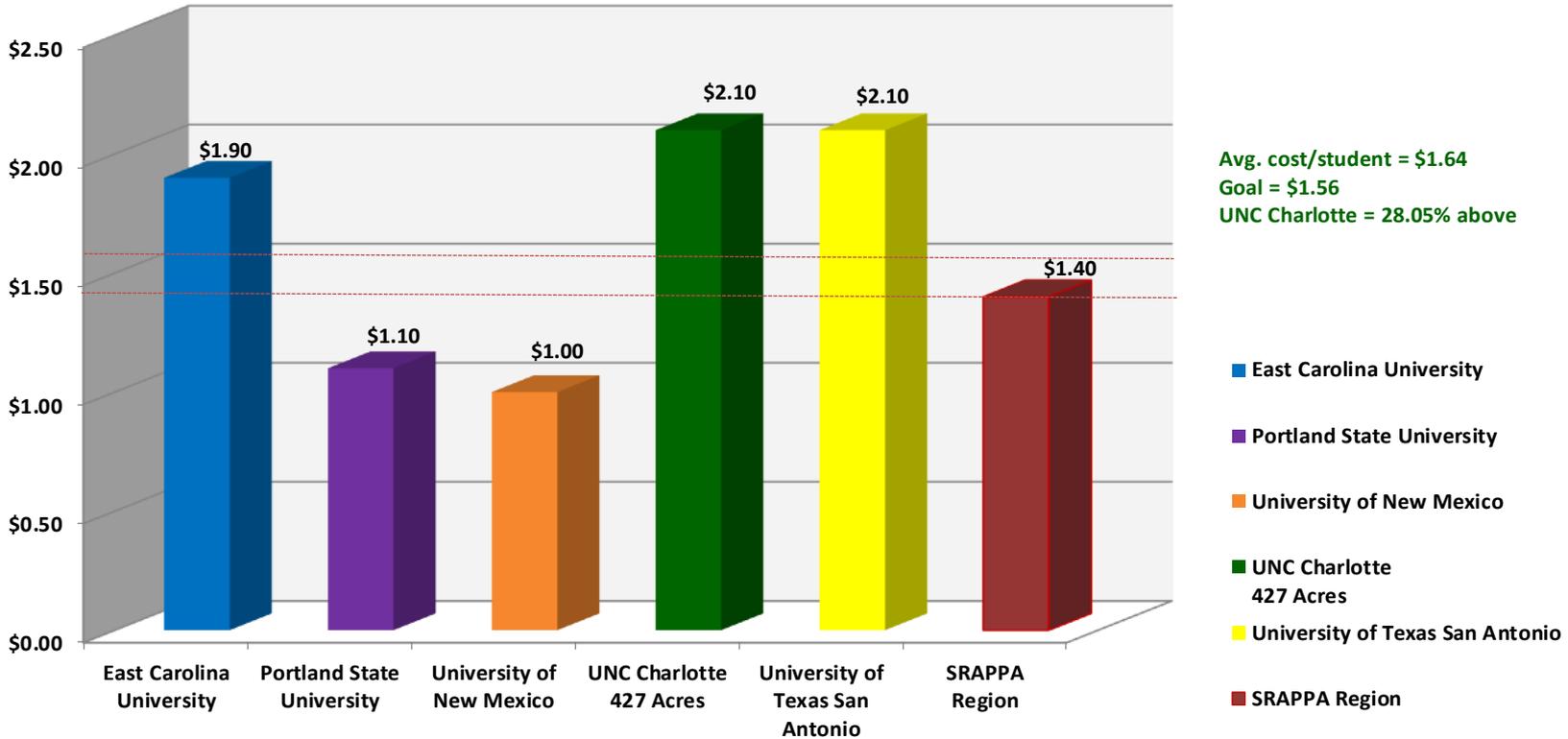
**Tactic: 5.1.5:** Achieve total Maintenance cost/GSF  $\pm$  5% of APPA Average for Peer Institutions

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

## Maintenance Total per GSF



**STATUS**

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1:** Promote Fiscal Responsibility

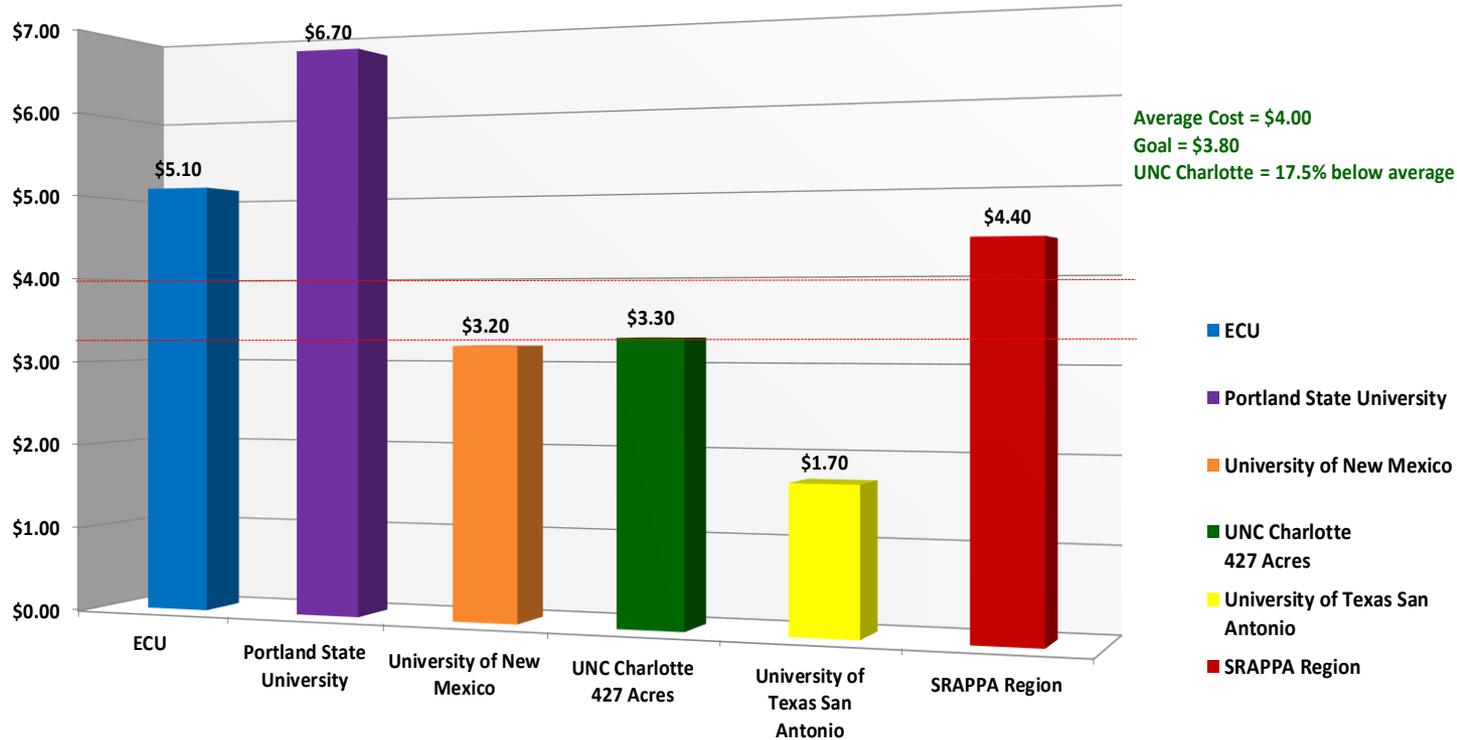
**Tactic: 5.1.6:** Achieve total Landscape cost/acre  $\pm$  5% of APPA Average for Peer Institutions

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

### Grounds - Total Cost per Acre



**STATUS**

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

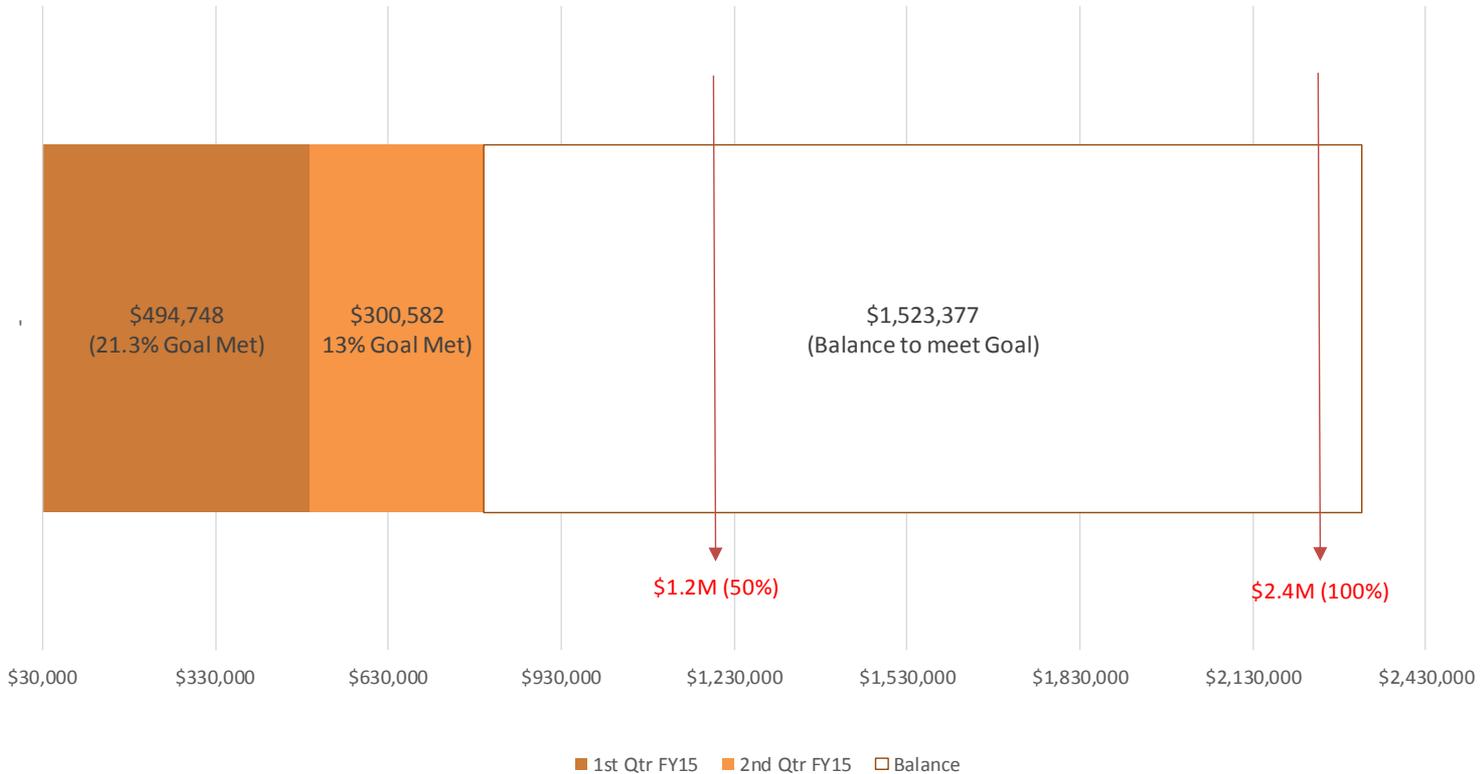
**Tactic: 5.1.7:** All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

**Measure:** Dollars in account at end of fiscal year

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

Dollars in Account at End of Fiscal Year



**STATUS**

## GOAL #5 – Promote Good Stewardship

<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

Lead  
Recycling

### ACTION PLAN

## • Waste Reduction and Recycling

### Actions Complete

**TOTAL recycling for quarter 39% (all totals are not in) , 40% for last year**

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
- Second Zero Waste Football season August - November
- Held Campus Clean UP and Tree Banding – October 22
- computer training October 8-9 with Jennifer Toth covering Outlook, Microsoft Office, Campus website, etc.
- Won the Charlotte Chamber Green Works Award for Zero Waste Football
- Presented on Zero Waste at the SERDEC Summit

### 3rd Quarter Actions Planned

- Replace Recycling Coordinator
- Start composting program at South Dining
- Work with H&RL on pairing up all trash cans with recycling cans
- 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream

# Facilities Management Strategic Planning Session – Second Quarter FY 2015



Objective 5.2: Develop a Sustainable Campus

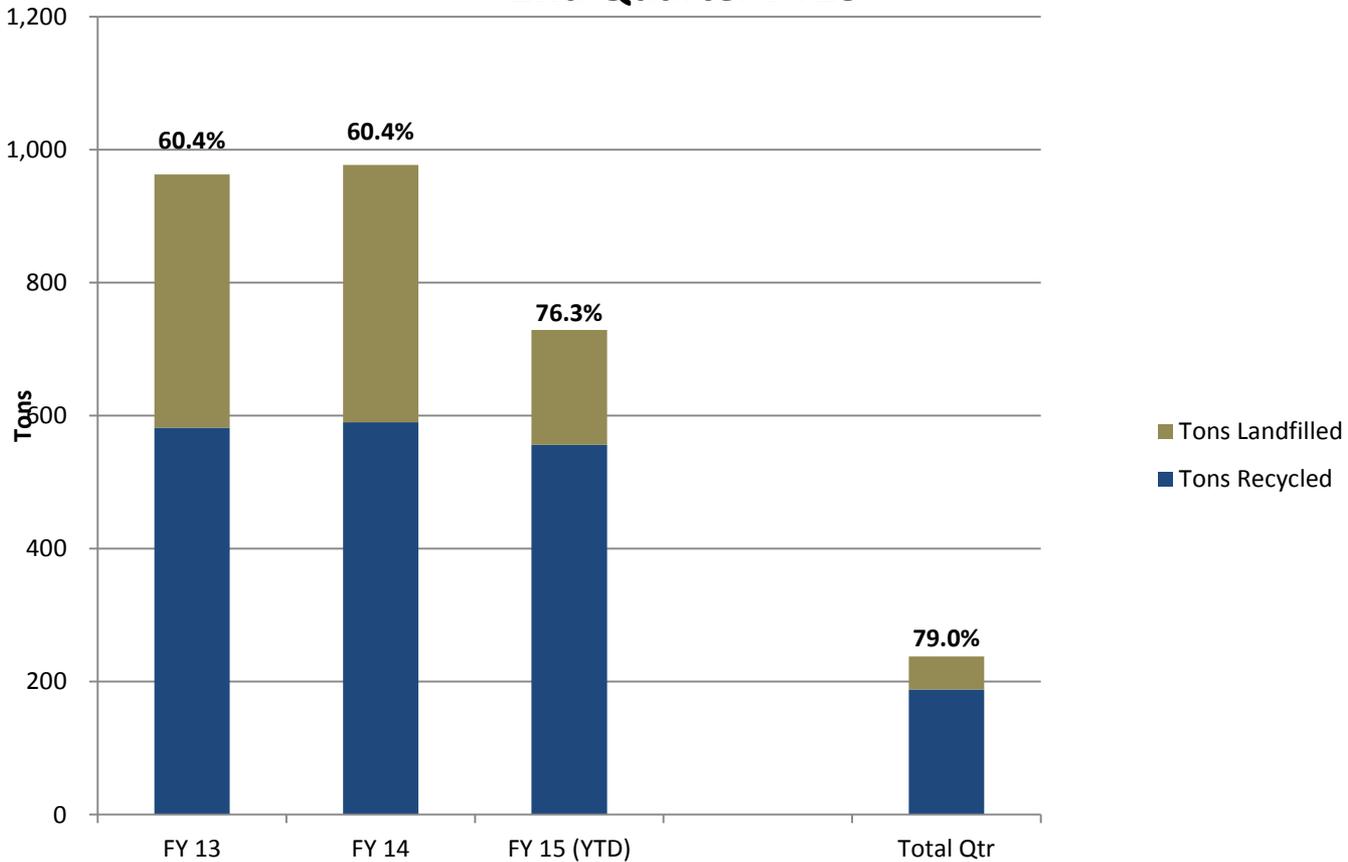
## Tactic 5.2.1

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

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

Balanced Scorecard Category: Innovation and Learning Perspective

## Construction & Demolition Debris Diversion 2nd Quarter FY15



# Facilities Management Strategic Planning Session – Second Quarter FY 2015



## Tactic 5.2.2

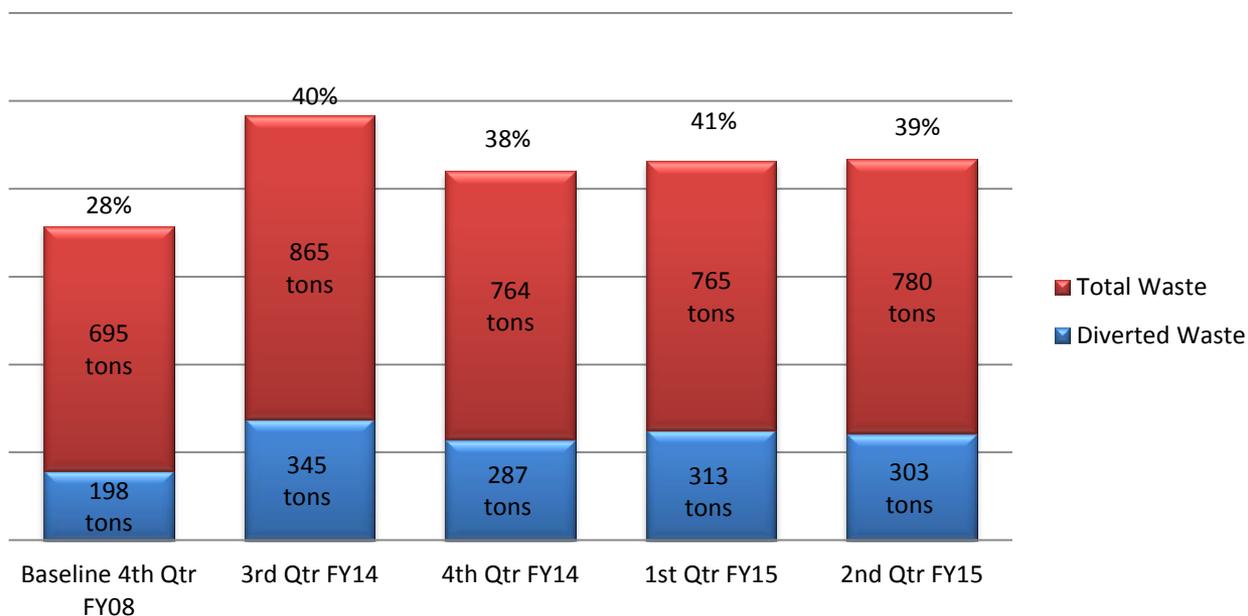
Increase Percent of Solid Waste Diversion on Campus to 45%

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

## Breakdown of Solid Waste



**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

**ACTION PLAN**

- **Actions Planned:**
  - **Assess additional actions list for achieving STARS Silver; by 2/15.**
  - **Quarterly update of implementation plan for earning further credits based on feasibility: 2/15, 5/15.**
  - **Achieve silver rating by end of FY 15.**

**STATUS**

**GOAL #5 – Promote Good Stewardship**

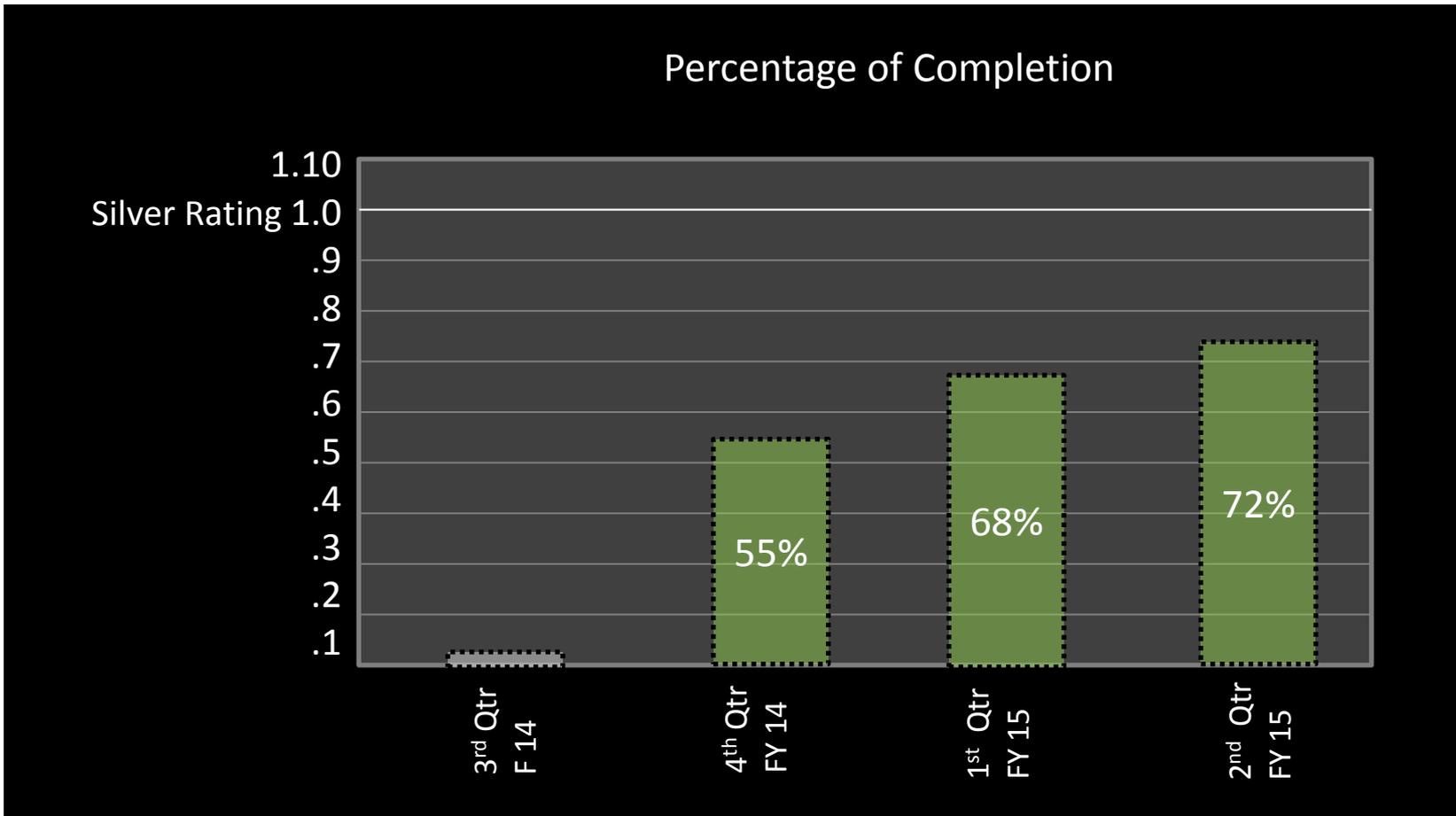
**Objective: 5.2: Develop a Sustainable Campus**

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

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

**Lead:** Facilities Planning

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



STATUS

**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

## ACTION PLAN

- **Actions Planned:**
  - **Develop 7 themes for implementing best practices by May 2015.**
    1. Assessment
    2. Faculty Development for Curriculum
    3. Campus as a “Living Laboratory” for Research
    4. Outreach Communications
    5. Design Standards
    6. Standard Operating Procedures
    7. Purchasing Practices
  - **Draft annual plan and budget by February 2015 to achieve implementation of 60% of identified best practices.**
  - **Demonstrate 60% of best practices implemented by October 2015.**

STATUS

**GOAL #5 – Promote Good Stewardship**

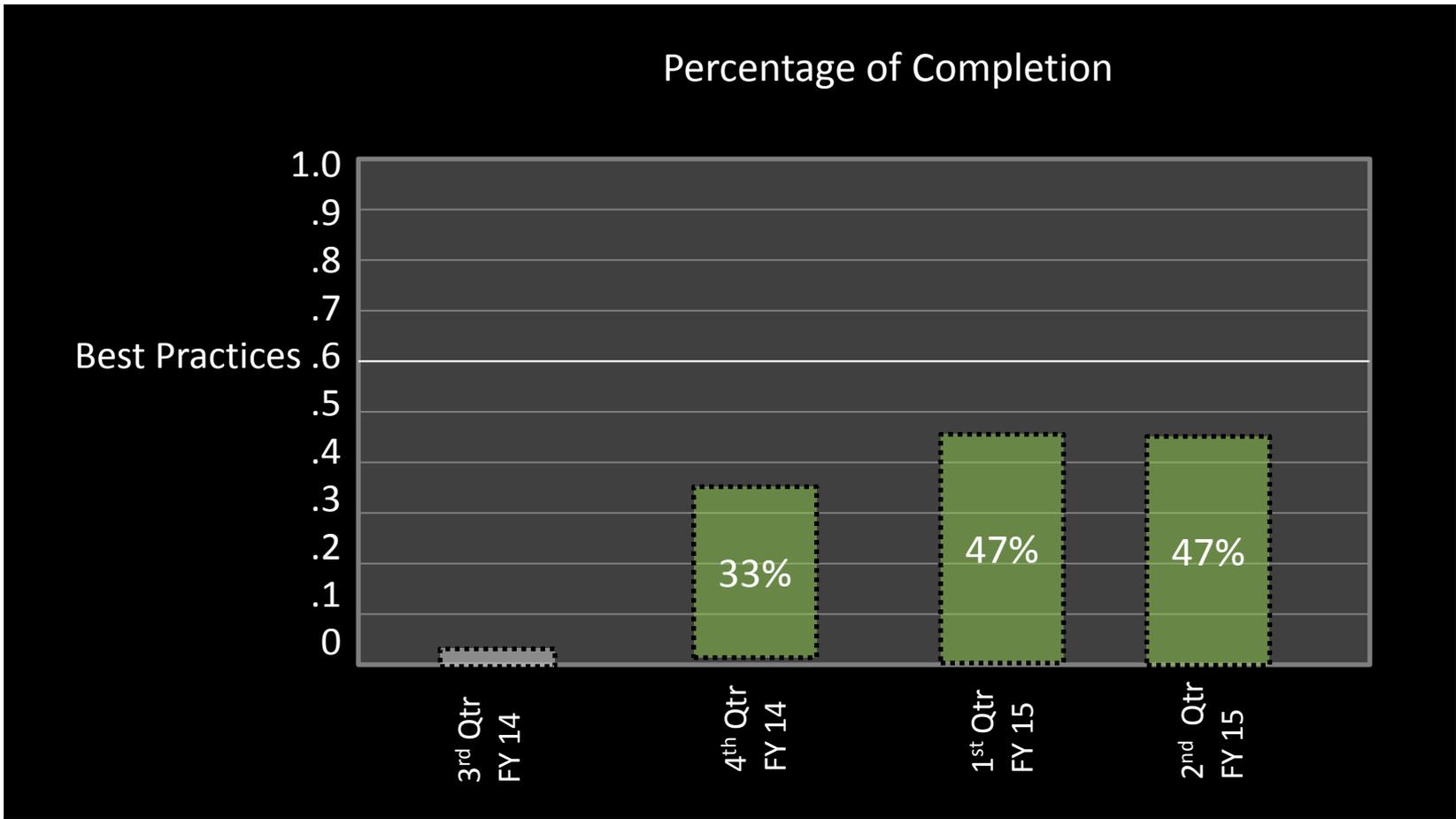
**Objective: 5.2: Develop a Sustainable Campus**

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

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

**Lead:** Facilities Planning

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



## 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 complete
- System Wide Lighting Performance Contract
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
  - Street light replacements fixtures have been finalized project to be complete by May.
  - Pedestrian Lights to be replaced as funds become available – start with campus core.

Facilities Management Strategic Planning Session – 2nd QTR FY 2015

Lead  
Capital

GOAL #5 – Promote Good Stewardship

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

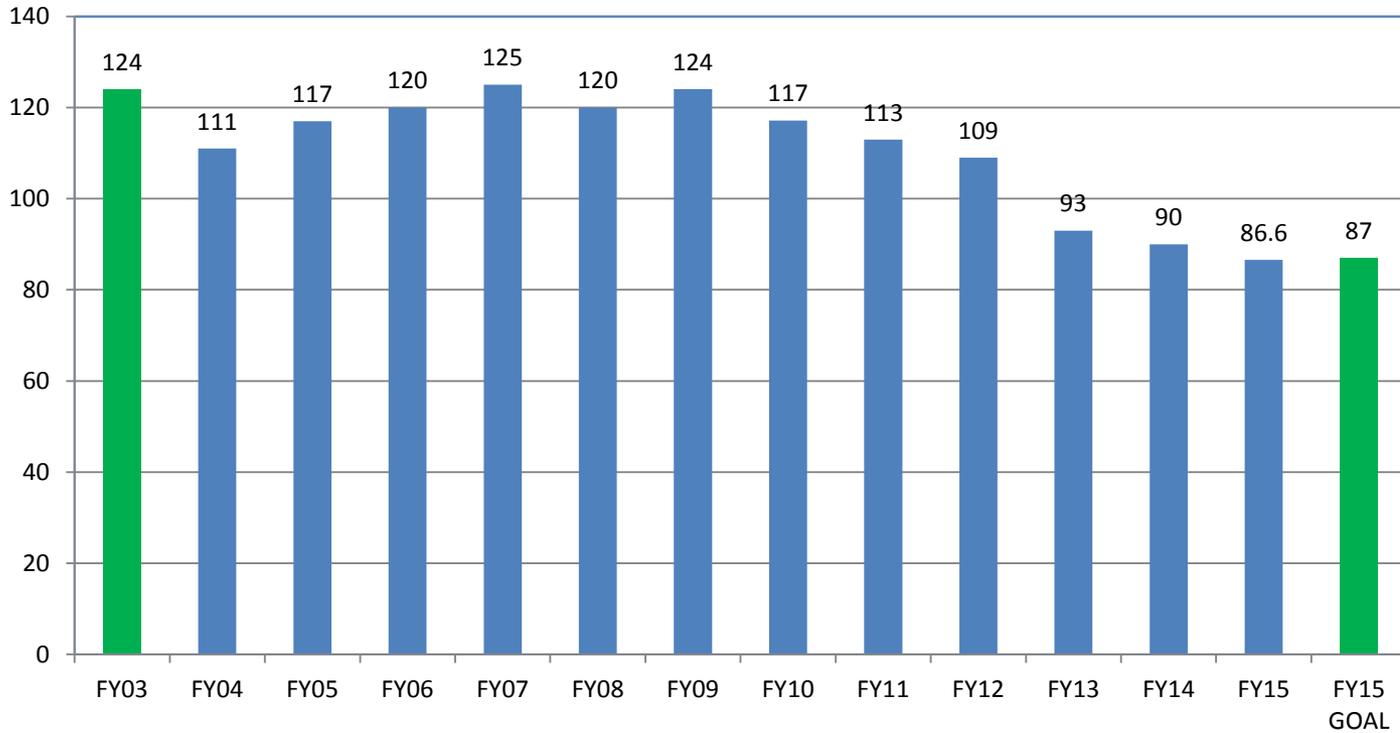
**Measure:** BTUs/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

Base Year FY 2003  
Current Reduction 30.2%  
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

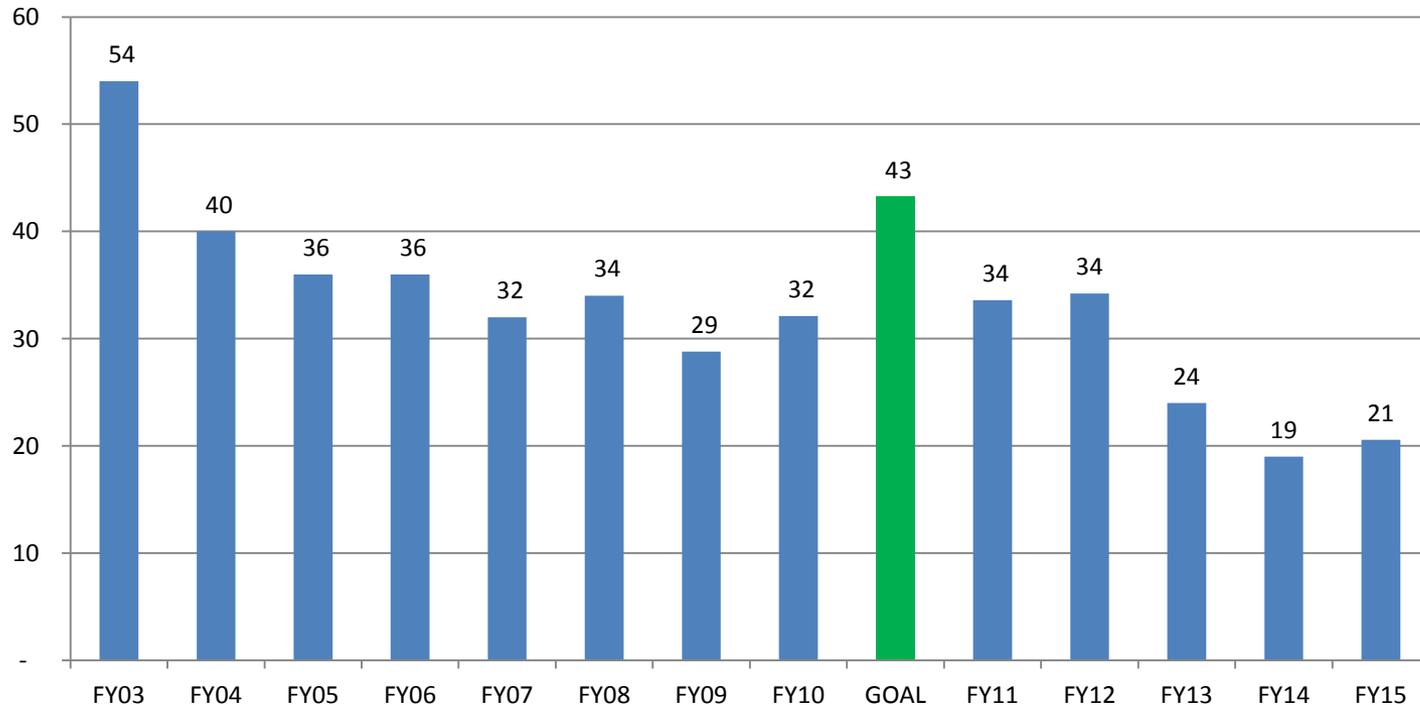
**Measure:** Gallons/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

STATUS

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

Goal 43 Gal/GSF  
Actual 21 Gal/GSF



## GOAL #5 – Promote Good Stewardship

Lead  
Capital

### 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

- Attended NC MWBE Coordinators' Network Professional Development Conference November 13-14, 2014
- Establish process to ensure compliance with new Prequalification Policy
- Establish/emphasize project specific HUB participation goals for single prime projects
  - CID Roadway Improvements Phase 2 – 15% goal
- Review *GFE* documentation for compliance before 1<sup>st</sup> tier subcontracts are awarded
- Work with internal/external groups to identify skilled HUB contractors

**GOAL #5 – Promote Good Stewardship**

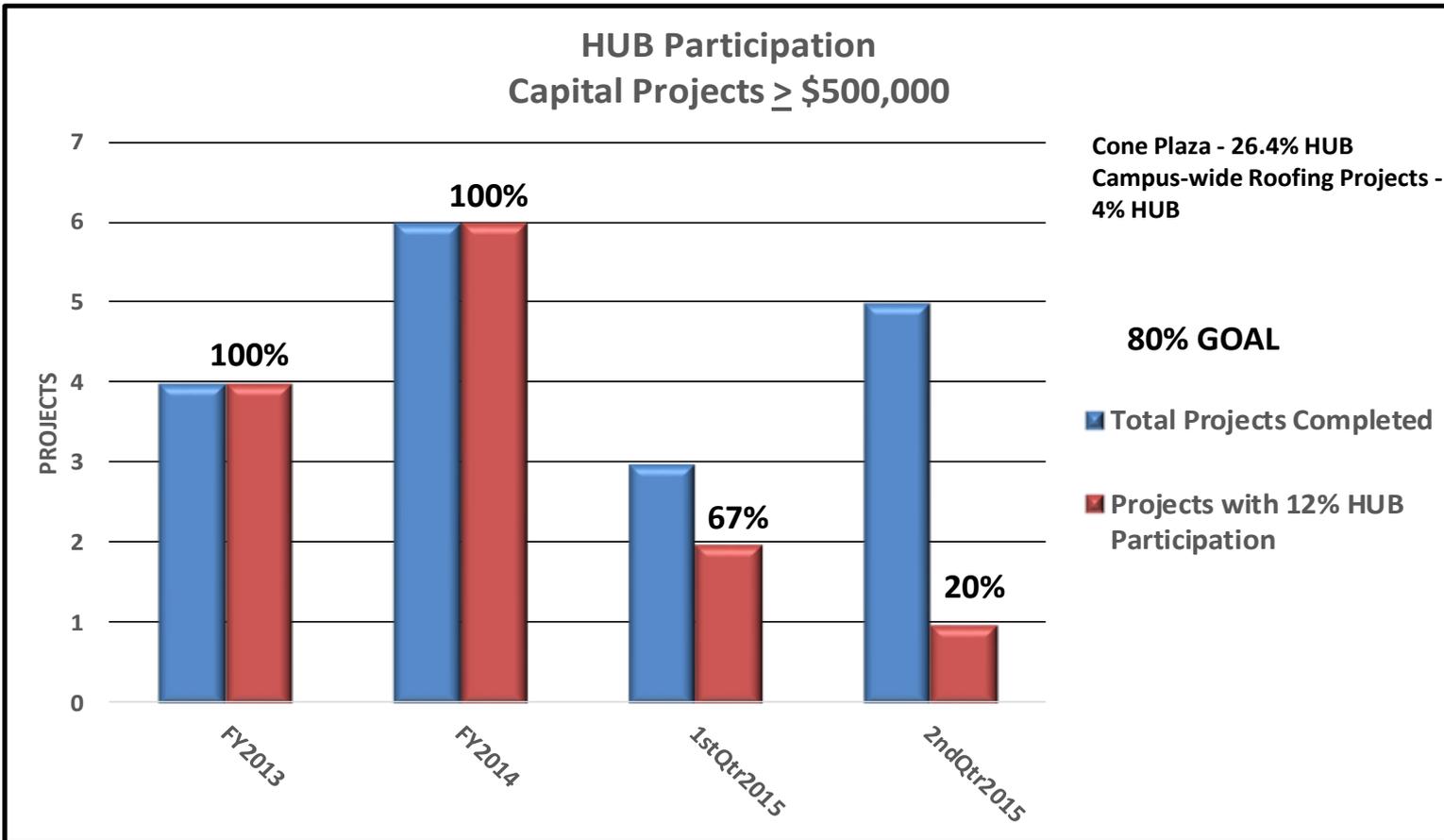
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



**STATUS**

**GOAL #5 – Promote Good Stewardship**

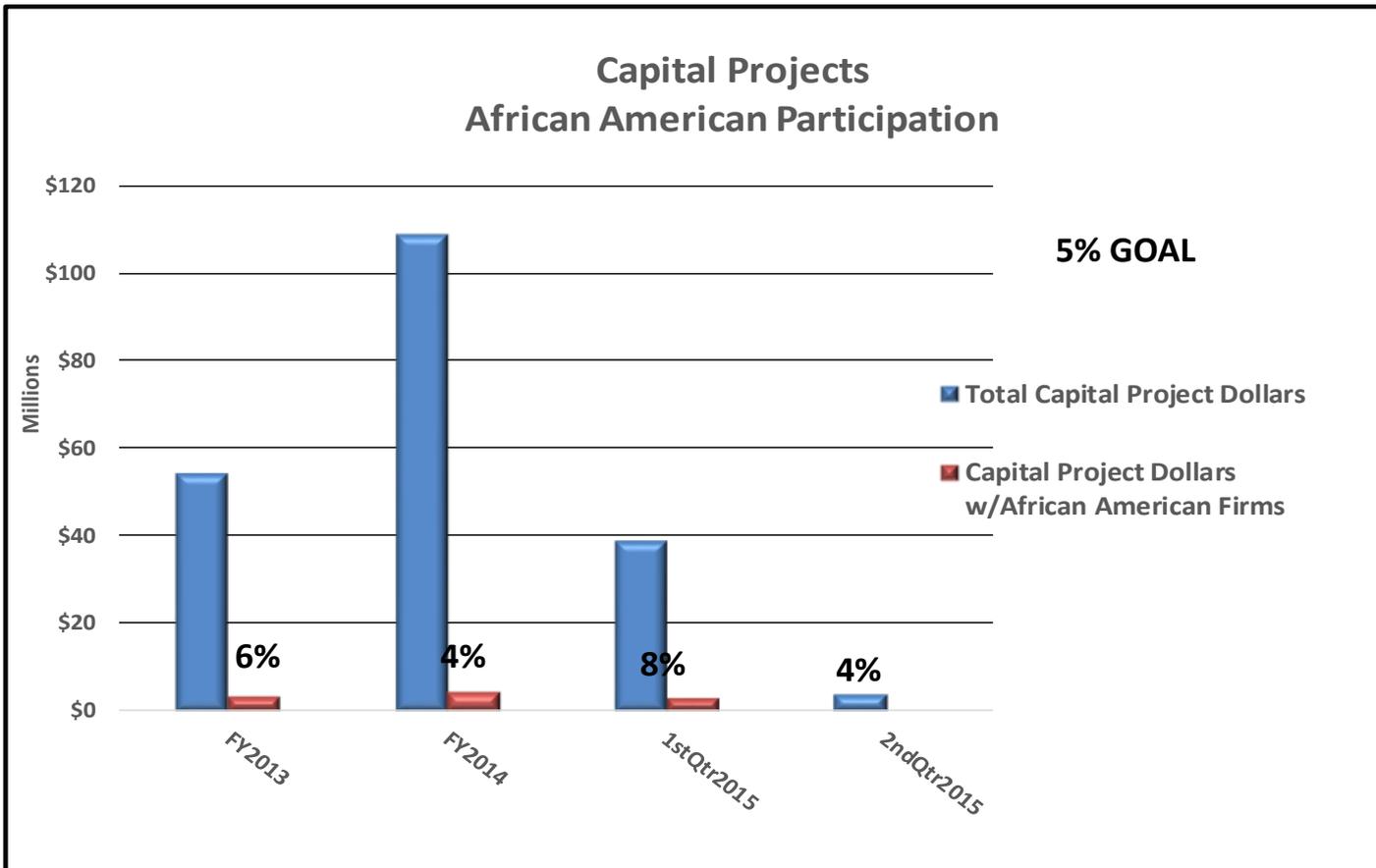
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



**STATUS**

**GOAL #5 – Promote Good Stewardship**

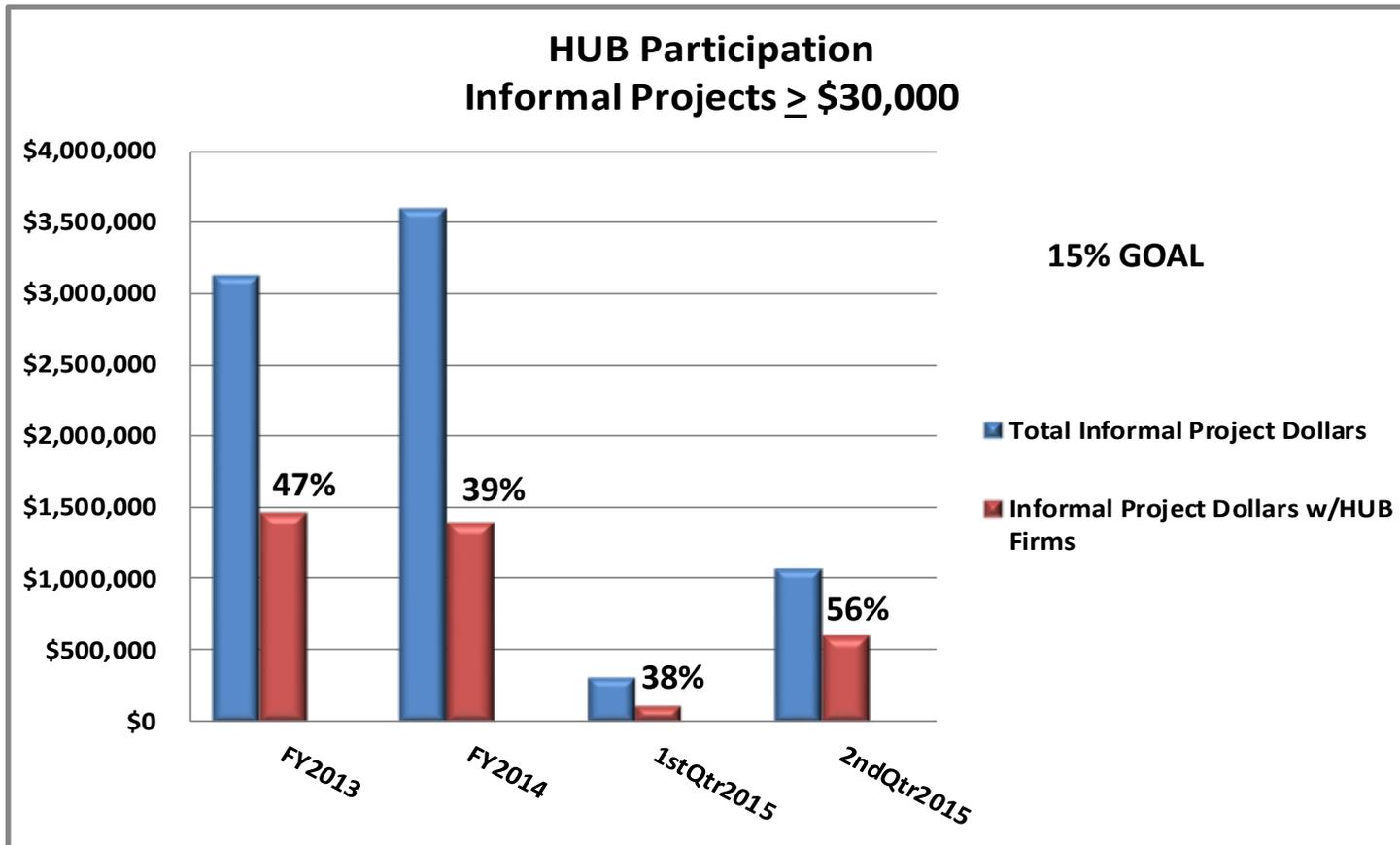
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



STATUS

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

<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

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#### NEW IMPROVEMENTS

Currently focused on expanding our outreach to new African American contractors & vendors.

*Timeline: FY15 QTR 3 - FY15 QTR 4*

Design Services and FIS are working to improve HUB reporting via ARCHIBUS Strategic Quarterly Reports.

*Timeline: FY15 QTR 3 - FY15 QTR 4*

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#### ONGOING IMPROVEMENTS

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

- Continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.

**GOAL**  
13.0%

**STATUS**  
32.2%

**Lead**  
Design Services

**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

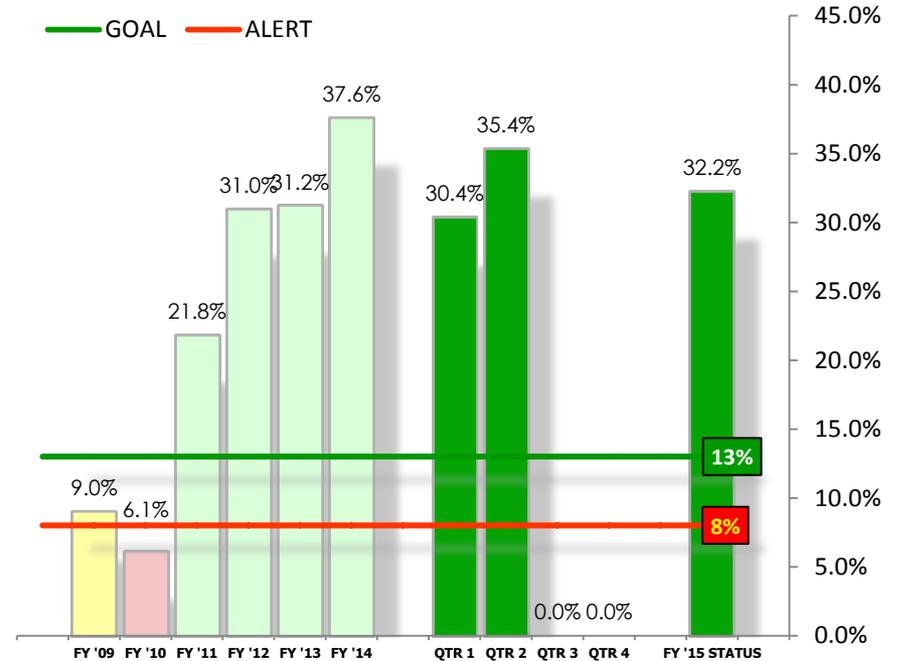
**Balanced Scorecard Category:** Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
FY '14	\$ 1,863,533	\$ 700,603	37.6%
QTR 1	\$ 495,625	\$ 150,457	<b>30.4%</b>
QTR 2	\$ 296,965	\$ 105,061	<b>35.4%</b>
QTR 3	\$ -	\$ -	<b>0.0%</b>
QTR 4	\$ -	\$ -	<b>0.0%</b>
<b>FY '15 STATUS</b>	\$ 792,590	\$ 255,518	<b>32.2%</b>

**13% Overall HUB Participation – Summary Graph**



Facilities Management Strategic Planning Session – Second Quarter FY 2015

<b>GOAL</b> 3.0%	<b>STATUS</b> 2.6%	Lead Design Services
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**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
FY '14	\$ 1,863,533	\$ 103,513	5.6%
QTR 1	\$ 495,625	\$ -	<b>0.0%</b>
QTR 2	\$ 296,965	\$ 7,695	<b>2.6%</b>
QTR 3	\$ -	\$ -	
QTR 4	\$ -	\$ -	
<b>FY '15 STATUS</b>	\$ 792,590	\$ 7,695	<b>1.0%</b>

**3% African American Participation – Summary Graph**

