



**Facilities Management
Quarterly Strategic Planning Session**

**Second Quarter – Fiscal Year 2016
October – December 2015**

APPA Award for Excellence
UNC Charlotte
WWW.
AGENDA

Opening – Phil Jones

Brainstorming Session – Phil Jones

Strategic Planning Metrics and Actions Plans

Look Ahead – Phil Jones

...Creating a Campus of Distinction





Strategic Planning Session

Facilities Management's Goals

Goal 1 - Continuously Improve Operation of Campus Facilities

Goal 2 - Create a Reliable and Sustainable Physical Infrastructure

Goal 3 - Foster a Customer Focused Organization

Goal 4 - Recruit, Develop, and Retain Quality Employees

Goal 5 - Promote Good Stewardship

...Creating a Campus of Distinction



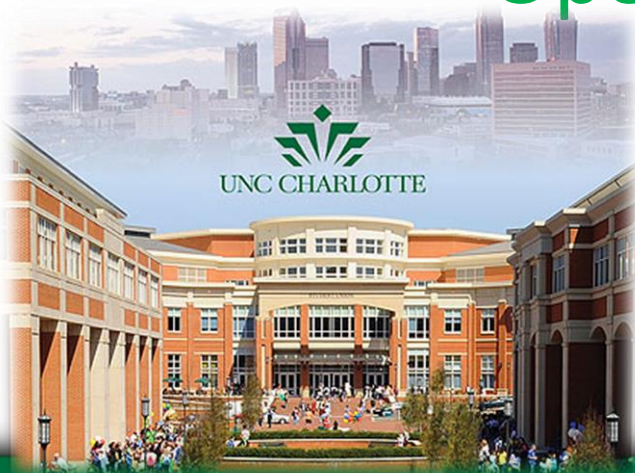
UNC CHARLOTTE

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

-- Harold Geneen, industrialist

GOAL #1

Continuously Improve
Operations of Campus



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

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

ACTION PLAN

Actions Planned

1. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.
5. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
6. PILOT PROGRAM: Checks and balances for all reimbursable work orders using hard copy spreadsheet

Actions Completed

1. Weekly review of work assignment completion.
2. Completed initial training in all Zones “Operating like a business.”
3. Adjusted break schedule to maximize efficiency.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

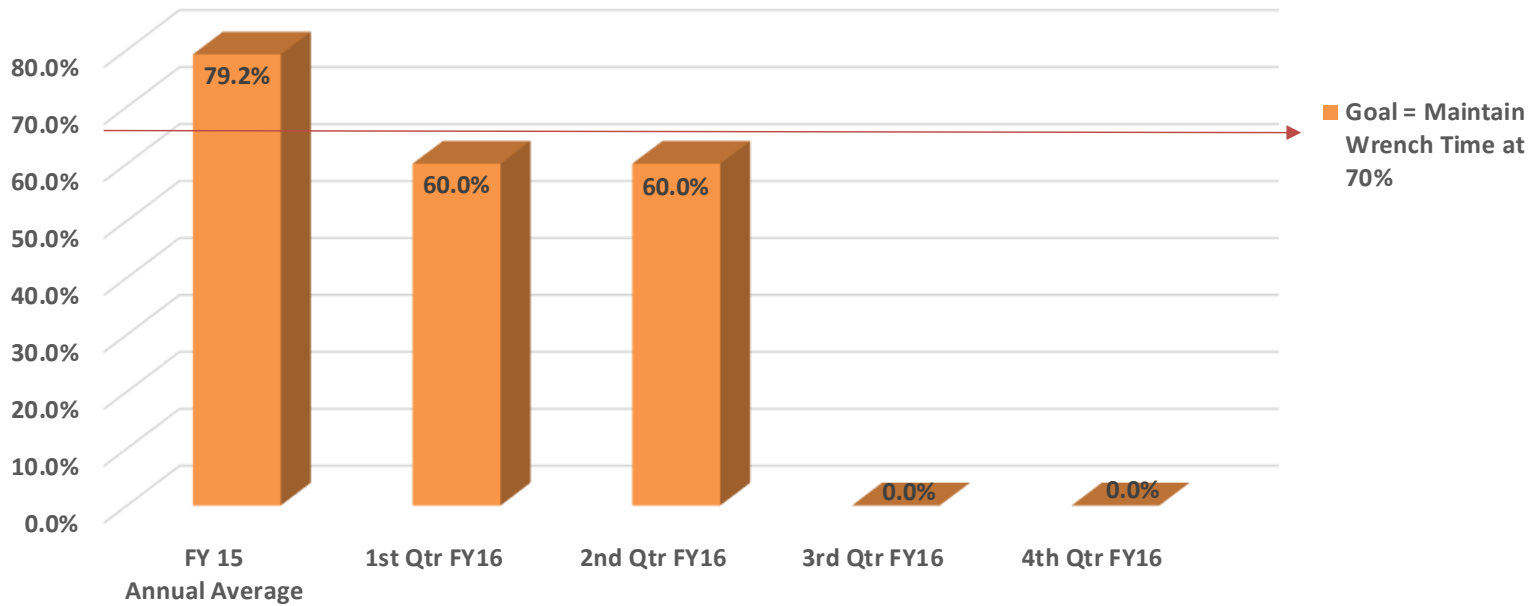
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process

Wrench Time



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities**Objective: 1.2: Improve Logistics Efficiency****Tactic: 1.2.1:** Improve Non-stock on-time delivery to 95%**Tactic: 1.2.2:** Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days**ACTION PLAN****Actions Planned**

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

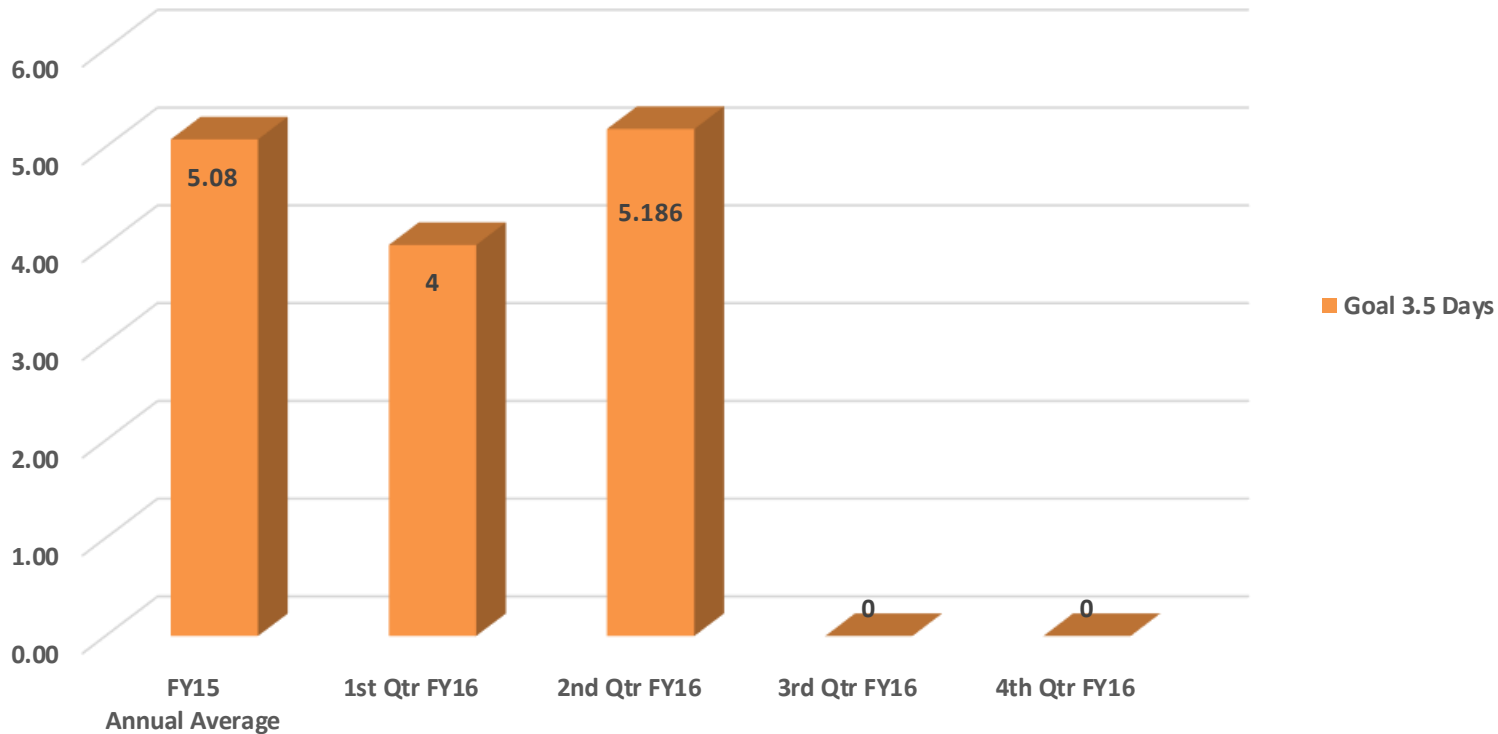
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Reduce Average Non-stock Requisition to Receipt Time



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities**Objective: 1.3: Improve Work Request Process****Tactic: 1.3.1:** Decrease Number of Work Orders Over 14 Days Old by 15%**Tactic: 1.3.2:** Decrease Work Request Cycle Time by 10%**Measure:** Hours from Work Request Submitted to Work Complete (APPA Benchmark)

ACTION PLAN

Actions Planned

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

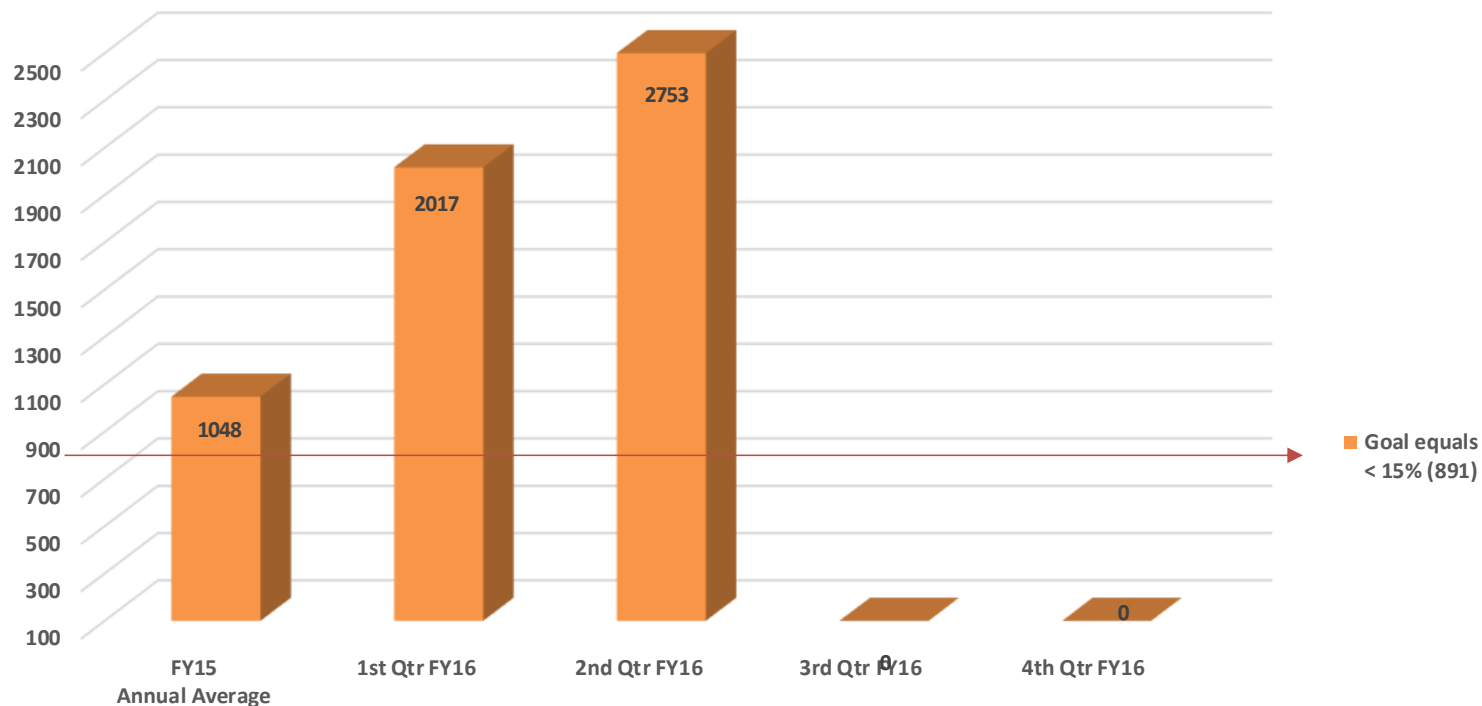
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

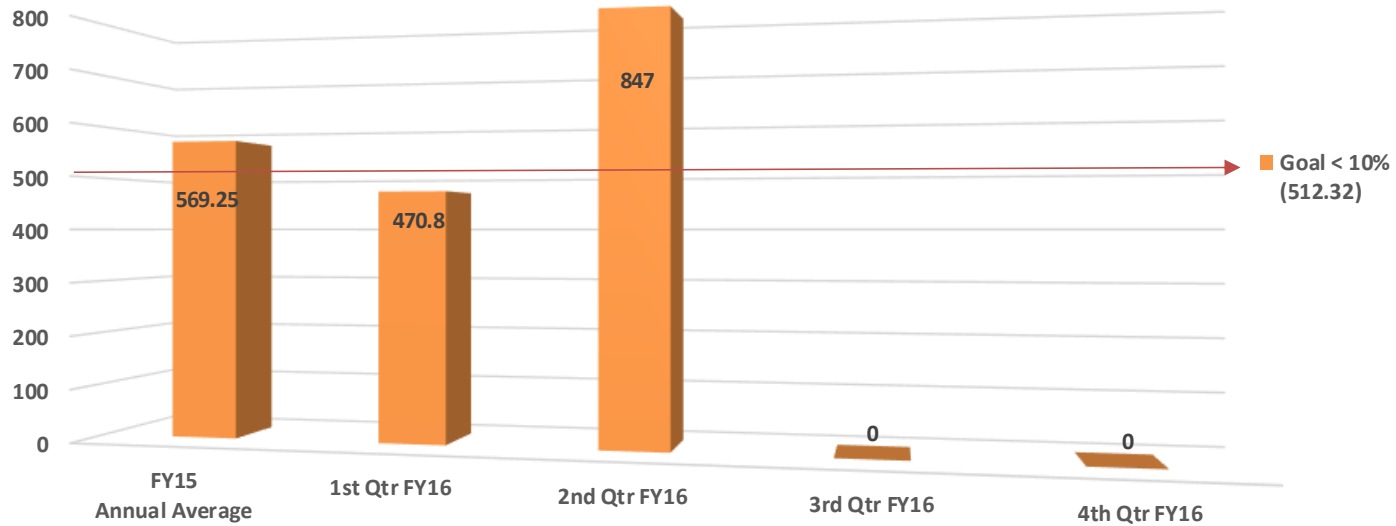
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2016

Lead
BES

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

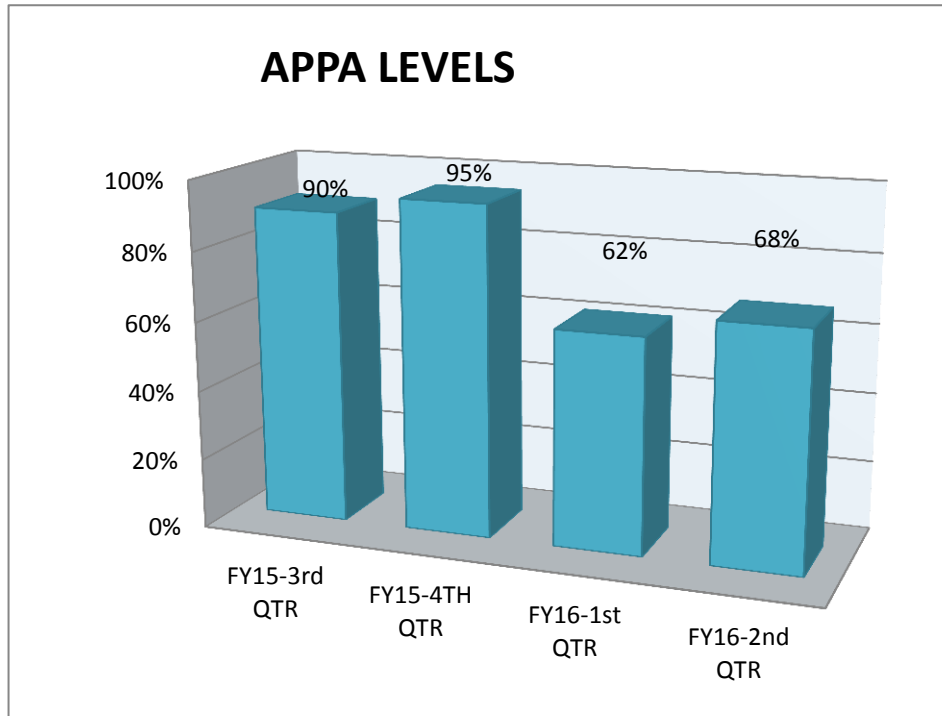
Objective: 1.4: Improve BES Processes

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

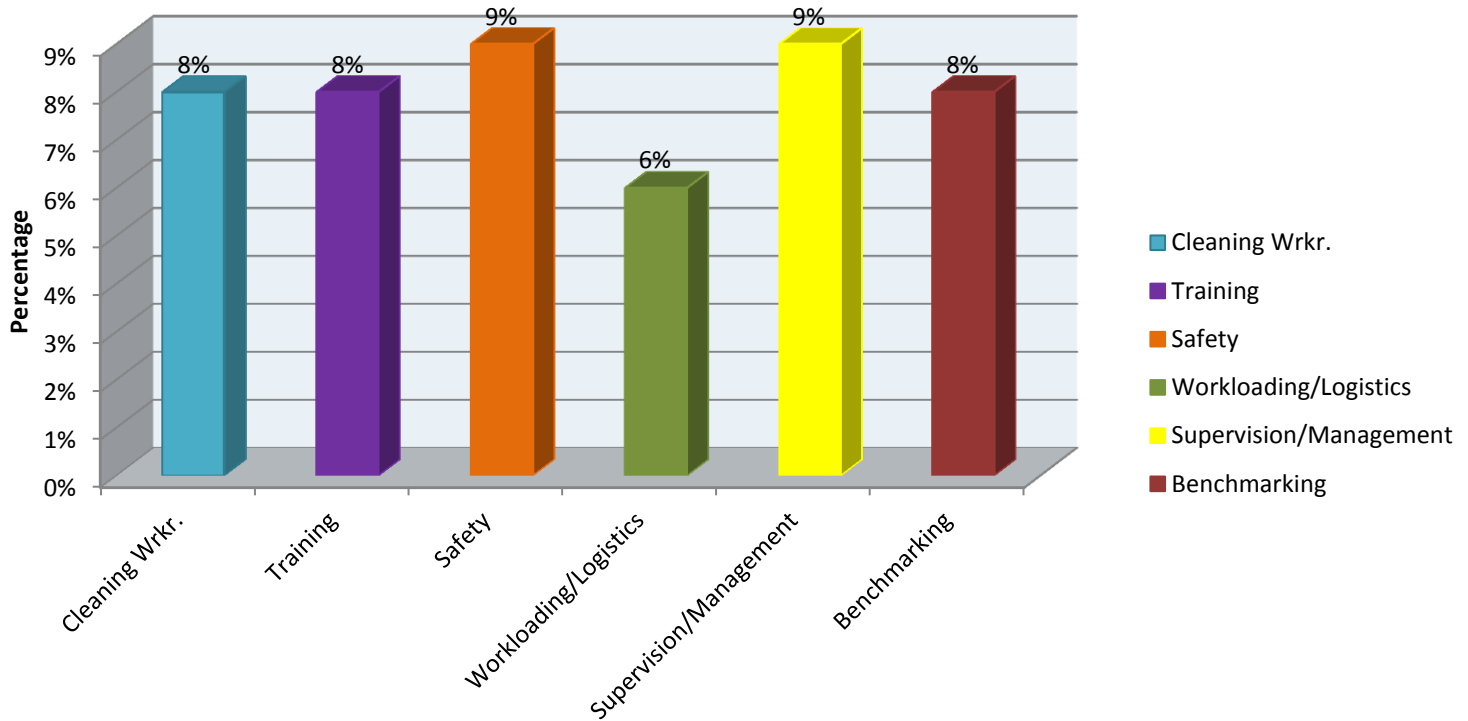
Balanced Scorecard Category: Customer Perspective

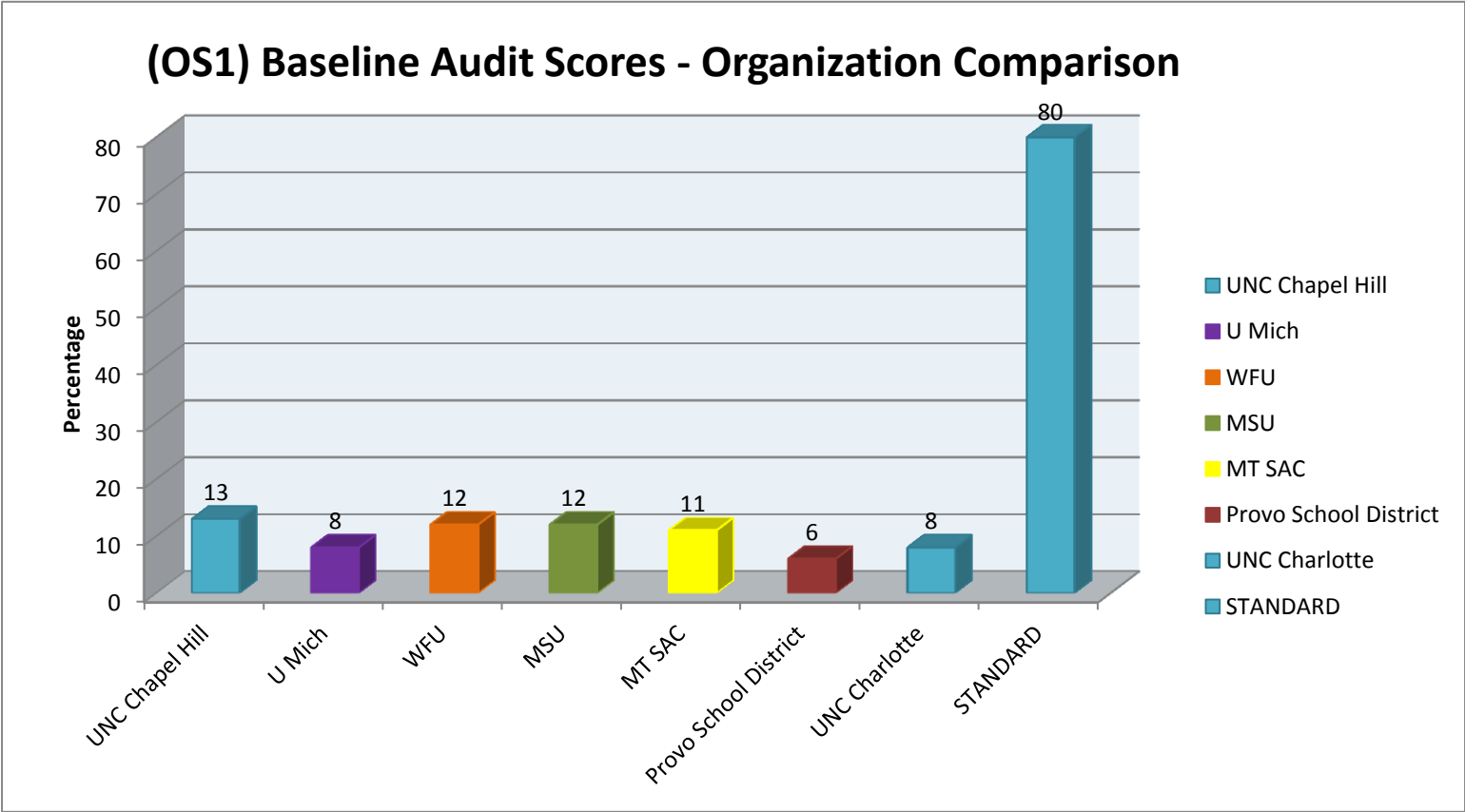


Percentage = 68%

STATUS

(OS1) Baseline Audit Scores - Job Category





GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes

Tactic 1.4.2: Achieve APPA Level 2 in 98% of Buildings

Lead
BES

ACTION PLAN

- **Actions Completed**

- Center City Process Checklist (10/2015)
- (OS1) Boot-camp Part III (12/2015)
- Attended (OS1) Work loading (12/2015)
- Successful implementation of weekly 1-on-1 and monthly group meetings between Area Managers and Zone Supervisors (12/2015)
- Completed floor care training for floor crew (12/2015)

- **Actions Planned**

- Full utilization of Daily Logs via Google Forms by Zone Supervisors and Lead Technicians (2/2016)
- Implement new quarterly self-audit process in Archibus – Monthly inspection of PMs per building (2/2016)
- Implement In-service training curriculum and matrix (2/2016)
- Update Hiring Process/Flow Chart (4/2016)
- Develop BES&R internal web-based portal – working with NiCole Lynch and Frank Stewart (5/2016)
- Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

ACTION PLAN

Actions Planned

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

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Hired PM Supervisor.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

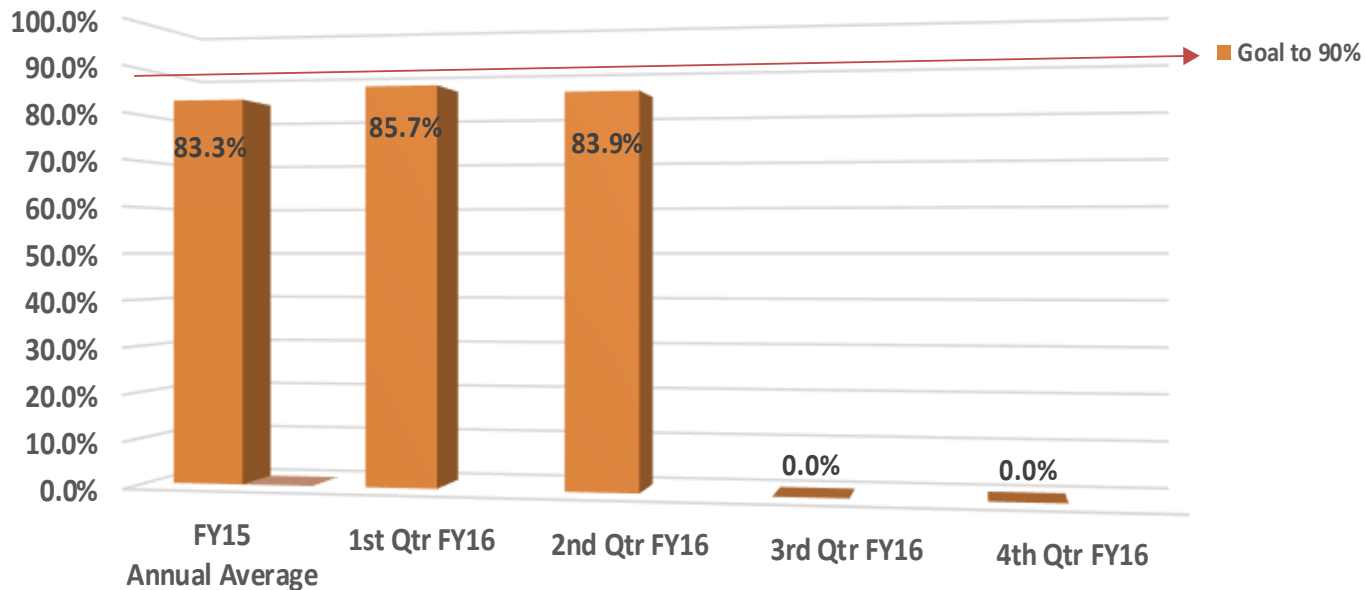
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

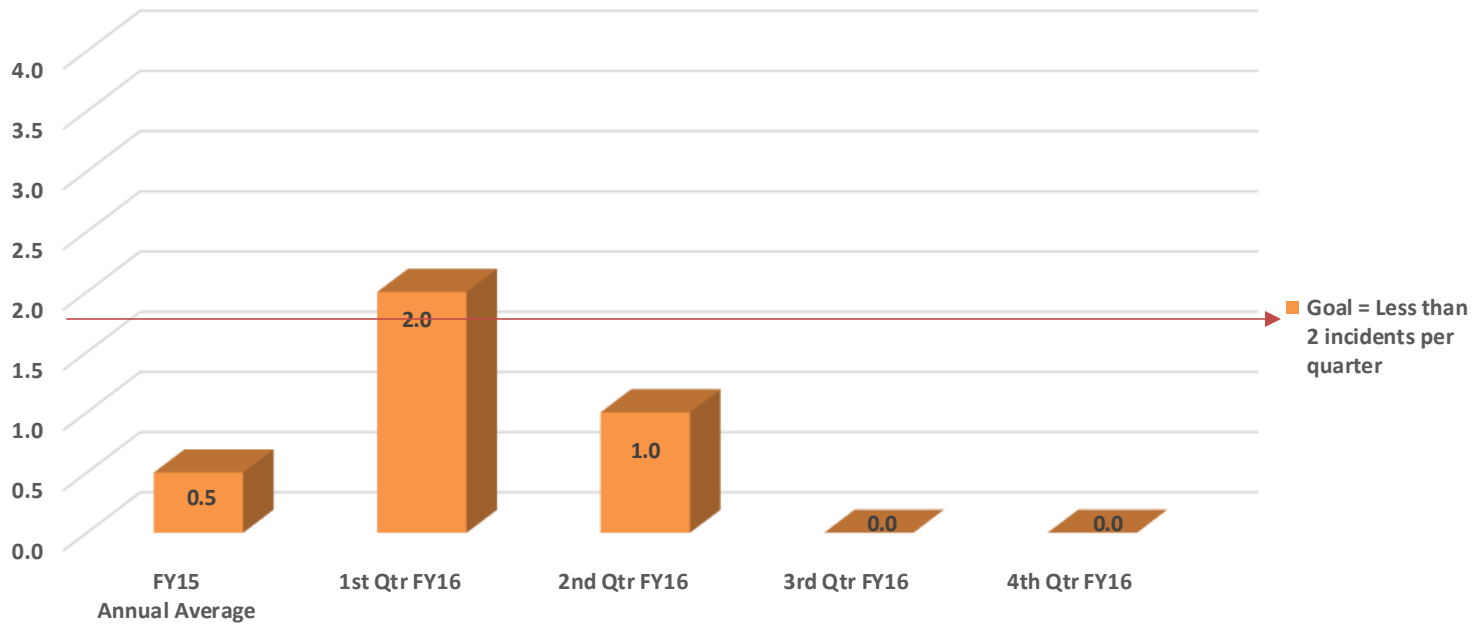
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

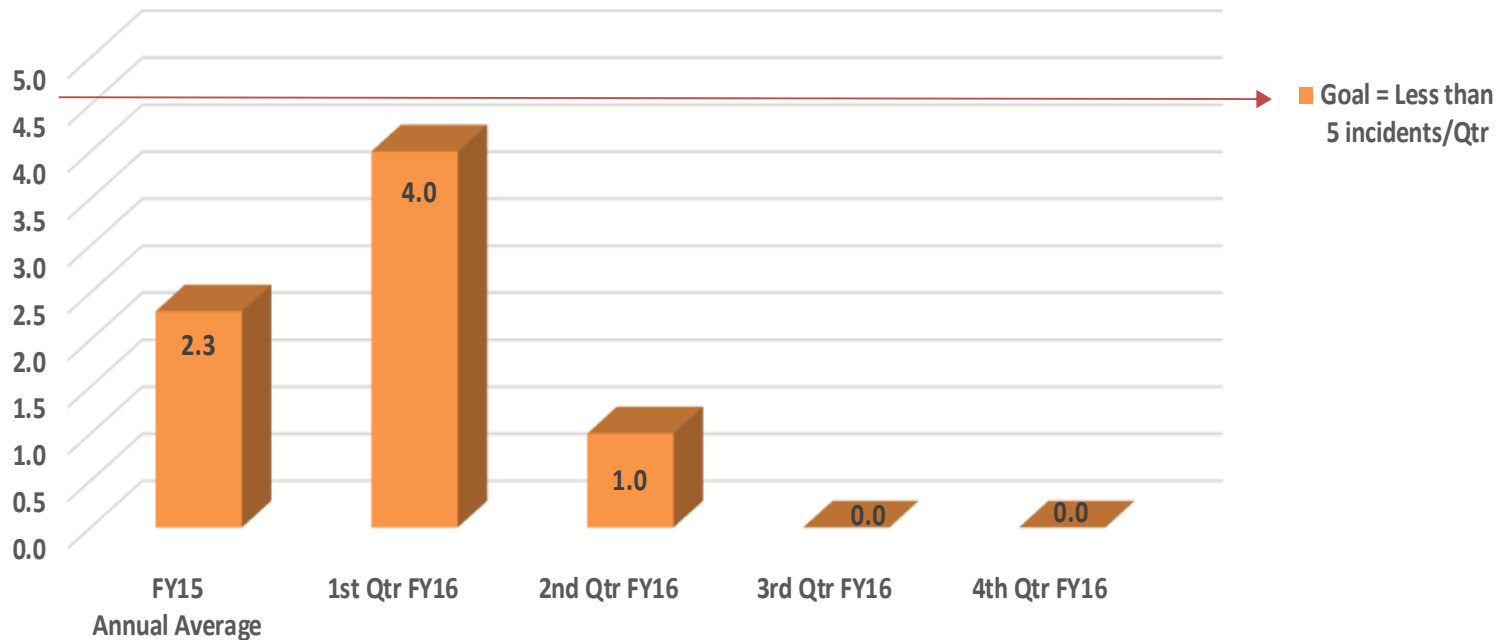
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages



Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

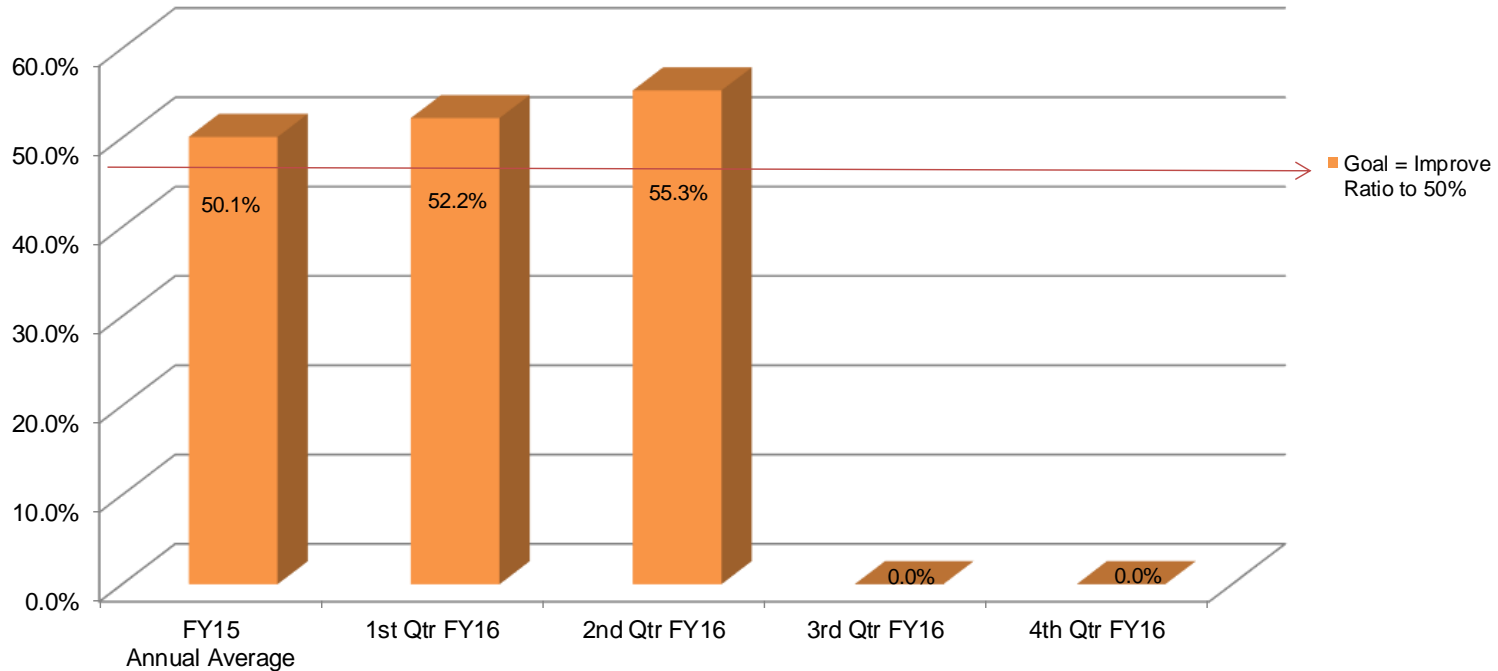
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Ratio of Preventive/Predictive Work Requests



STATUS

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Planned:

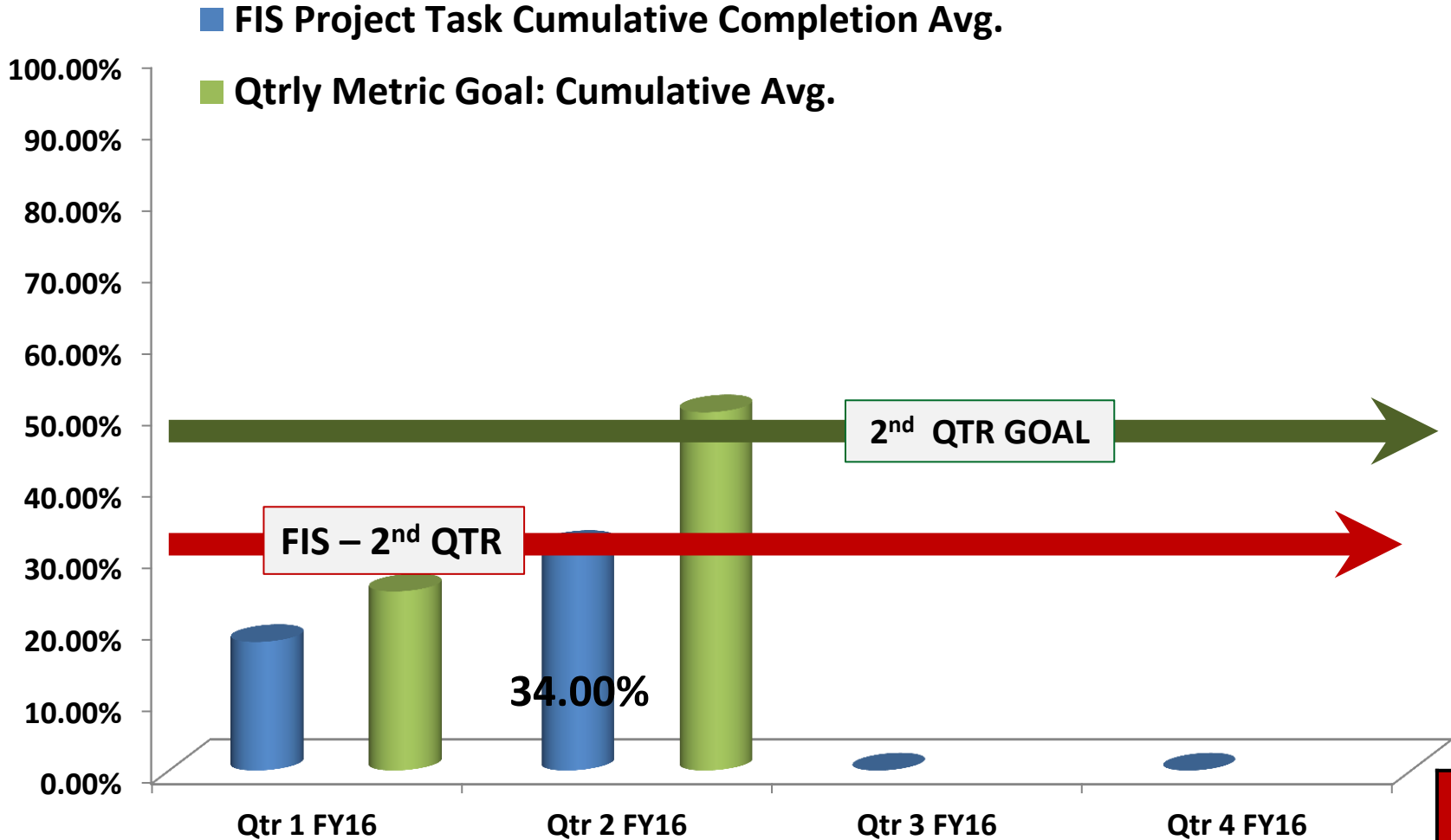
1. Complete, Test and Deploy Mobile Recycling project by Feb 28, 2016.
2. Finalize and Test Real Estate Updates by March 15, 2015.
3. Go Live with Motor Fleet Options on Feb 1, 2015.
4. Go Live with Project Customer Moodle2 training by March 15, 2015.
5. Finalize Real Estate Lease application updates by Feb 28, 2015.
6. Complete next phase of Open Options Script Improvements for faster data pull by January 31, 2015.
7. Complete SDI Enhancements by Feb 28, 2016.
8. Test and Go Live with GIS Outages/Construction Notifications March 15, 2016.
9. Finalize Set up and Begin Testing for Building Automations Niagara by Feb 15, 2016.

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

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Lead FIS

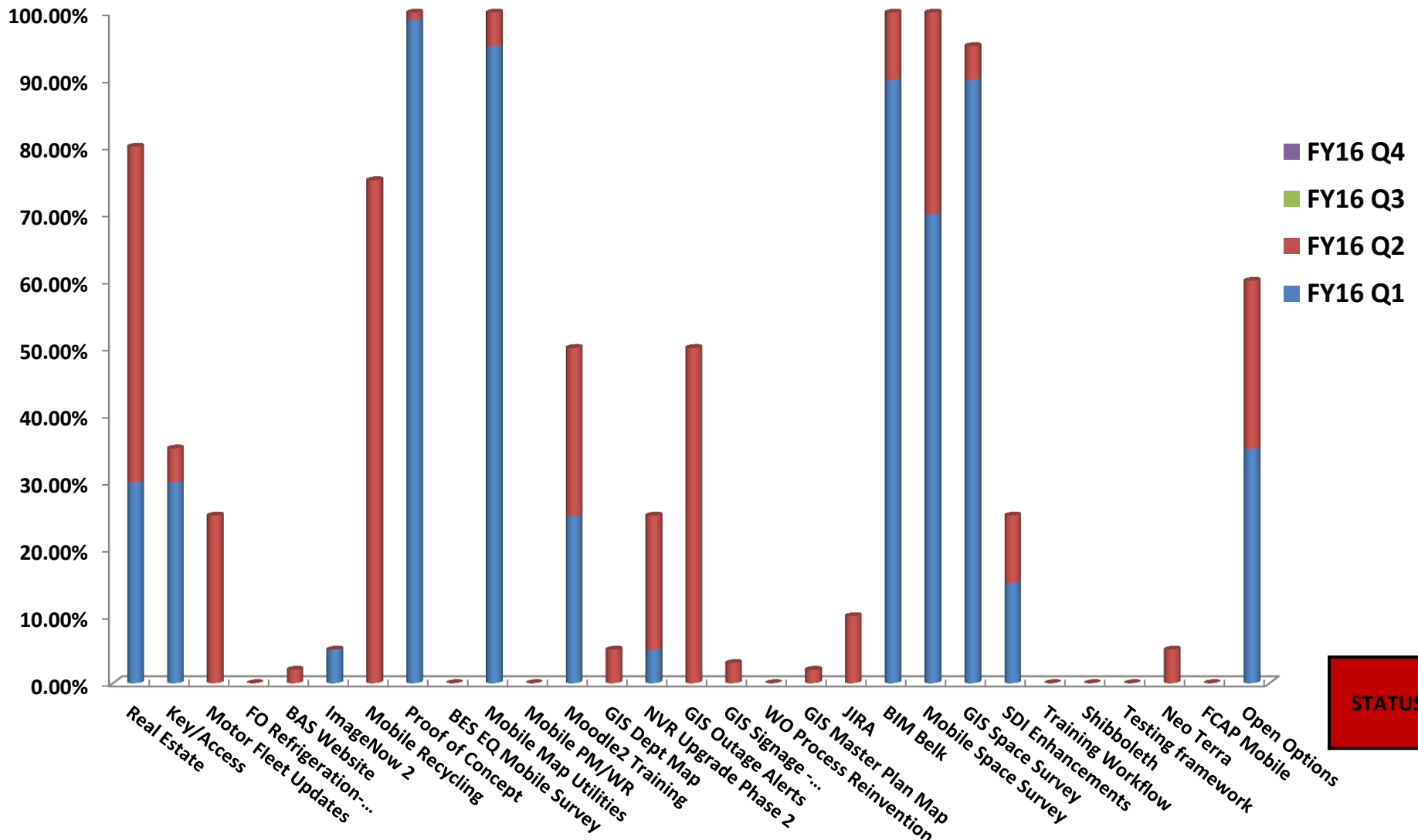
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

Balanced Scorecard Category: Internal Business Processes



STATUS

FM Prioritized Projects – FY16

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Completed:

1. Migrated Primavera to State Construction.
2. Completed and Deployed New BAS Upgrade (N4).
3. Deployed ARCHIBUS Mobile Space Survey.
4. Completed and Went Live with Mobile Map Utilities.
5. Completed Proof of Concept Project.
6. Completed BIM data collection process for Belk Gym Project; awaiting final documentation.
7. Completed N4 Server Set up for Building Automations.

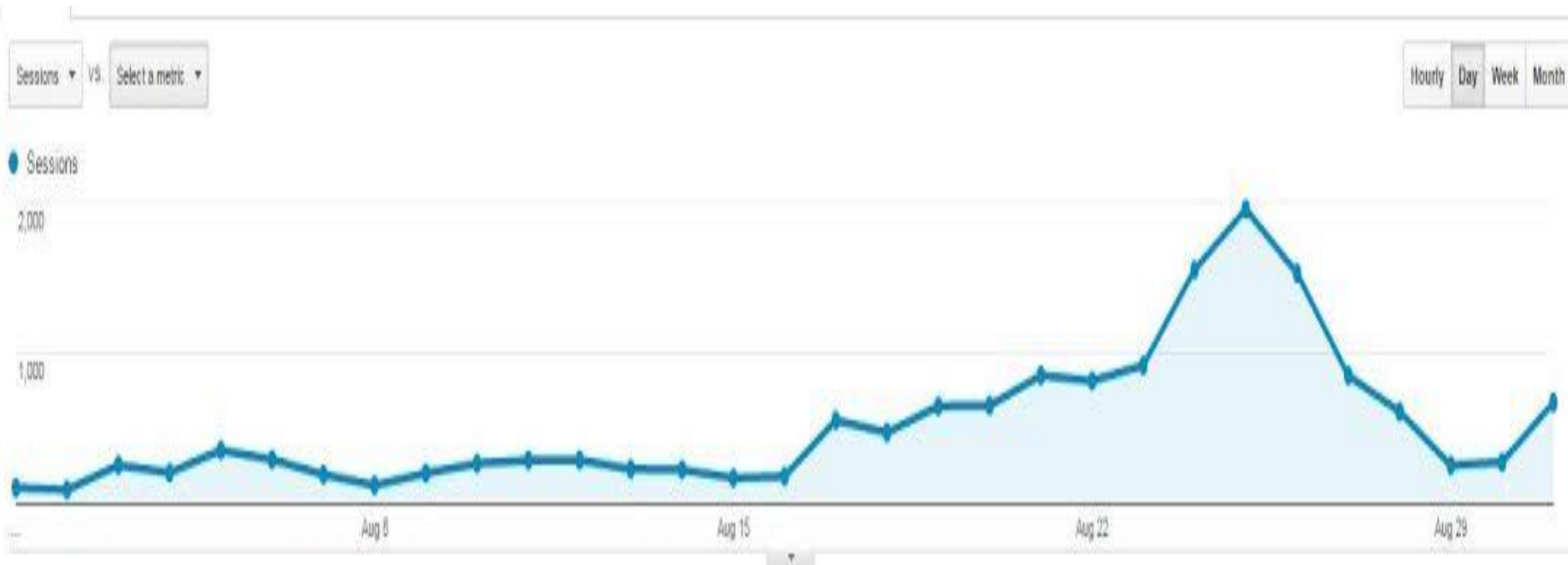
Interactive Map Traffic

Peaks at beginning of semesters.

Peak of 1,950 Users per day when students arrived on campus.

Over 16,000 visits in August alone.

August 2015 Traffic

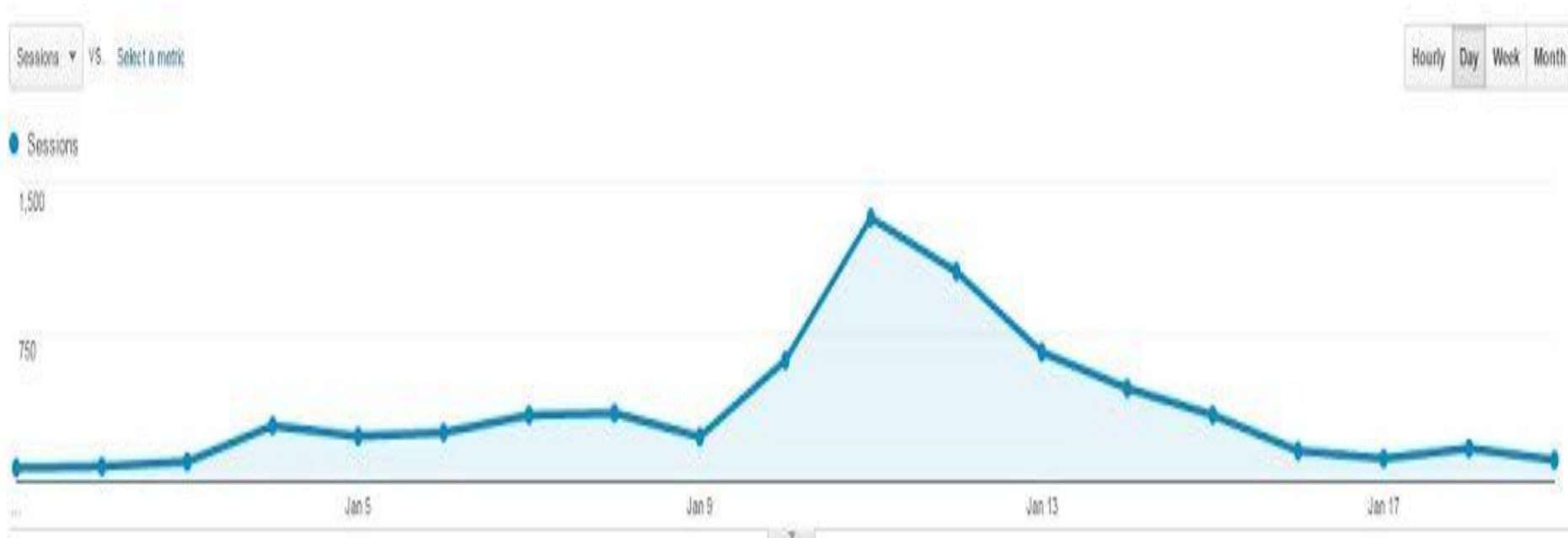


Interactive Map Traffic

Peak of 1,300+ Users per day when students arrived on campus.

Over half of the traffic that comes to *facilities.uncc.edu* to view maps, visits the Interactive Map.

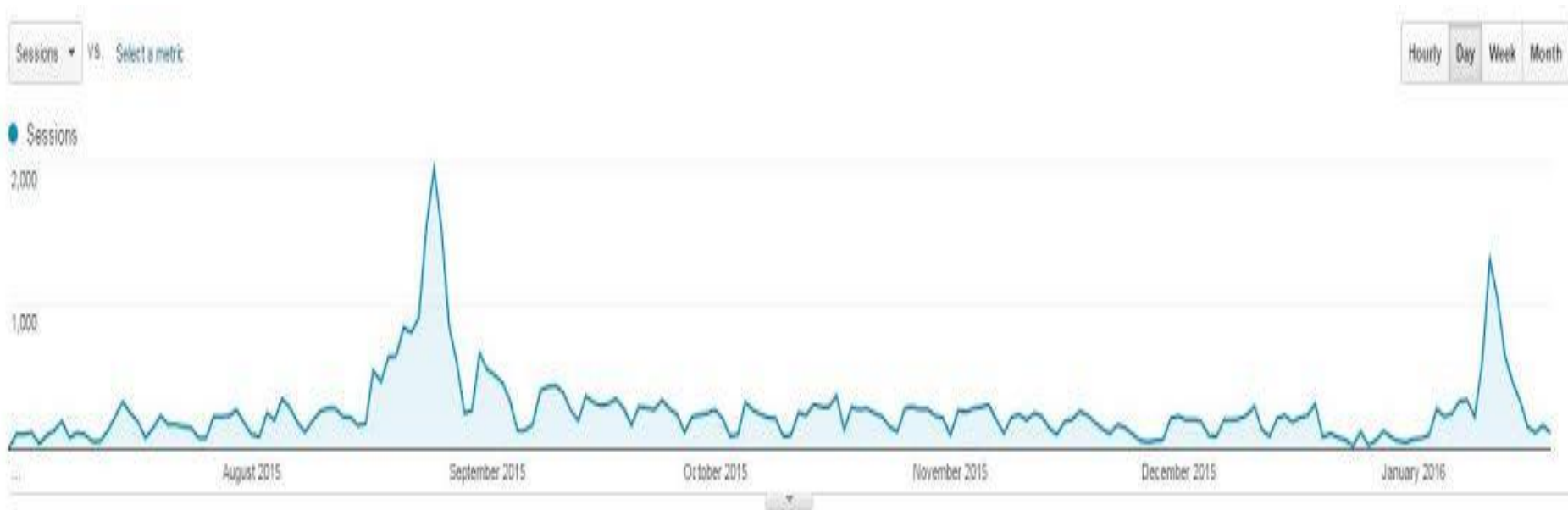
January 2016 Traffic



Interactive Map Traffic

Total traffic since Interactive Map has gone live: over 55,000 visits.

August 2015 - January 2016 Traffic



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

Lead -
Design
Services

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

Tactic 2.2.2: Review Project Capacity - Goal 250 projects per year.
Measure: Number of Projects Completed (Annual Goal)

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

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

- Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
 - ✓ *Timeline:* **FY16 QTR 2 – DESIGN SERVICES TESTING PHASE IS NOW ONGOING**

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

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
 - ✓ *Timeline:* **FY17 QTR 1 – FY17 QTR 4 – Work In Progress**

ONGOING IMPROVEMENTS

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

| | | | |
|---------------------------------------|-------------------------|---------------------------|------------------------------|
| 2 nd Q Status 100.0% | Annual Goal 95.0% | Annual Status 97.8% | Lead - Design Services |
|---------------------------------------|-------------------------|---------------------------|------------------------------|

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

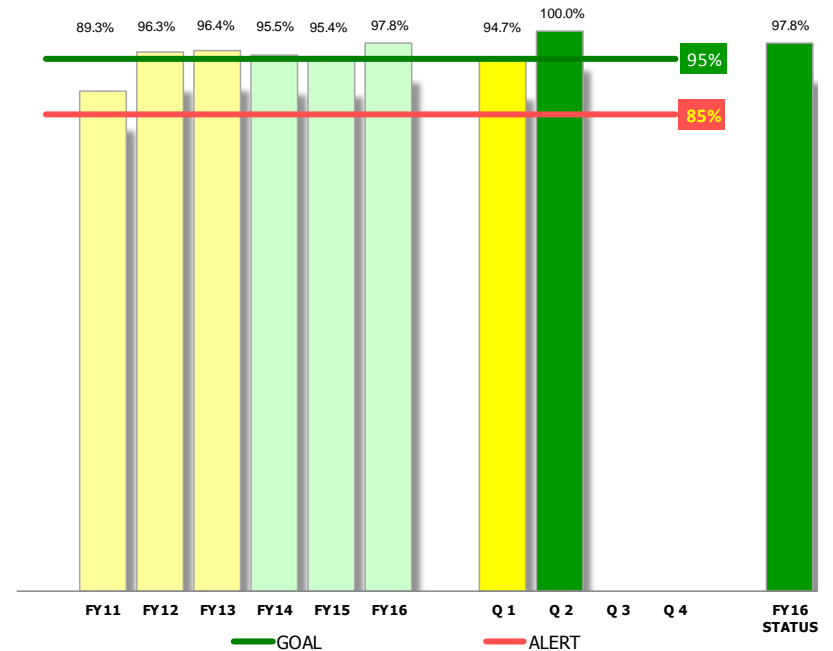
Lead: Design Services

Balanced Scorecard Category: Customer

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 |
|--------------------|-----------------|-------------------------------------|---|---------------|
| FY11 | 224 | 200 | 24 | 89.3% |
| FY12 | 240 | 231 | 9 | 96.3% |
| FY13 | 139 | 134 | 5 | 96.4% |
| FY14 | 221 | 211 | 10 | 95.5% |
| FY15 | 216 | 206 | 10 | 95.4% |
| FY16 | 46 | 45 | 1 | 97.8% |
| Q 1 | 19 | 18 | 1 | 94.7% |
| Q 2 | 27 | 27 | 0 | 100.0% |
| Q 3 | 0 | 0 | 0 | 0.0% |
| Q 4 | 0 | 0 | 0 | 0.0% |
| FY16 STATUS | 46 | 45 | 1 | 97.8% |



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

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

ACTION PLAN

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

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

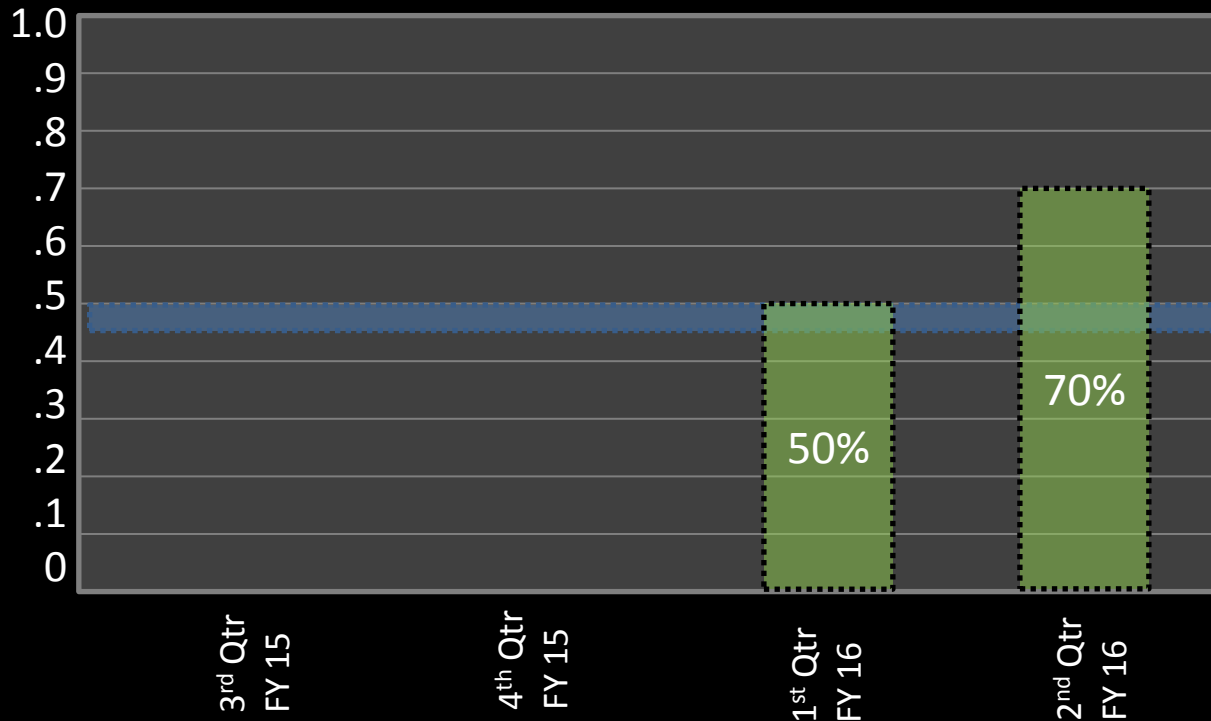
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2016.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

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

ACTION PLAN

- **Sustain current process of completing Operating Budget sheets for new projects**
- **Complete studies related to future Capital projects, Friday Settlement Issue, Light Rail Circulation Study, and Craver and Mary Alexander Road Intersection Sector Study - future building site cost analysis (proposed Science site)**

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

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

ACTION PLAN

Actions Completed

- Began advanced planning on Admissions Center, Belk Track Resurfacing, Health & Wellness

Actions Planned

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

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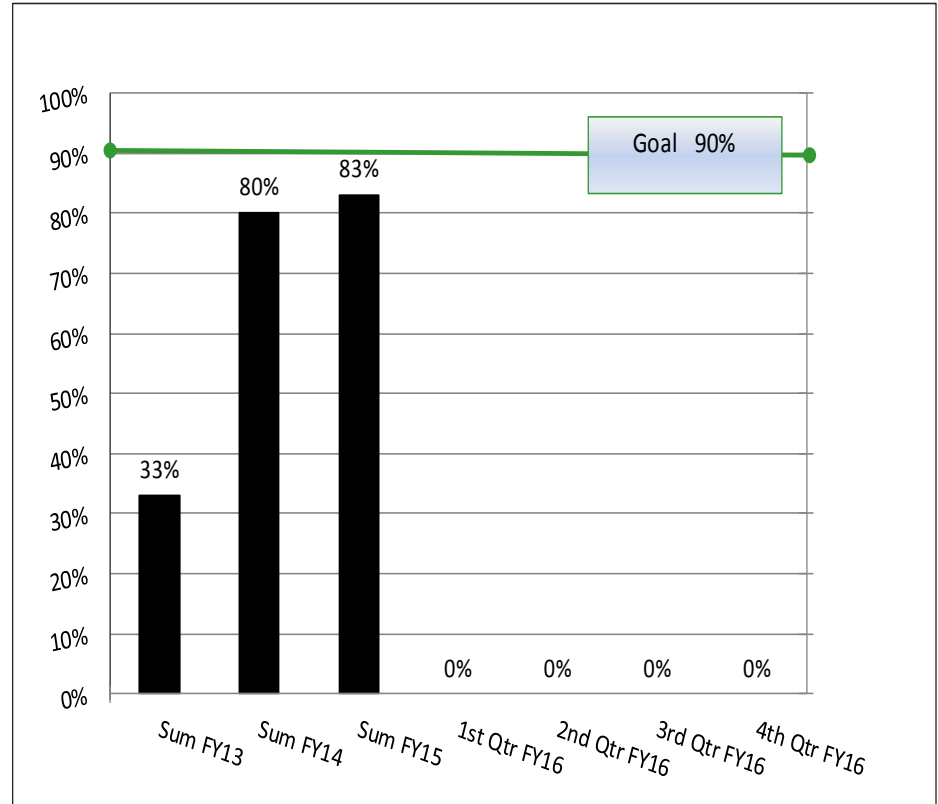
**Lead
Capital**

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

| STRATEGIC REVIEW by Fiscal Year (July-June) | No. of projects authorized in Capstat | Designer under contract w/in 120 days | Designer not under contract w/in 120 days | % Designers under contract w/in |
|---|---------------------------------------|---------------------------------------|---|---------------------------------|
| Summary FY-13 | 14 | 3 | 6 | 33% |
| Summary FY-14 | 7 | 4 | 1 | 80% |
| Summary FY-15 | 7 | 5 | 1 | 83% |
| 1st Qtr. FY-16 | 0 | 0 | 0 | N/A |
| 2nd Qtr. FY-16 | 0 | 0 | 0 | N/A |
| 3rd Qtr. FY-16 | 0 | 0 | 0 | |
| 4th Qtr. FY-16 | 0 | 0 | 0 | |



Tactic Measurement for 2nd Quarter is N/A

Status

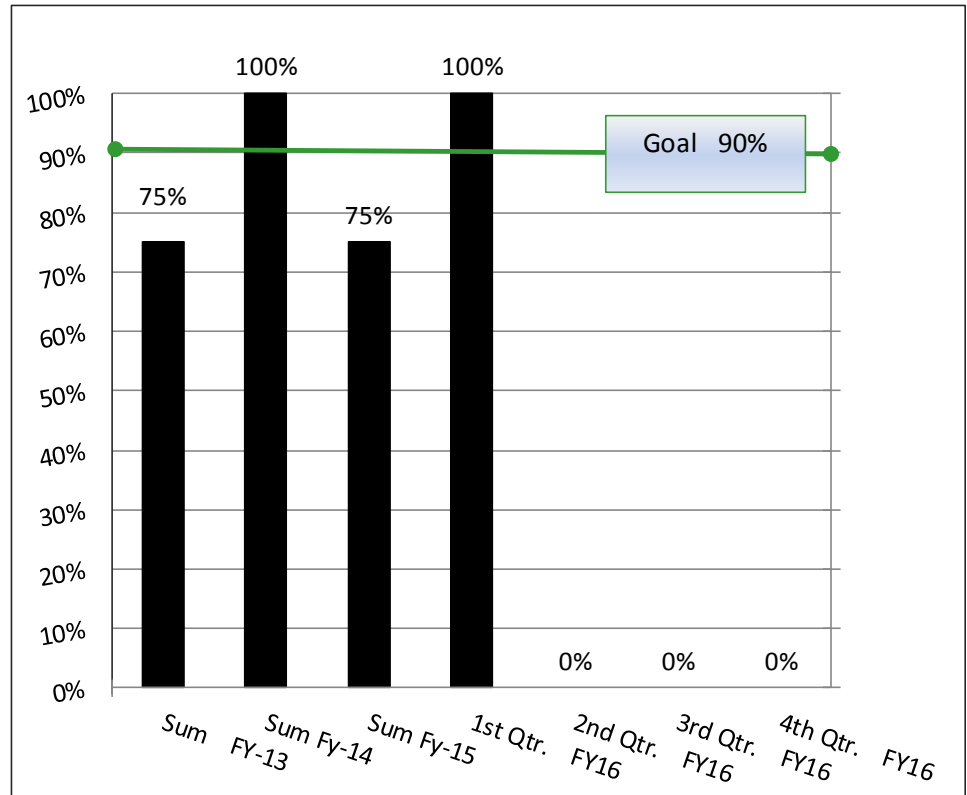
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

| STRATEGIC REVIEW by Fiscal Year (July-June) | No. of projects completed by scheduled | #not completed by scheduled time | % Designs complete by completion time |
|---|--|----------------------------------|---------------------------------------|
| Summary FY-13 | 3 | 1 | 75% |
| Summary FY-14 | 8 | 0 | 100% |
| Summary FY-15 | 3 | 1 | 75% |
| 1st Qtr. FY-16 | 1 | 0 | 100% |
| 2nd Qtr. FY-16 | 0 | 0 | N/A |
| 3rd Qtr. FY-16 | | | |
| 4th Qtr. FY-16 | | | |



Tactic Measurement for 2nd Quarter is N/A

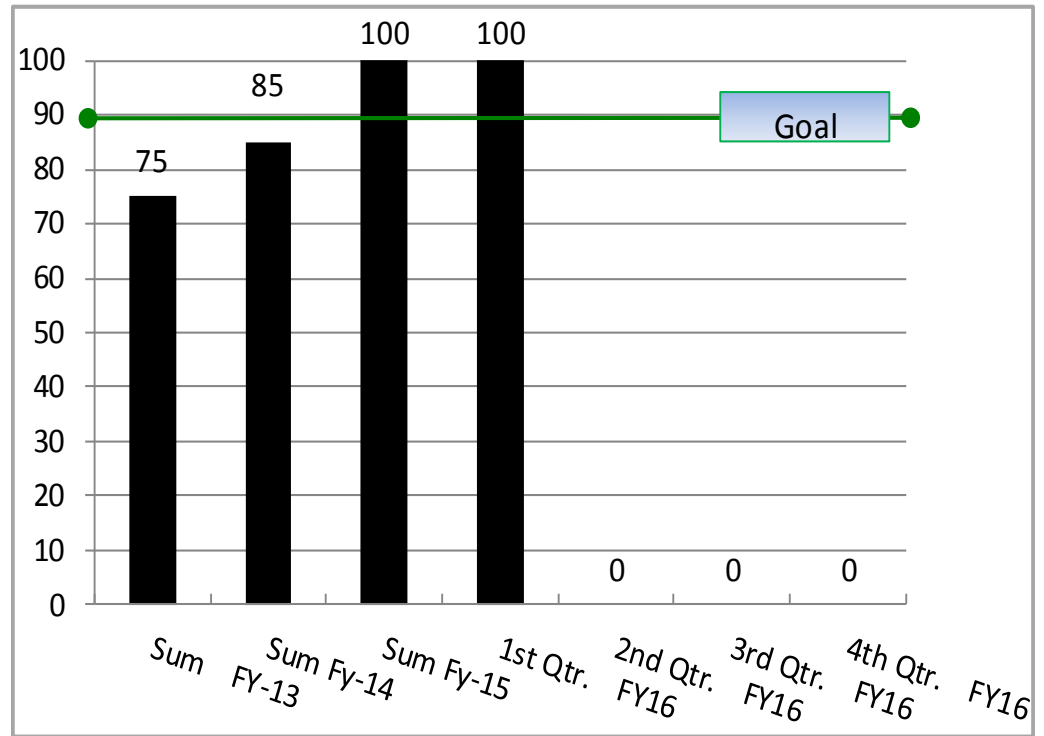
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.4 90% of designs complete within design budgeted fee

Measure: Percentage of designs completed within the original design contract amount

Balanced Scorecard Category: Internal Processes

| STRATEGIC REVIEW by Fiscal Year (July-June) | # of designs with original budgeted fee | # designs complete not within budget | % Designs not complete w/in budgeted fee |
|---|---|--------------------------------------|--|
| Summary FY-13 | 3 | 1 | 75% |
| Summary FY-14 | 6 | 1 | 85% |
| Summary FY-15 | 3 | 0 | 100% |
| 1st Qtr. FY-16 | 1 | 0 | 100% |
| 2nd Qtr. FY-16 | 0 | 0 | N/A |
| 3rd Qtr. FY-16 | | | |
| 4th Qtr. FY-16 | | | |



Tactic Measurement for 2nd Quarter is N/A

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

| | | |
|------------------|--------------|---|
| Objective | 2.6 | Improve the Capital Construction Process |
| Tactic | 2.6.1 | 90% of capital construction Projects completed on time |
| | 2.6.2 | 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency) |

ACTION PLAN

Actions Complete

- Took occupancy of Belk Gym (minus pool, i.e. late scope addition)

Actions Planned

- CMs keep baseline schedules current & refer to them regularly, focus on design and construction end dates.
- PMs & CMs discuss schedule (baseline & current) with end users, designers & contractors
- Inform designers and contractors of each other's contractual schedule dates
- PMs & CMs maintain & print project budgets & account reports monthly (have at all project meetings)
- PMs share budgets with AVC and end users.
- Hold contingency for unforeseen conditions, project requirements, inflation, etc.
- Manage construction scope creep

Facilities Management Strategic Planning Session – Second Quarter FY 2016

Lead Capital

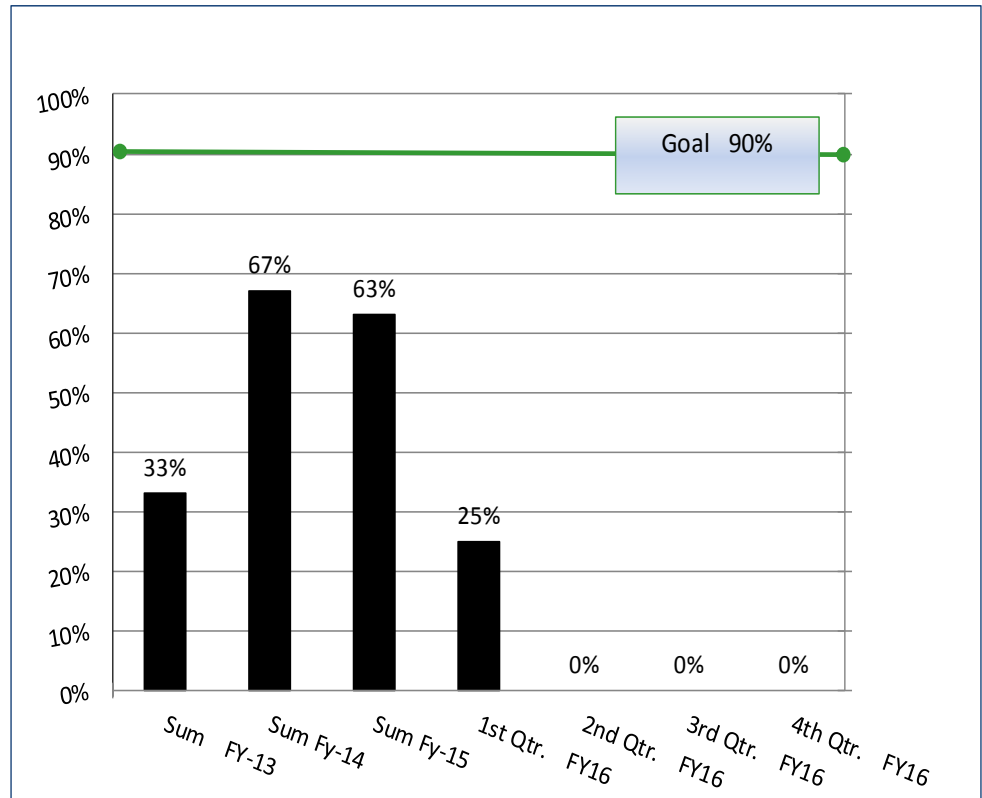
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

| STRATEGIC REVIEW by Fiscal Year (July-June) | # completed on schedule | not completed on schedule | % completed on time |
|---|-------------------------|---------------------------|---------------------|
| Summary FY-13 | 1 | 2 | 33% |
| Summary FY-14 | 6 | 3 | 67% |
| Summary FY-15 | 5 | 3 | 63% |
| 1st Qtr. FY-16 | 1 | 3 | 25% |
| 2nd Qtr. FY-16 | 0 | 1 | 0% |
| 3rd Qtr. FY-16 | | | |
| 4th Qtr. FY-16 | | | |



Status

Tactic Measurement for 2nd Quarter is 0%

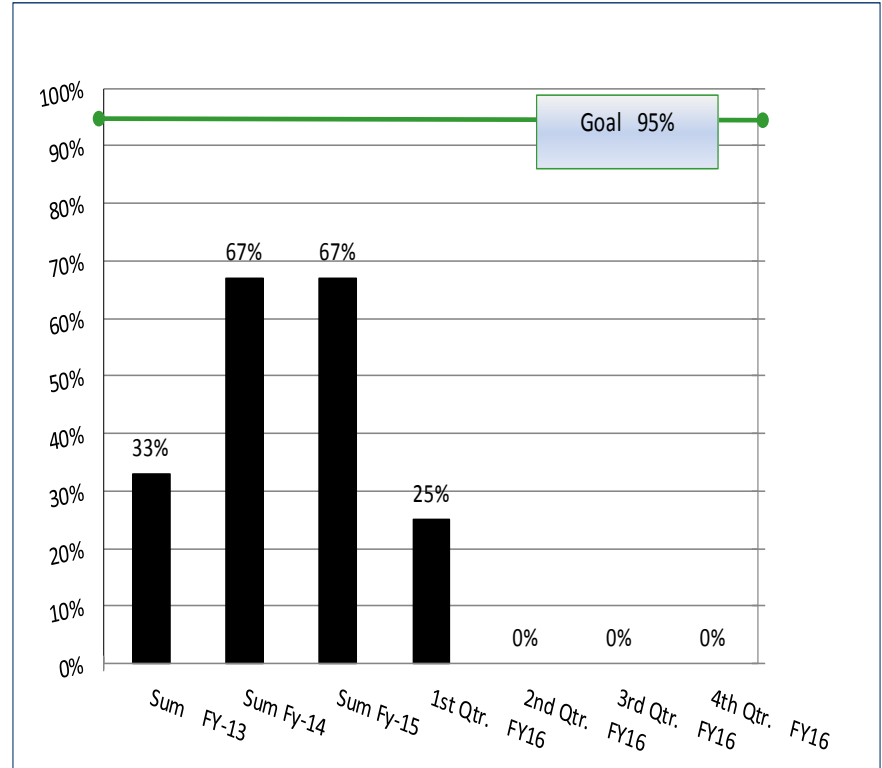
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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 | 4 | 2 | 67% |
| 1st Qtr. FY-16 | 1 | 3 | 25% |
| 2nd Qtr. FY-16 | 0 | 1 | 0% |
| 3rd Qtr. FY-16 | | | |
| 4th Qtr. FY-16 | | | |



Status

Tactic Measurement for 2nd Quarter is 0%



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

Lead
FBO

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.1: Achieve overall customer satisfaction of 93% (**proposed**) for FM services.
Measure: Annual Customer Survey results: Percentage of customers selecting "fair, good or very good" with the statement: "Overall I am satisfied with <the service> I received from Facilities Management"

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Customer Satisfaction Survey

- Will contact Urban Institute for survey administration calendar; UI will assign team member to administer survey; 5 month timeline required; Projected survey administration in Fall 2016 (FY 17).

Publicity/Public Relations:

- **Campus Construction Reports*:** Goal to prepare and distribute approx. every six weeks. **Last one sent 12/21/15**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - CID projects near completion, Lizotte appointed STAR tech advisor, 2015 Power Partner award, etc.
- **Publicity documentation and analytics*:** Will contact Cindy Tribucher and report annually.

Internal Communications:

- **Intranet and Web Site** Content review and user feedback. *(note: level 0 security information)* **FIS and WAG meetings to be reinstated;**
- **Regularly scheduled communications meetings** with BES and Operations
 - Bimonthly meetings for both with the first scheduled for January 22

GOAL #3 – Foster a Customer Focused Organization**Objective: 3.1: Continuously improve customer service/satisfaction****Tactic: 3.1.2:** Decrease the Number of Hot/Cold Calls by 20%**Tactic: 3.1.4:** 90% of Reactive Work Request Customers are satisfied or very satisfied**ACTION PLAN****Actions Planned**

1. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.
2. Continue to develop BAS Controls section and cross-train with Zones.
3. Continue to include Energy Manager in Bi-Weekly Operations' meetings.
4. Continue daily monitoring of building temperatures within Zones.
5. Develop Utilities Team (focus on BAS Team; retro commissioning and Utility Manager) December 2015
6. Working w Capital; Retro-commissioning 3 buildings (Cameron, McEniry, Smith)
7. Continue to improve condensate return for main Steam Plant
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification. Continue to develop controls section and cross-train with Zones.
2. Adjusted Customer Satisfaction Survey.
3. Updated temperature policy

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

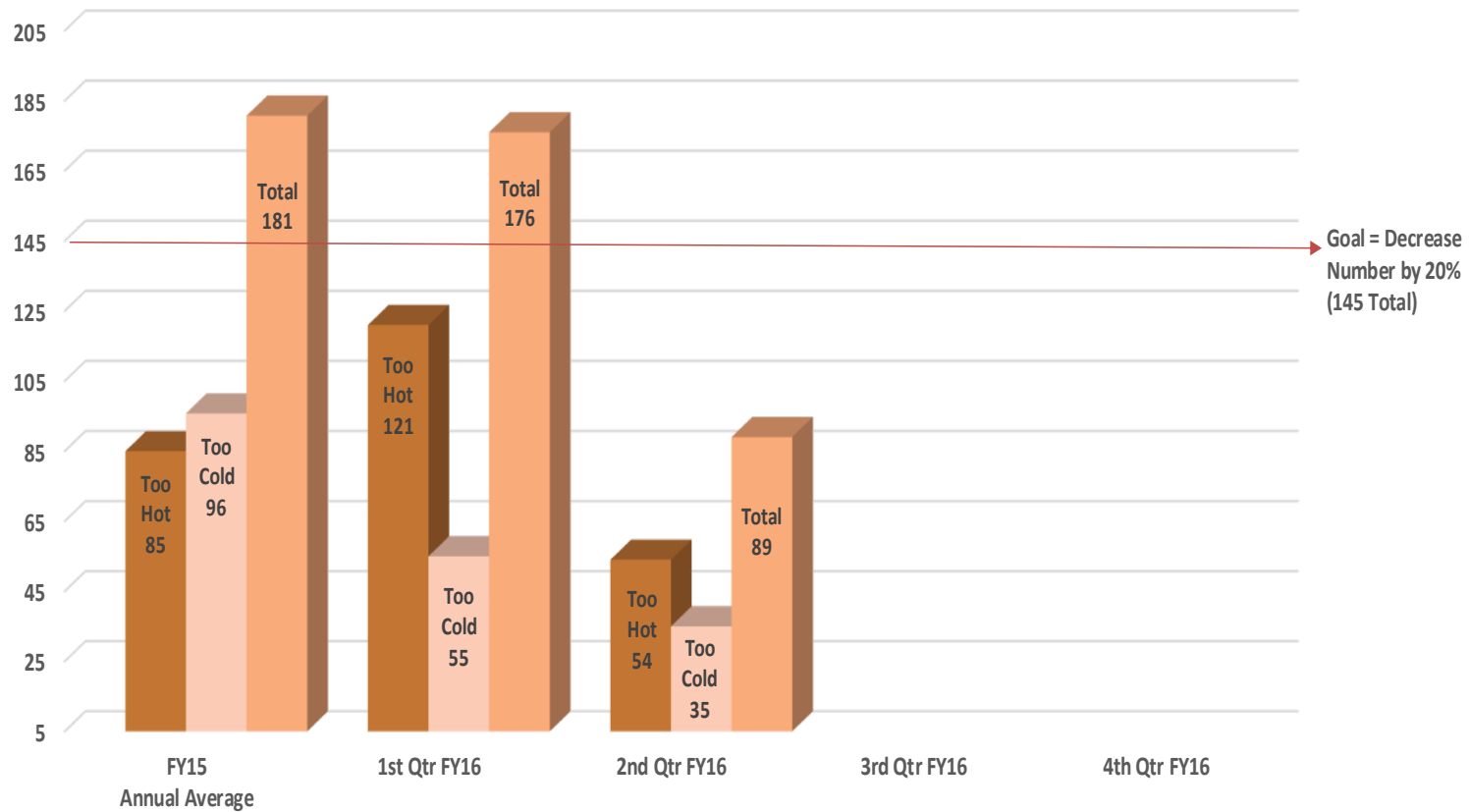
Objective: 3.1: Continuously improve customer service/satisfaction

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

Decrease the Number of Hot/Cold Calls



STATUS

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:

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

- After project is complete, stop by and meet with Customer to review how the renovated space is performing.
- Keeping the communication lines open by email, phone and face to face works wonders.
- When possible, hold weekly meetings on job site to discuss progress with Customer.

Facilities Management Strategic Planning Session – Second Quarter FY 2016

2nd Q
Status
100.0%

Annual
Goal
90.0%

Annual
Status
100.0%

Lead -
Design
Services

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service/Satisfaction

Lead: Design Services

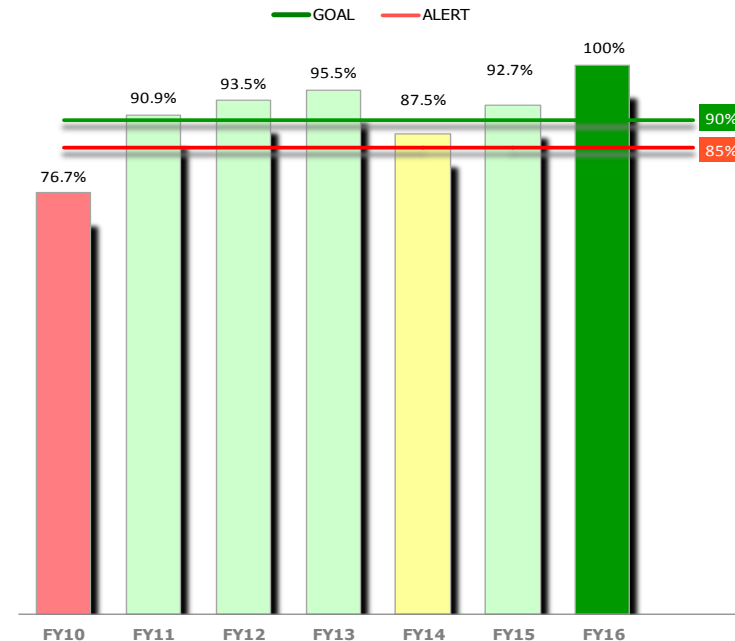
Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Project Related Customer Surveys

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

| Survey Totals by Fiscal Year | Number of Surveys issued | Number of Survey Responses | More than Satisfied | Satisfied | Less than Satisfied | Percent Satisfied |
|------------------------------|--------------------------|----------------------------|----------------------|-----------|---------------------|-------------------|
| FY10 | 30 | 30 | 18 | 5 | 0 | 76.7% |
| FY11 | 33 | 33 | 24 | 6 | 2 | 90.9% |
| FY12 | 31 | 31 | 27 | 2 | 0 | 93.5% |
| FY13 | 22 | 22 | 18 | 3 | 0 | 95.5% |
| FY14 | 24 | 24 | 18 | 3 | 0 | 87.5% |
| FY15 | 117 | 41 | 35 | 3 | 0 | 92.7% |
| FY16 | 29 | 13 | 9 | 4 | 0 | 100% |
| <i>1st Quarter</i> | <i>17</i> | <i>10</i> | <i>7</i> | <i>3</i> | <i>0</i> | <i>100%</i> |
| 2nd | 12 | 3 | 2 | 1 | 0 | 100% |
| <i>3rd Quarter</i> | | | | | | |
| <i>4th Quarter</i> | | | | | | |
| 2nd | 12 | 3 | <i>RESPONSE RATE</i> | | | 25.0% |



Customers Comments:

PC is very willing to explore options and offer cost effective solutions.

PC is very attentive to detail; PC offers wise professional advice, and is always friendly.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

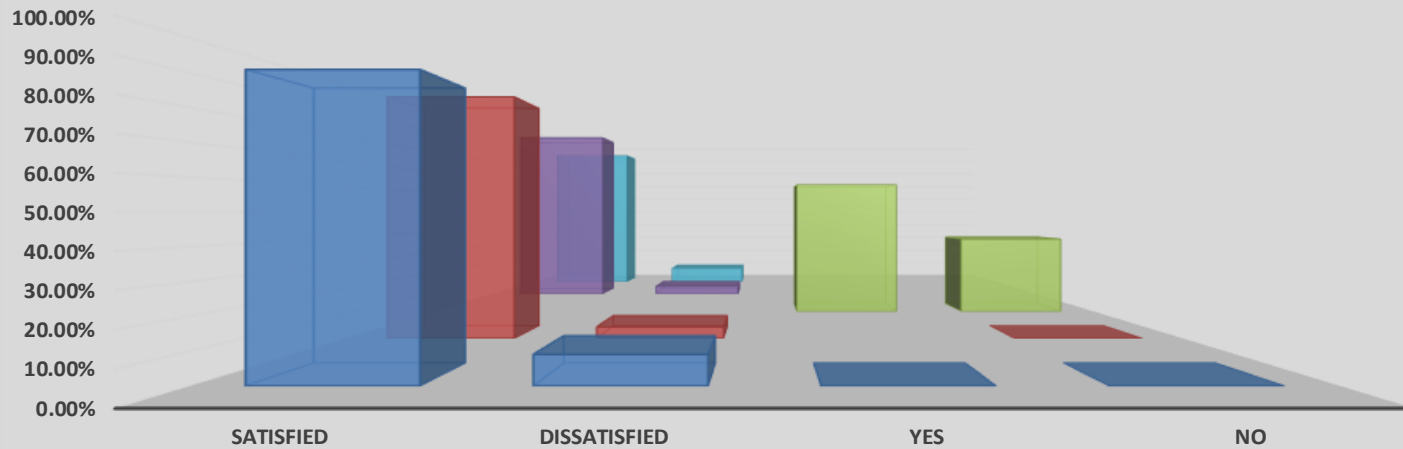
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Customer Service Satisfaction



| | Satisfied | Dissatisfied | Yes | No |
|--|-----------|--------------|--------|--------|
| How satisfied were you with the time it takes for Fac Ops staff to respond to you issue? | 90.90% | 9.10% | 0 | 0 |
| How satisfied were you with the resolution of your issue or concern? | 95.45% | 4.55% | | 0 |
| Was there follow-up? Yes/No | | | 63.63% | 36.37% |
| How satisfied were you with our staff's courteousness and professionalism? | 95.45% | 4.55% | | |
| How satisfied were you with your overall experience? | 90.47% | 9.53% | | |

93%

STATUS

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

Tactic 3.1.5: Build brand awareness
Measure: Action Plan Only

ACTION PLAN FOR IMPROVEMENT

Customer Communication Initiatives (interrelated):

- **Launch 2nd customer feedback interviews Late Fall 2016, Early Spring 2017**
- **External Marketing Campaign*: “Creating A Campus of Distinction”**
 - Signage **This launched in February, 2015, and meetings with BES and FO to be scheduled.**
 - Solicit feedback/input from Directors **Meetings to be scheduled to discuss potential expansion**
- **Customer Facing technology Meeting to be held February 9**
 - Communication plans and user testing assistance with Campus Map and CRDM Report.

Special Projects:

- **Traffic communications committee** (joint partnership with U. Communications):
 - Request guidance from AVC



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% |

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

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

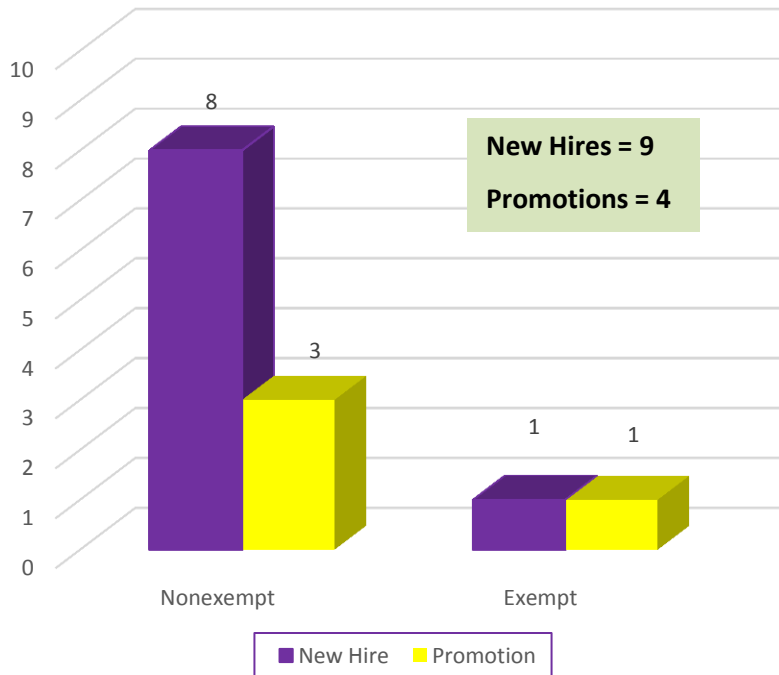
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

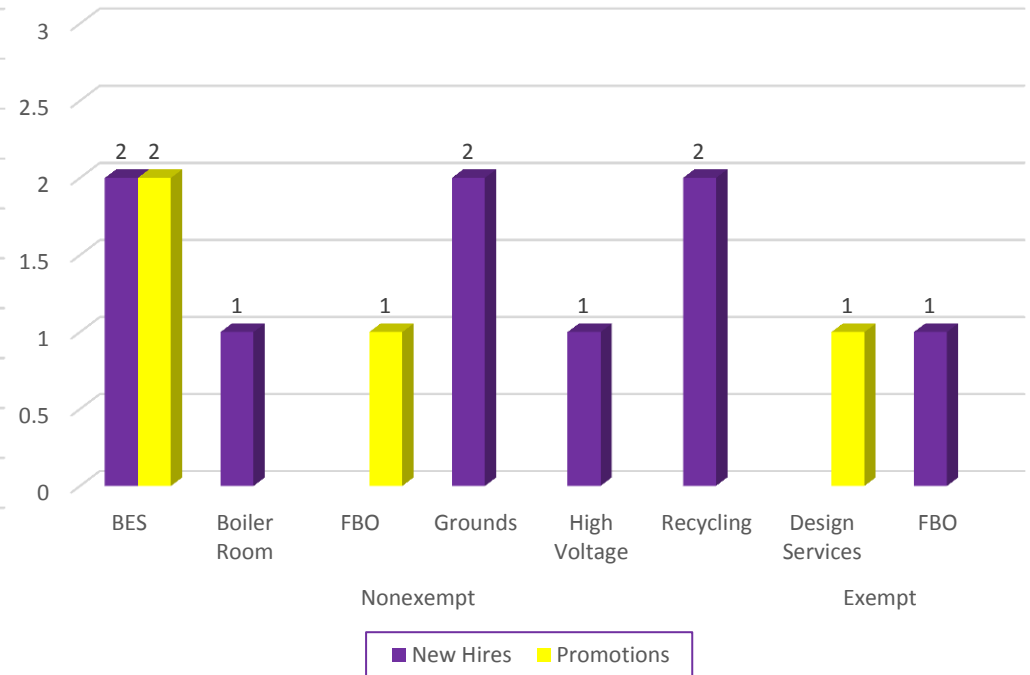
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotion 2nd Quarter FY 2016



FM New Hires/ Promotions per Department 2nd Quarter FY 2016



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

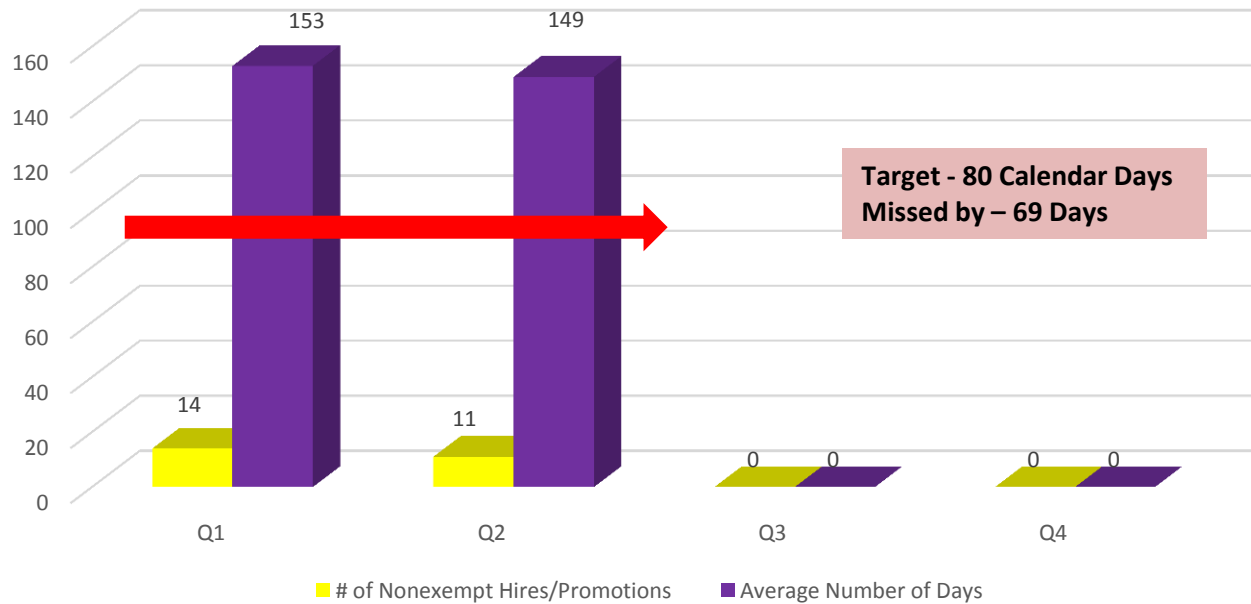
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Nonexempt Vacancies - FY 2016



STATUS

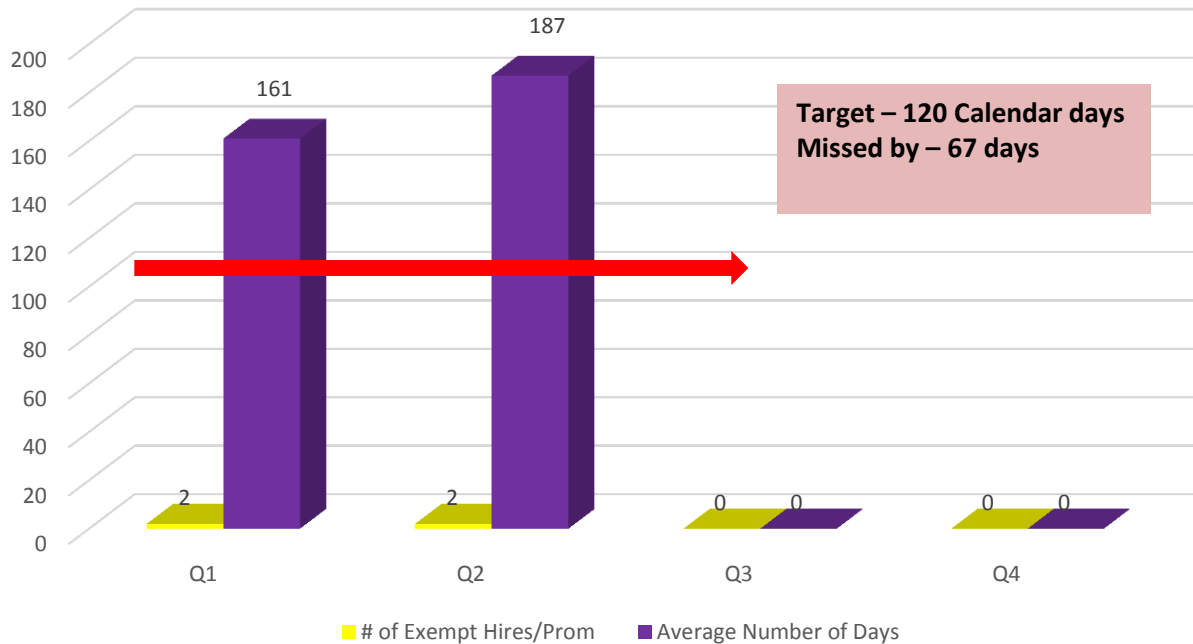
GOAL #4 Recruit, Develop and Retain Quality Employees

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

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Exempt (Salaried) Vacancies - FY 2016



STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June, 2016

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

Facilities Management Strategic Planning Session - Second Quarter 2016

GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

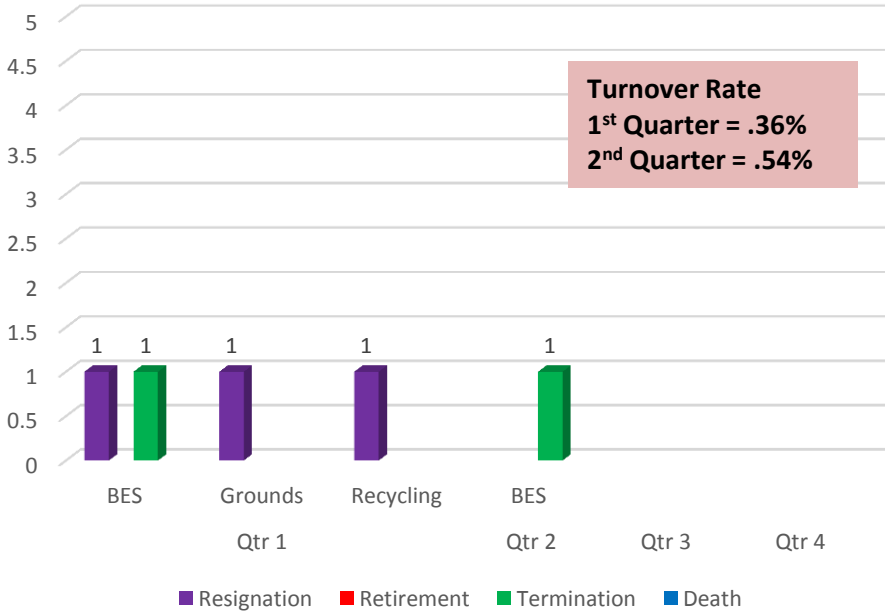
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

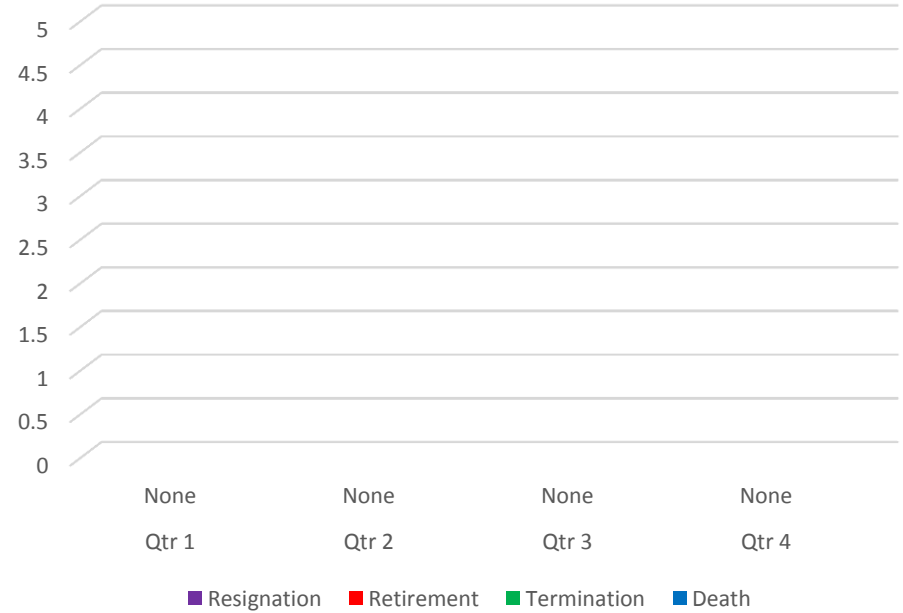
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations by Department During Probation
Nonexempt FY 2016



Separations by Department During Probation
(Salaried) Exempt FY 2016



Status

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

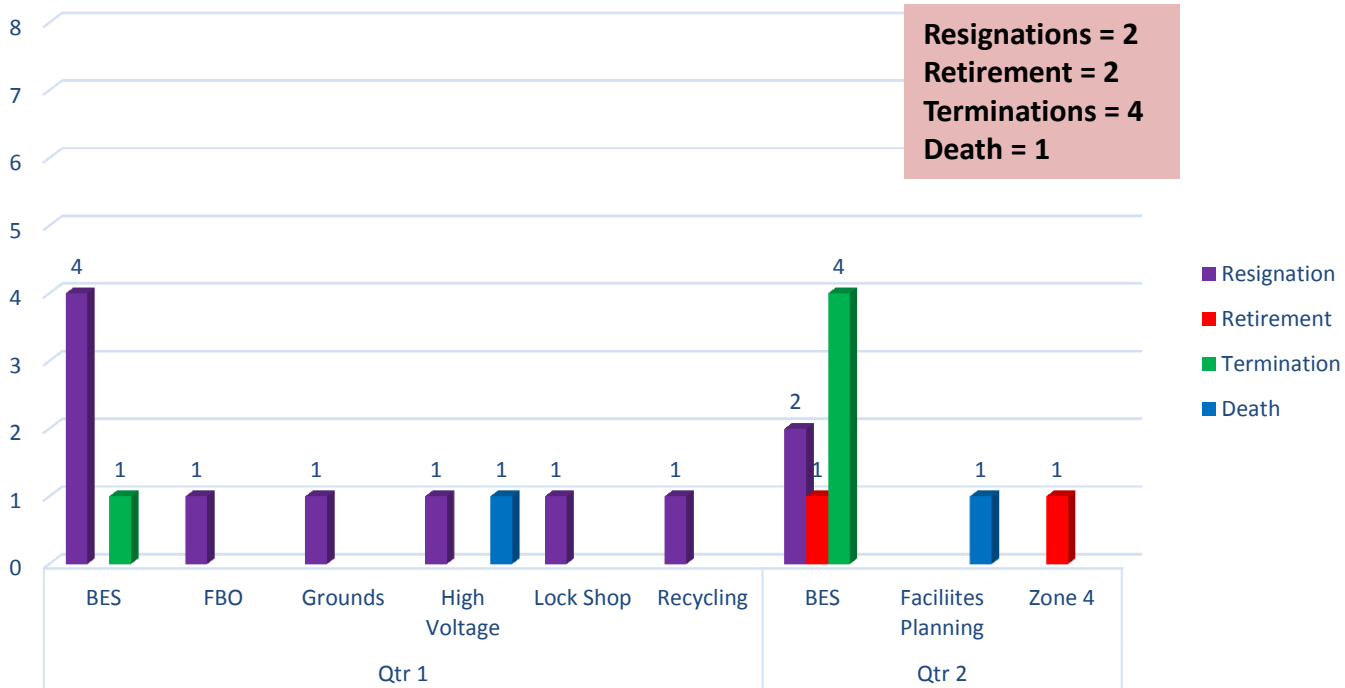
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2016 Nonexempt





GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

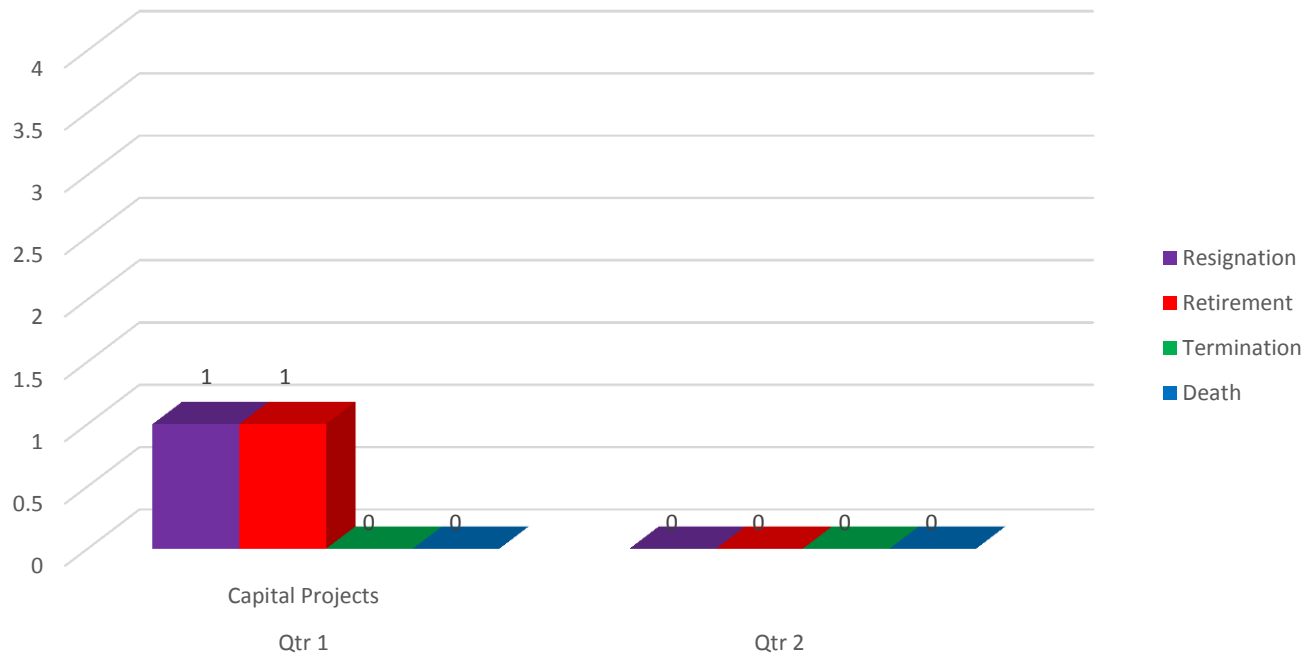
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

FM Separations FY 2016 Exempt



GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

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

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

FM ACADEMY

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

Technical

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

Safety

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

Leadership

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

Externally Driven Initiatives

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

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

| | |
|----------------------|---|
| Tactic 4.2.1: | Increase Supervisor/Manager Training to 40 hours/year |
| Measure: | Average Hours of Training completed by Supervisors and Managers |

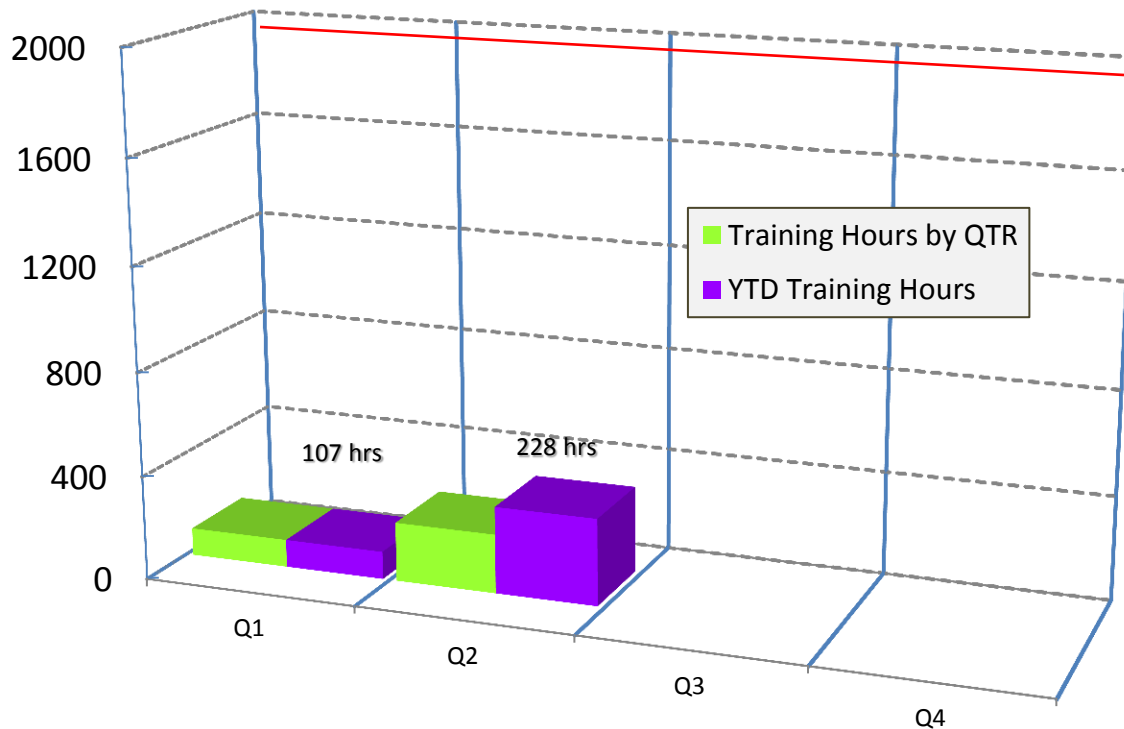
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 16

Training Hours for Supervisors & Managers by Quarter



Annual Target

FY 2016
 Target - 1,960 hrs
 2nd Qtr. Target – 490 hrs

Actual YTD
 335 hrs (17 %)

Actual 2nd Qtr.
 228 hrs (47 %)

ANNUAL

GOAL #4 Recruit, Develop and Retain Quality Employees

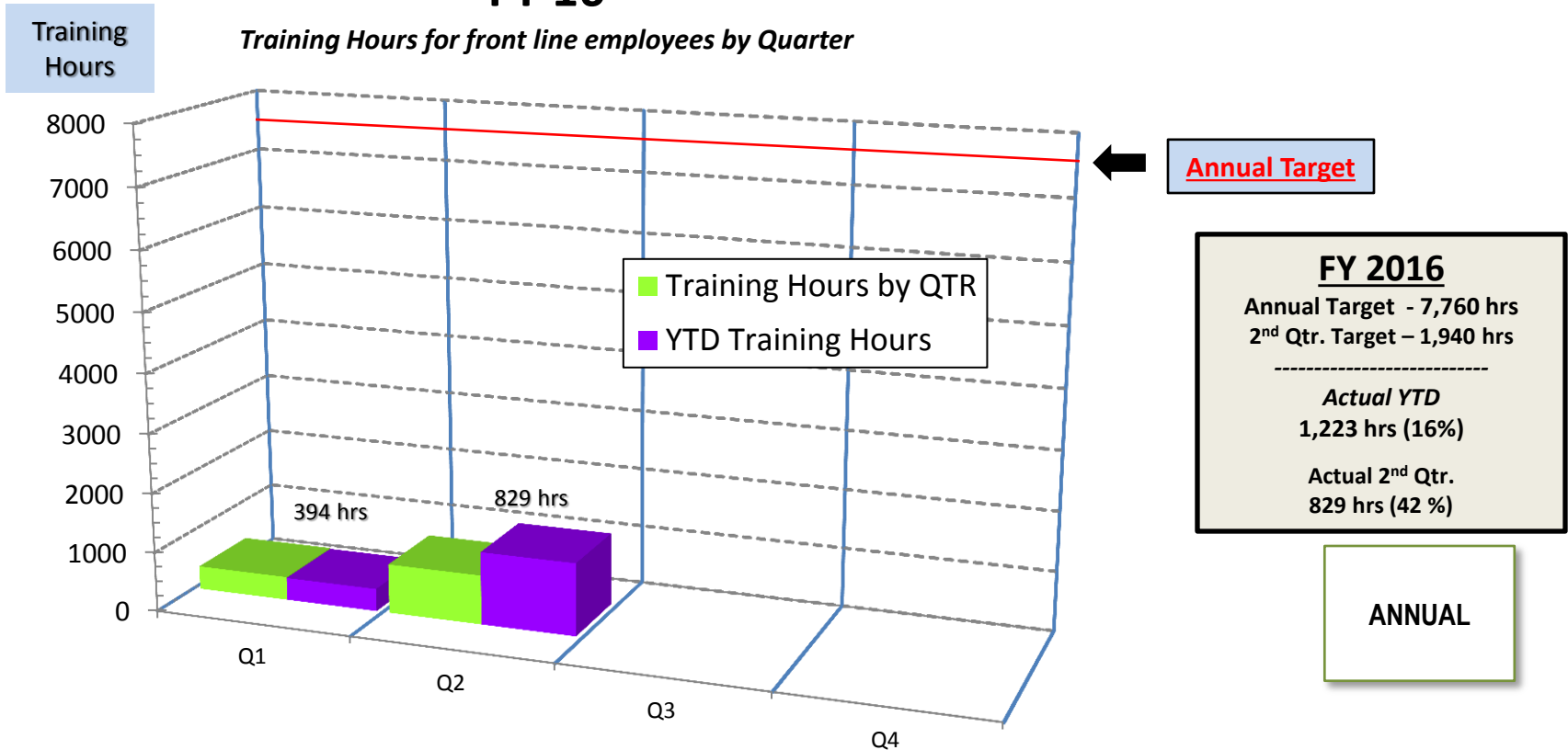
Objective 4.2: Improve Workforce Development

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

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 16



GOAL #4 Recruit, Develop and Retain Quality Employees**Objective 4.3: Create and Maintain a Quality Work Environment**

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

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT**Survey Logistics:**

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – **TBD (based upon UI availability)**
- Discuss survey administration feasibility with Urban Institute and obtain potential scheduling timeframes – January 2016;
- Next survey date TBD.

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

| | |
|----------------------|---|
| Tactic 4.4.1: | Reduce the number of reportable accidents by 20% |
| Tactic 4.4.2: | 98% of Mandatory Compliance Training completed annually |
| Measure: | Percent of employees completing mandatory compliance training |

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Activities to Foster “Safety Mindset”

- Supervisor Safety Talks (SST) Monthly
- Twelve month SST topics calendar posted for 2016
- 6th Annual FM Safety Fair Annual
- 8th Annual FM Safety Slogan Contest Annual

Safety Training

- “Safety Training Needs Assessment” sent to new employees & their supervisor Ongoing
- “EHS Safety Check List” sent to Directors Oct 2015
- List Safety training topics/links on FM Learning & Development web page Oct 2015
- Communicate EH&S training schedule to FM Ongoing

Lead
FM Wide

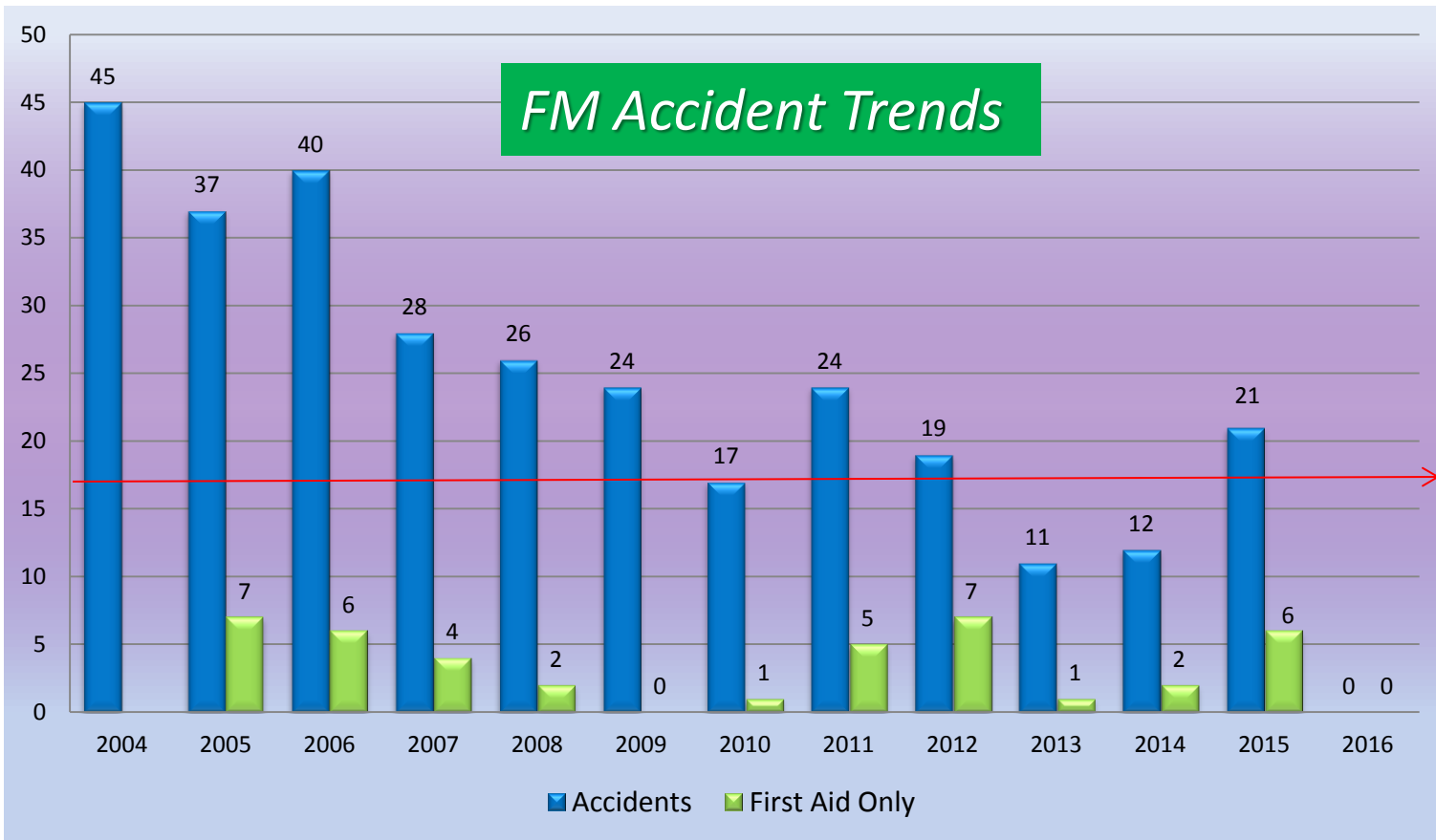
GOAL #4 Recruit, Develop and Retain Quality Employees

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



2016 Continuous Improvement Target ≤ 17

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 |

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

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

Safety Training FY16 YTD – 881 hours

- Safety Training Taskforce (Collaborative initiative with EH&S) Ongoing
- Winter Preparedness Expo Dec 2015
- Safety related activities
 - FM Safety Committee meeting Bi-monthly
 - Supervisor Safety Talks (*12-month calendar posted to website*) Monthly
- Safety Slogan Contest - *“Safety Pays In Many Ways”* July 2016
- Accident/Incident Totals (CY15)
 - Accidents - 21 2015 CY
 - Minor incidents – 6 2015 CY

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

| Action Item | Target Date |
|---|--|
| FM Academy | |
| <ul style="list-style-type: none"> • Web Content Development, working with NiCole Lynch, FM Communications Officer, for updates on Learning & Development webpage. <ul style="list-style-type: none"> – Online training evaluation form posted to FM website – Supervisor Safety Talk (SST) topics 2016 calendar published – Commonly used FM Acronyms listing (to be published Feb 2016) – Training vendor sourcing & selection (as needed/as funded) – Updates to website on upcoming L & D events | Ongoing |
| Leadership | |
| <ul style="list-style-type: none"> • Hosting APPA leadership workshops onsite. Leadership Academy Level I completed May 2015. <ul style="list-style-type: none"> – APPA Leadership Academy (Level II) – APPA Leadership Academy (Level III) – APPA Supervisor Toolkit | <p>Feb 2016</p> <p>Mar/Apr 2016</p> <p>June 2016</p> |
| Technical | |
| <ul style="list-style-type: none"> • Working with Materials Management on RFP process to secure onsite training providers. <ul style="list-style-type: none"> – Electrical Troubleshooting & Preventive Maintenance – Pump Repair & Maintenance | <p>Mar 2016</p> <p>Apr/May 2016</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 |

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Finance/Budget:

- FY 16 Call for Divisional one-time funding completed on time; Total FM request \$2.8M; Received to date = \$1M
- Develop allocation method for training budgets;
- Holding Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams; Mid-year budget reviews with FO and BES leadership teams scheduled for January 2016;
- Reinstitute capital project budget meetings with Capital team; Meetings began October 2015; Next meetings to be scheduled for January 21, 2016;
- INTERSCOPE training and refreshers provided/completed as needed; additional training provided to Materials Management for quarterly HUB report in October – will be repeated in January 2016;
- Budget Memo and Instructions draft prepared for submission to AVC in late January 2016; Package distribution to be completed during week of January 18th; Training course on how to complete the spreadsheet under consideration.
- **NEW:** Management Process for projects managed by FO – Growing area of concern regarding budget management and tracking of expenses for larger dollar (capitalized – over \$5K) projects done by FO.

Supplemental Grant/Award Funding:

- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2016; Currently on hold due to absence of Grants Management/Procurement specialist until February 2016;

GOAL #5 Promote Good Stewardship**Objective 5.1: Promote Fiscal Responsibility**

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

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting – Ongoing Improvements

- Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2016
 - Improve org code usage – July 2015 through June 2016; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org;
 - Funding org underway with several changes made in June 2015; Additional changes are under discussion with Position Control and should be completed by September 2015. Request delayed by Position Management (Budget Office) due to bonus pay requirement and strategic increase initiative; Anticipate completion of submitted changes January 2016;
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. – **15th of each month;**
- Need for an entry-level accountant position for FY 16 to improve and monitor use of account codes across FM; Position will assist in the areas of reporting; monitoring and management; Key component for FBO organizational structure and succession planning, as well;
- **APPA Survey** – Cost data gathered and reviewed by AVC; Survey completed on time.

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

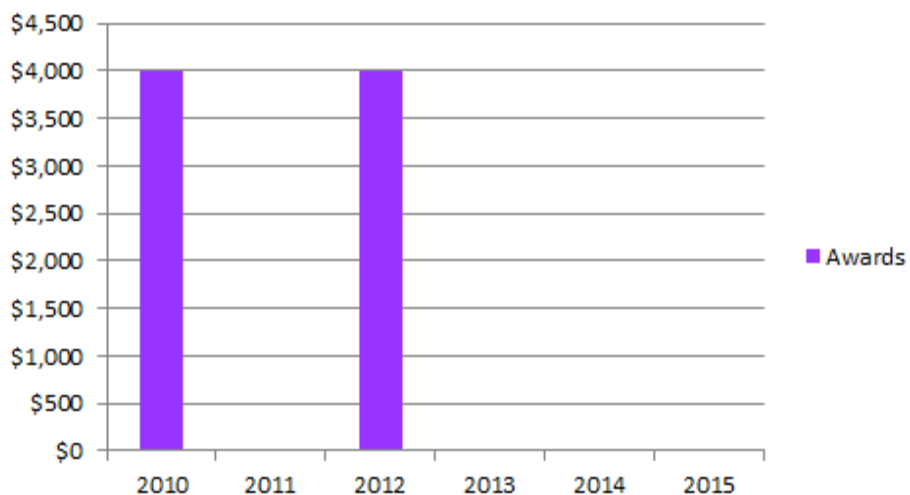
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually

Measure: Percent increase in supplemental funding

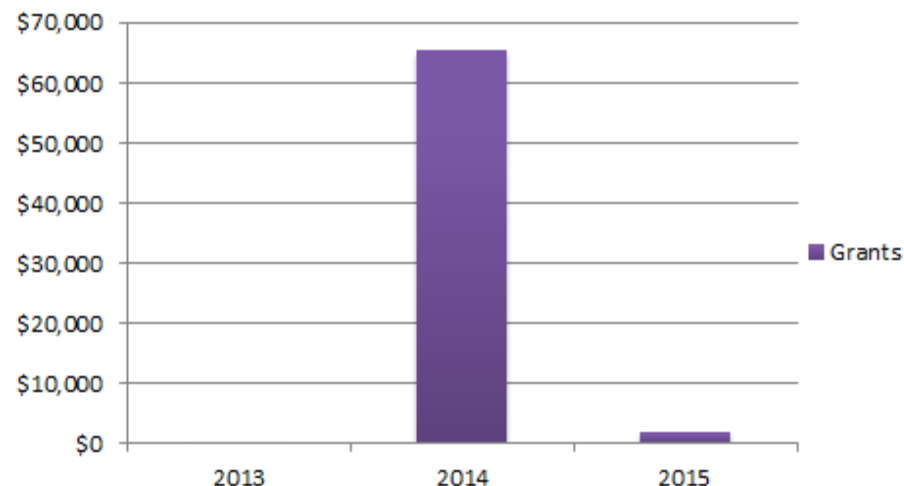
Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

Monetary Awards



Grants



ANNUAL

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

| | |
|---|---|
| <p>Tactic 5.1.3: Measure:</p> | <p>Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)</p> |
|---|---|

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

FY 15 APPA Survey:

- Cost Data collection for FY 15 survey: *Complete - December 2015*;
- Beta version available: *Tentatively* February 2016;
- Actual results available: *Tentatively* March 2016;
- Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF : *Tentatively* April 2016 SP session.

FY 15 NACUBO Key Facilities Metrics Survey:

- Data collection for FY 15 survey completed and submitted on time;
- Actual results available: *Tentatively* March 2016;
- Review of data and next step determination is outstanding; AVC guidance needed.

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)

ACTION PLAN

- Actions Completed
 - (EDA-EI) Equipment Inventory process implemented throughout entire unit (12/2015)
- Actions Planned
 - Research compostable PPE's and Trash bags at Center City (2/2016)
 - Complete logistics portion of Supply Chain Management Project in McEniry (4/2016)
 - Complete building needs assessment for floor care equipment (2/2016)
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (ongoing)
 - Submit Second Draft of 5-Year BES&R Plan to Phil Jones (2/2016)
 - Install COED and Kennedy laundry rooms (4/2016)
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (ongoing)

GOAL #5 – Promote Good Stewardship**Objective: 5.1: Promote Fiscal Responsibility****Tactic: 5.1.5:** Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions**Tactic: 5.1.6:** Achieve total Landscape cost/acre \pm 5% of APPA Average for Peer Institutions**Tactic: 5.1.7:** All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year**ACTION PLAN****Actions Planned**

1. Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not to Charge) by July 2015. Rough draft completed; working with Dr. Jay Raja.
2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
3. Tracking Labor Services bi-weekly with separate shop goals.
4. Active participants in upcoming Process for Reengineering Project.

Actions Completed

1. Realigned the labor services positions to ensure maximum utilization of resources by Jan 2015.

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

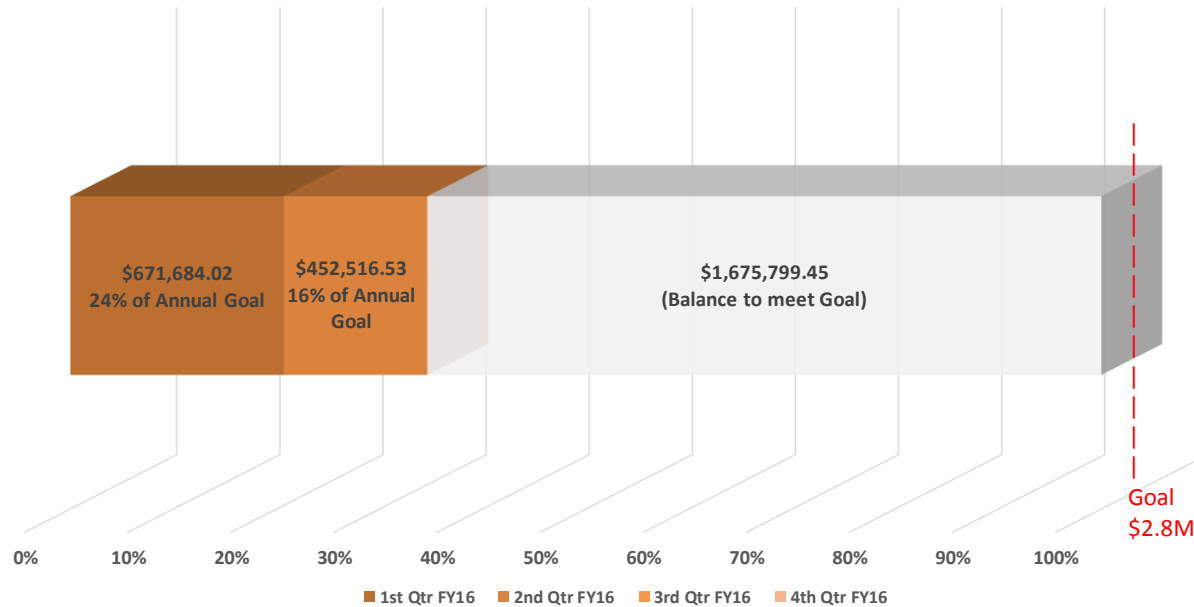
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



\$1,124,200.55

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2016

Objective 5.2: Develop a Sustainable Campus

Tactic 5.2.1

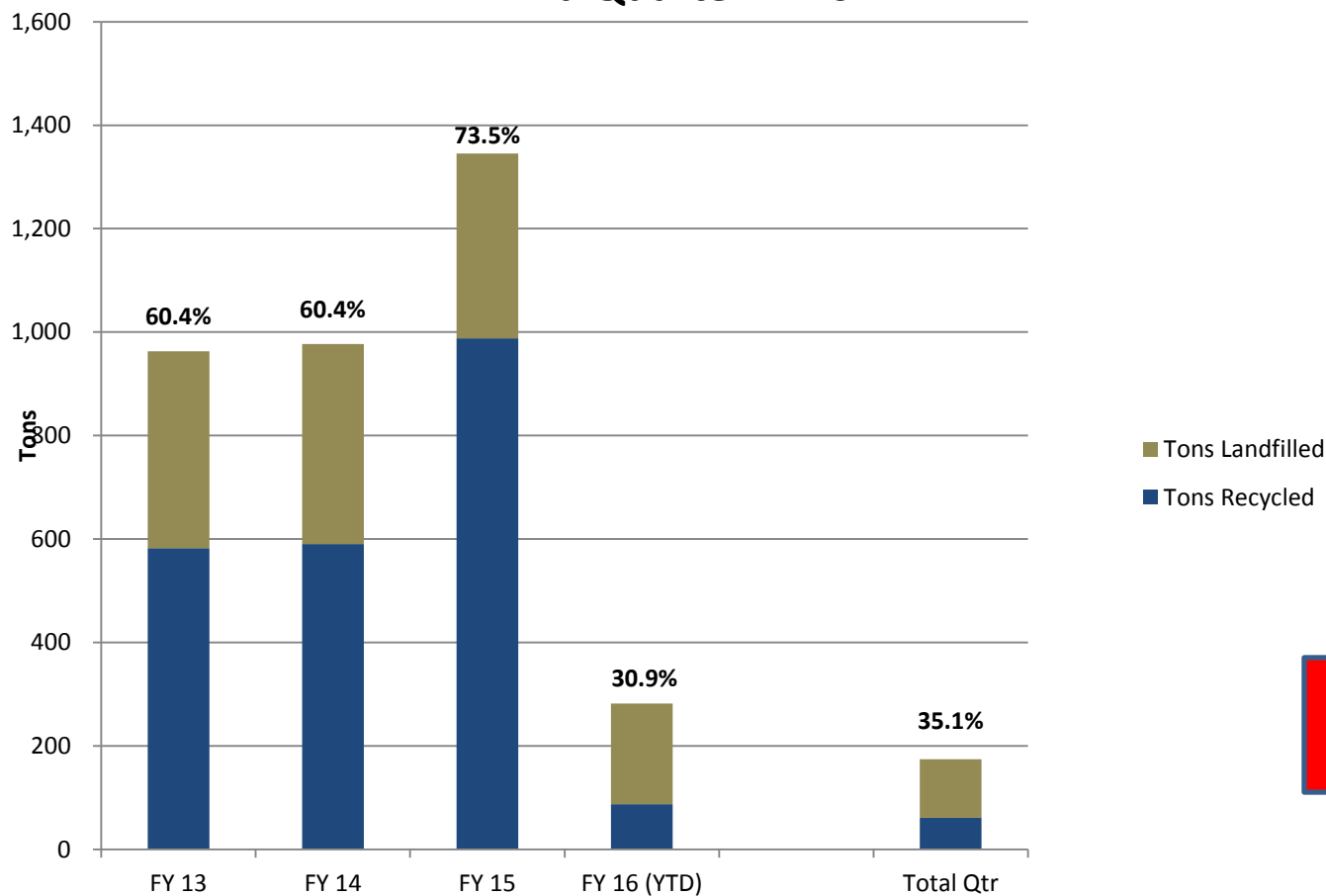
Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

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

Balanced Scorecard Category: Innovation and Learning Perspective



Construction & Demolition Debris Diversion 2nd Quarter FY16



STATUS:
2nd Qtr

Facilities Management Strategic Planning Session – Second Quarter FY 2016



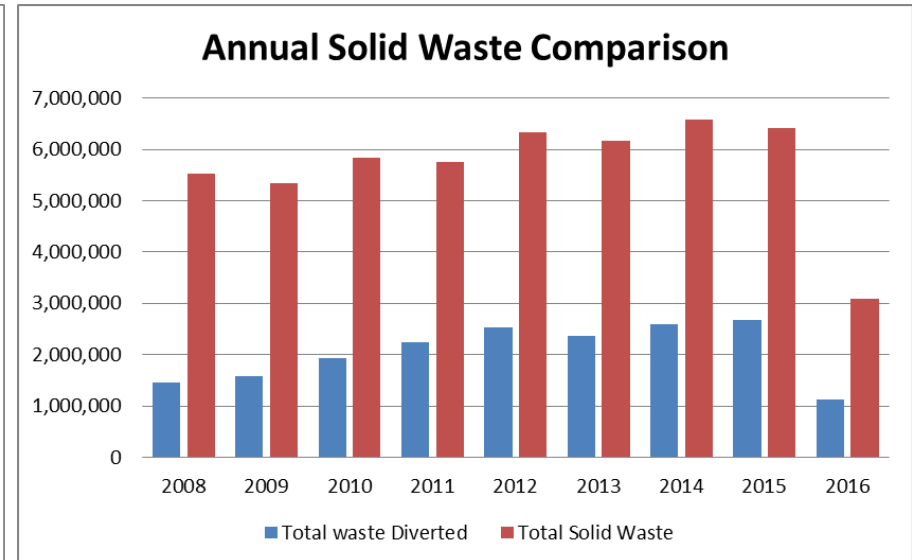
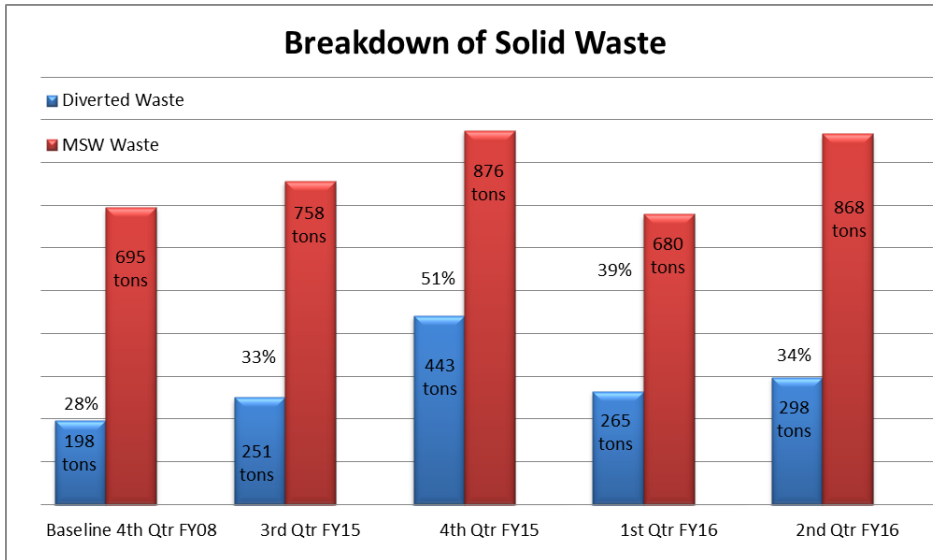
Tactic 5.2.2

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

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



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



GOAL #5 – Promote Good Stewardship-

Objective 5.2

Develop a Sustainable Campus

Objective 5.2.2

Increase Percent of Solid Waste diversion on Campus to 45% by 2018

Lead
Recycling

ACTION PLAN

• Waste Reduction and Recycling

Actions Complete

- Continuing work with HRL to increase recycling rates in residence halls.
- Continuing training new C&D Coordinator.
- Football season was completed (average ~76% recycling from stadium).
- Trash hauling driver was changed; working on getting him trained and on board.

3rd Quarter Actions Planned

- Continue planning building for hazardous/universal waste storage (with Grounds and Design)
- Increase social media presence – Twitter, Facebook, Instagram.
- Plan for Spring Campus Cleanup, Tree Planting, and Earth Day activities. (with Grounds and Sustainability)
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream – ON HOLD (space constraints and scheduling)
- Conduct waste audits in housing quads where there are no recycling bins (continue working with HRL to pair up all trash and recycling bins) – ON HOLD (space constraints and scheduling)
- Departmental training - waste audits on our Recycling roll-offs at ReCommunity (February 8 and 15)
- Increase education component – beginning with Chartwell’s dining halls (SoVi and Crown Commons).

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Assess additional actions for achieving STARS Silver (completed – documentation actions only).**
- **Uploading information to STARS Website with help from Planning Temp**
- **Submit for rating by end of fiscal year (ideally April for Earth Month).**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

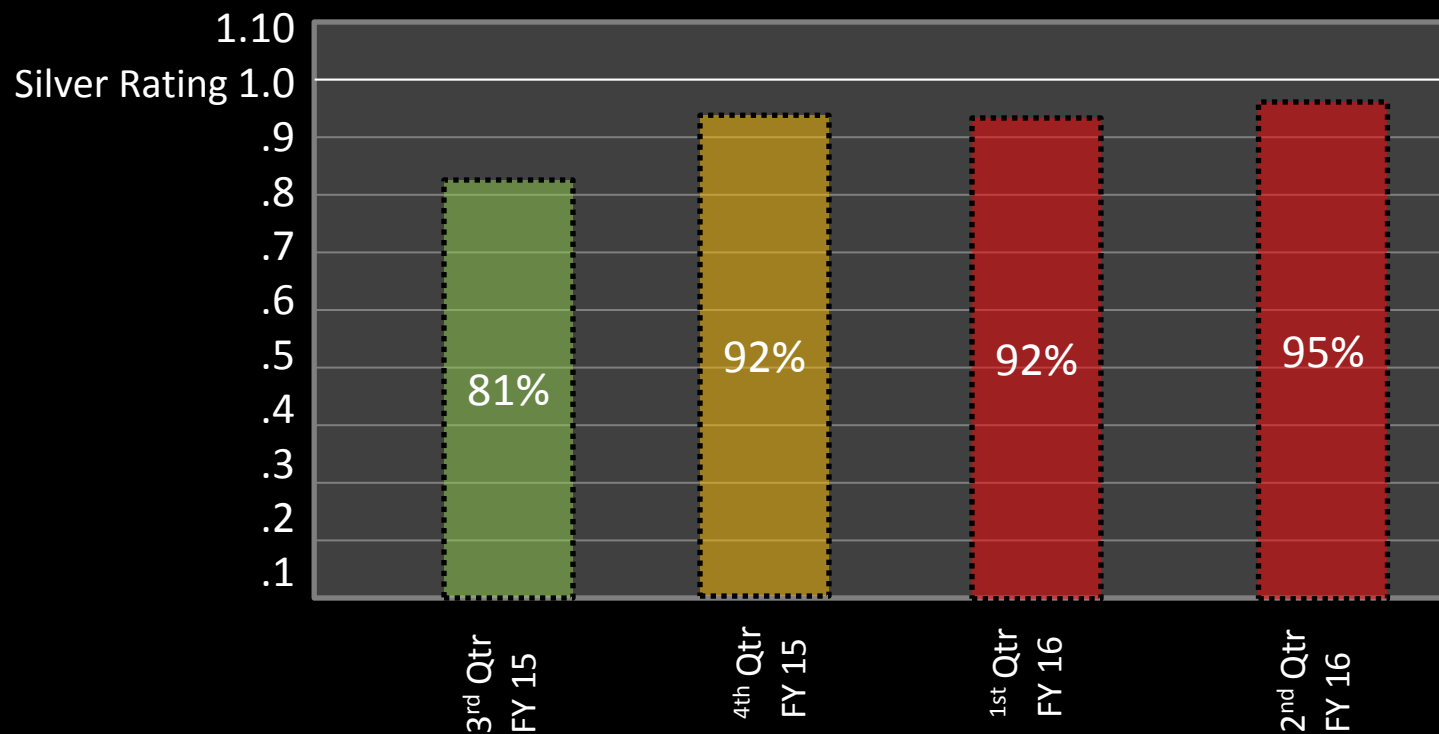
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 16.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

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 16.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Apply 7 themes for implementing best practices:**
 1. **Assessment (March-April STARS Submission)**
 2. **Faculty Development for Curriculum (May Workshop for Faculty)**
 3. **Campus as a Laboratory (CGI: \$28k for studies underway, supplies)**
 4. **Outreach Communications (Website development; CGI: \$5k for signs)**
 5. **Design Standards**
 - **CGI: biking, water, recycling; completed \$72k; \$20k underway; \$34k new in Dec.)**
 - **CFAT: \$64k for car-charging stations**
 6. **Standard Operating Procedures (CFAT \$15k and CGI \$15k for EV monitoring)**
 7. **Purchasing Practices (Need to start new Task Force)**
- **Estimated 63% of best practices implemented by (>60% in July 2015; COMPLETED):**
 - **Continue: In-house certifications (e.g. Green Office)**
 - **Upgraded: Sustainability Website based on 7 Themes**

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2016

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

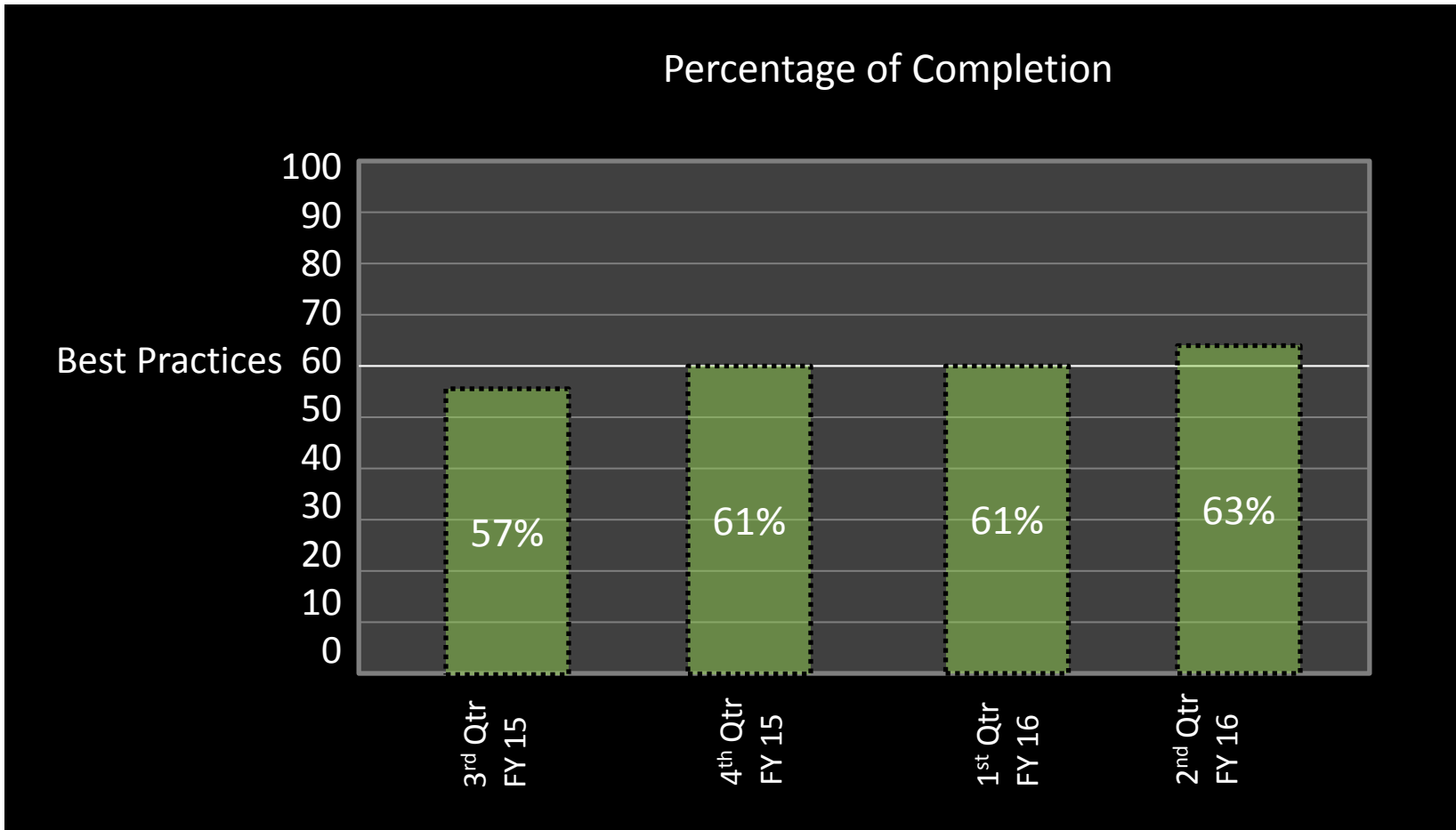
Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 16.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

Lead
Facilities
Planning



GOAL #5 – Promote Good Stewardship

Objective 5.3

Conserve Natural Resources

Tactics 5.3.1

Decrease Energy Usage 30% by FY2015

Lead
Capital

**ACTIONS TO REDUCE CAMPUS
ENERGY USAGE**

- Continue retro-commissioning program
 - Cameron, McEniry, & Smith started
- Exterior Lighting upgrades to LED
 - Street light replacements - Complete
 - Replacing building mounted HID's
 - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 40% reduction by 2025

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

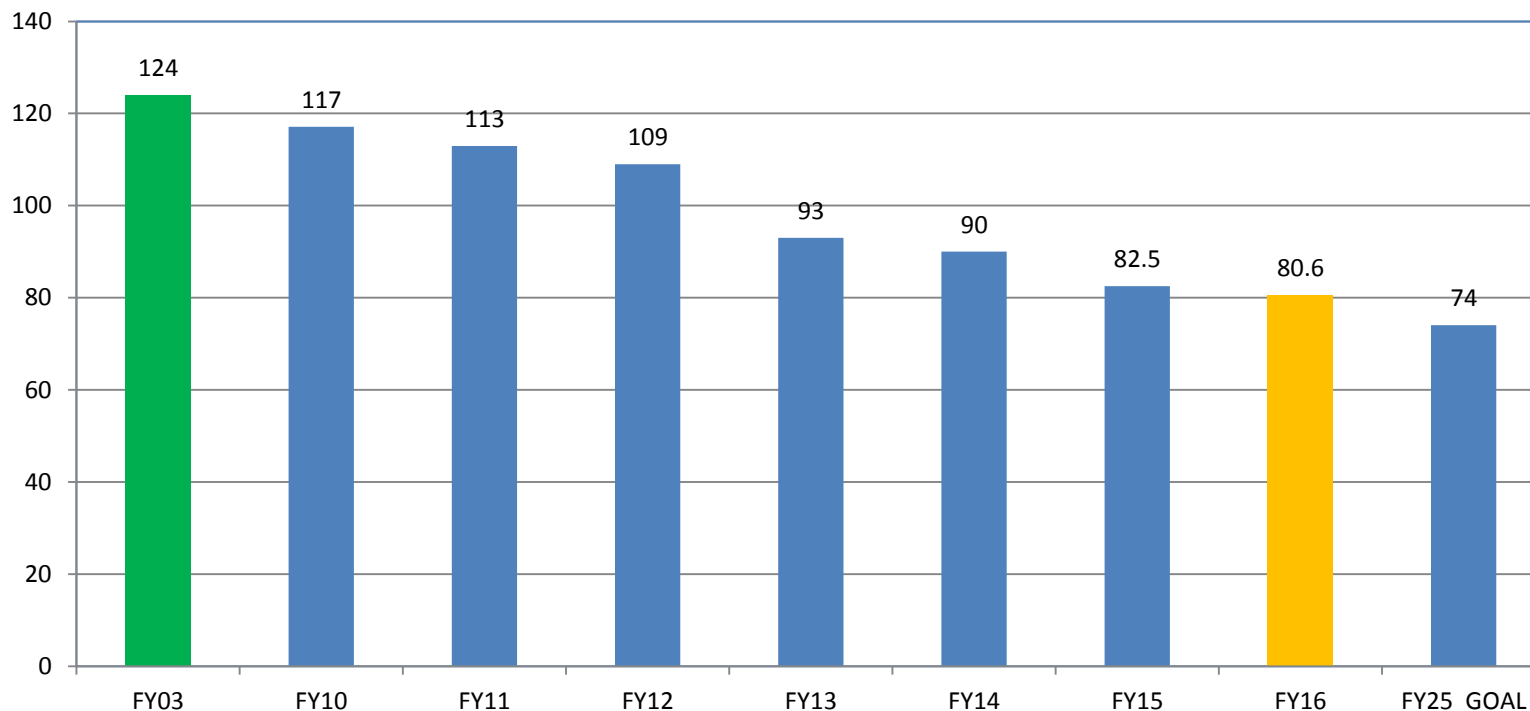
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 35%
System Goal of 40% by
2025

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship

**Lead
Capital**

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

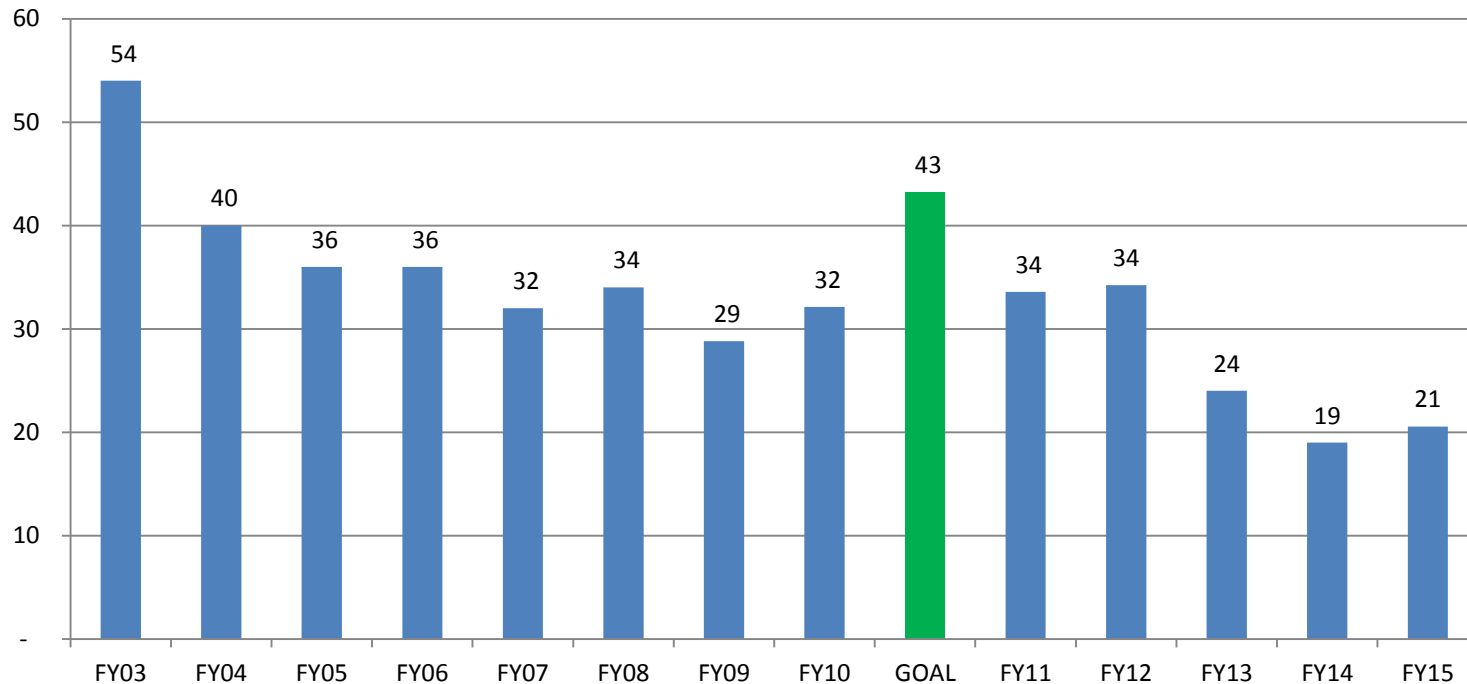
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF

STATUS



GOAL #5 – Promote Good Stewardship**Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation****Tactic 5.4.1:** 12% HUB participation on 80% of Capital Projects**Tactic 5.4.2:** 5% African American Participation on Capital Projects**ACTION PLAN**

- Establish project specific participation goals for single prime projects
 - 20% goal for Elm, Maple, Pine Renovation
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded on CMAR projects
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO/DOA to ensure HUB information is accurately reflected in InterscopePlus
- Work with SCO to revise new Prequalification Policy
- Conduct Construction *Meet & Greet* March 10, 2016

GOAL #5 – Promote Good Stewardship

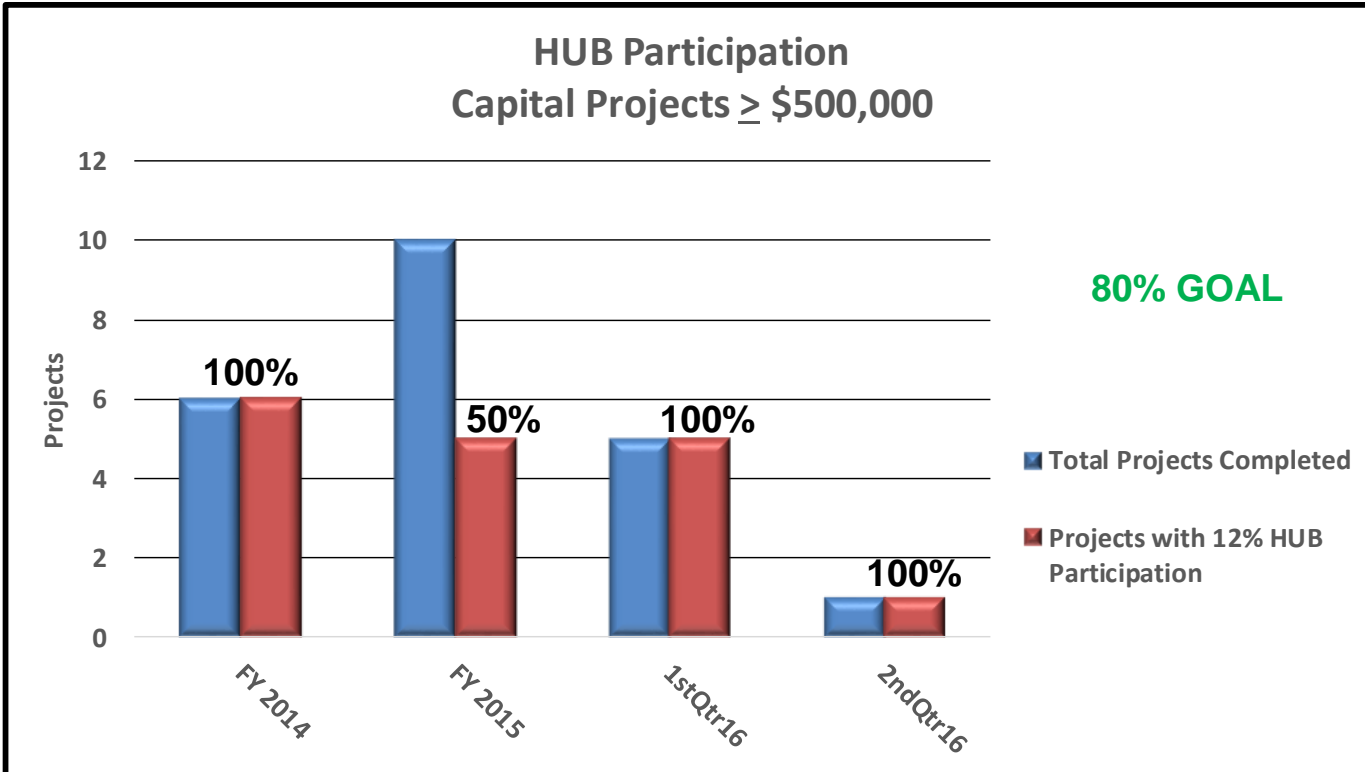
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



Belk Gymnasium
Renovation – 27%

STATUS

GOAL #5 – Promote Good Stewardship

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

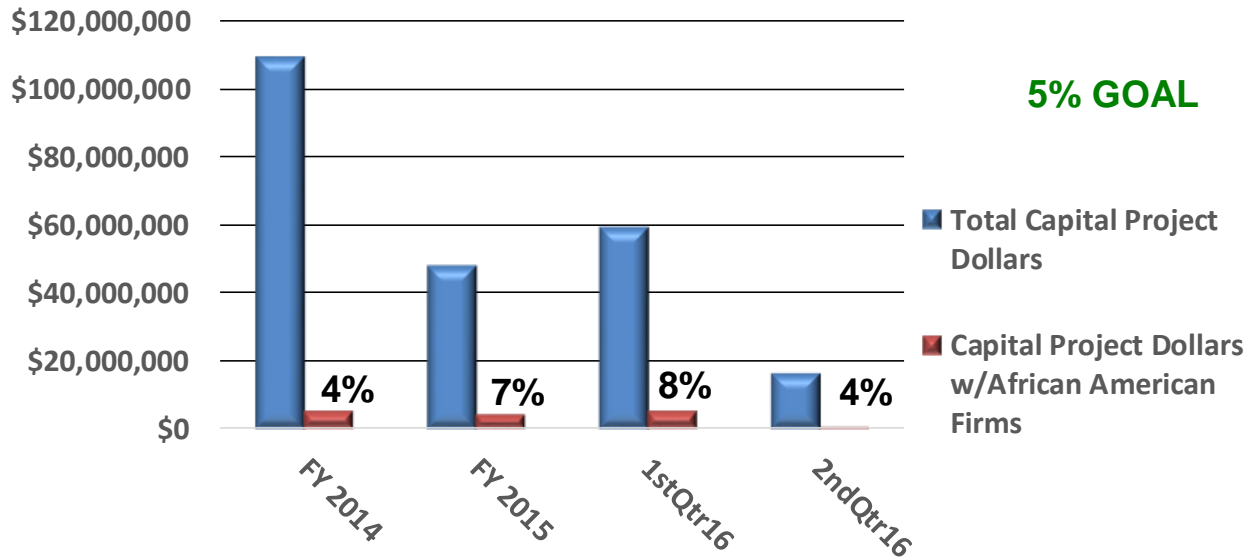
Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

**Capital Projects
African American Participation**



Belk Gymnasium
Renovation – 3.6% AA

STATUS

GOAL #5 – Promote Good Stewardship

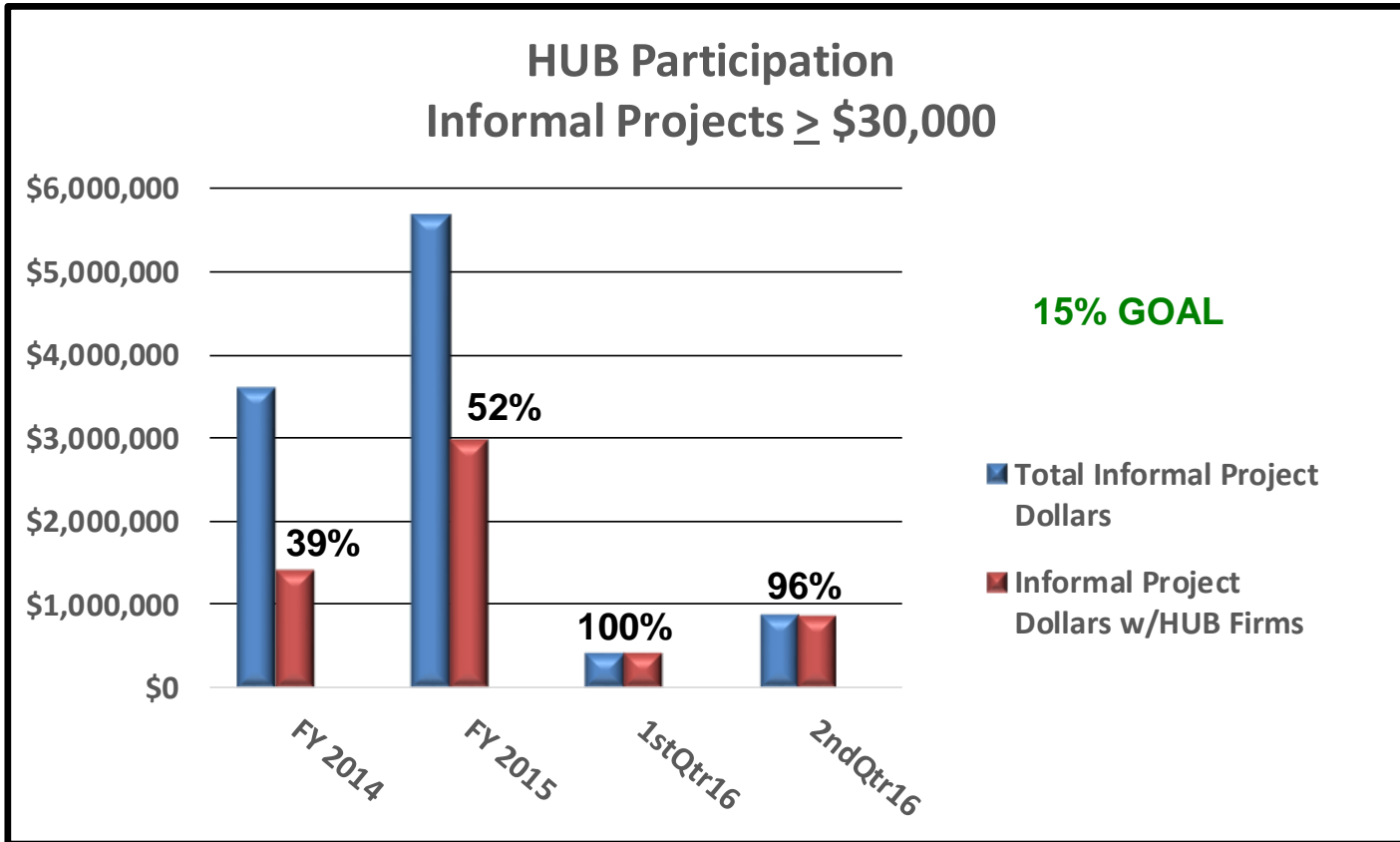
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

Lead -
Design
Services

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

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

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors & vendors via ARCHIBUS Strategic Quarterly Reports.

ONGOING IMPROVEMENTS

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

- Design Team continue to review and discuss HUB contractors and vendors at our Design Services weekly meetings.

| | | | |
|--------------------------------------|-------------------------|---------------------------|------------------------------|
| 2 nd Q Status 41.7% | Annual Goal 13.0% | Annual Status 39.2% | Lead - Design Services |
|--------------------------------------|-------------------------|---------------------------|------------------------------|

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

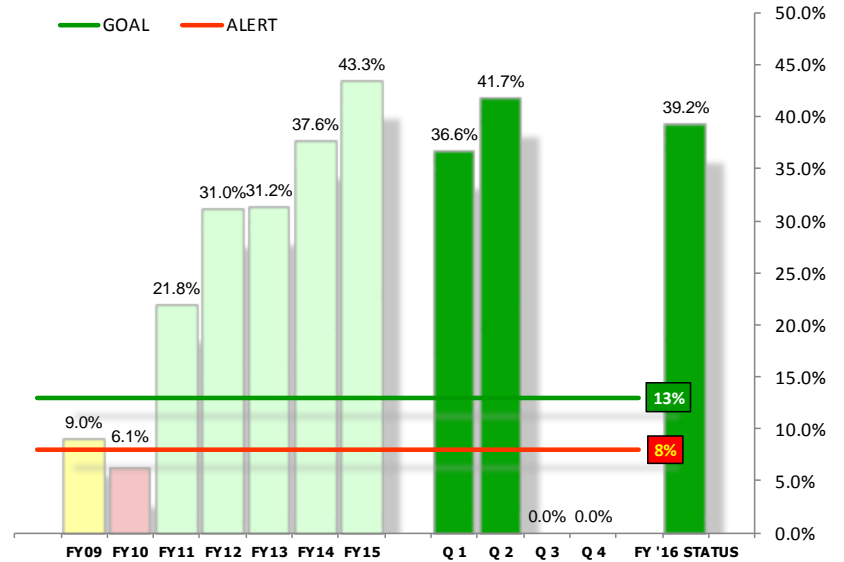
Balanced Scorecard Category: Internal Business Process

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 |
|----------------------|------------------------------|---------------------|--------------|
| FY09 | \$ 996,756 | \$ 89,479 | 9.0% |
| FY10 | \$ 1,452,202 | \$ 88,703 | 6.1% |
| FY11 | \$ 3,924,102 | \$ 857,125 | 21.8% |
| FY12 | \$ 2,878,027 | \$ 891,793 | 31.0% |
| FY13 | \$ 2,891,003 | \$ 902,065 | 31.2% |
| FY14 | \$ 1,863,533 | \$ 700,603 | 37.6% |
| FY15 | \$ 2,655,882 | \$ 1,150,394 | 43.3% |
| Q 1 | \$ 455,156 | \$ 166,732 | 36.6% |
| Q 2 | \$ 472,858 | \$ 197,068 | 41.7% |
| Q 3 | \$ - | \$ - | 0.0% |
| Q 4 | \$ - | \$ - | 0.0% |
| FY '16 STATUS | \$ 928,014 | \$ 363,800 | 39.2% |

13% Overall HUB Participation – Summary Graph



| | | | |
|-------------------------------------|------------------------|--------------------------|------------------------------|
| 2 nd Q Status 6.3% | Annual Goal 3.0% | Annual Status 3.3% | Lead - Design Services |
|-------------------------------------|------------------------|--------------------------|------------------------------|

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

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

| QUARTERLY REVIEW | Value of Contracts under 30K | African Am. Contribution | African Am. Total |
|--------------------|------------------------------|--------------------------|-------------------|
| FY09 | \$ 996,756 | \$ 40,894 | 4.1% |
| FY10 | \$ 1,452,202 | \$ 73,987 | 5.1% |
| FY11 | \$ 3,924,102 | \$ 77,377 | 2.0% |
| FY12 | \$ 2,878,027 | \$ 46,475 | 1.6% |
| FY13 | \$ 2,891,003 | \$ 115,219 | 4.0% |
| FY14 | \$ 1,863,533 | \$ 103,513 | 5.6% |
| FY15 | \$ 2,655,882 | \$ 46,795 | 1.8% |
| Q 1 | \$ 455,156 | \$ 1,250 | 0.3% |
| Q 2 | \$ 472,858 | \$ 29,820 | 6.3% |
| Q 3 | \$ - | \$ - | 0.0% |
| Q 4 | \$ - | \$ - | 0.0% |
| FY16 STATUS | \$ 928,014 | \$ 31,070 | 3.3% |

3% African American Participation – Summary Graph

