



Strategic Planning Session

**Second Quarter – Fiscal Year 2018
October – December 2017**



...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



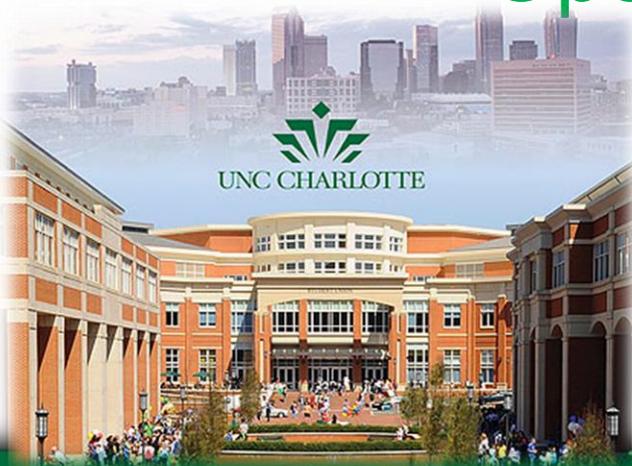
UNC CHARLOTTE

"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 (on-going)
2. Working with FIS on the “work order reinvention project”
3. Working w consultant to discuss WO process and materials acquisition strategies

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

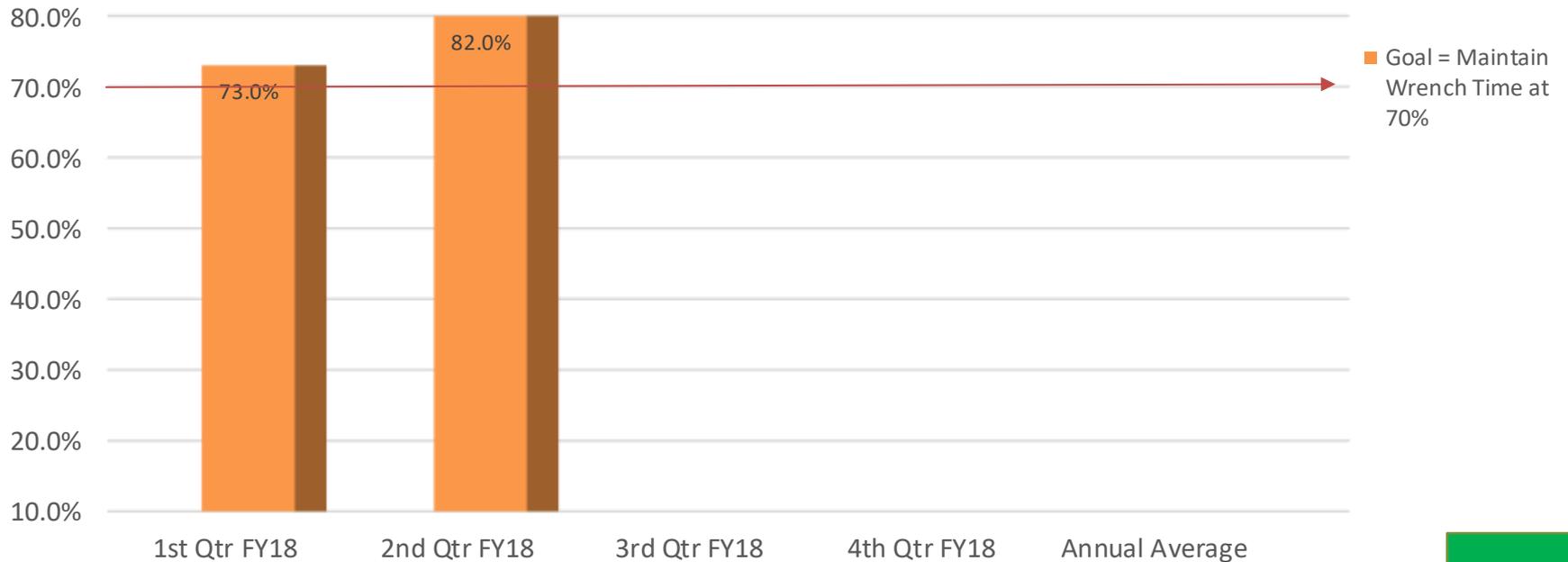
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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
2nd Quarter

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

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

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

ACTION PLAN

Actions Planned

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

Actions Completed

1. Met with vendor to discuss the work order material ordering process
2. Assigned additional approvers to help expedite the process.
3. Streamlined stock inventory
4. Implemented email notification process for SDI orders

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

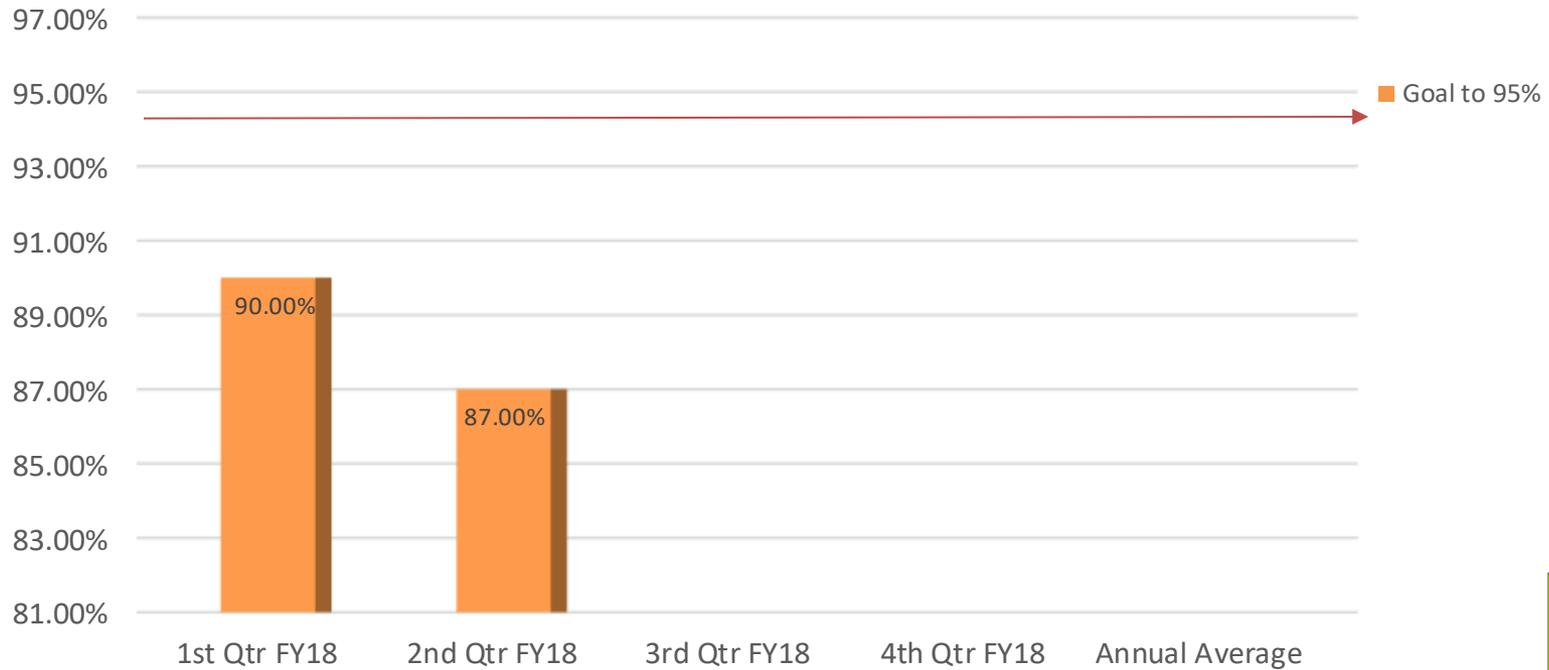
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Non-stock on-time Delivery



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

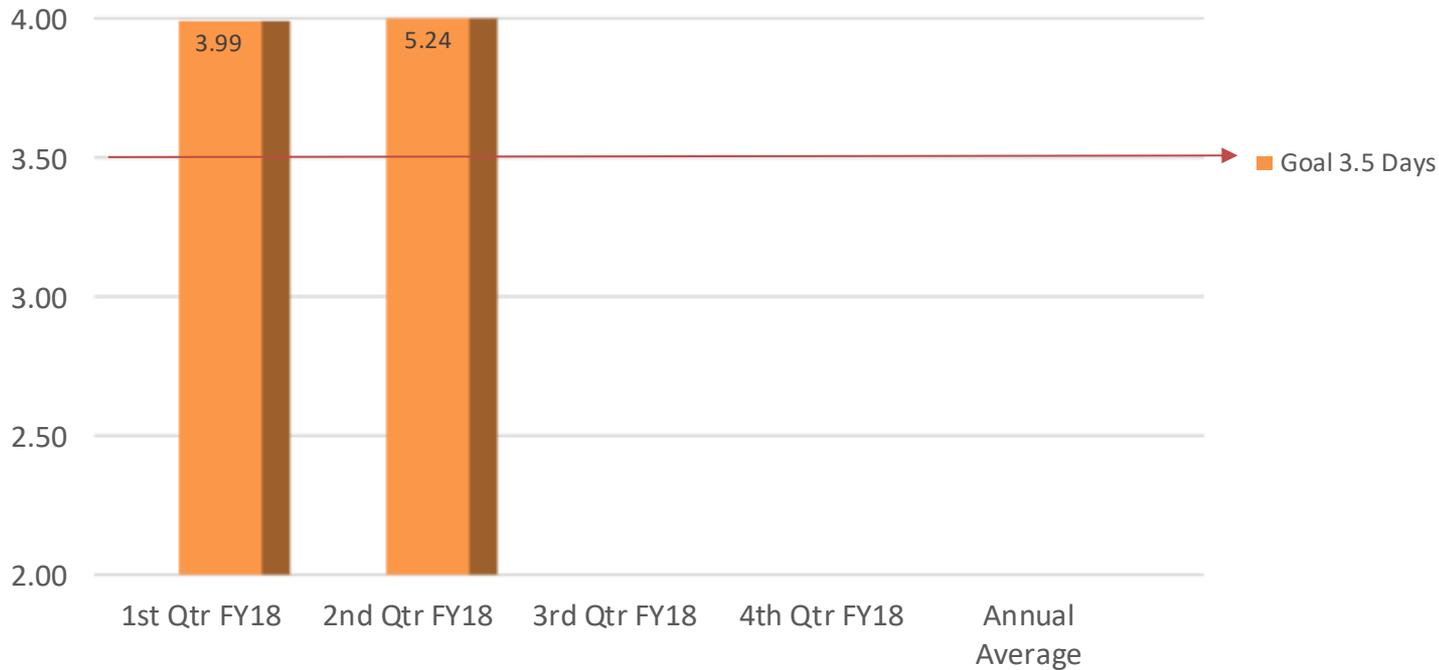
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Reduce Average Non-stock Requisition to Receipt Time



STATUS
2nd Quarter

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

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

ACTION PLAN

Actions Planned

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

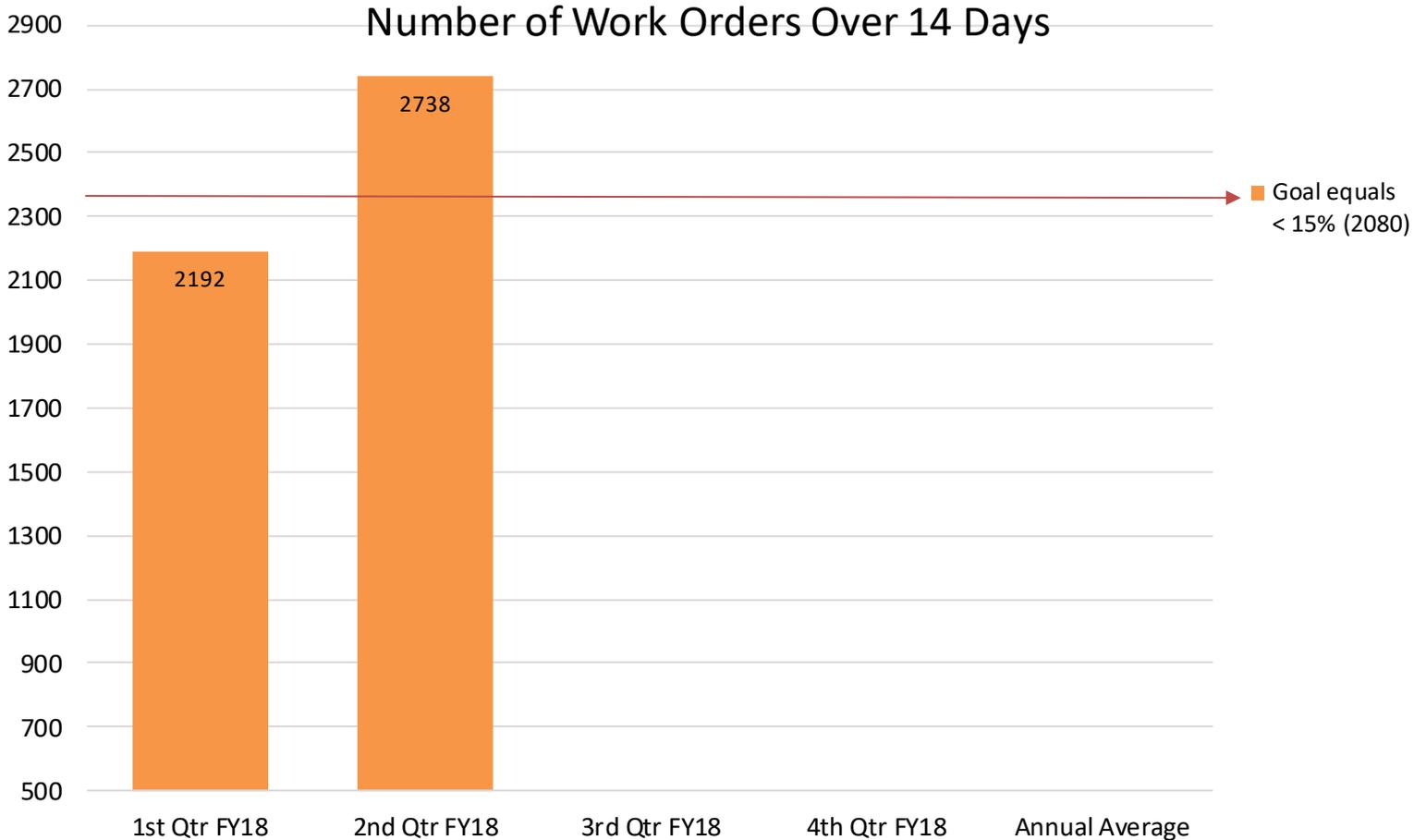
Objective: 1.3: Improve Work Request Process

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

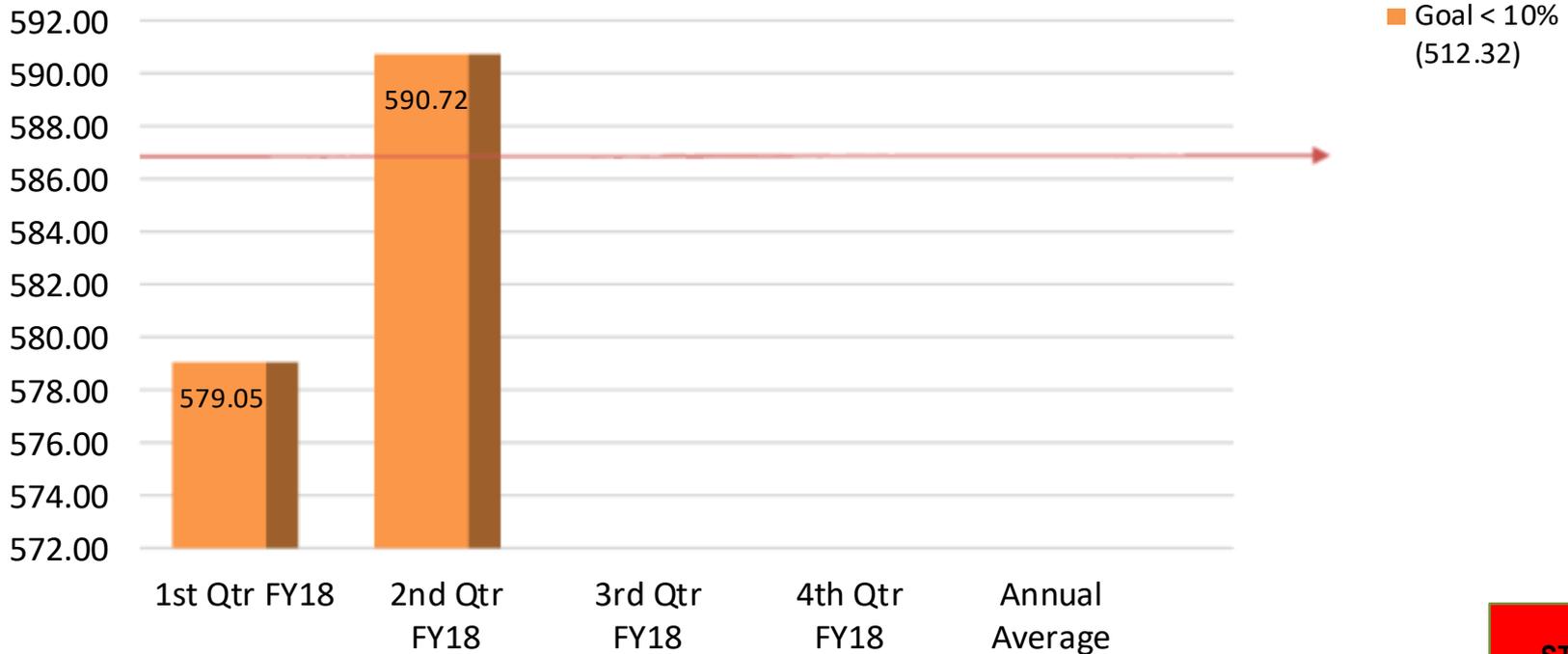
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STATUS
2nd Quarter

GOAL #1 – Continuously Improve Maintenance and Operations

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

Lead
BES

ACTION PLAN

- **Actions Completed**
 - Completed 2 Contributing Technician Hiring Pool Cycles
 - High Performance Team Cleaning (HPTC) Bootcamp – Center City and Grigg Zone
 - Placed Lead Technician Keys into Key Boxes with Current Key Slot Openings
- **Actions Planned**
 - Implement new APPA Appearance forms into quarterly audits (3/2018)
 - Implement High Performance Team Cleaning in all Academic and Administrative buildings (3/2022)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (Ongoing)

Facilities Management Strategic Planning Session – Second Quarter FY 2018

Lead
BES

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

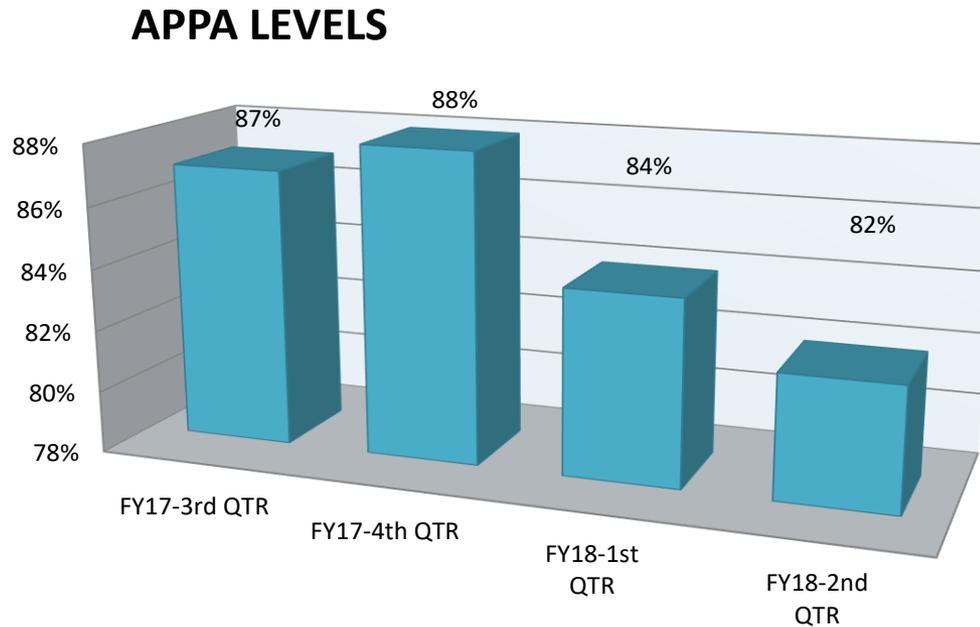
Objective: 1.4: Improve BES Processes

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

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

Lead: Building Environmental Services

Balanced Scorecard Category: Customer Perspective



Percentage = 82%

STATUS

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

ACTION PLAN

Actions Planned

1. Realign PM Program; targeting specific areas Fire Systems, High Voltage, Zone 4/Dining Services (On going)
2. Continue expansion of PM Program; Work with key customers – Auxiliary Services (March 2018 completion)
3. Using the FIN Project to perform PM's, collect asset data and perform select retro commissioning activities (on-going)
4. FCAP will continue to identify and prioritize equipment conditions and needs, for replacement; This information is used to support CRDM projects. (on-going)

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Restructure the ARCHIBUS PM Equipment Manager module.
3. Completed the conversation of old PM to new PM module (Oct 2017)
4. Hired BIM Manager – (Oct 2017)

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

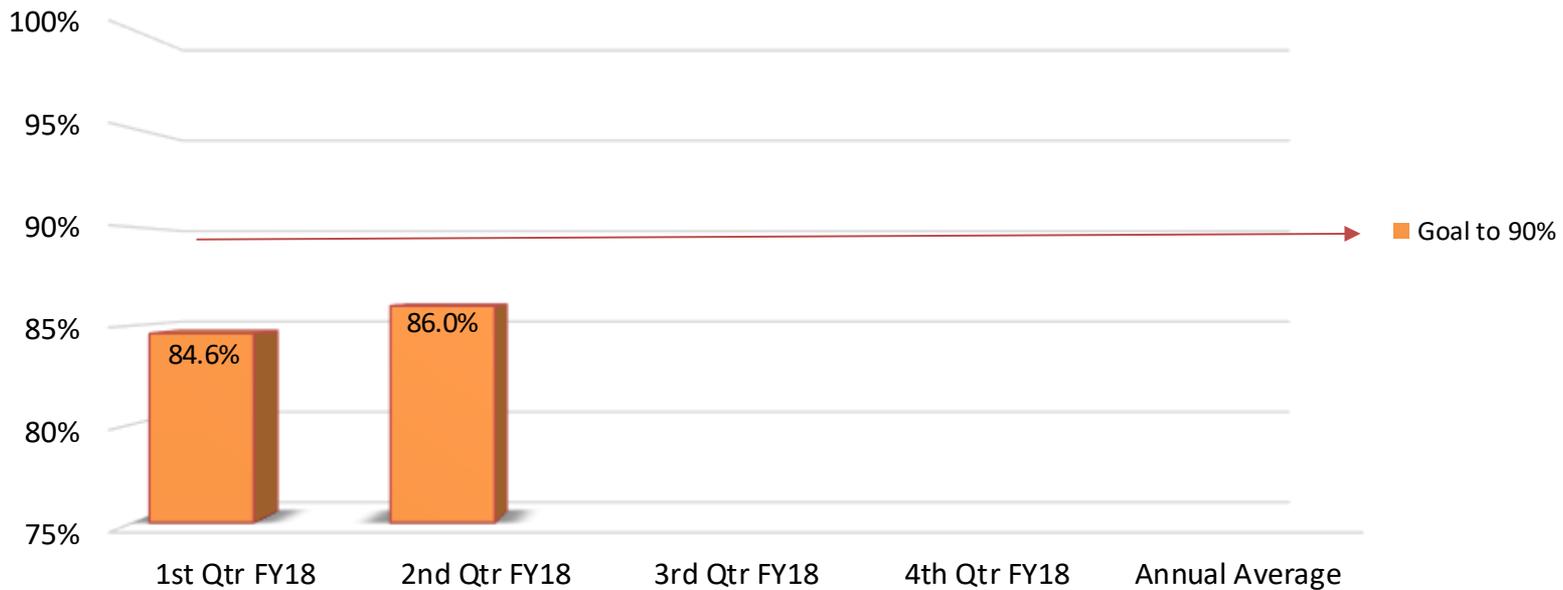
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

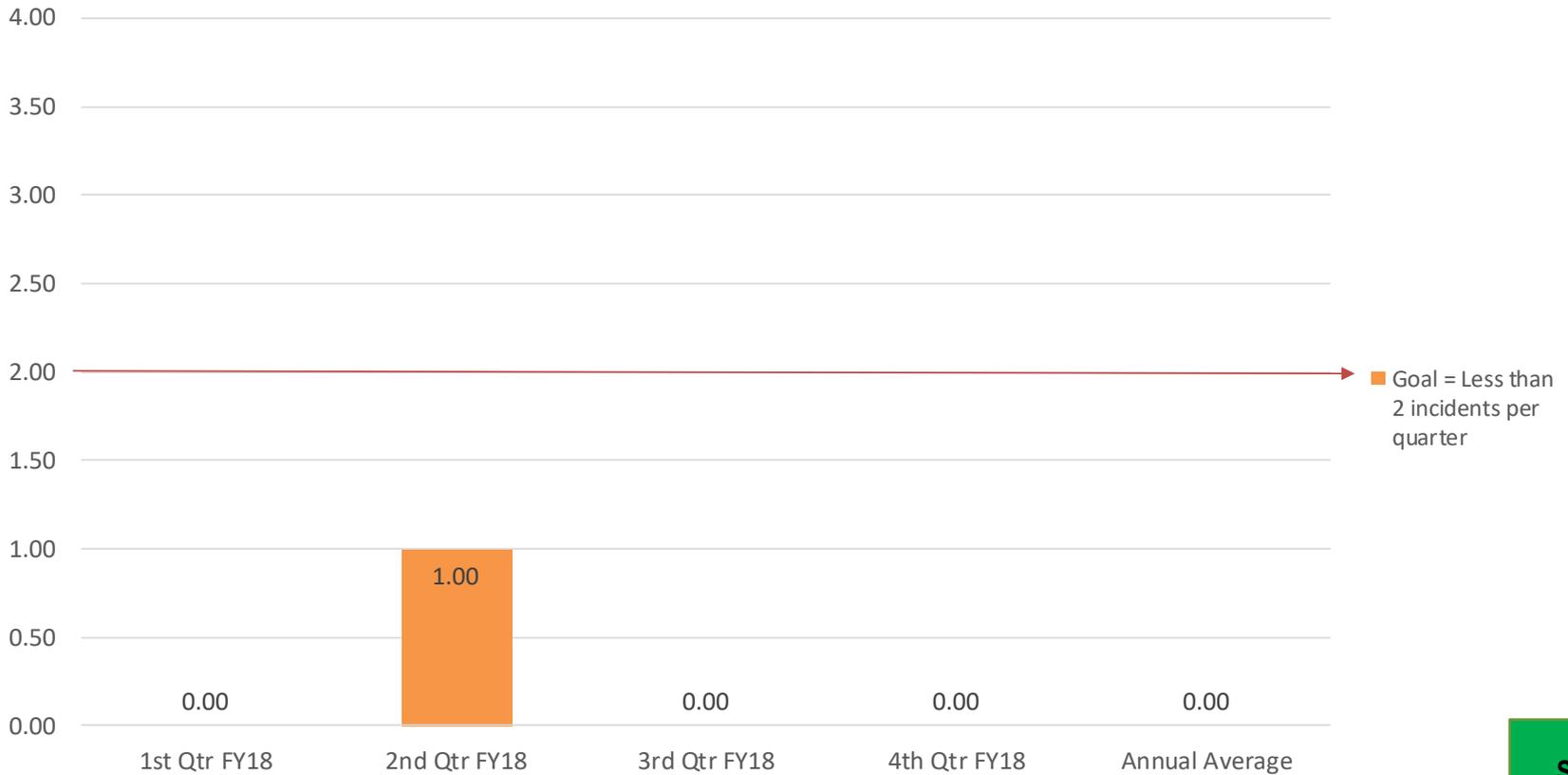
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

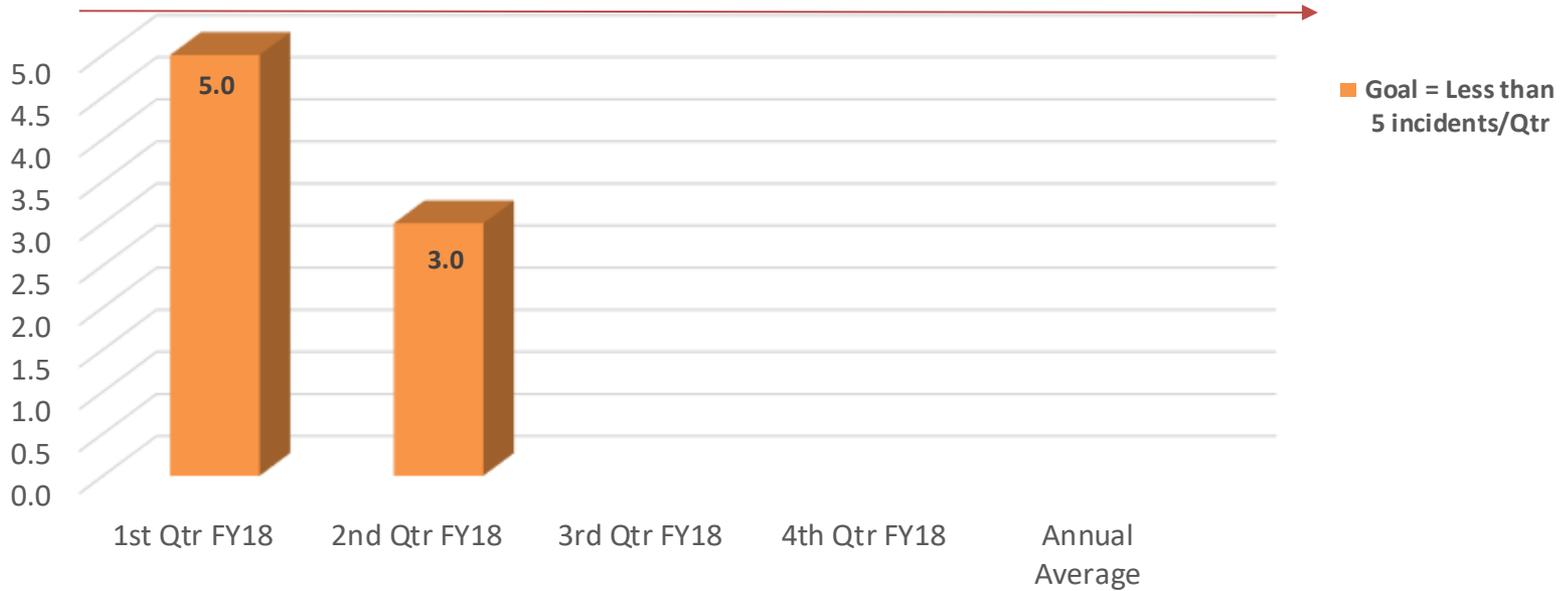
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

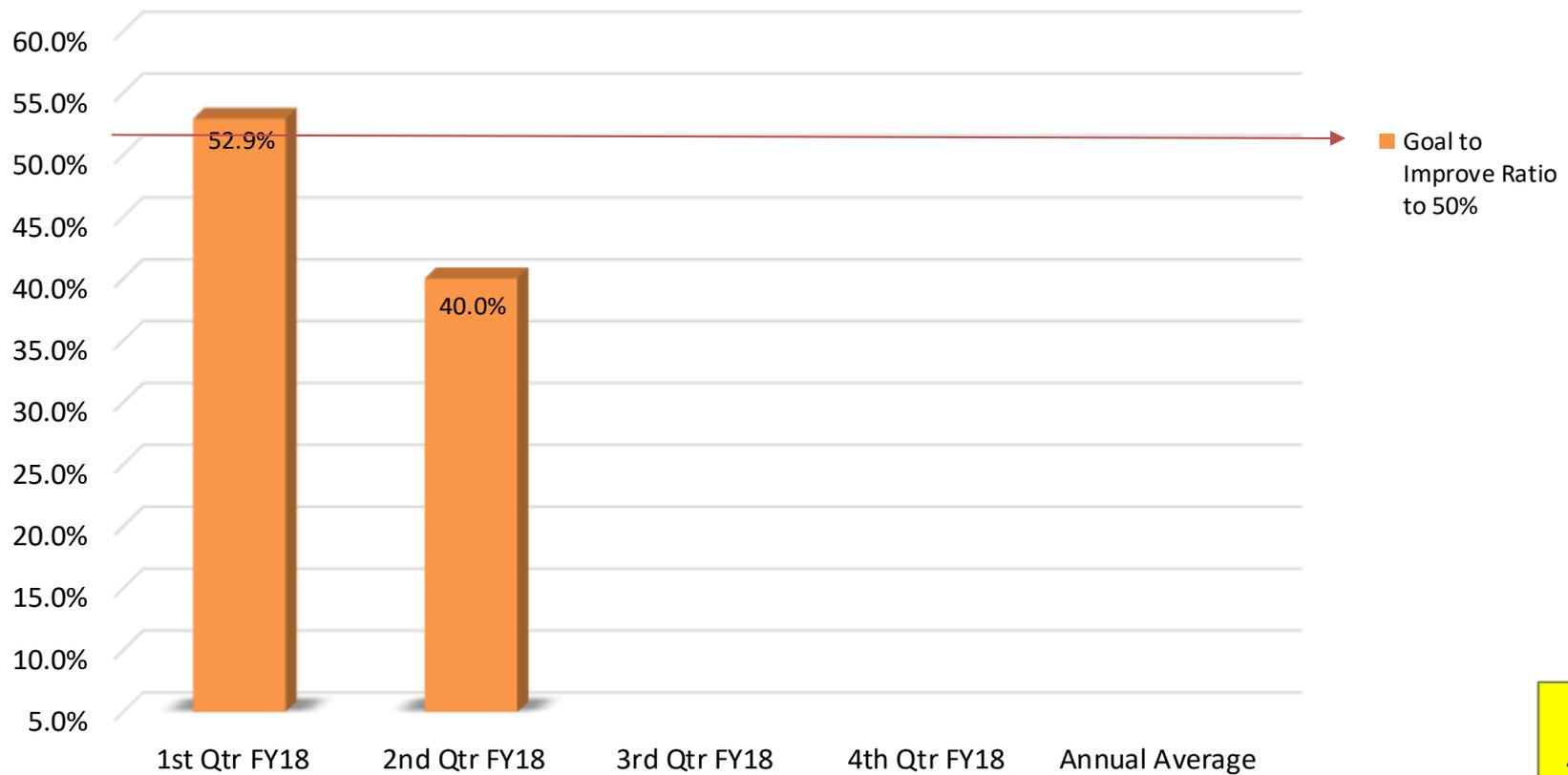
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

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
2nd Quarter



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"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 – FY18

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

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Lead
FIS

ACTION PLAN

Actions Planned:

1. Hire GIS Survey Technician and Access Controls Technician positions by April 30, 2018.
2. Complete Work Order Reinvention and testing by March 30, 2018.
3. Complete Development and User Testing Phases for the Real Estate module by April 15, 2018.
4. Complete Map Updates by Feb 28, 2018.
5. Complete FIN Stack Energy Report by Mar 30, 2018.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Completed:

1. Hired Nick Occhipinti for GIS Developer position; start date was Nov 27, 2017.
2. Completed the BINS Mobile App and testing for Recycling inventory process.
3. Began Work Order Reinvention Improvement project meetings.
4. Completed Classroom Support Asset tracking mobile application.
5. Completed ARCHIBUS views for Refrigeration Compliance Phase2.
6. Completed Asbestos Updates.
7. Completed roll out of new FY18 PCs and updates to Active Directory.

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

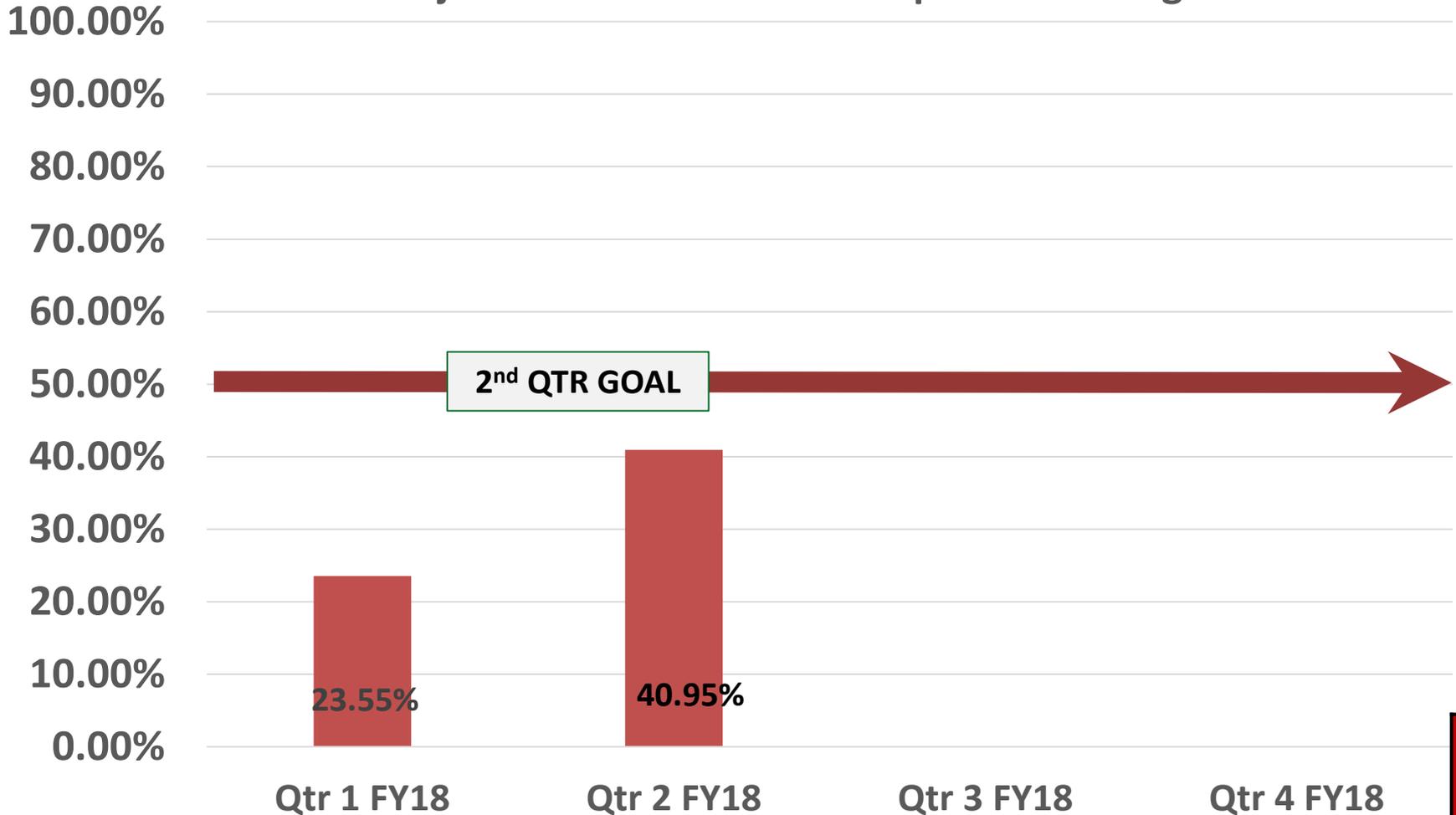
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

Balanced Scorecard Category: Internal Business Processes

FIS Project Task Cumulative Completion Average



STATUS

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

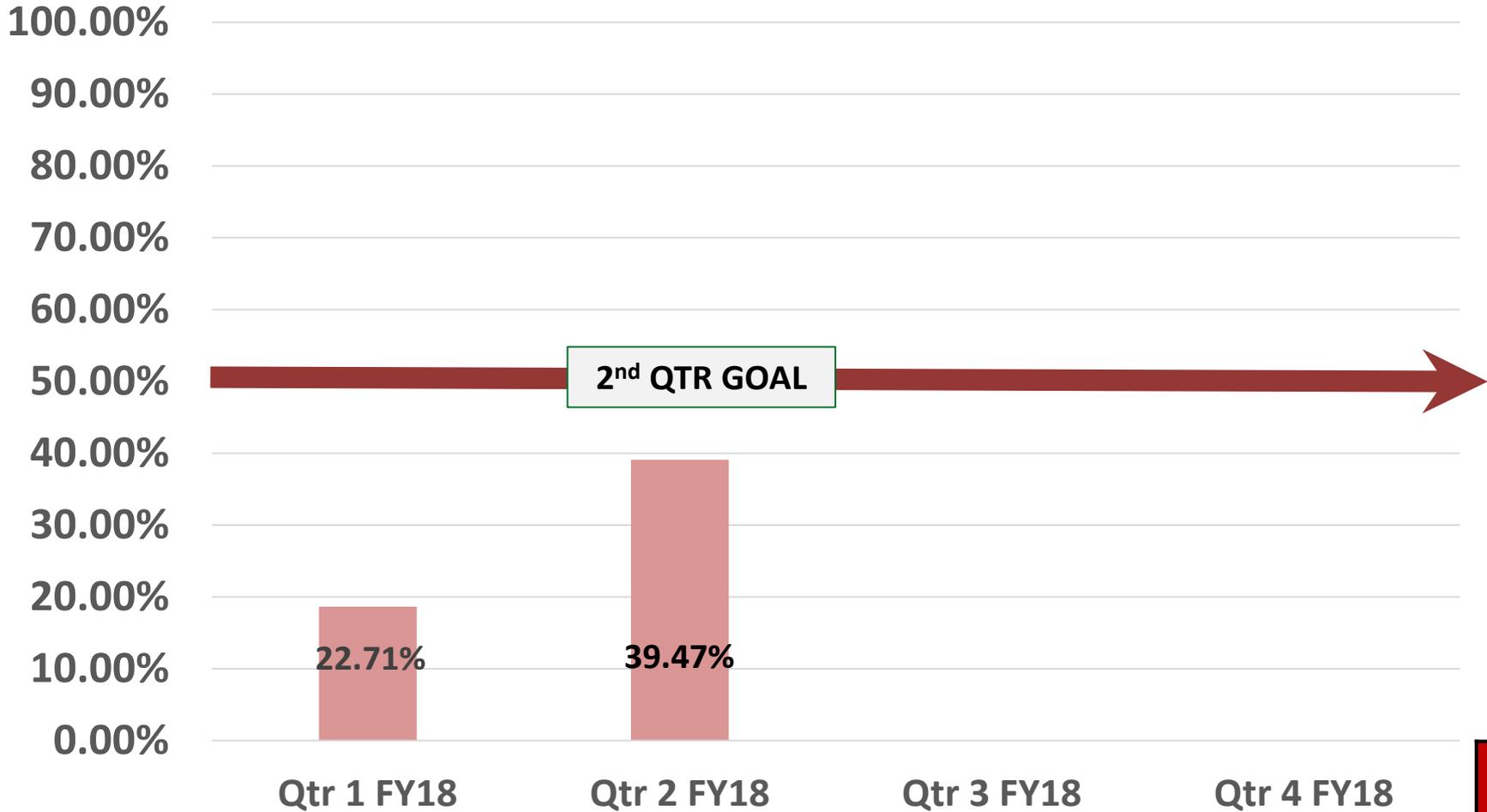
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

Balanced Scorecard Category: Internal Business Processes

FIS Weighted Project Average Completion



STATUS

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Lead FIS

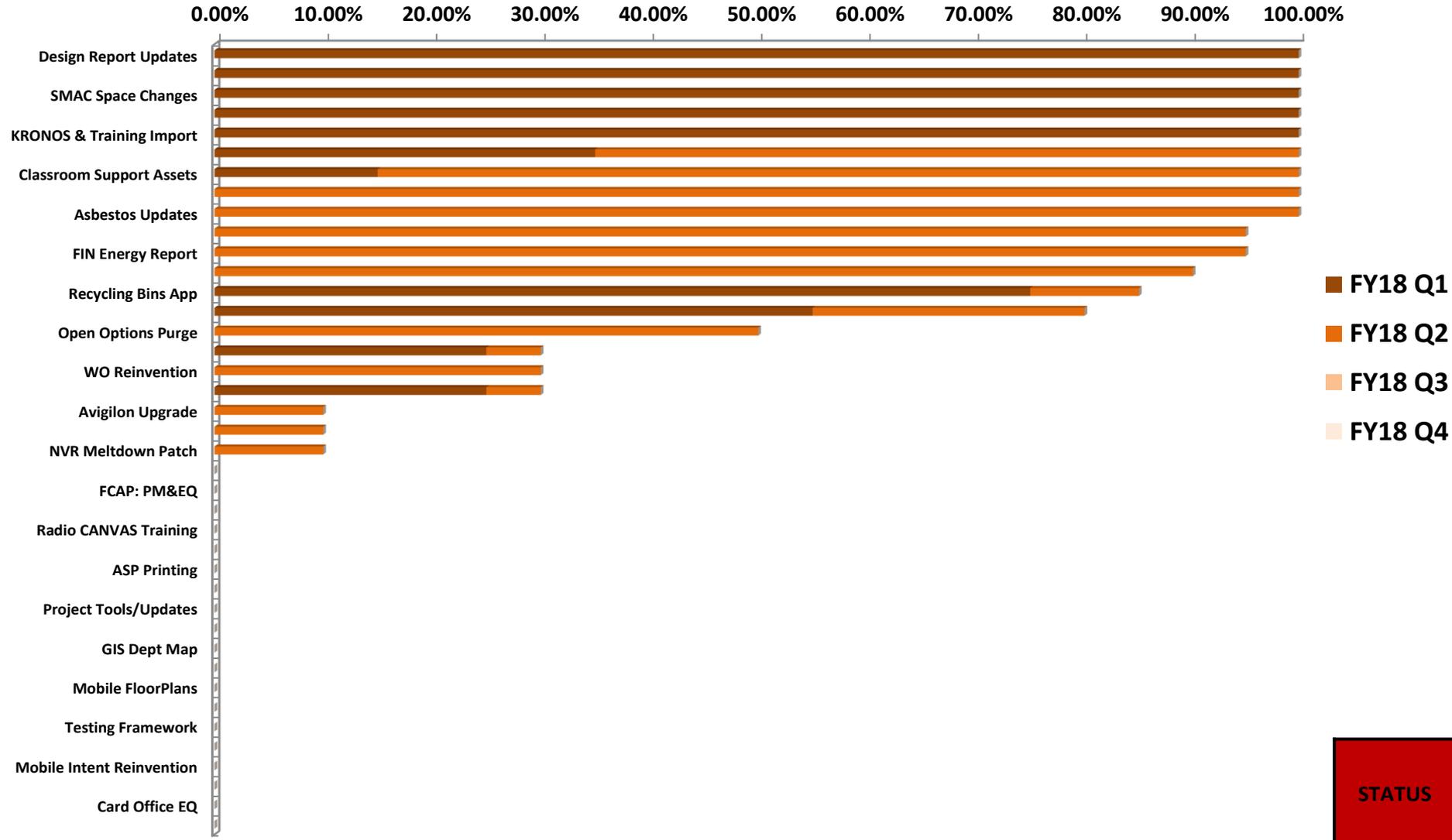
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

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

Balanced Scorecard Category: Internal Business Processes



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1:	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure:	Percentage (Number of Construction Projects Completed on or before Delivery Date Divided by Total Number of Projects 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

Code Reviews and Meetings with Environmental Health and Safety (EH&S) – Customer Service:

- PORTAL review meeting on three code subjects outlined in an Inspection Report from EH&S.
- FM – Police & Public Safety review document on one code subject.
- Student Union review meeting on egress code.

★ We hope to continue these code review meetings with EH&S. We need their assistance with coming to Design Services prior to issuing an assessment that is not a code violation.

✓ *Timeline: **FY18 QTR 1 - FY18 QTR 4 – Work In Progress***

RECENTLY COMPLETED – REVIEWED WEEKLY

Reduce and Eliminate Paper Processes – Recently Implemented:

Invoice – Purchase Order Management – ARCHIBUS: Eliminate excel spreadsheet with potential for errors. Provides a real time, date driven review of invoicing for all contracts including ITS and The AISLE Group (Classroom Support).

ONGOING IMPROVEMENTS

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

Facilities Management Strategic Planning Session – Second Quarter FY 2018

Annual Goal
95%

QTR 2
Status
94.3%

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

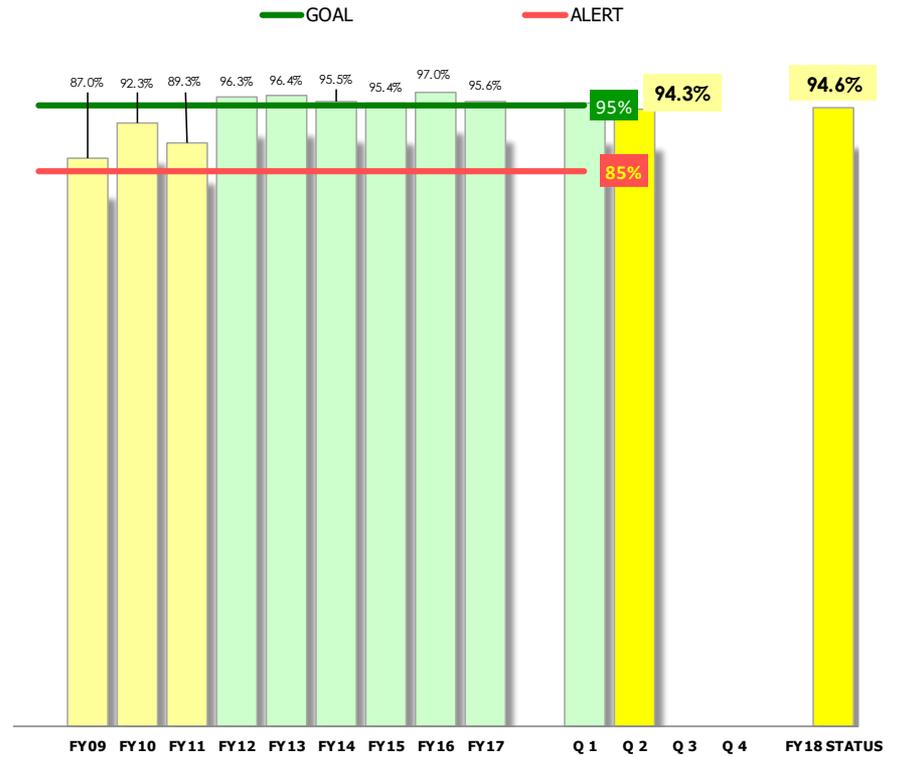
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects Completed on or before Delivery Date Divided by Total Number of Project Completed)

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

FY 18

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY09	115	100	15	87.0%
FY10	182	168	14	92.3%
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
FY16	233	226	7	97.0%
FY17	205	196	9	95.6%
Q 1	21	20	1	95.2%
Q 2	35	33	2	94.3%
Q 3	0	0	0	0.0%
Q 4	0	0	0	0.0%
FY18 STATUS	56	53	3	94.6%



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

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

ACTION PLAN

Actions Completed

- Baseball Indoor Training, Softball Indoor Training, West Substation, Reclaimed Water, CRI Entrance

Actions Planned

- Hire a new Director for Capital Projects
- Atkins Air Handler (AHU) *12/12/17 Craver Rd. Hot Water Supply/Return *12/12/17
- Student Government Office *12/12/17

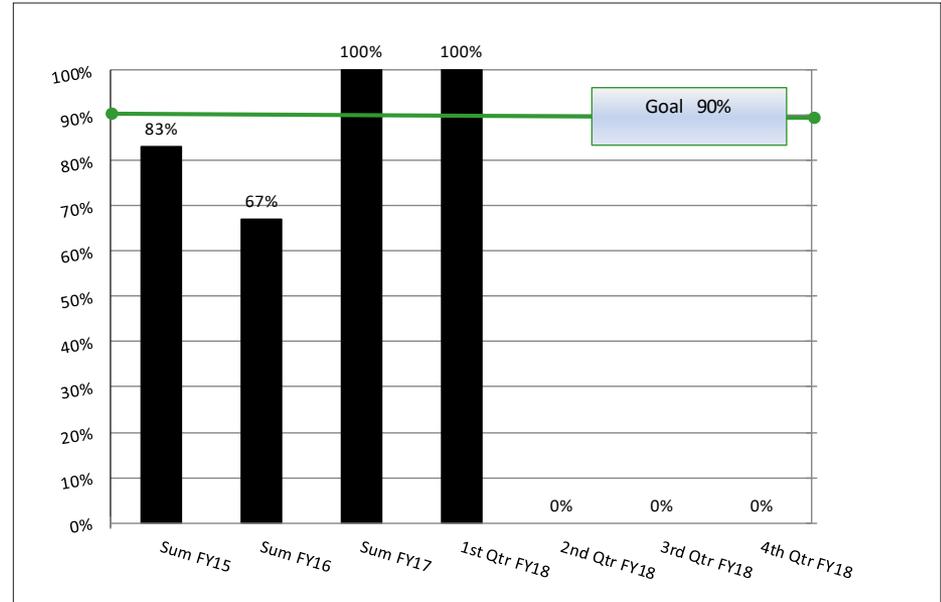
*(Date authorization received.)

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects auth. in Interscope	Designer under contract w/in 120	Designer not under contract w/in 120	% Designers under contract
Summary FY-15	7	5	1	83%
Summary FY-16	6	4	2	67%
Summary FY-17	6	8	0	100%
1st Qtr. FY-18	2	2	0	100%
2nd Qtr. FY-18	4	0	0	N/A
3rd Qtr. FY-18			0	0%
4th Qtr. FY-18			0	0%



Tactic Measurement for 2nd Quarter is N/A%

Status

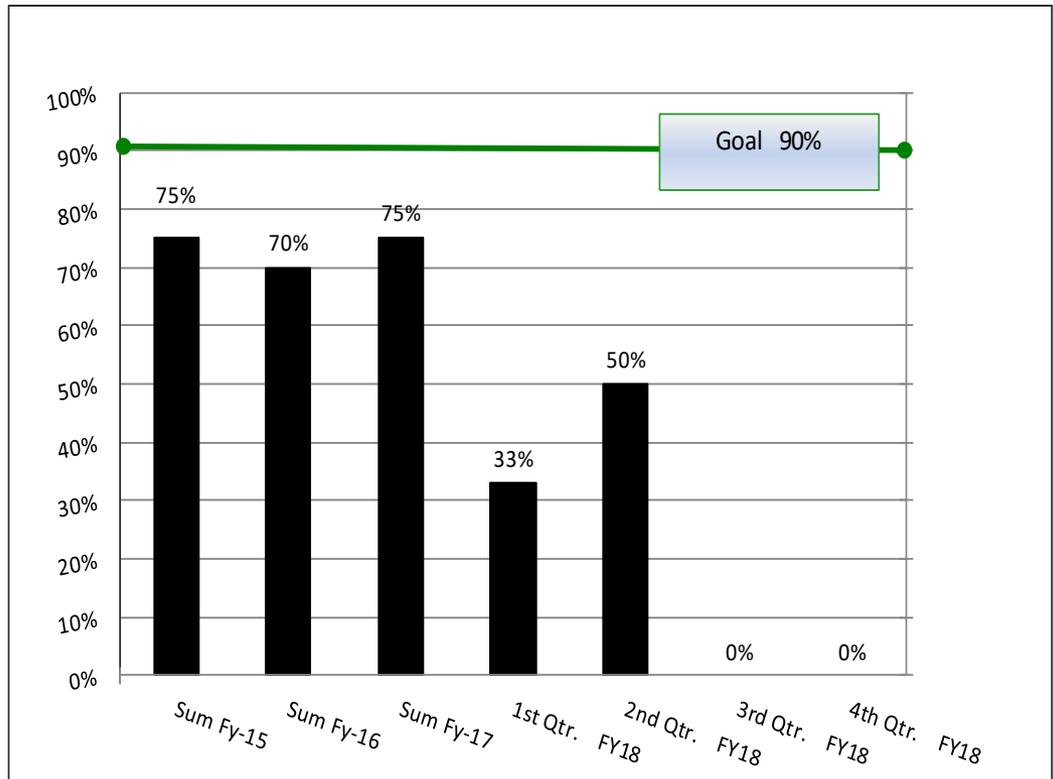
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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-15	3	1	75%
Summary FY-16	7	3	70%
Summary FY-17	6	2	75%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	2	1	50%
3rd Qtr. FY-18			%
4th Qtr. FY-18			%



Tactic Measurement for 2nd Quarter is 50%

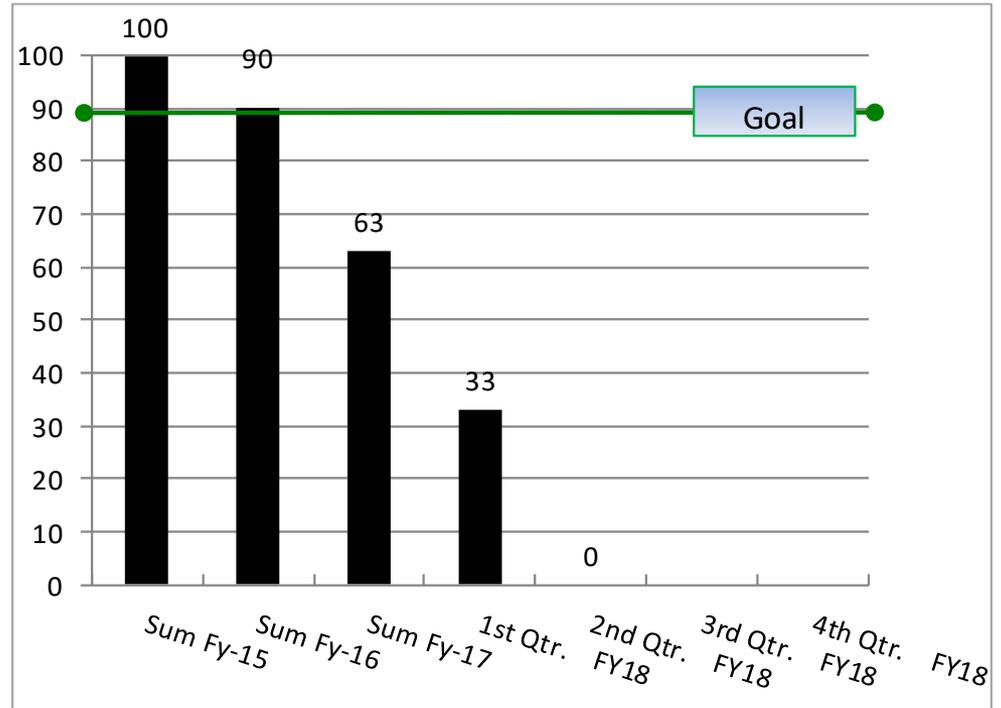
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Processes

STRATEGIC REVIEW by Fiscal Year (July-June)	# of designs with original budgeted fee	# designs complete not within budget	% Designs not complete w/in budgeted fee
Summary FY-15	3	0	100%
Summary FY-16	9	1	90%
Summary FY-17	5	3	63%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	0	2	0%
3rd Qtr. FY-18			%
4th Qtr. FY-18			%



Tactic Measurement for 2nd Quarter is 0%

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

- Student Counseling Center, Campus Wide Generator Upgrades and RDH have been occupied.
- Our fourth construction manager, Josh Kallam, has been acclimated.

Actions Planned

- CMs keep schedules current & refer to them regularly.
- CMs discuss schedule (baseline & current) with end users, designers & contractors.
- Inform designers and contractors of each other's contractual schedule dates
- CMs maintain project budgets & account reports monthly.
- CMs share budgets with AVC and end users.
- Hold contingency for unforeseen conditions, project requirements, inflation, etc.
- Manage construction scope creep
- Use Earned Value Management

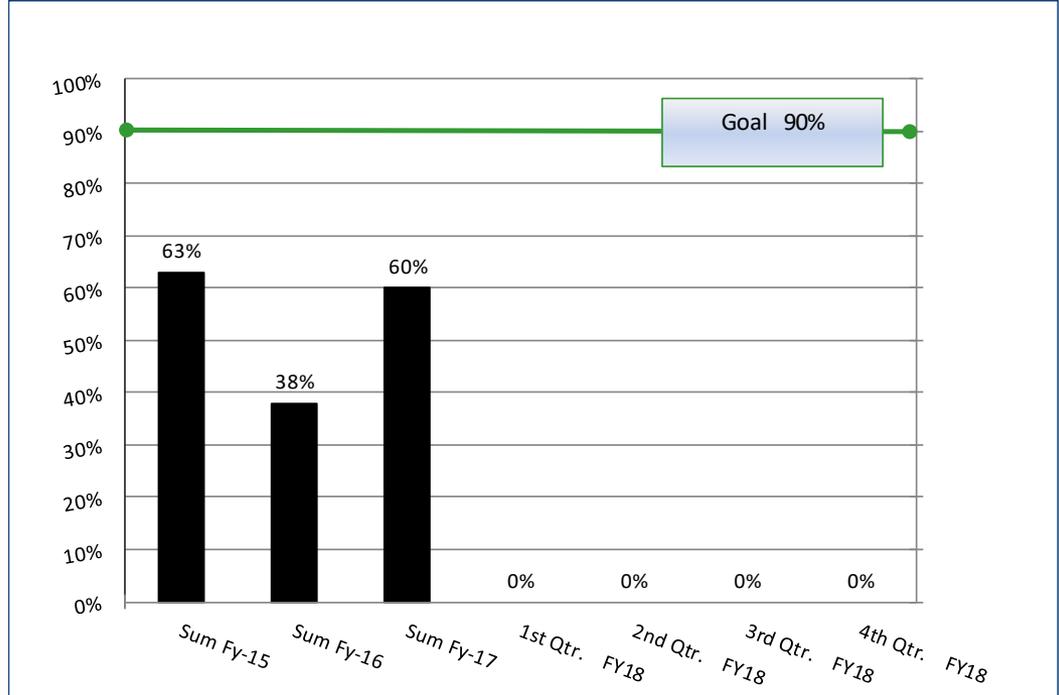
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-15	5	3	63%
Summary FY-16	3	5	38%
Summary FY-17	3	2	60%
1st Qtr. FY-18	0	0	0%
2nd Qtr. FY-18	0	3	0%
3rd Qtr. FY-18	0	0	%
4th Qtr. FY-18	0	0	%



Tactic Measurement for 2nd Quarter is 0%

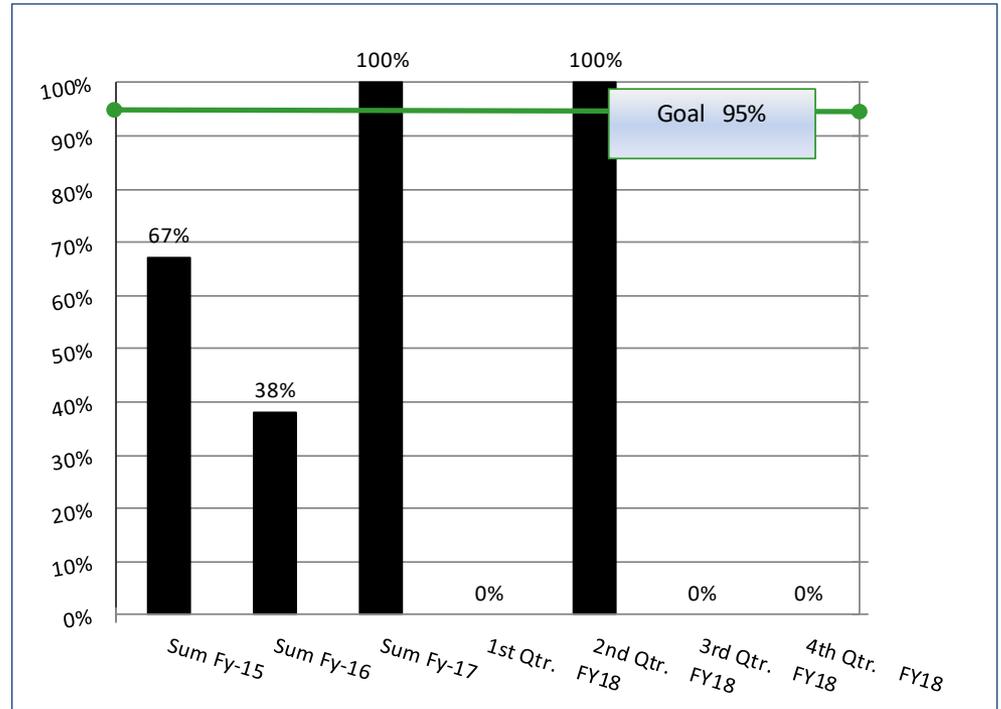
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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



Lead
Real Estate

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Real Estate

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

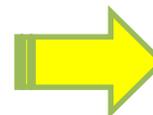
In Progress

Completed

A. Compliance: Niner Pantry Memorandum of Understanding signed and completed by all parties.



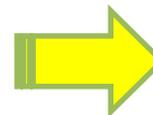
B. Compliance: Submit Request for Delegated Authority packet by February 15, 2018 to Property Review Committee and Chancellor in order to obtain authority to make real estate transactions at the university level.



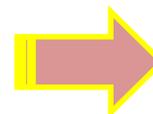
C. Acquisition: Obtain an appraisal report for potential acquisition properties by December 31, 2017.



D. Other: Obtain cabinet approval for real estate lease policy.



E. Other: Update priorities on acquisition list (in conjunction with five-year plan) by end of year 2018.



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

1. Construction of a new sub station (2018)
2. Continue monthly and annual PM service on generators
3. Implement Di-electric Oil Testing on transformers (2018)
4. Verification of steam system needs for critical areas – on-going
5. On going monthly coordination meetings with critical facility customers – October 2017
6. Continuing conversations with key customers on campus-wide Service Level Agreement (SLA) and Memorandum of Understanding (MOU)
7. Gathering critical systems data to assist Academic Affairs with their equipment maintenance

Actions Completed

1. Hired a Critical Facilities Manager (August 2017)



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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Online updates every four weeks. **On hold**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - **Inside UNC Charlotte** – Fall construction update and UNC Charlotte designated Bicycle Friendly University
 - **SYC Newsletter** – Campus Construction (*published Dec. 15, 2017*)
- **Publicity documentation and analytics*:** Will continue to work with UComm and ITS on analytics; goal is to increase external media (in particular, trade publications) coverage.

Customer Communication Initiatives (interrelated):

- **Customer Facing technology Ongoing**
 - Facilities Notifications RSS feed on home page of FM web site continues to run smoothly
 - “Five-year Plan” List of Projects and Schedules tab and home page rotating header (*updated Dec. 19, 2017*)

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

ACTION PLAN

Actions Planned

1. Continue to work with customers; educate them on the UNC Charlotte Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Hire BAS Technician - Jan 2018; temporary out source BAS support (Feb 2018)
4. Working with FIS on FIN Project upgrade
5. Develop Retro Commissioning program; got approval to hire retro commissioning tech (Nov 2017)
6. Develop and implement customer follow-up plan; updating survey customer service level and follow up (on-going)
7. Working with Capital; Retro-commissioning (Woodward and Grigg) (on-going)

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Hired BAS Controls Programming Specialist – Nov 2017

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

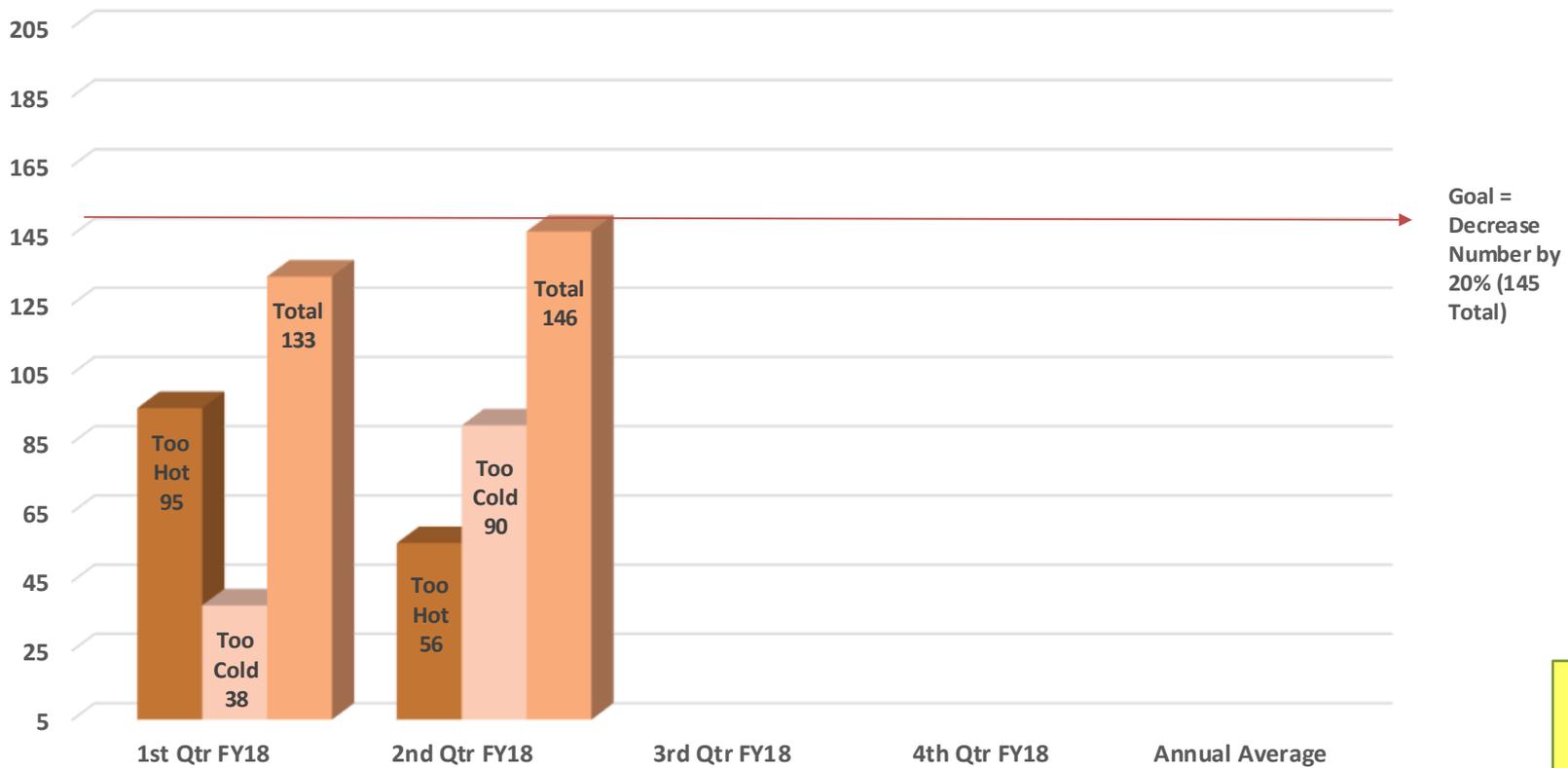
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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
2nd Quarter

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 90% of Informal Project Customers are Satisfied or More than 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:

- Meet with Customer after project is complete and being used to review how the renovated space is performing. Received excellent feedback; this helps the design and construction options going forward on other projects.
- Keeping consistent communication lines open by email, phone and face to face works wonders.
- Sending daily construction field reports works well for one very “hands on” Customer.
- Holding weekly meetings on job site to discuss progress with Customer. Customers enjoy seeing project progress with the chance to discuss any issues or concerns face to face on site.
- Each Customer is unique and so must be the way I communicate with them. Sometimes it's face to face, other times email or by phone. It often depends on what needs to be discussed. The process is simple to state yet difficult to master. Effective communication is not easy.
- **Design Services Team Meetings often include discussing effective Customer Service issues, concerns, and best practices.**

Facilities Management Strategic Planning Session – Second Quarter FY 2018

Annual Goal
95%

QTR 2
Status
80%

Lead
Design Services

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

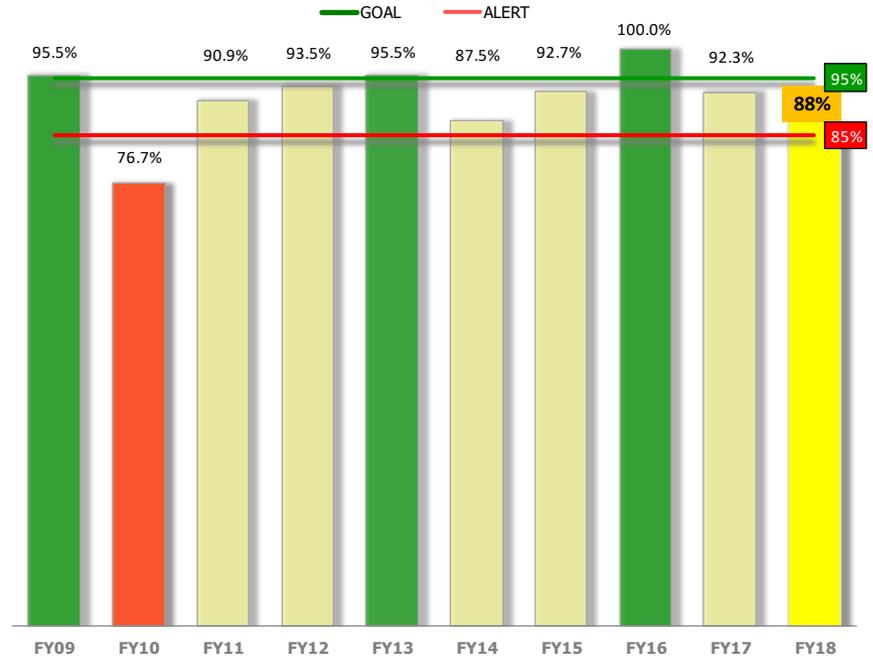
Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 95% of Informal Project Customers are Satisfied or More than Satisfied

Measure: Results from Project Related Customer Surveys

95% of Informal Project Customers More than Satisfied or Satisfied with Services Received

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY09	22	22	18	3	0	95.5%
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
FY16	115	32	28	4	0	100.0%
FY17	38	13	6	6	1	92.3%
FY18	35	8	6	1	1	88%
Q 1	20	3	2	1	0	100%
Q 2	15	5	4	0	1	80%
Q 3						
Q 4						
YEAR TO DATE	35	8	RESPONSE RATE - TOTAL			23%



Customer Comment:

Example of One “More than Satisfied” Customer Comment:

I truly appreciated the level of communication from the Project Coordinator (PC). PC emailed me with important questions and updates in a timely manner. PC was also very responsive to my questions. I had a great experience working with this PC !

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Ongoing:

- **Light Rail Coordination Committee** (member of the communications working group)
- **Digital Signage Steering Committee** (campus-wide initiative)
- **Campus Congestion, Construction, and Parking Communication Plan** (joint initiative with Christy Jackson and Lou Ann Lamb; Phase 1 completed May 31, Phase 2 completed August 31, Phase 3 (implementation underway)
- **(University) Crisis Communication Committee** (member of stakeholders group)
- **PaTS Communications Plan** (partnership with Parking and Transportation Services, Business Affairs, etc.)
- **Academic Complex Communication Plan** (implementation underway)
- **“Five-year Plan” External Communication Plan** (implementation underway)
- **“Five-year Plan” website** (continual updates to projects listing, other areas as needed)
- **Traffic communications committee** (joint initiative with University Communications):
 - Continue to seek guidance from AVC
 - Initiative evolved with Notification updates posted to Inside UNC Charlotte

Completed:

- **SRAPPA Conference** – FM hosted (member of planning committee)
 - Program booklet completed Oct. 16, 2017

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Upcoming:

- **Apprenticeship Program communication and marketing plan**
- **FBO Unit Spotlight video**
- **Zero Waste Basketball communication initiatives**
- **“Recyclemania” communication plan**
- **Earth Month communication plan**
- **Reinstate Web Advisory Group**
- **Establish FM Communications Task Force and Working Group**
- **Develop department social media strategy**
- **FM Communication Guidebook**
- **Update Professional Communications Policy #10**



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 FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through March 2018

Recruitment Strategies:

- Creating resource tools for Facilities Management hiring managers, to include:
 - a. Recruitment Process Manual and best practice recruitment tools.
 - b. FM HR may be reaching out for feedback.
- Managing creation of new positions and career progressions for FY18.

Challenges:

- a. Creating clear justifications.
- b. Getting managers/supervisors to take the time to create the modification in NinerTalent with supporting information.
- FM HR has access to EEO reports on each filled position which provides us with the demographics of our applicant pool.



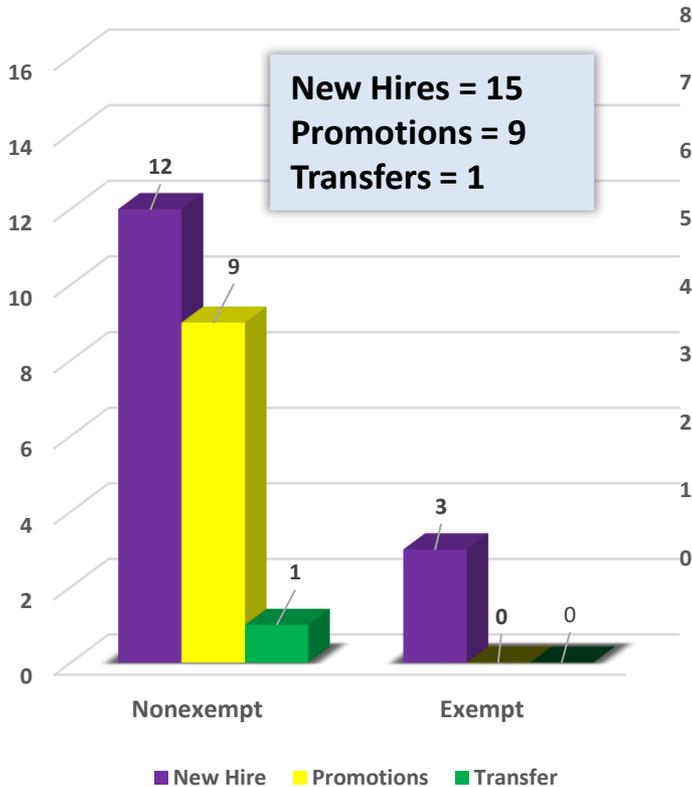
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

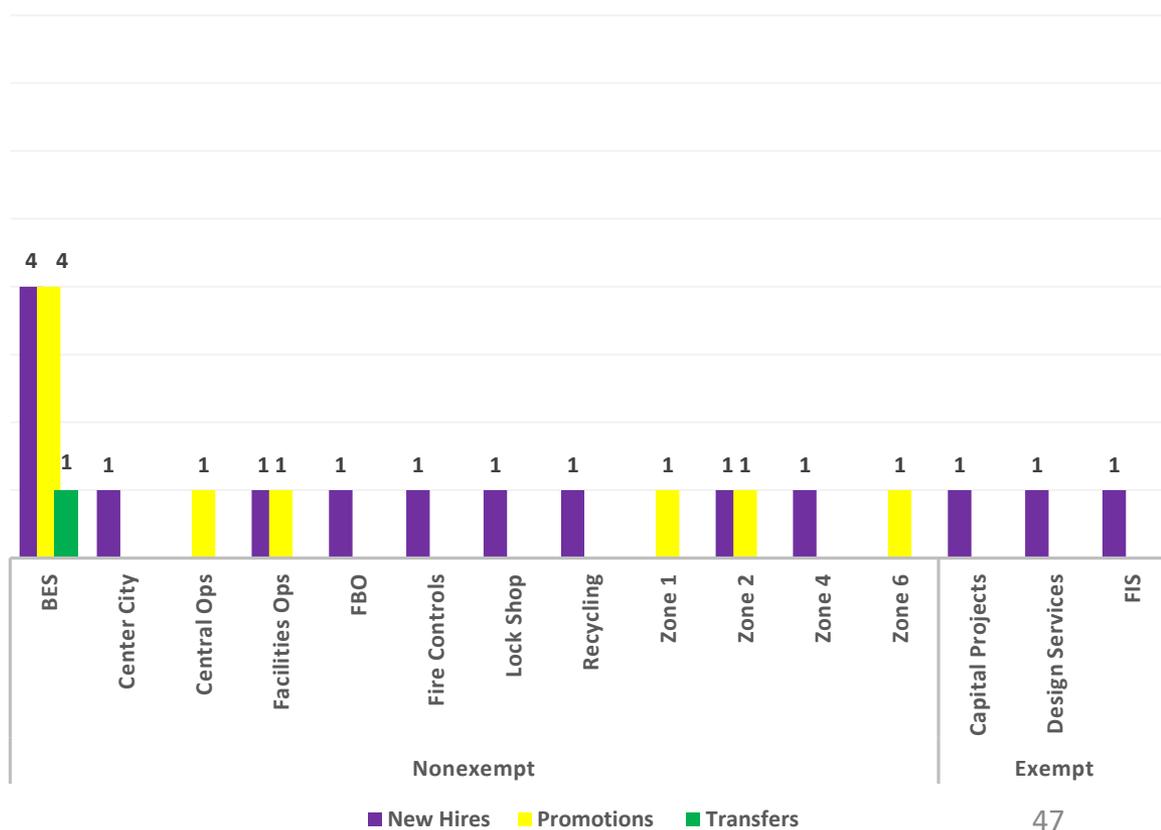
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

**FM New Hire/ Promotion
 2nd Quarter FY 2018**



**FM New Hires / Promotions per Department
 2nd Quarter FY 2018**



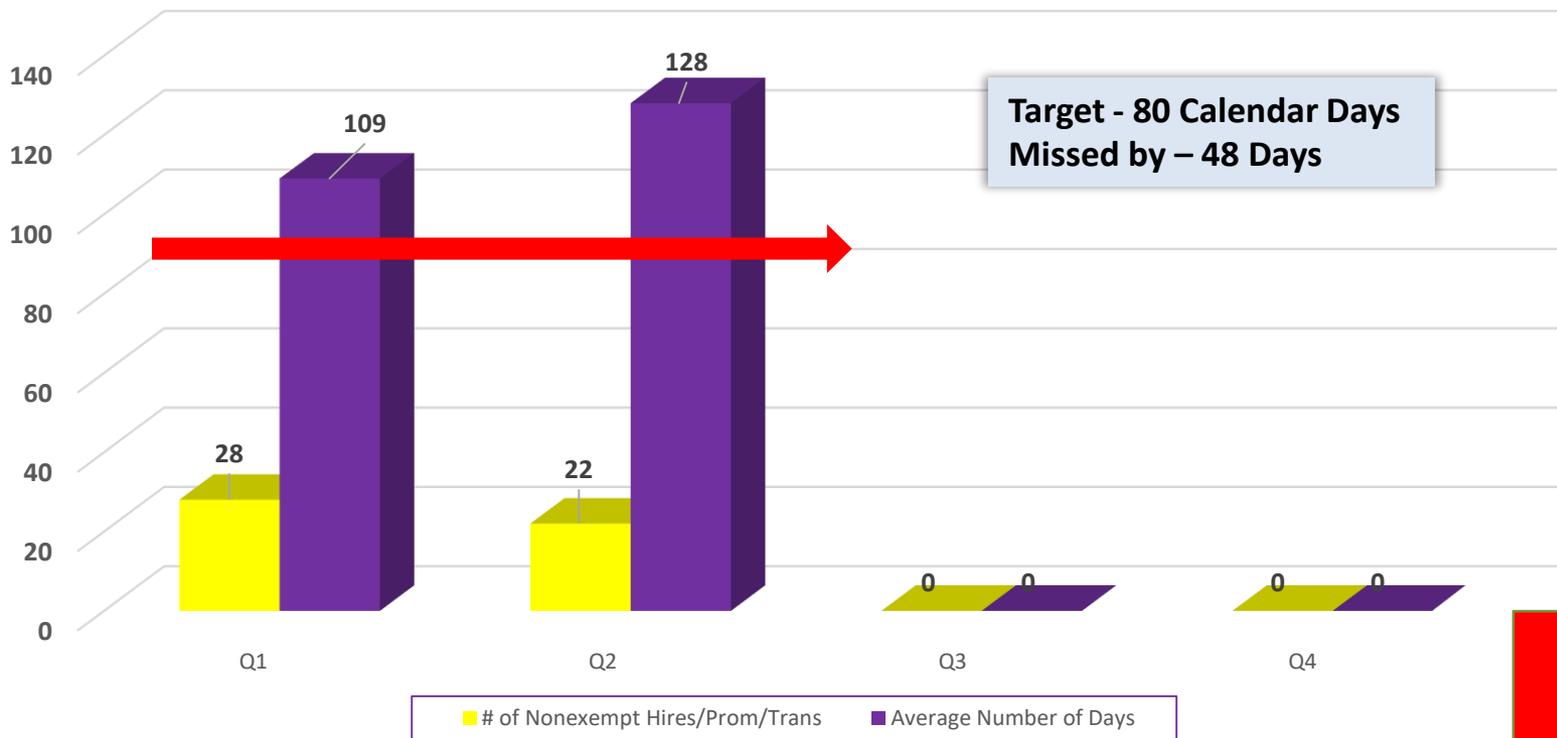
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

Average Number of Days to Fill Nonexempt Vacancies - FY 2018



STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

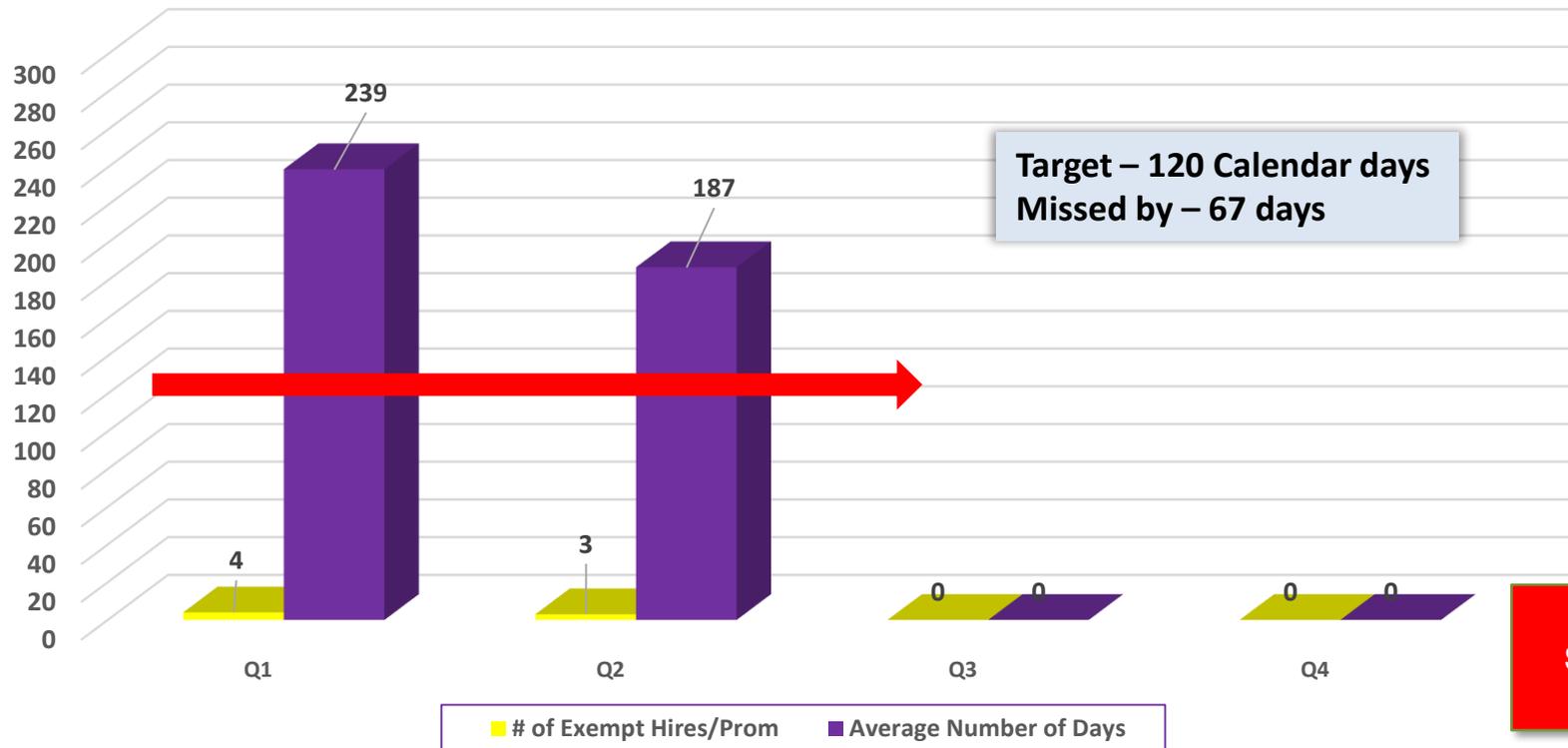
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Exempt (Salaried) Vacancies - FY 2018



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 March 2017

- 2017/2018 Performance Appraisal Process
 - a. FM HR partnering with main HR to provide Employee/Manager training; dates to be determined.
 - b. Any new employees that started after October 1, 2017 will not be included in the Appraisal Process.
 - c. NinerTalent STAKES Task Schedule email to FM Leadership
- Progressive Discipline Presentation at Supervisors' Forum; partnering with main HR for more formal training TBD.
- Created and seeking feedback and approval to finalize Facilities Management standard onboarding process.
- Created and seeking feedback and final approval for budget approval form. Form intended to manage mid-year budget requests.
- Succession Planning Part One, Research and Data Collection:
 - a. Meet with Main HR Benefits/HRIS to identify the categories we will need in our demographic report.
 - b. Goal is to project FM retirees in the next one, three, and five years to prepare a recruitment strategy.

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 March 2018

- Reorganizing FM HR Team duties to better meet the demands and requests in recruitment and employee relations.
- Collaborate with and provide guidance to leadership to better strategize future personnel needs.
- Created a climate survey action plan to provide guidance to leadership on next steps for improvement.
- Creating standardized processes in FM, specifically:
 - Checklist for supervisors to assist with writing written counseling or written warning memos.
 - Address the issue of Mandatory employees who do not come to work due to various circumstances.

Facilities Management Strategic Planning Session - Second Quarter FY 2018

GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

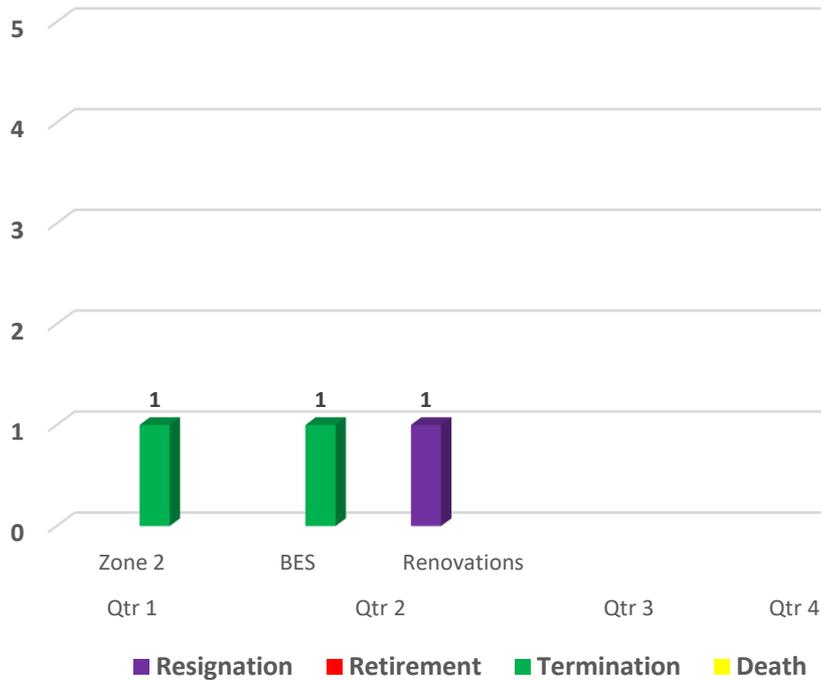
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

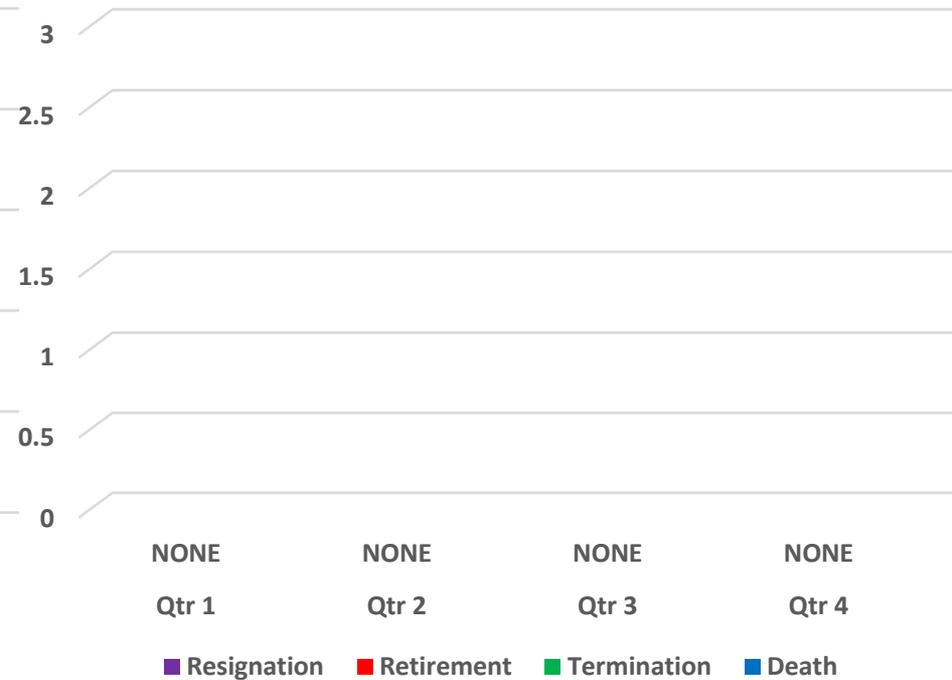
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

**Separations by Department During Probation
Nonexempt FY 2018**



**Separations by Department During Probation
Exempt (Salaried) FY 2018**



Status

GOAL #4 Recruit, Develop and Retain Quality Employees

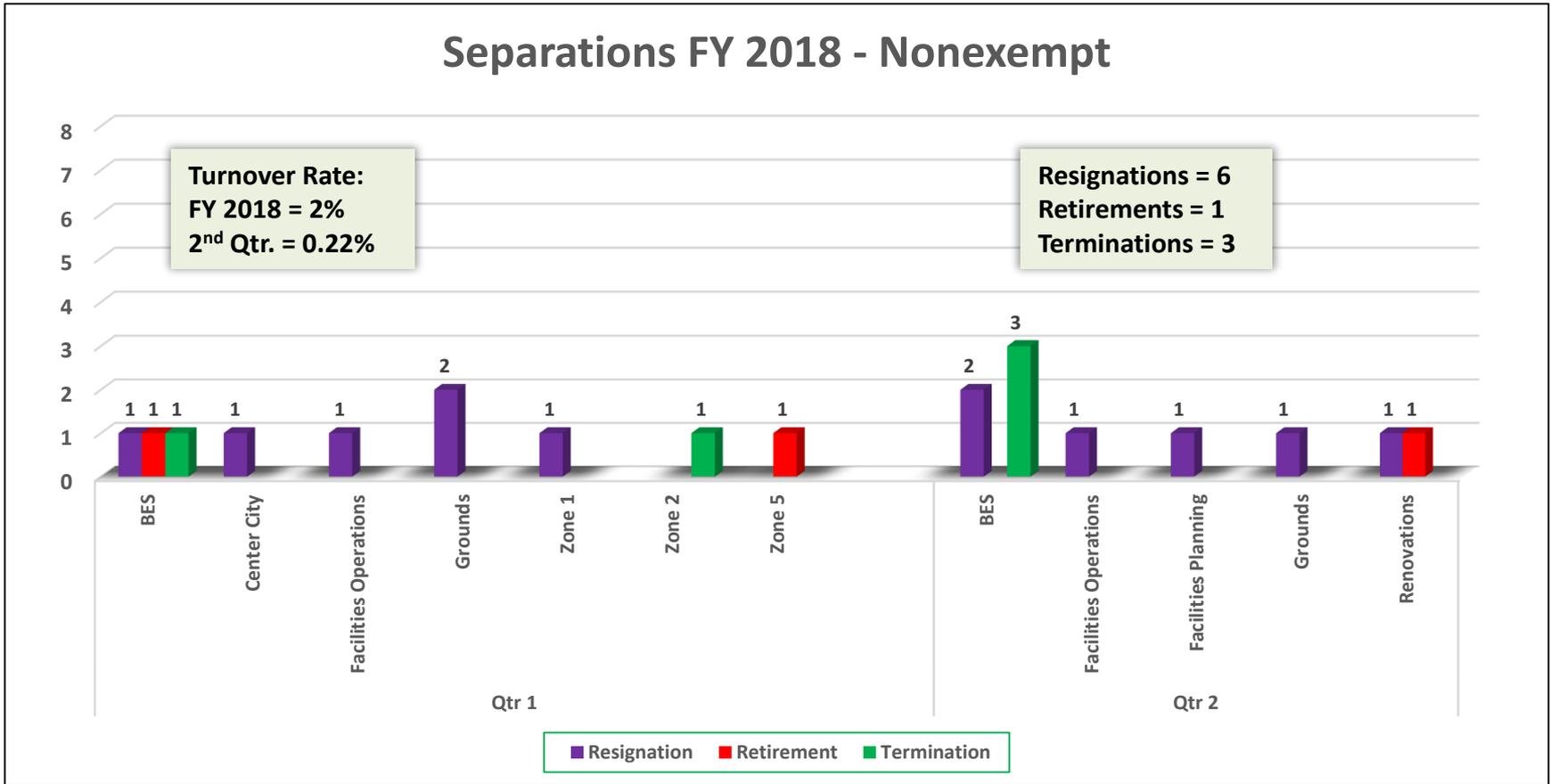
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning





GOAL #4 Recruit, Develop and Retain Quality Employees

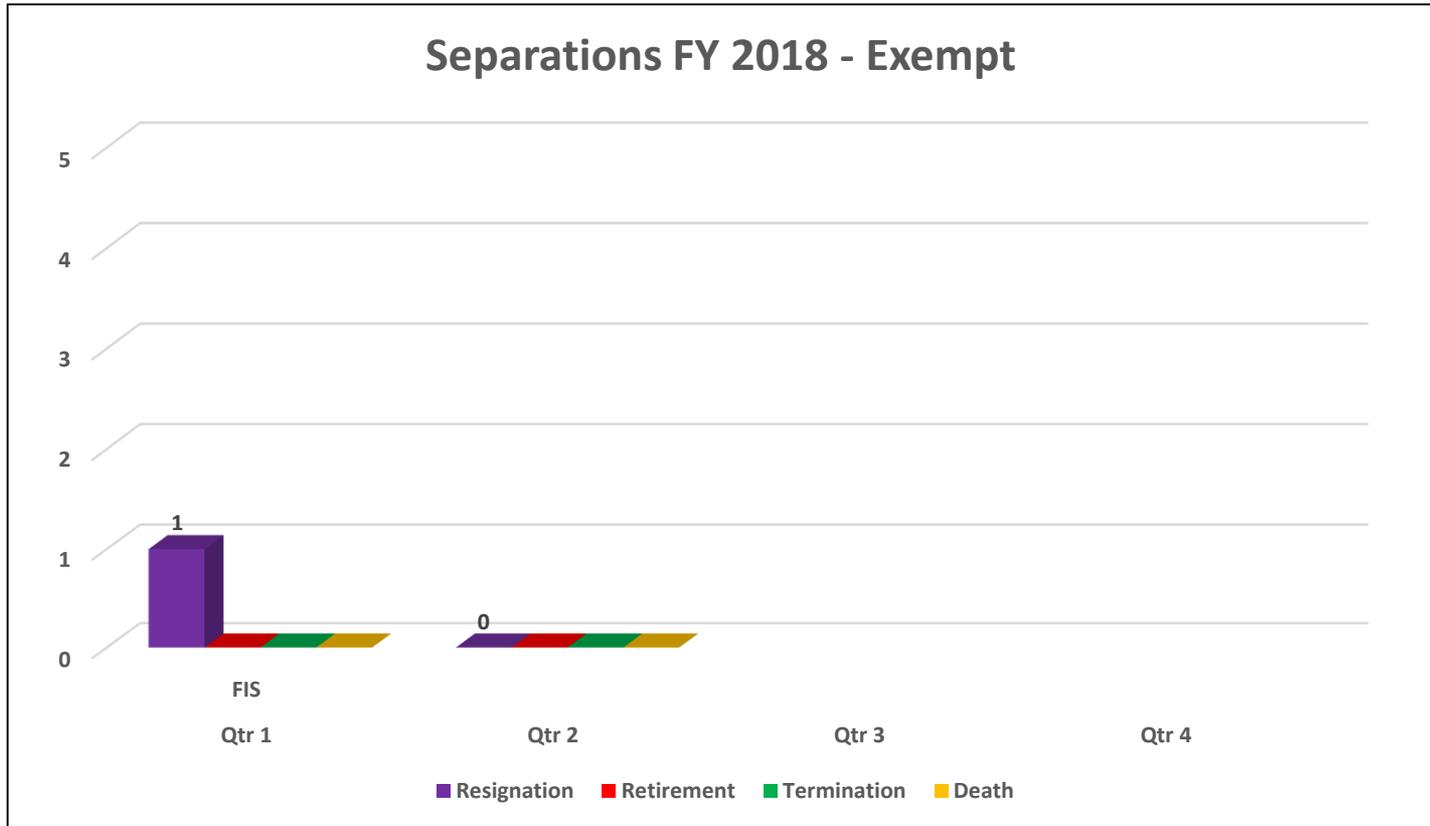
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

- | | |
|----------------------|---|
| Tactic 4.2.1: | Increase Supervisor/Manager Training to 40 hours/year |
| Tactic 4.2.2: | Increase Employee Training to 20 hours/year |

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

FM ACADEMY

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

Technical

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

Safety

- Supervisor Safety Talks Monthly

Leadership

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

Externally Driven Initiatives

- Niner Talent “Workplan” training Annual, as needed

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year

Tactic 4.2.2: Increase Employee Training to 20 hours/year

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

Departmental Development

- Identify and source vendors for training delivery;
 - Areas of focus: Leadership, Technical, Administrative, Safety and Professional Development;
- Ongoing initiatives with FO and BES&R Learning and Development coordinators on:
 - Reimagining the former FBO proposed “Gotcha” recognition program with BES&R.
 - Consulting with BES&R team on 5-S implementation for select area(s)
- **FM Apprenticeship Program** developments to date:
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and designated classroom instruction. DOL Journeyman Certification received upon successful completion of program.
 - Committee in place dealing with program standards and operating guidelines
 - Program Standards to be complete by February
 - Engaging with community colleges to set up Educational Partner relationships to identify course work, programs, and marketing opportunities
 - Presentation planned to introduce program at January All Employee Meeting
 - Apprentice ‘Position Description’ will be submitted to Central HR this month.
 - Recruitment to begin in late Spring 2018
 - The need for the creation of a Steering Committee and a selection team identified
 - Electrician apprentice positions approved for recruitment (HVAC positions to be added later)
 - Working with FBO-Communications to create marketing plan.

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

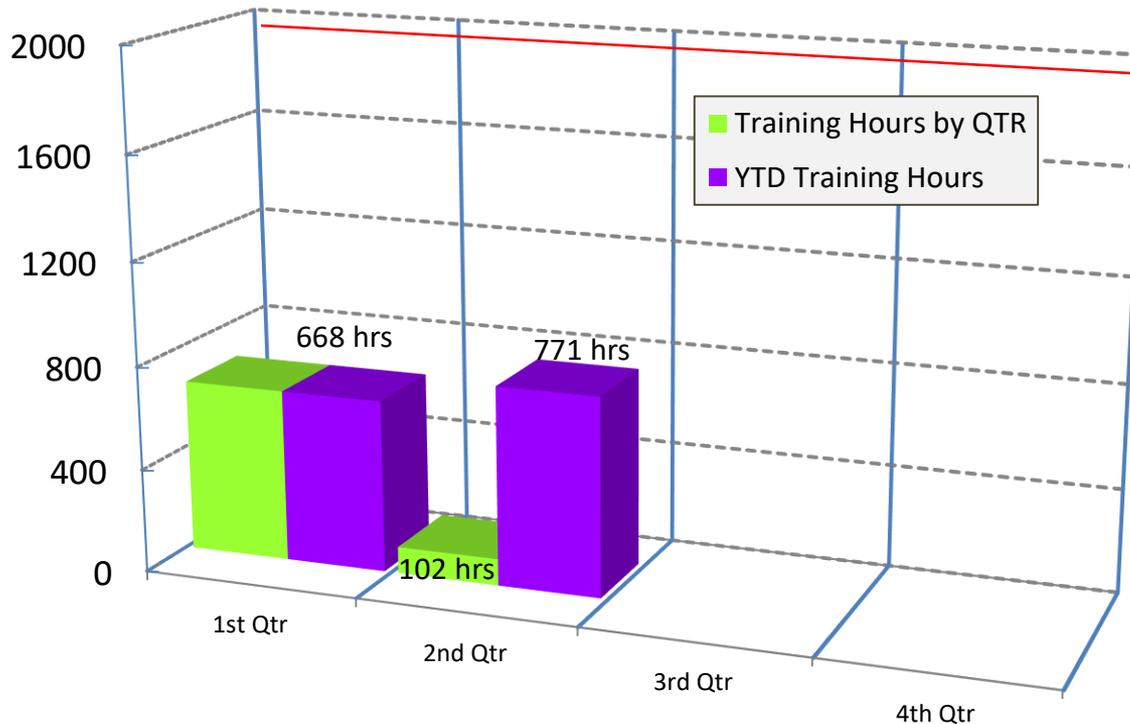
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 18

Training Hours for Supervisors & Managers by Quarter



Annual Target

FY 2018
Target - 1,960 hrs

Actual YTD
771 hrs (40%)

Annual

GOAL #4 Recruit, Develop and Retain Quality Employees

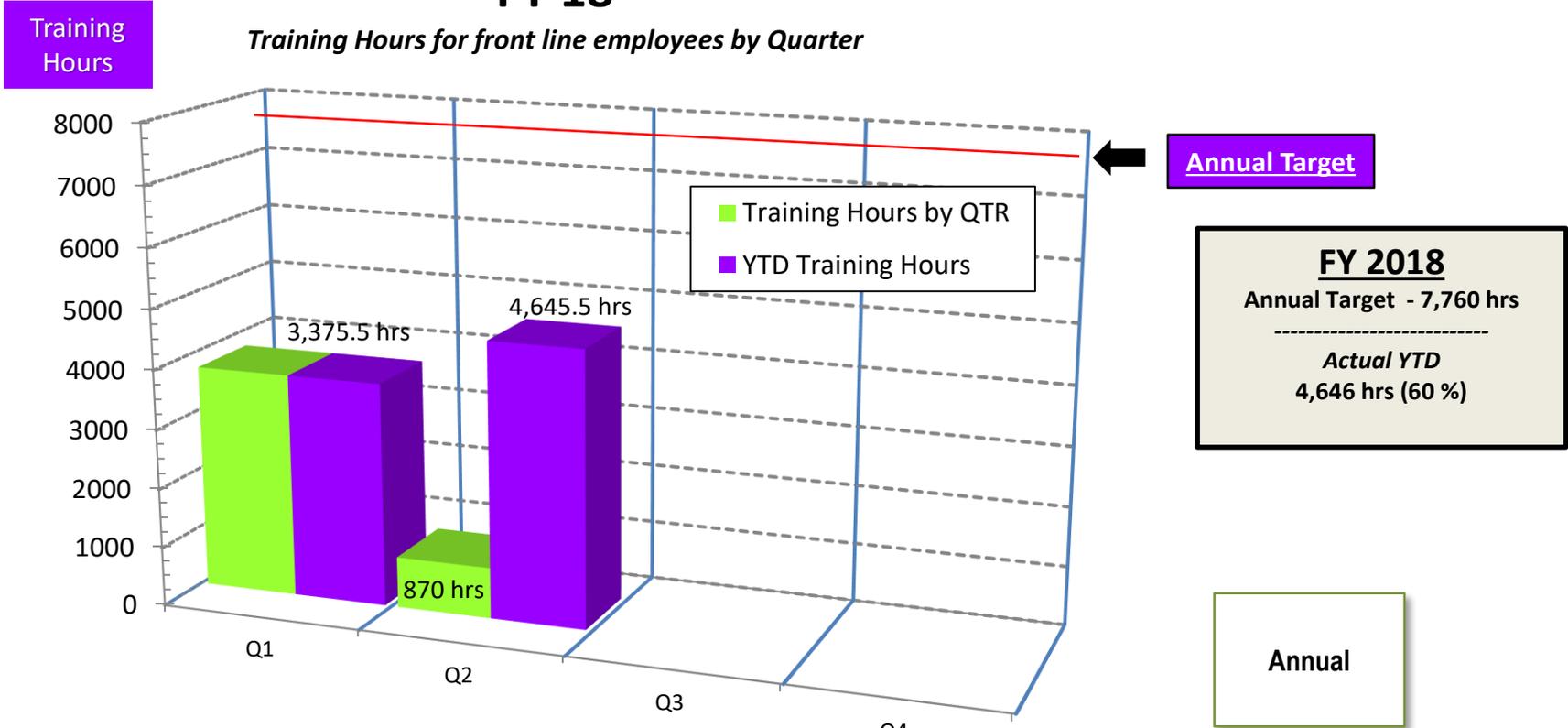
Objective 4.2: Improve Workforce Development

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

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 18



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment

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

Lead: Facilities Business Office

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Survey Logistics:

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

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

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment

Tactic 4.3.1:	90% of Employees satisfied or very satisfied working in FM
Measure:	Annual Employee Work Climate Survey

Lead: Facilities Business Office

Balanced Scorecard Category: Customer Perspective

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

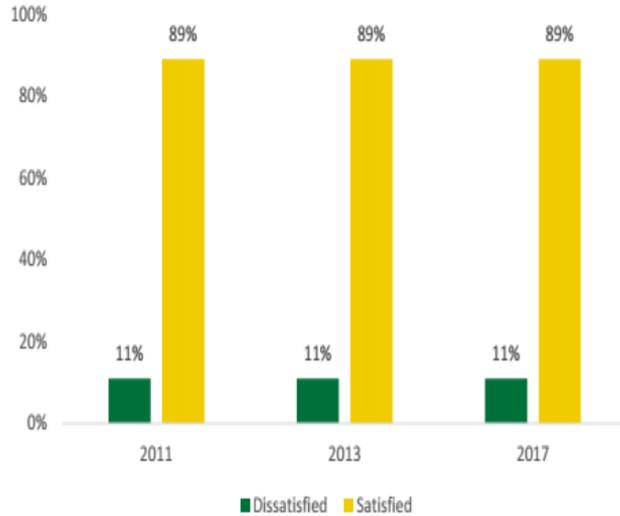
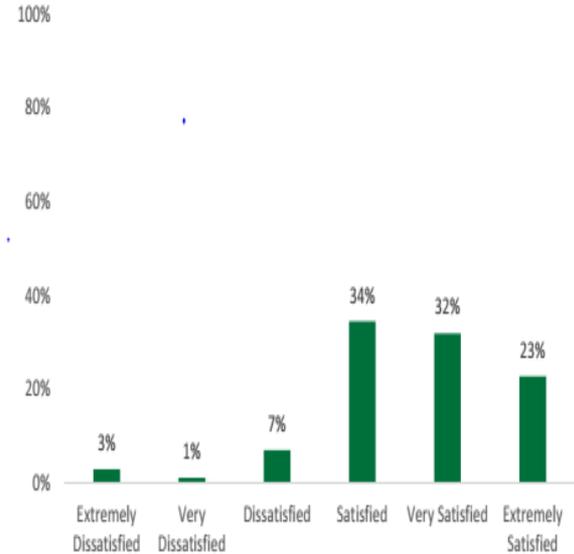


FIGURE 148: OVERALL, HOW SATISFIED ARE YOU WORKING IN THE FACILITIES MANAGEMENT DEPARTMENT?



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

Tactic 4.4.1:	Reduce the number of reportable accidents by 20%
Tactic 4.4.2:	98% of Mandatory Compliance Training completed annually

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

Efforts to reduce accidents:

2nd Quarter Safety Training Hours – 466

- Near Miss reports campaign
 - Submissions have increased significantly
- Safety Training Taskforce (Collaborative initiative with EHS):
 - FM Training Calendar established listing safety training topics delivered by EHS
 - Discussions held on best way to report training;
 - Digital training records system developed by FM team (refinements ongoing)
 - Working on reporting improvement to utilize Archibus reporting abilities.
- Safety related activities:
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks - Monthly
- Current Accident/Incident Stats (**CY18**)
 - Accidents - 2
 - Minor incidents – 0
 - Near Miss - 0

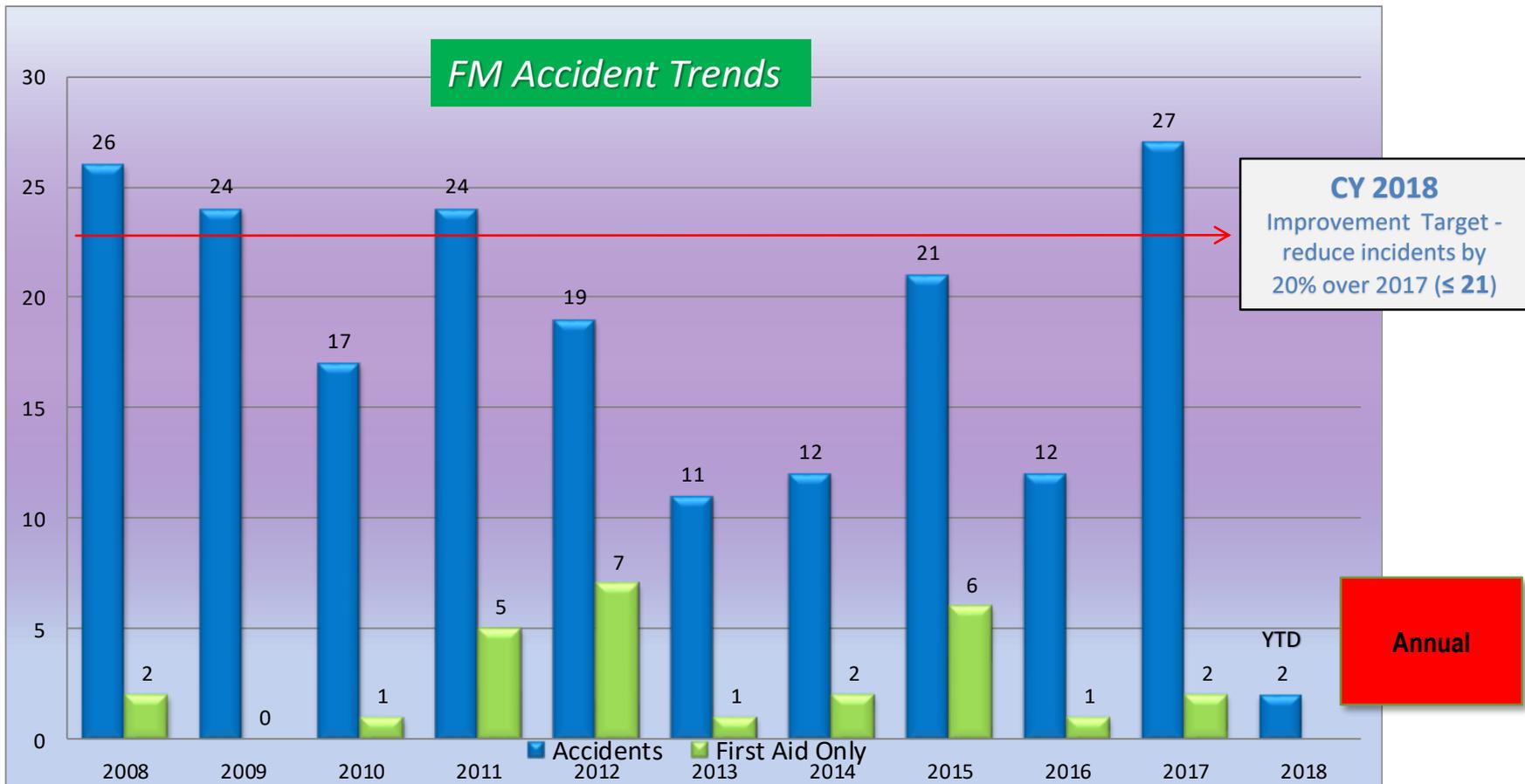
Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Tactic 4.4.1: Reduce the number of reportable accidents by 20%
Measure: Number of Reportable Accidents (Measured by Calendar Year)

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

Action Item

Target Date

- FM Apprenticeship Program
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and designated classroom instruction. DOL Journeyman Certification received upon successful completion of program.
 - Committee in place dealing with program standards and operating guidelines
 - Program Standards to be complete by February
 - Engaging with community colleges to set up Educational Partner relationships to identify course work, programs, and marketing opportunities
 - Presentation planned to introduce program at January All Employee Meeting
 - Apprentice 'Position Description' will be submitted to Central HR this month.
 - Recruitment to begin in late Spring 2018
 - The need for the creation of a Steering Committee and a selection team identified
 - Electrician apprentice positions approved for recruitment (HVAC positions to be added later)
 - Working with FBO-Communications to create marketing plan.

(Continued on next slide)

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

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

- **Leadership – APPA leadership workshops**
 - APPA Leadership Academy (Level 1 – proposed dependent on funding availability) TBD
 - APPA Leadership Academy (Levels 2-4) TBD
- **Digital Training Records System**
 - FM project team (Derberry, Franklin and Mullins) developed a Google Docs based records system: System launch in Mar 2017; ongoing improvements in process
 - FM Training Calendar created for FM training sessions (shared with EHS)
- **Learning & Development projects**
 - Computer training for FM employees 2018
 - Critical for Niner Stakes literacy, benefits enrollment, training record entry, etc.
 - Develop “Supervisor Training – Employee Management” session (2-3 planned) 2018

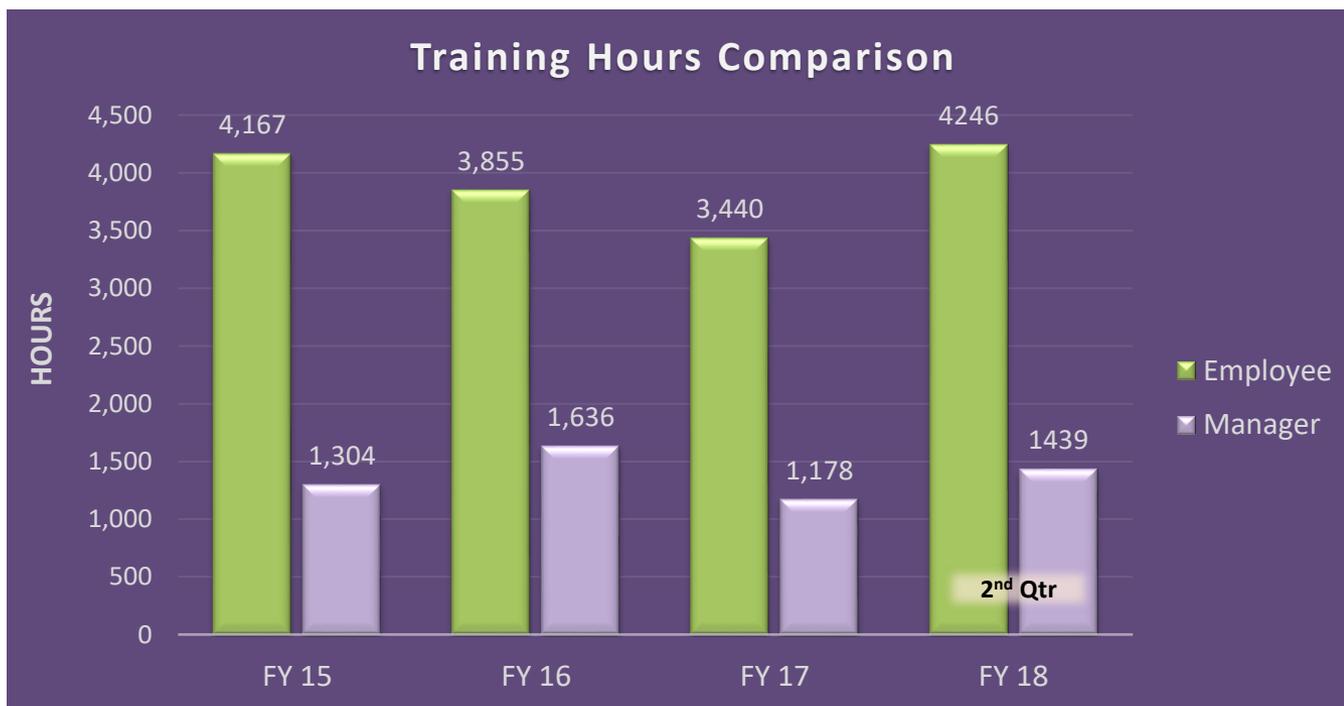
Facilities Management Strategic Planning Session – Second Quarter FY 2018

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective





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 FOR IMPROVEMENT

Finance/Budget:

- Preparations for year-end are now underway to include:
 - more frequent communication,
 - analysis of where we actually stand;
 - strategic meetings with large FM units;

Budget Memo and Instructions

- Memo and instructions to be submitted January 29th;

Supplemental Grant/Award Funding:

- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring matching funds, ensure buy-in from AVC prior to submitting proposals each fiscal year;
- Encourage use of APPA grant and award program to supplement funding within FM. FBO has been awarded two mini grants for \$500/each.

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting

Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management;
- Current analysis of receipts supported funds underway.
 - First fund review – Informal Projects;
 - Review anticipated to complete January 2018; Goal – determine why fund balance has been in the negative.
 - Upon completion – next analysis will be Labor Services.
- Conducting spending trend analysis to assist with better budget projections for maintenance and service agreements is also underway. Anticipated completion: March 2018

FY 17 APPA and NACUBO Key Facilities Metrics Surveys:

- Survey completed one week prior to deadline; thanks to all participants.
- Beta survey version expected in February and actual results anticipated end of March 2018.

Administrative Cost/GSF Analysis:

- Cost per GSF for administration – analysis for past 5 years underway. Will add FY 17 once survey results released.

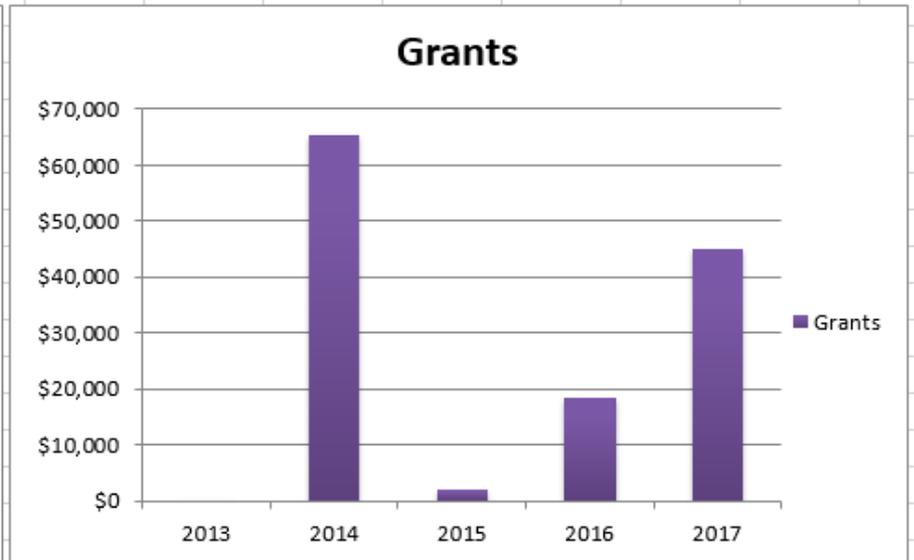
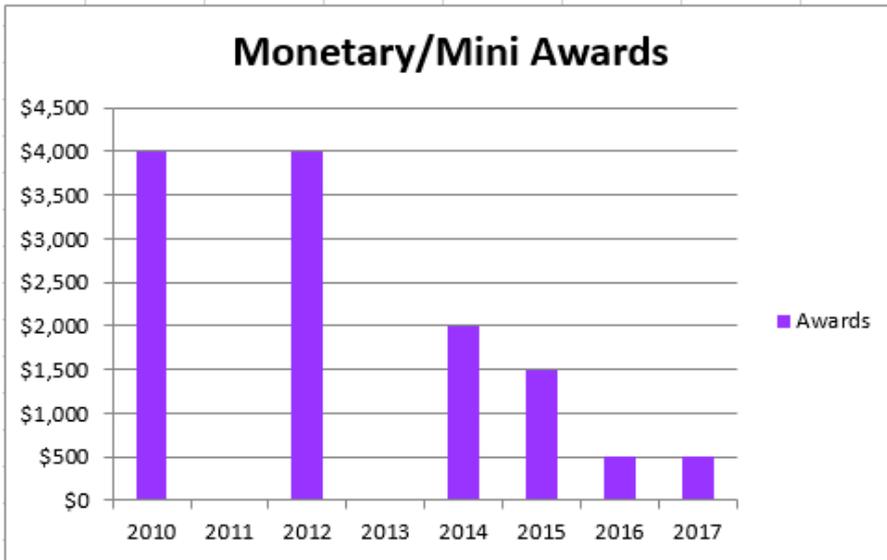
GOAL #5 Promote Good Stewardship

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



GRANTS:
ANNUAL

AWARDS:
ANNUAL

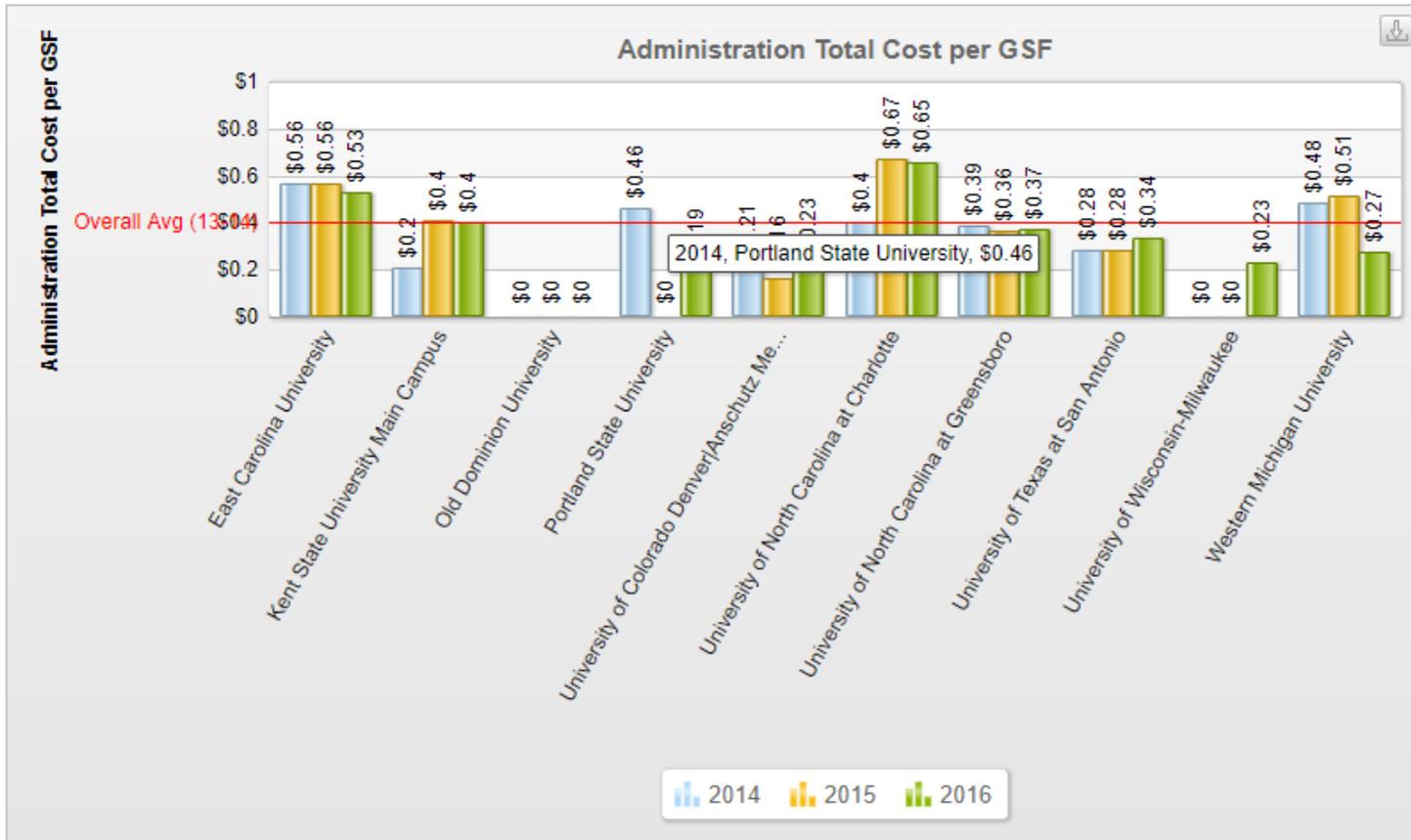
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions
Measure: Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



Overall APPA Avg. = \$0.5
 SRAPPA Avg = \$0.4
 Target = \$0.404 (-5%)
 UNC Charlotte = \$0.65

ANNUAL

GOAL #6 –Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

Lead
BES

ACTION PLAN

- Actions Planned
 - Development of BES & Recycling 5-year plan with budget projections (3/2018)
 - Implement team cleaning model throughout all BES zones (3/2022)
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (Ongoing)
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (Ongoing)
 - Developed Production Tracking tool based on attendance and staffing (Ongoing tracking)

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

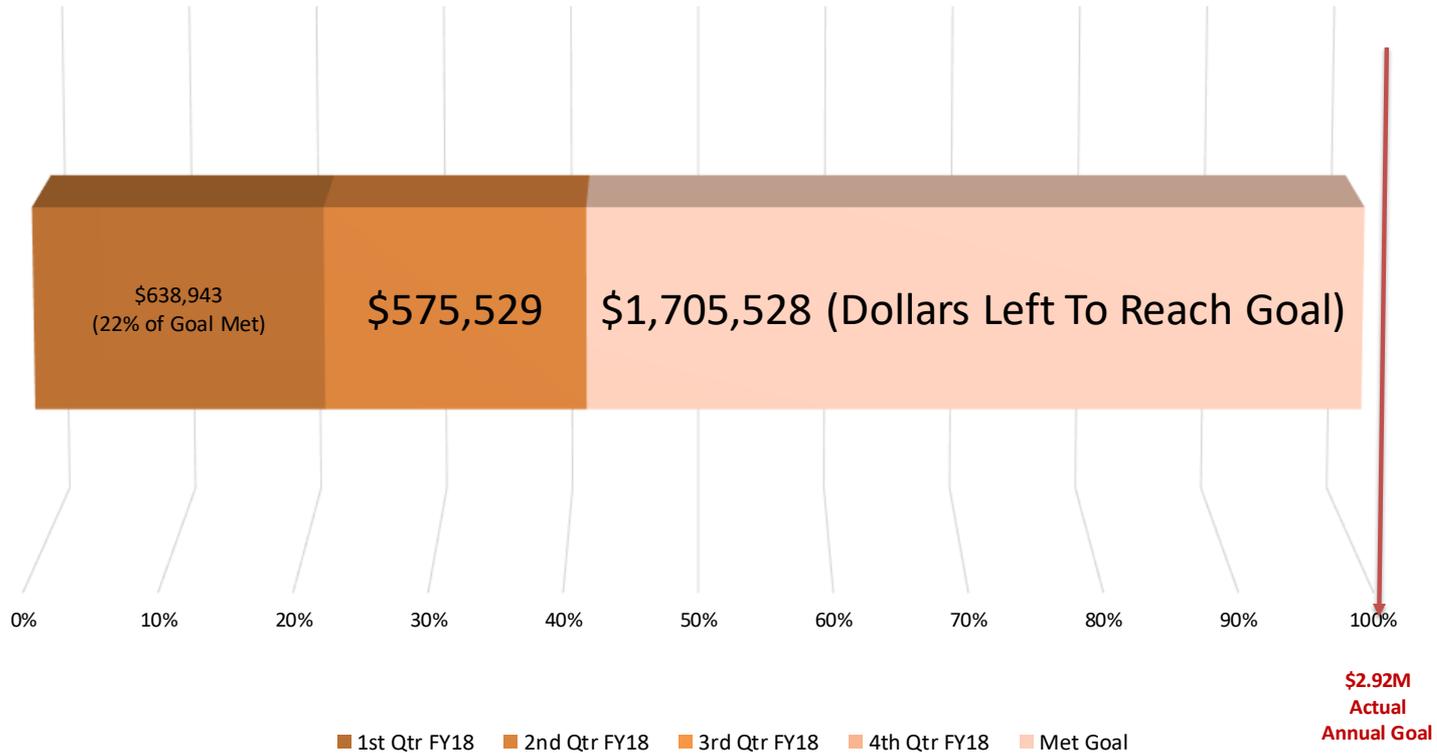
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



STATUS
2nd Quarter

GOAL #5 – Promote Good Stewardship

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



ACTION PLAN

Waste Reduction and Recycling

Actions Complete

- Hired Recycling Project Manager – Darcy Everett. (November 2017)
- Zero Waste Football season completed – 84% diversion rate for season. (November 2017)
- Assisted with helping pull off a successful SRAPPA Conference. (October 2017)
- Began working with Chartwells to implement composting and recycling collections back of house.
- Began shifting collections and storage to new Recycling Facility – yay!! We have a loading dock!
- Received approval for new Recycling Education & Outreach position. (In system December 2017)
- Began re-working barcode/data collection for tracking our inventory and work load. (540 interior collection sites - does not currently include exterior bins)

3rd Quarter Actions Planned

- Complete position description, post & hire Recycling Education and Outreach Coordinator position. (February/March)
- Complete move to new Recycling Facility (Waiting on baler move to be complete)
- Continue work with Chartwells (January - Orbis Grille, Starbucks, and new Catering Kitchen added)
- Develop relationship with educational/residence side of HRL to improve educational efforts within residence halls.
- Complete barcoding project for interior recycling/trash collection stations.
- Support Sustainability Office in pilot games for Zero Waste Basketball (2 men's games; 1 women's game)

Facilities Management Strategic Planning Session – Second Quarter FY 2018



Objective 5.2: Develop a Sustainable Campus

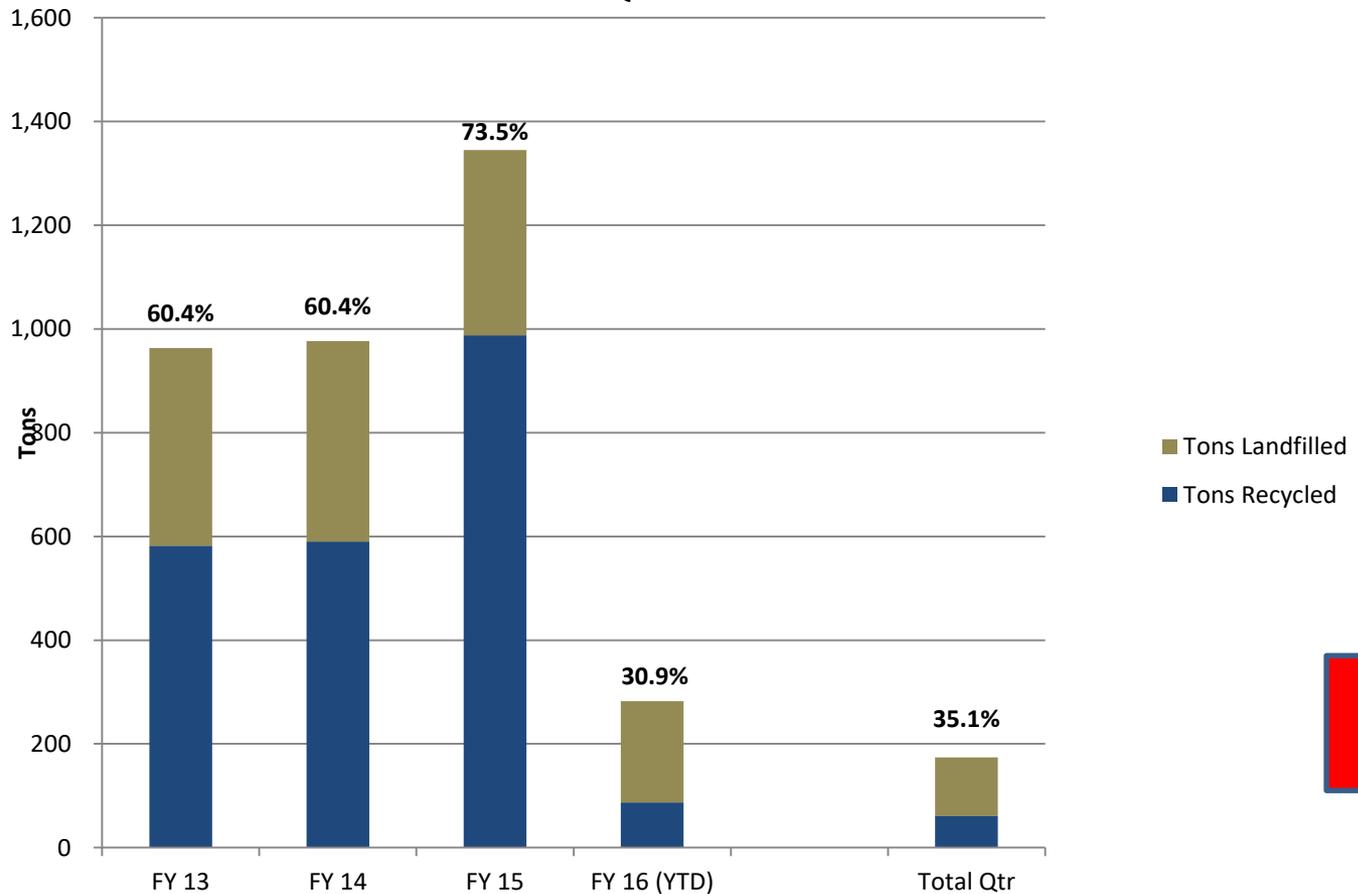
Tactic 5.2.1

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 3rd Quarter FY17



STATUS:
4th Qtr

Facilities Management Strategic Planning Session – Second Quarter FY 2018



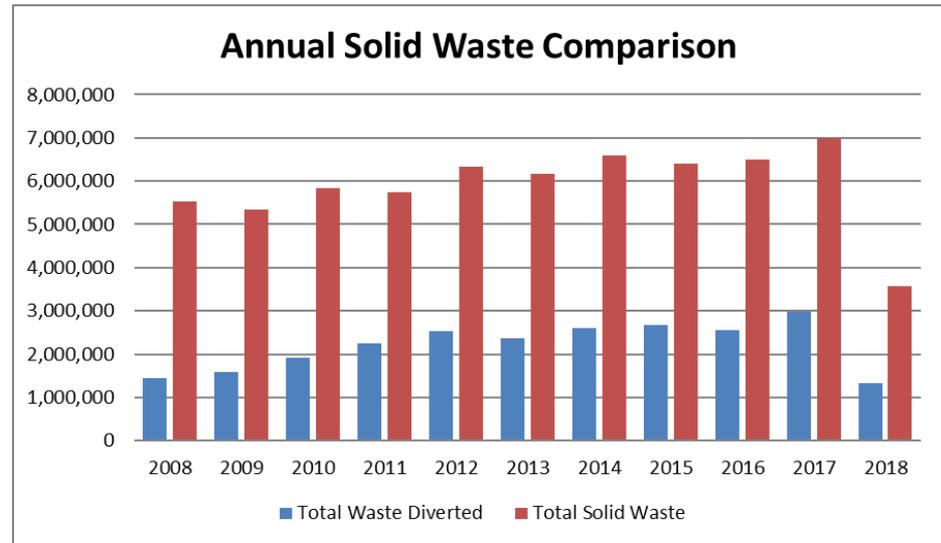
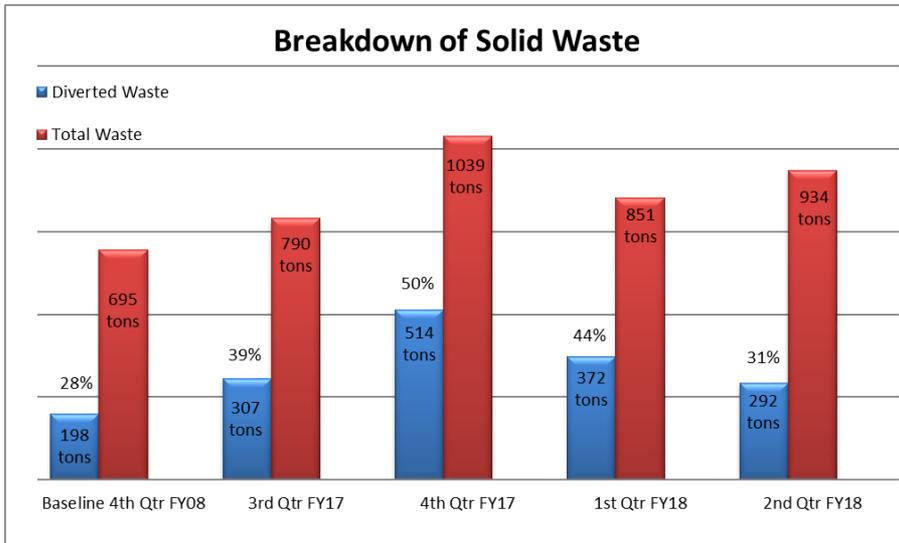
Tactic 5.2.2

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

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve gold rating on the Sustainability Tracking and Reporting System (STARS).

Measure: STARS points documented to achieve gold rating.

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

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

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by June 2018**
 - **Executive Committee: Base on Compliance with UNC Sustainability Policy (*italics*)**
 - **2 Priorities**
 - **Academics:** *Integration of Sustainability Principles*
 - **Operations:** *Operations & Maintenance; Design & Construction; Master Planning*
 - **3 Initiatives**
 - *Recycling & Waste Management*
 - *Environmentally Preferable Purchasing*
 - *Transportation*
 - **1 Commitment**
 - *Climate Change Mitigation & Renewable Energy*

STATUS

GOAL #5 – Promote Good Stewardship

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

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Retro-commissioning program
 - Begin Bioinformatics and King in FY19
 - Identify and retro-commission **minimum** 1 building per year
- Exterior Lighting upgrades to LED
 - Replacing building HID's and Pedestrian Lights as funds become available – start with campus core. (Design Services projects.)
- New Goal of 40% reduction by 2025
- **WARNING!** How do we reach 2025 goal and stop/prevent slippage of GESC savings?

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

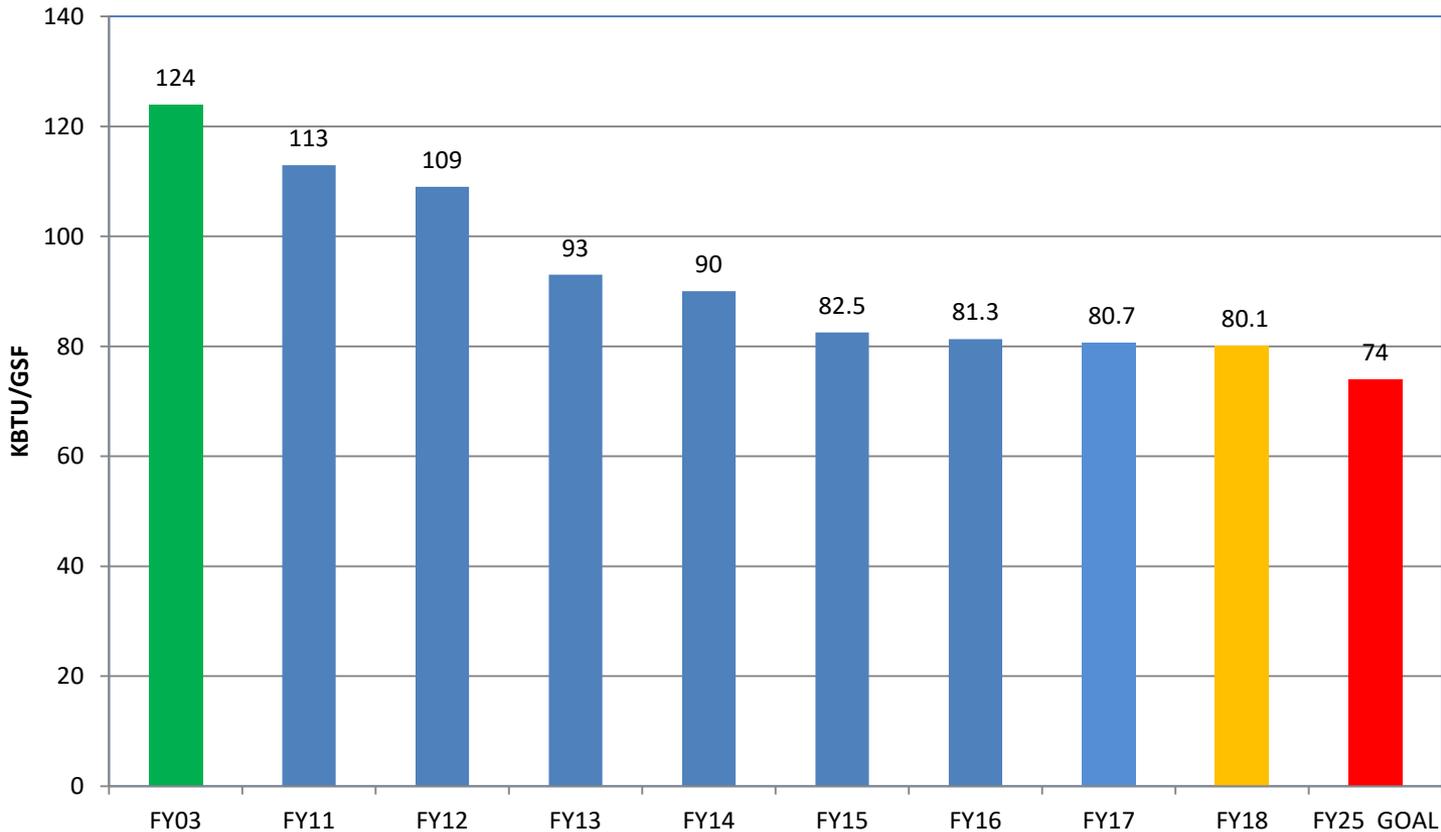
Measure: KBTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

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

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship – First Quarter FY2018**Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation****Tactic 5.4.1:** 12% HUB participation on 80% of Capital Projects**Tactic 5.4.2:** 5% African American Participation on Capital Projects**ACTION PLAN**

Conduct Construction “*Meet & Greet*” March 8, 2018

Continue . . .

- Establish project specific participation goals for single prime projects;
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *Good Faith Effort* documentation for compliance
- Work with internal/external groups to identify skilled subcontractors – minority & non-minority firms
- Encourage firms to bid our work

GOAL #5 – Promote Good Stewardship

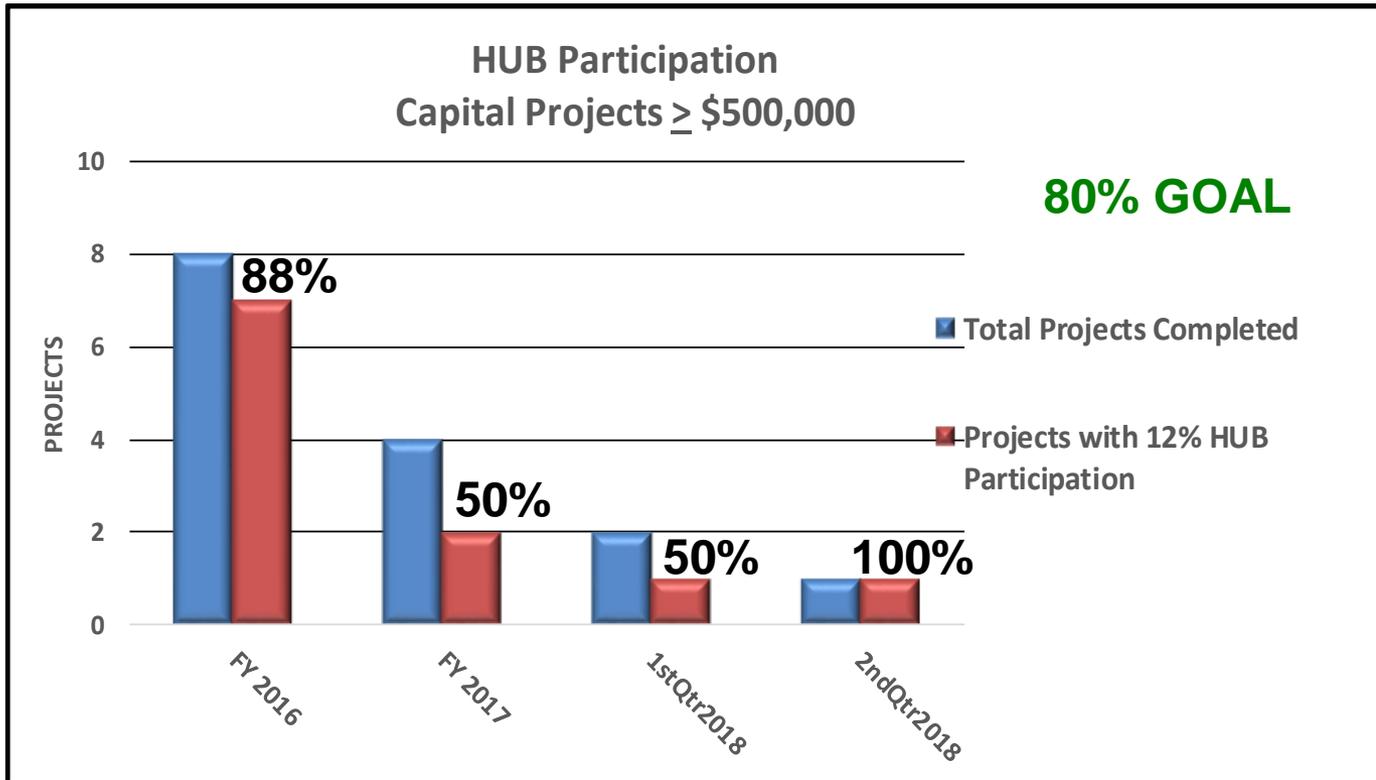
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



**RDH Renovation
Project – 27% HUB**

STATUS

GOAL #5 – Promote Good Stewardship

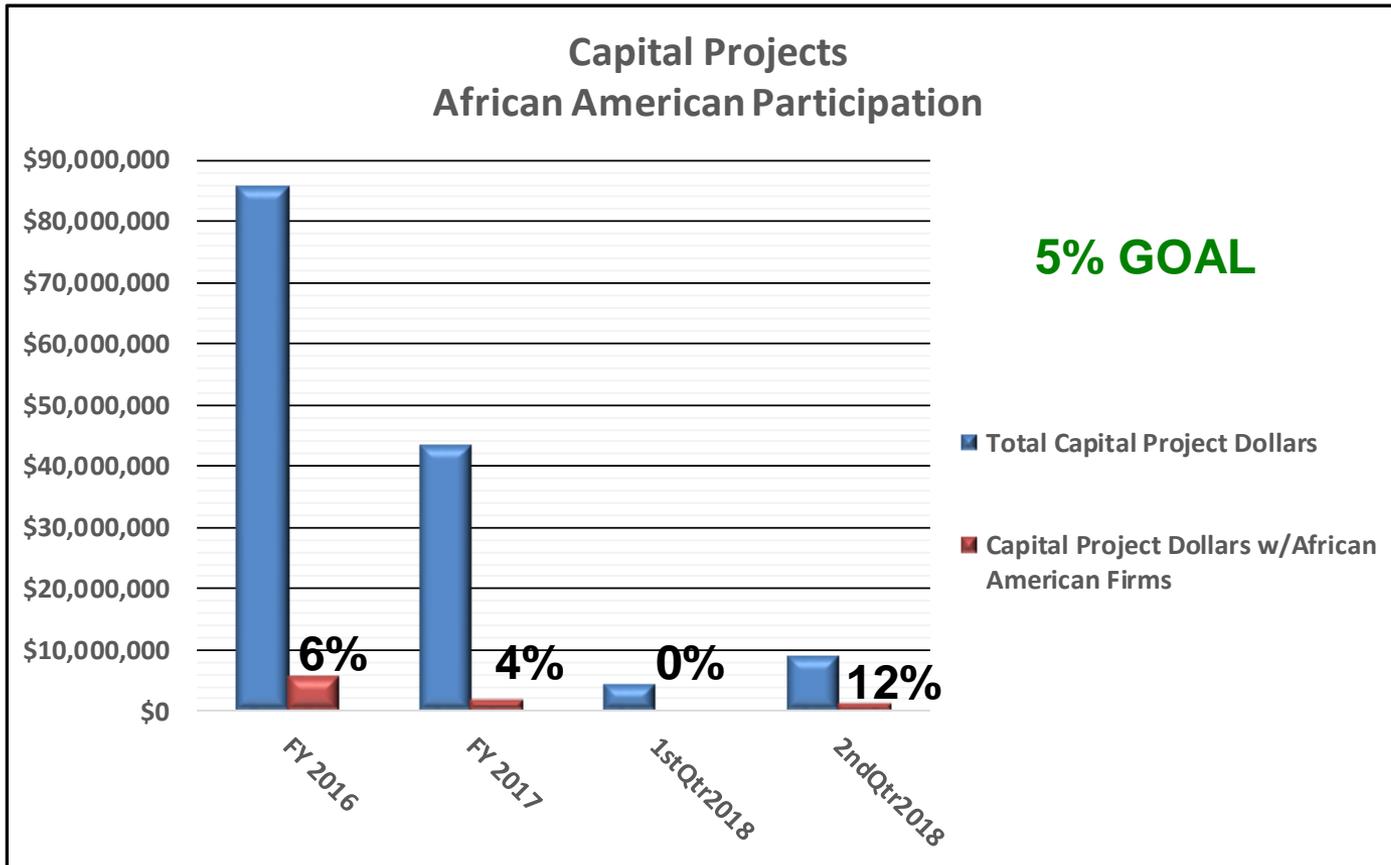
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



RDH Renovation
27% Total HUB
12% African
American

STATUS

GOAL #5 – Promote Good Stewardship

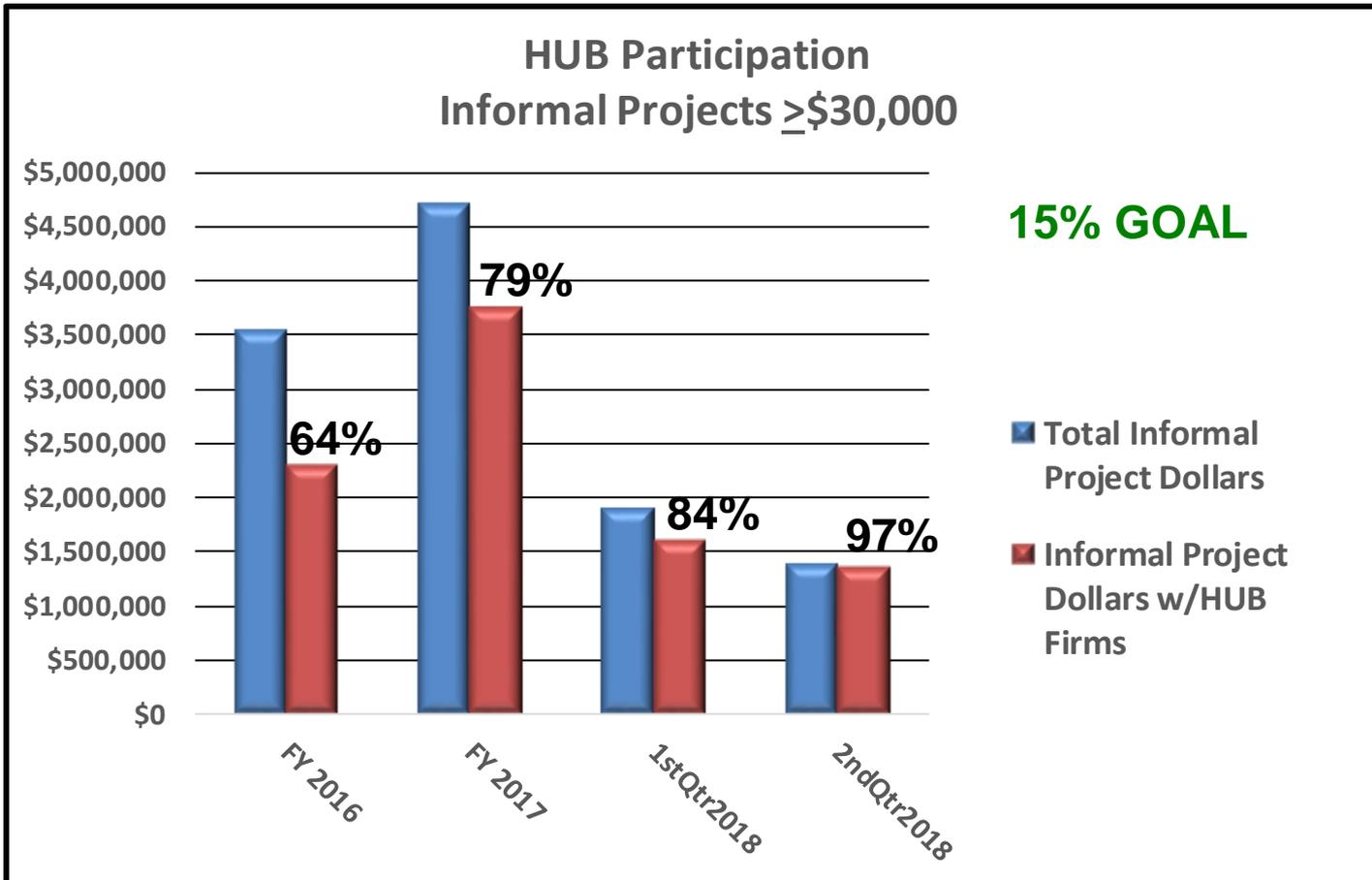
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4:	13% Overall HUB Participation on Informal Projects Below \$30,000 Including 3% African American
Measure:	Total Percentage of HUB Participation on All Informal Projects Below \$30,000 (Construction only) Divided by Total Contracts
Tactic 5.4.5:	3% African American Participation on Informal Projects Below \$30,000
Measure:	Total African American Contract Dollars (Construction only) Divided by Total Contract Dollars

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

We met with one local active African American contractor - **Reliable Restorations:**

Specialties include emergency response, fire restoration, water restoration, smoke damage restoration, odor control, and **interior construction and finishes.**

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

ONGOING IMPROVEMENTS

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

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

- Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
- Amanda Caudle and Ashley Sisco act as advisors to other Design Services Project Coordinators.

Facilities Management Strategic Planning Session – Second Quarter FY 2018

Annual Goal
13%

QTR 2
Status
22.5%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4: 13% overall HUB Participation on Informal Projects Below \$30,000 Including 3% African American
Measure: Total Contract Dollars for HUB Participation on All Informal Projects Below \$30,000 (**Construction only**) Divided by Total Contracts

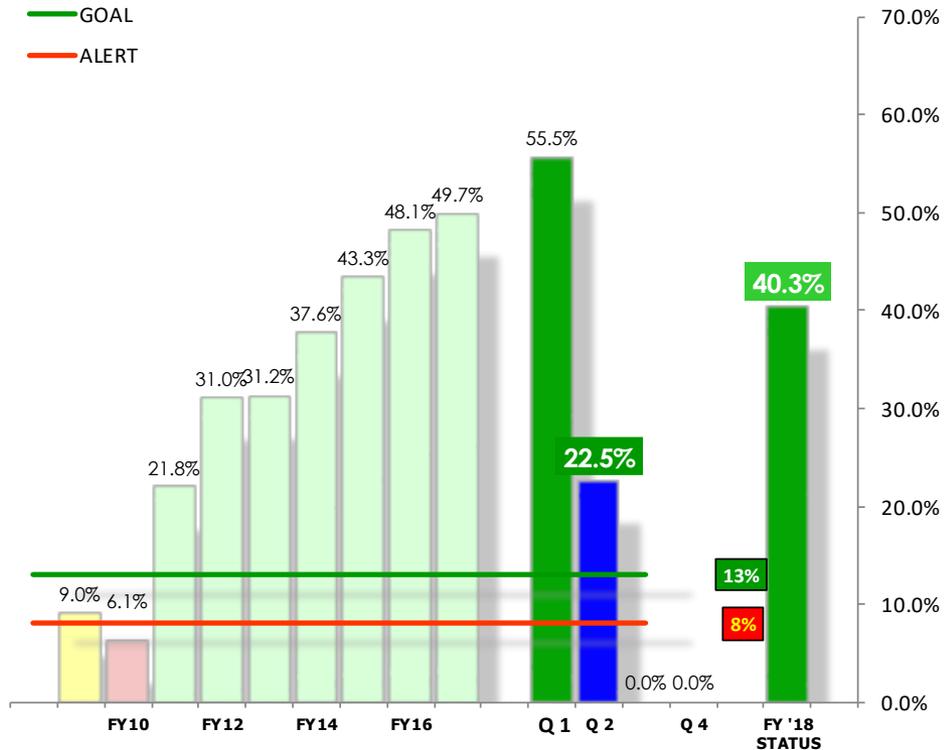
13% Overall HUB Participation Informal Projects Below \$30,000

13% Overall HUB Participation – Summary Graph

FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
FY16	\$ 2,605,540	\$ 1,252,152	48.1%
FY17	\$ 2,122,583	\$ 1,055,439	49.7%
Q 1	\$ 414,160	\$ 229,963	55.5%
Q 2	\$ 354,275	\$ 79,808	22.5%
Q 3	\$ -	\$ -	
Q 4	\$ -	\$ -	
FY '18 STATUS	\$ 768,435	\$ 309,771	40.3%

HUB OVERALL GOAL: 13.0%



Facilities Management Strategic Planning Session – Second Quarter FY 2018

Annual Goal
3%

QTR 2 Status
6.59 %

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 for Informal Projects Below \$30,000 (**Construction only**) Divided by Total Contract Dollars

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

FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
FY16	\$ 2,605,540	\$ 47,345	1.8%
FY17	\$ 2,122,583	\$ 14,905	0.7%
Q 1	\$ 414,160	\$ 30	0.007%
Q 2	\$ 354,275	\$ 23,361	6.594%
Q 3	\$ -	\$ -	
Q 4	\$ -	\$ -	
FY '18 STATUS	\$ 768,435	\$ 23,391	3.044%

HUB OVERALL GOAL:

3.0%

3% African American Participation – Summary Graph

