



Strategic Planning Session

**Third Quarter – Fiscal Year 2014
January – March 2014**

- 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**



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 monitoring, reporting and recording of employee’s time.
 - a) Meet with shop supervisor and PA’s to review.
 - b) Stress importance with all employees.
 - c) Get supervisors out “in the field”
 - d) Review white sheets in detail.
 - 2 – Get employees out of the shop.
 - 3 – Manage expectations.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

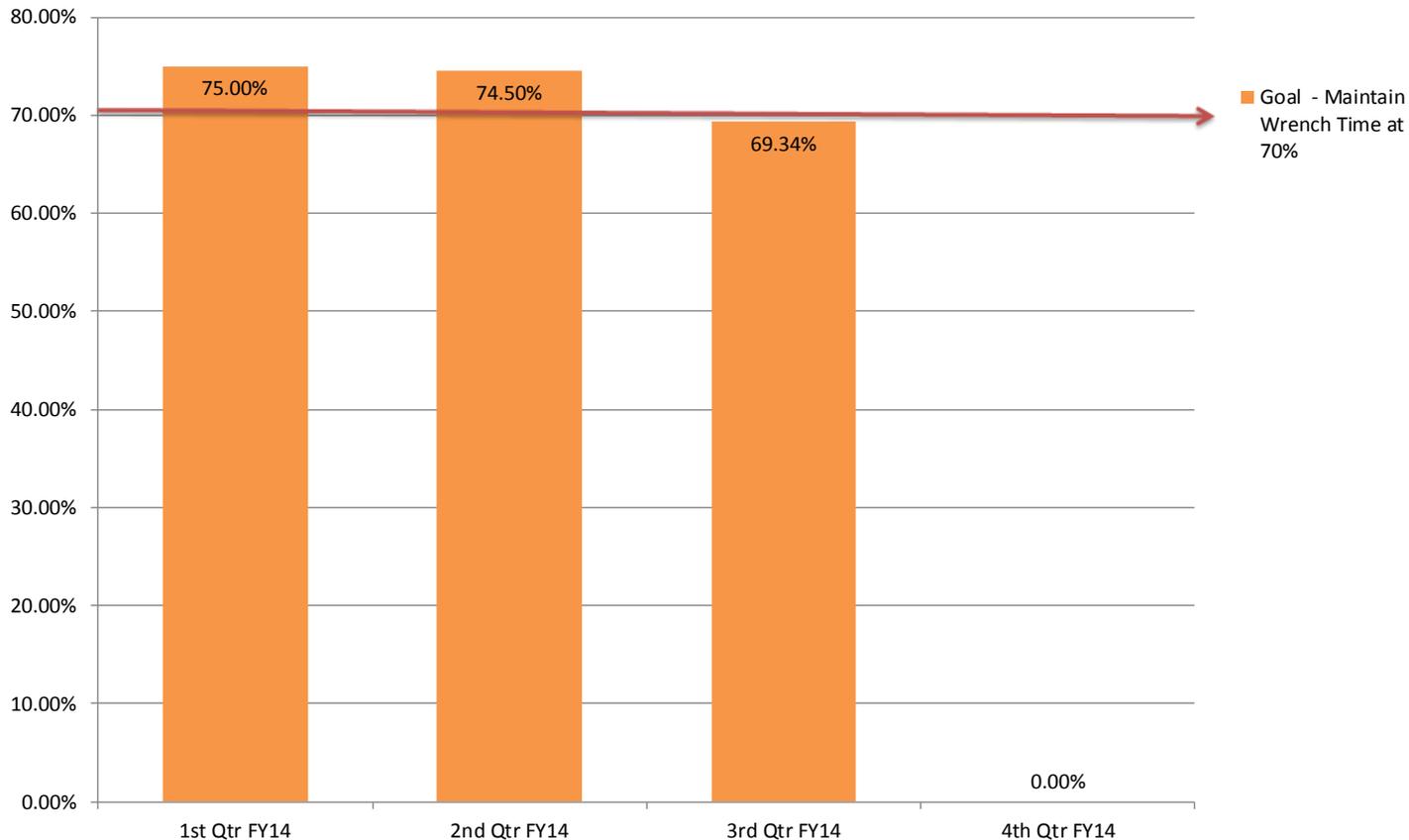
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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).
- 2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
- 3 – Send out daily reminders for approvals; monitor req to PO processing time.
- 4 – Promote the use of SDI Punch-out.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

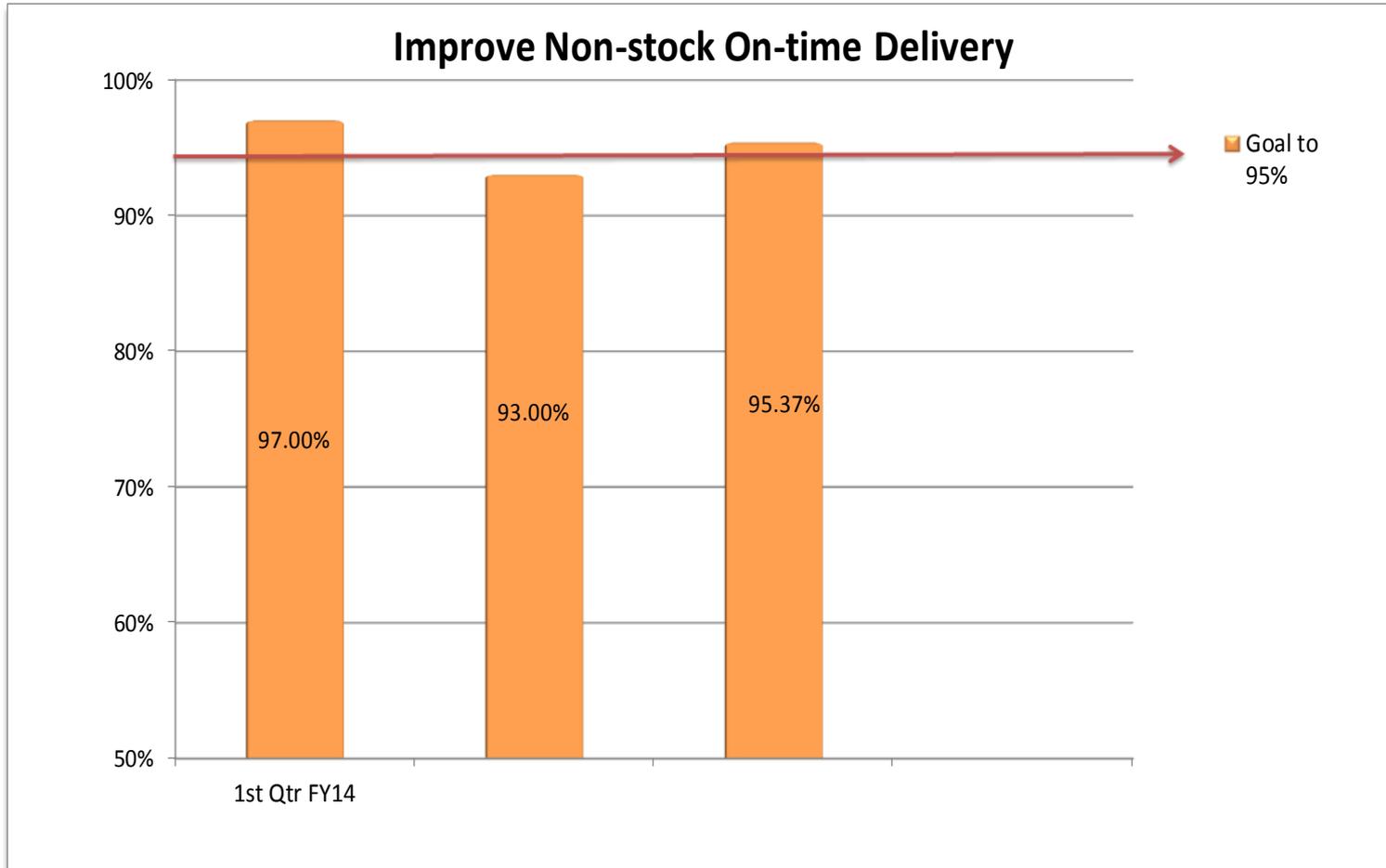
Objective: 1.2: Improve Logistics Efficiency

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

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

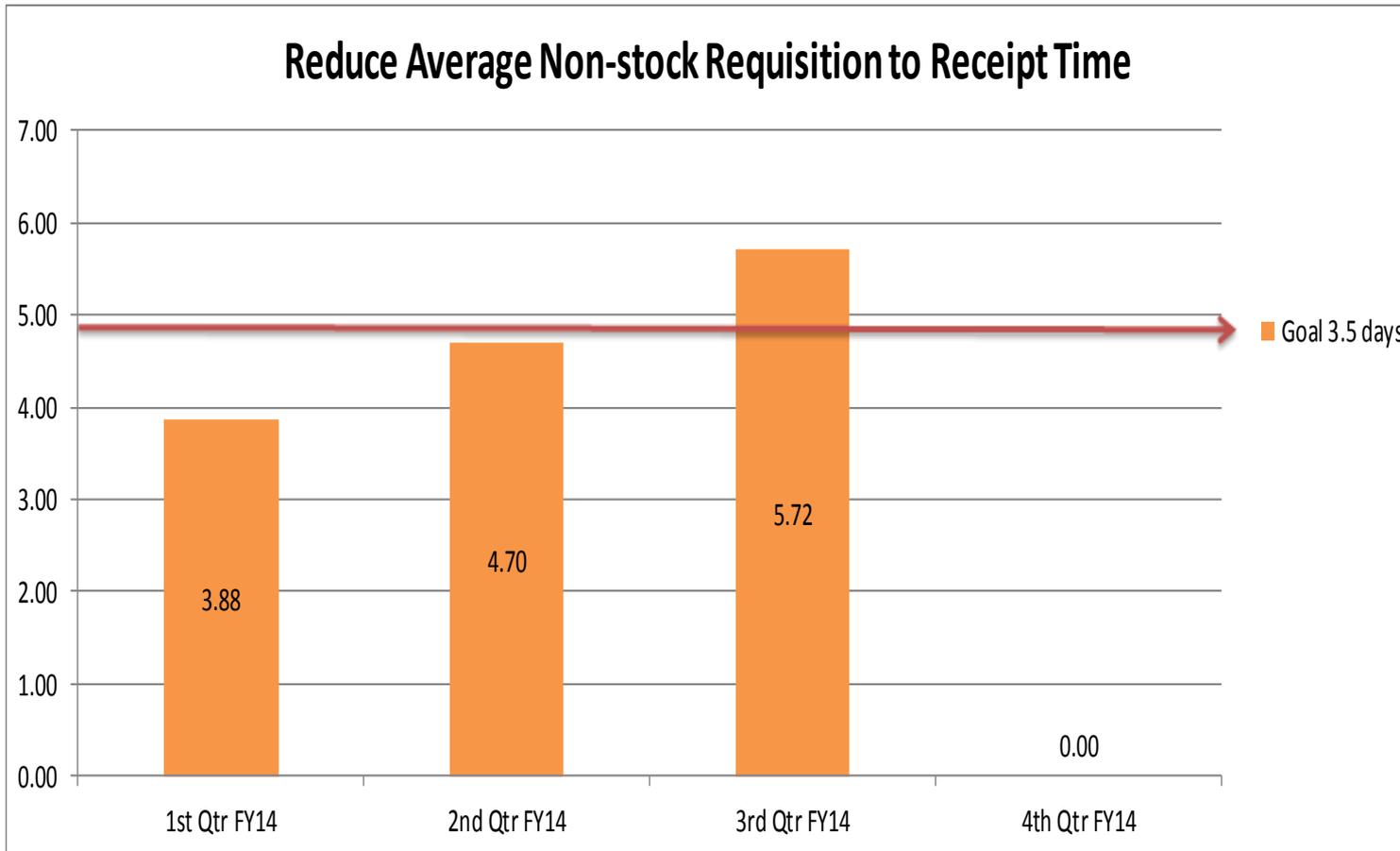
Objective: 1.2: Improve Logistics Efficiency

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

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

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

ACTION PLAN

- Actions Planned

- 1 – Daily review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.
- 2 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
- 3 – Weekly meeting with UPA and Managers to monitor 14 day report.
- 4 – Help customers understand building priorities (wants vs. needs).

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

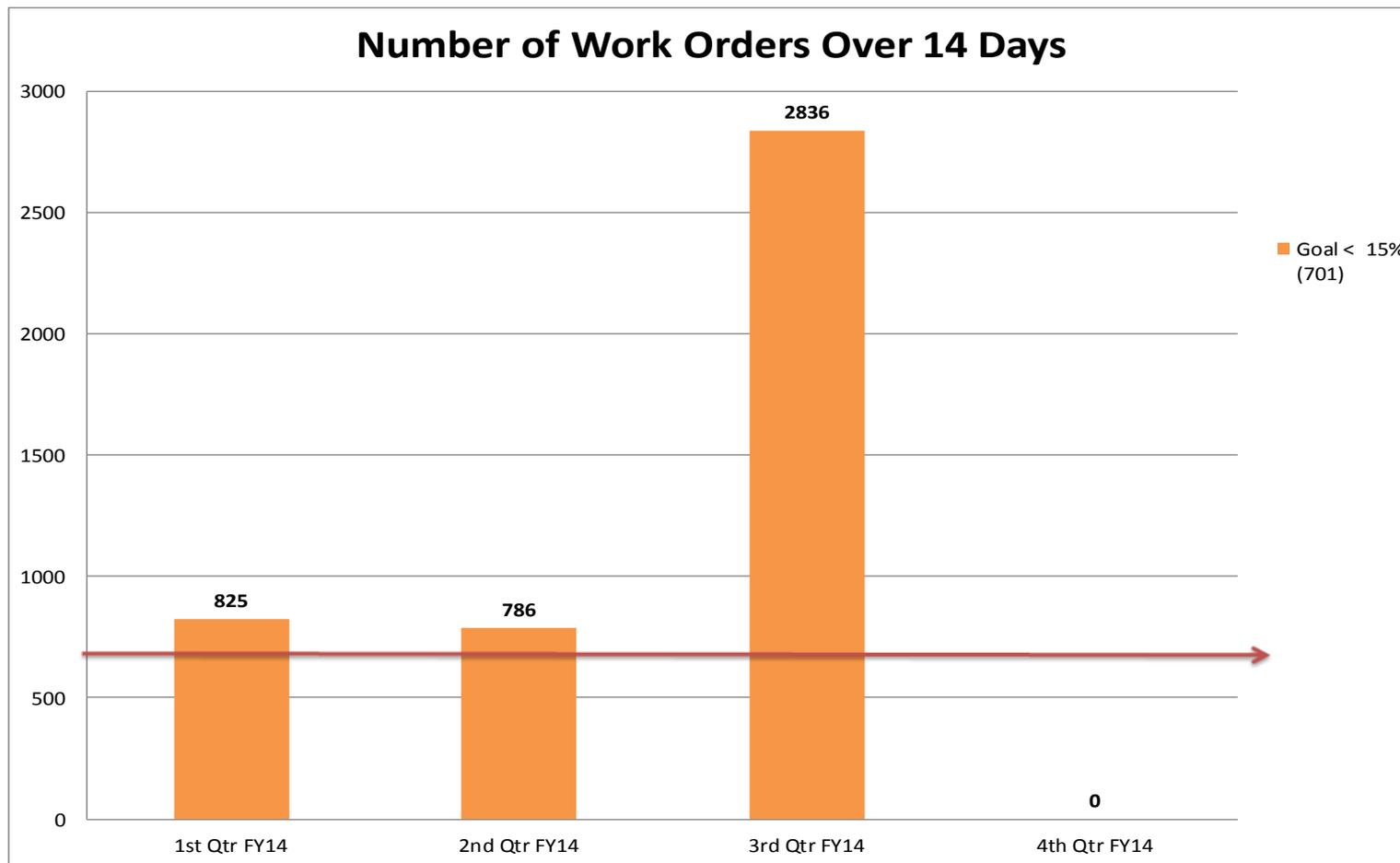
Objective: 1.3: Improve Work Request Process

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

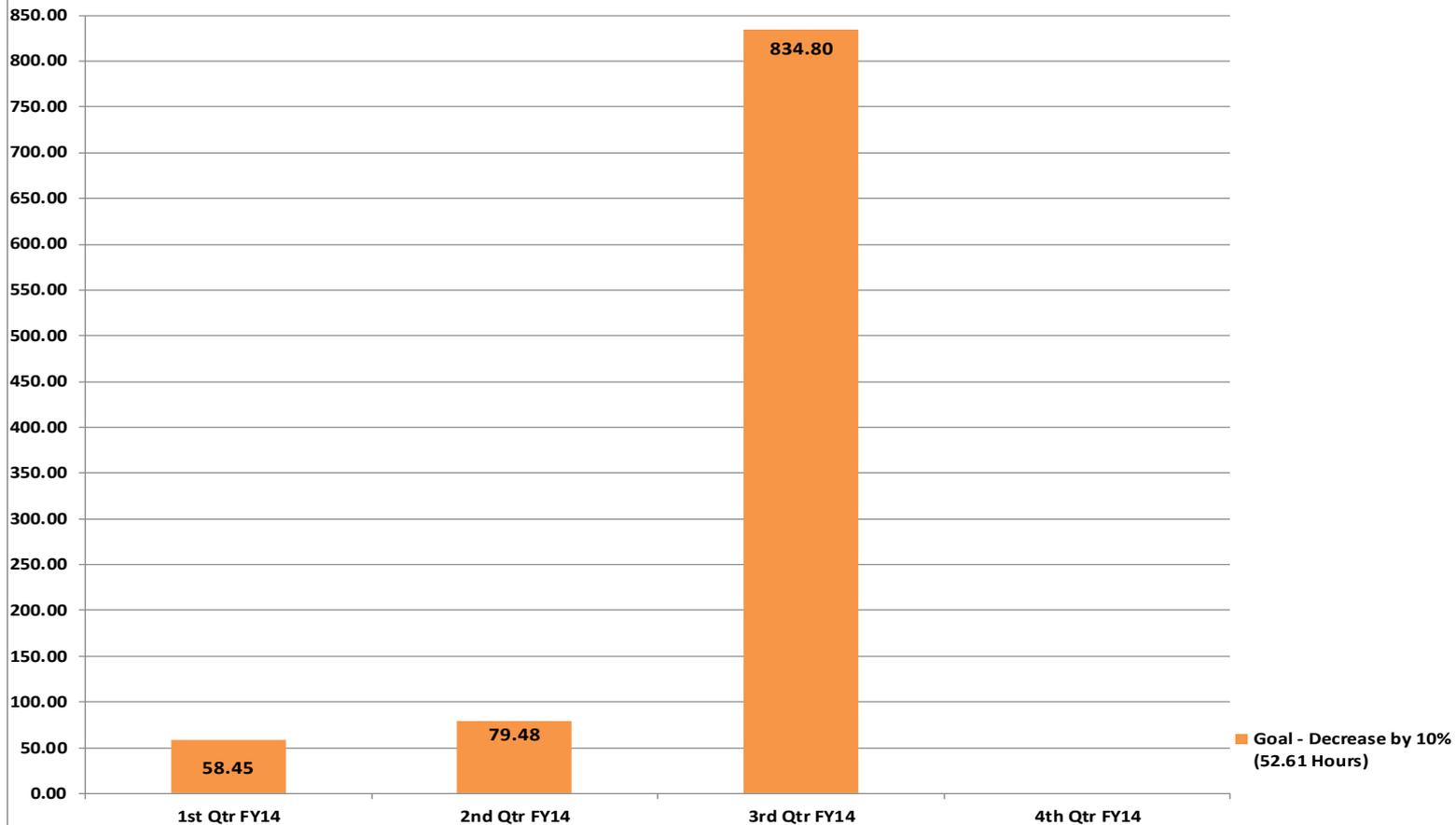
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STATUS

GOAL #1 – Continuously Improve Maintenance and Operations

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

Lead
BES

ACTION PLAN

- Actions Completed
 - BES Re-Org Study
 - BES Re-engineering Proposal Approved
 - All buildings not in renovation audited (self audit)
 - Changed chart to reflect summary data for last four quarters
 - Recommended (OS1) Pilot
 - Outside audit of cleaning processes using OS1 and APPA Appearance Levels

- Actions Planned
 - Conduct Re-engineering implementation planning meetings by 12/31/14
 - Continue quarterly self audits by 7/13/14
 - Review (OS1) and APPA audit reports by 6/10/14
 - Attend (OS1) related training (Janitor University, October 6-10, 2014, Work loading Class, TBD, Simon Institute Symposium, July 13-15, 2014)
 - Select building for (OS1) Pilot Study by 7/1/14

Facilities Management Strategic Planning Session – Third Quarter FY 2014

Lead
BES

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

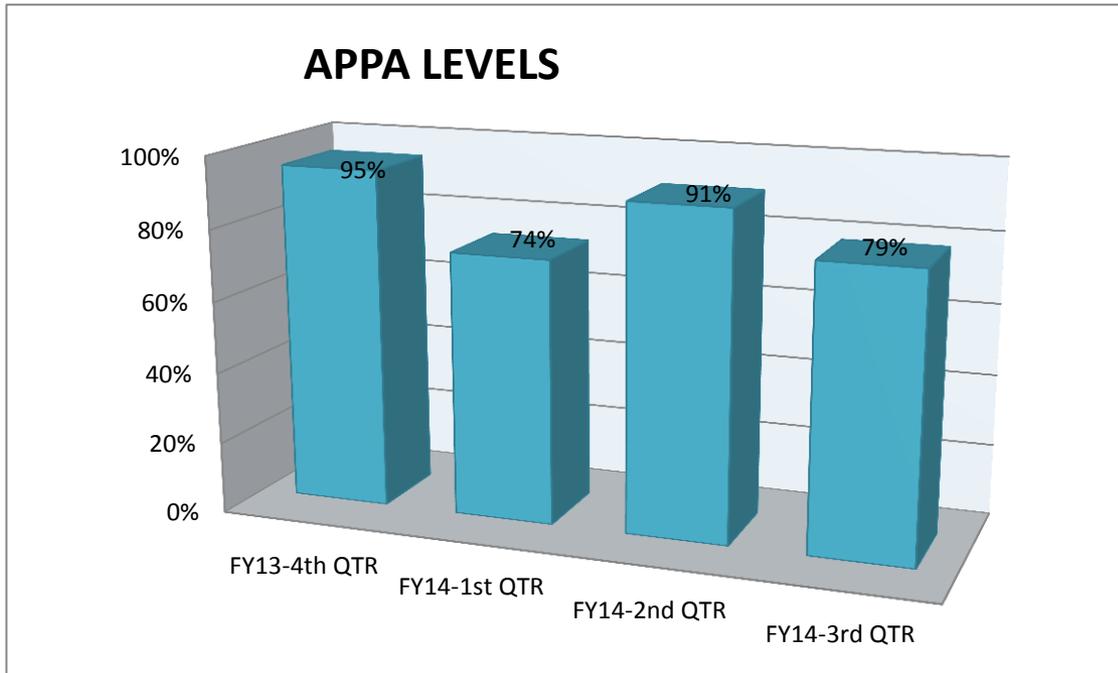
Objective: 1.4: Improve BES Processes

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 = 79%

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 – Complete conversion from old PM Module to new PM Module. (August 2014)
UPA and Managers to monitor status.

- 3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.

- 4 – Identify and prioritize equipment conditions and needs for replacement.

- 5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

- 6 – Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

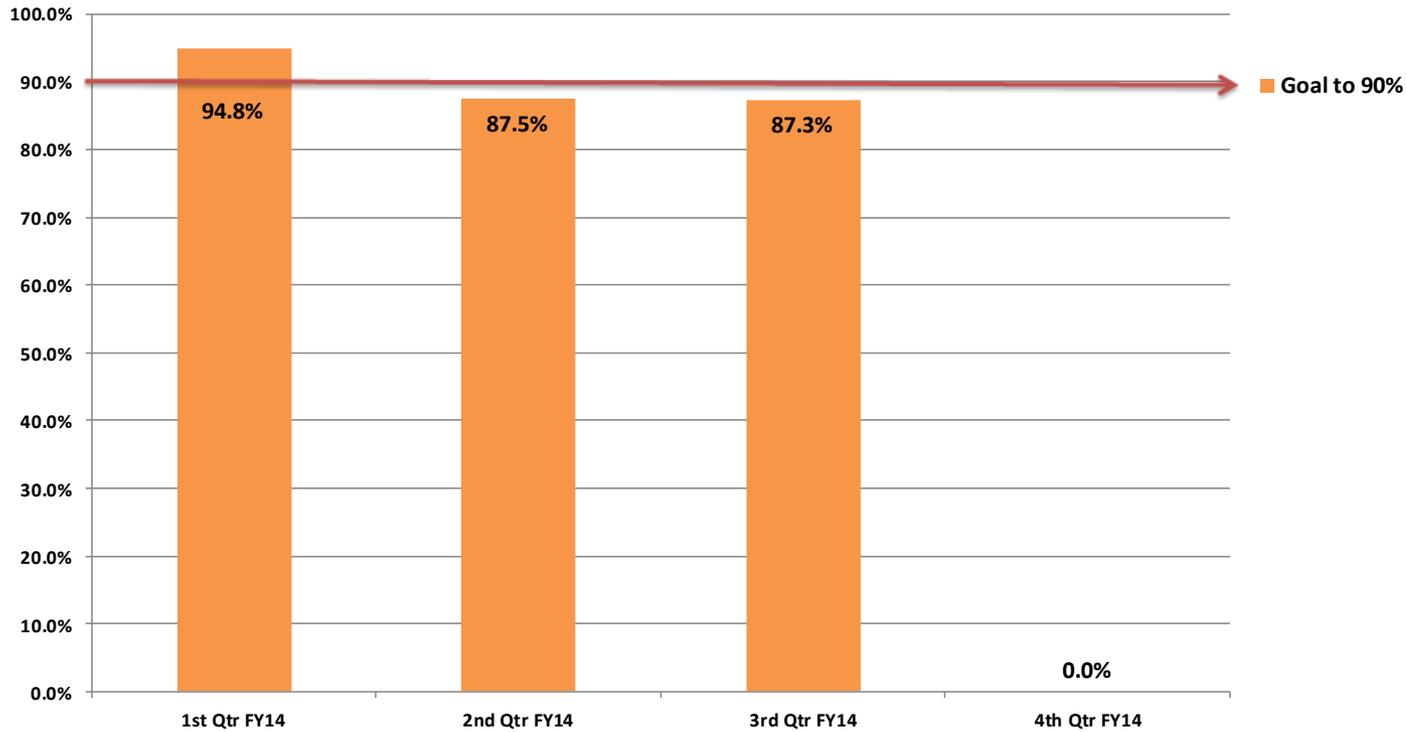
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

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

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

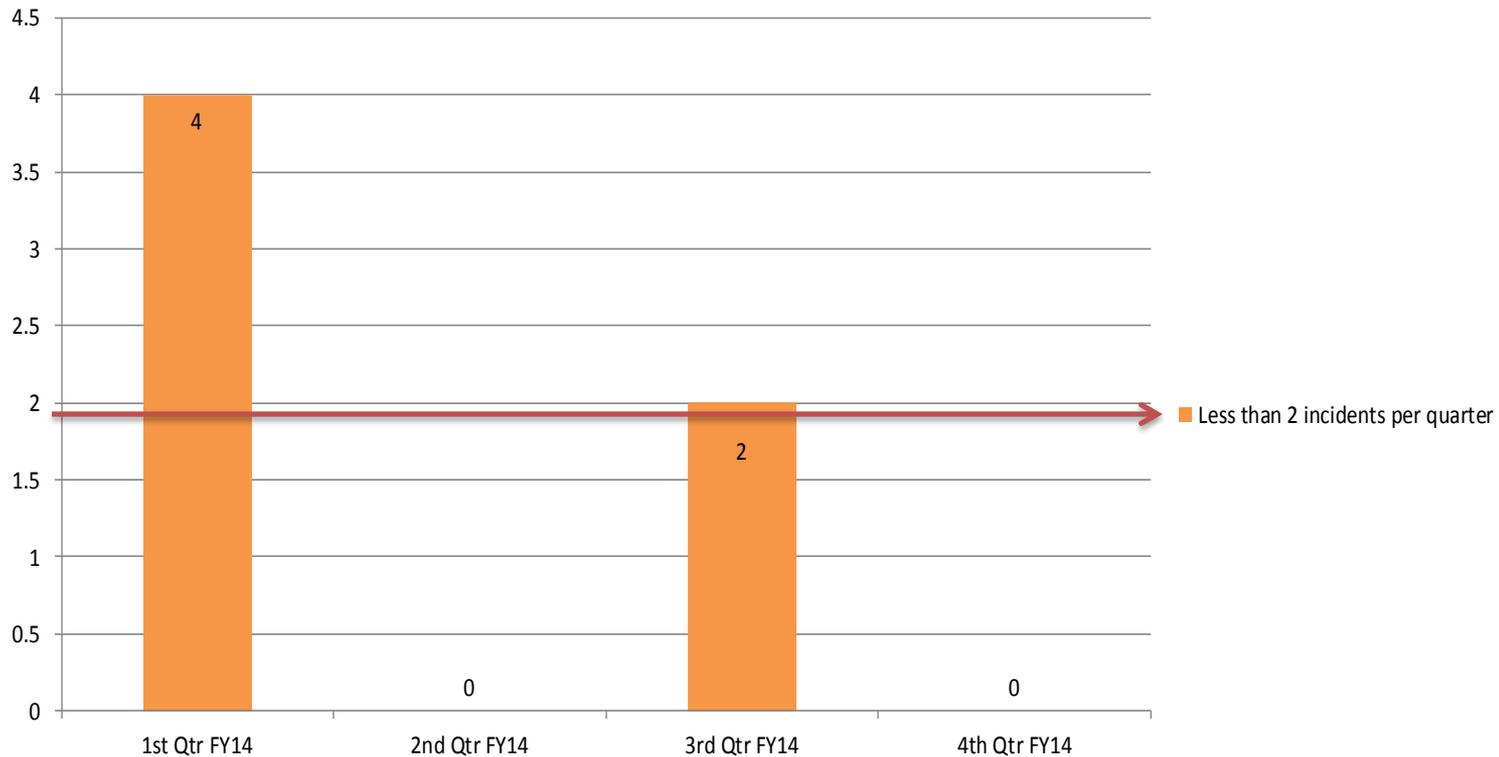
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

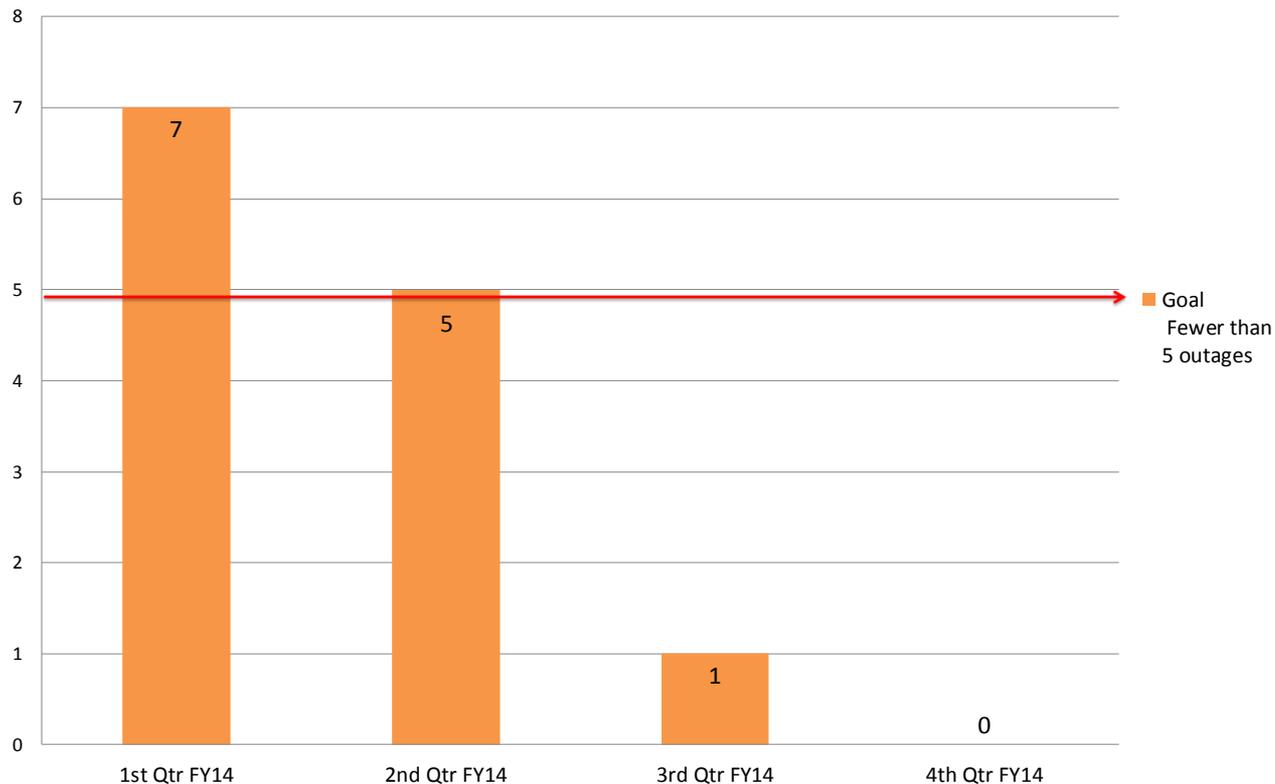
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Utility Outages



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

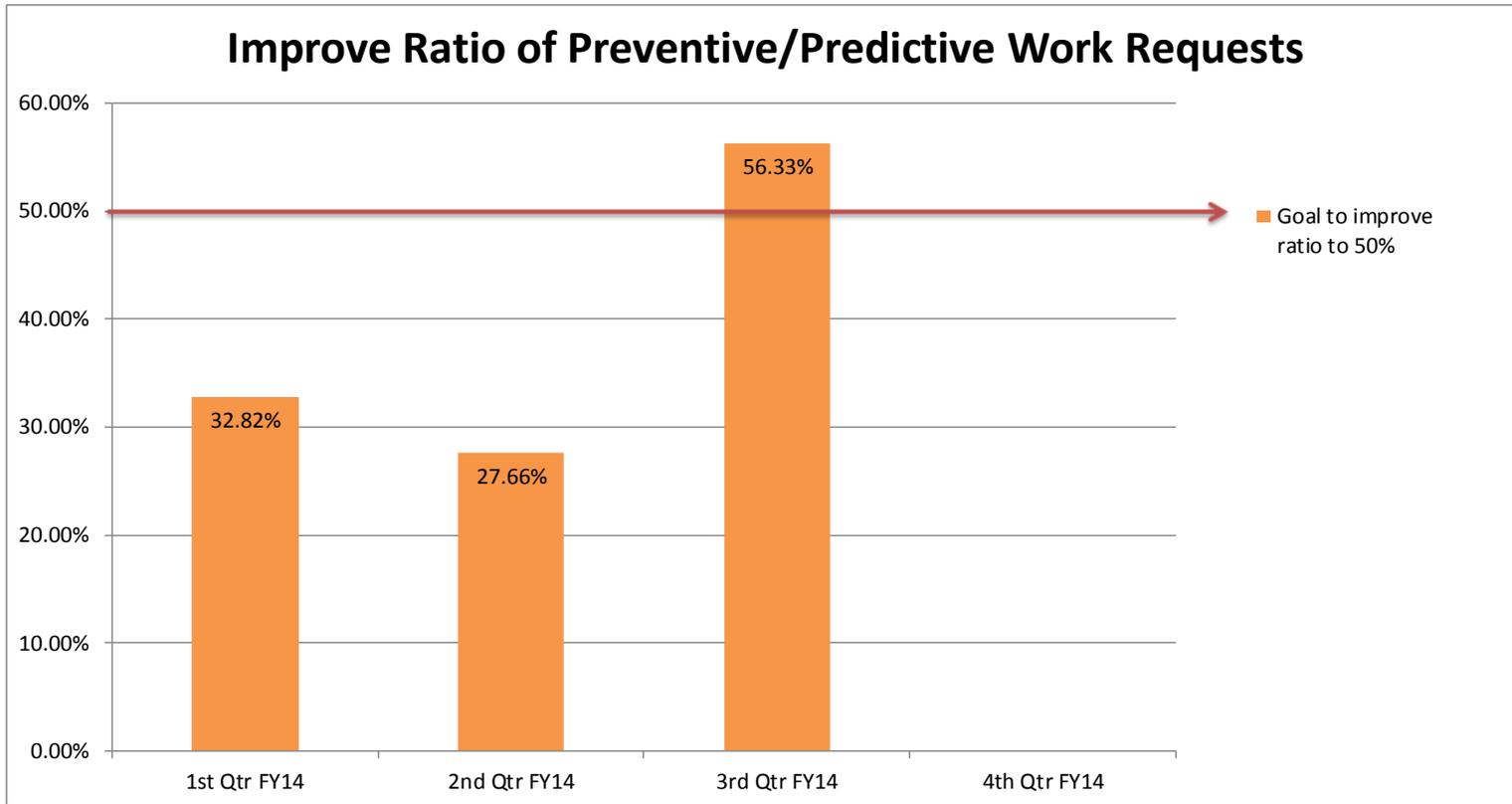
Objective: 1.5: Improve Facility Systems Reliability

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



FM Prioritized Projects – FY14

1. ARCHIBUS Upgrade – **Completed 30Dec2013**
2. Space GA Reports – **Completed 14Feb2014**
3. Space Data Clean Up – **Estimated Completion Date: 15March2014**
4. Design & FBO Enhancements – **Estimated Completion Date: 15Jan2014**
5. FM Surveys – **Estimated Completion Date: 5March2014**
6. ImageNOW Document Management – **“Hold” for ITS to add Dev Server and Infrastructure/licenses ; new ImageNOW project may proceed beginning Jun/July.**
7. Real Estate Module – **Estimated Completion Date: 01Apr2014**
8. Facilities Condition Assessment Program (FCAP) – **Estimated Completion Date: 7Feb2014**
9. CRDM Enhancements – **Estimated Completion Date: 30Apr2014**
10. FBO Accounting Upgrades – **Estimated Completion Date: 15May2014**
11. LockShop Enterprise Data Assistant (EDA) – **Completed 28Feb2014**
12. BES Enterprise Data Assistant (EDA) Asset Management - **Estimated Completion 01May2014**
13. BAS LDAP Upgrade & Security Enhancements – **Estimated Completion Date 6Jun2014**
14. ARCHIBUS Key Management – **Estimated Completion Date 30June2014**
15. WO Hot Work Permit Form/Utility – **Estimated Completion Date 15April2015**
16. Campus Map Portal – **Estimated Completion Date: 15May2014**

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

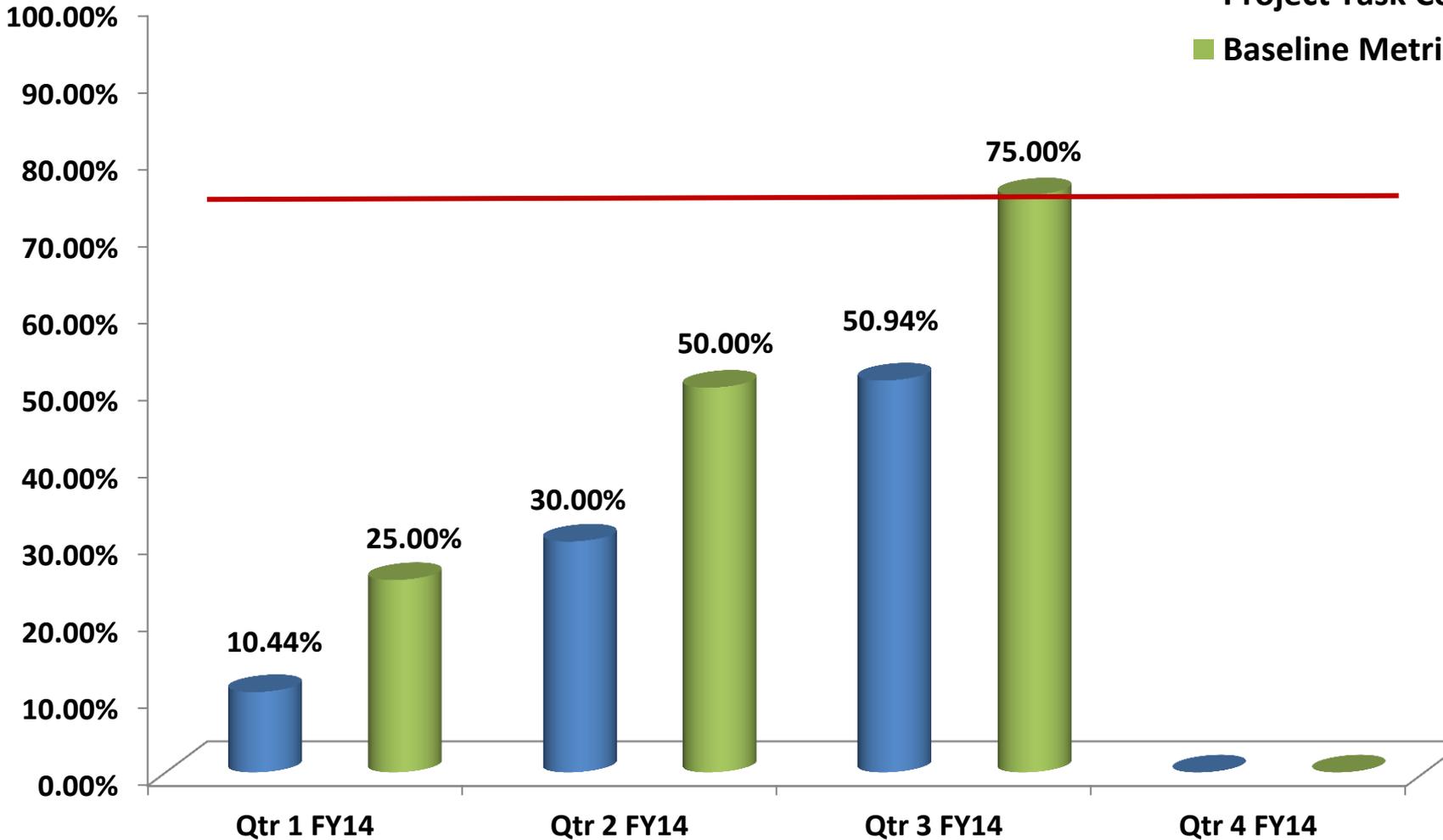
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

■ Cumulative Average:
Project Task Completion
■ Baseline Metric



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2014

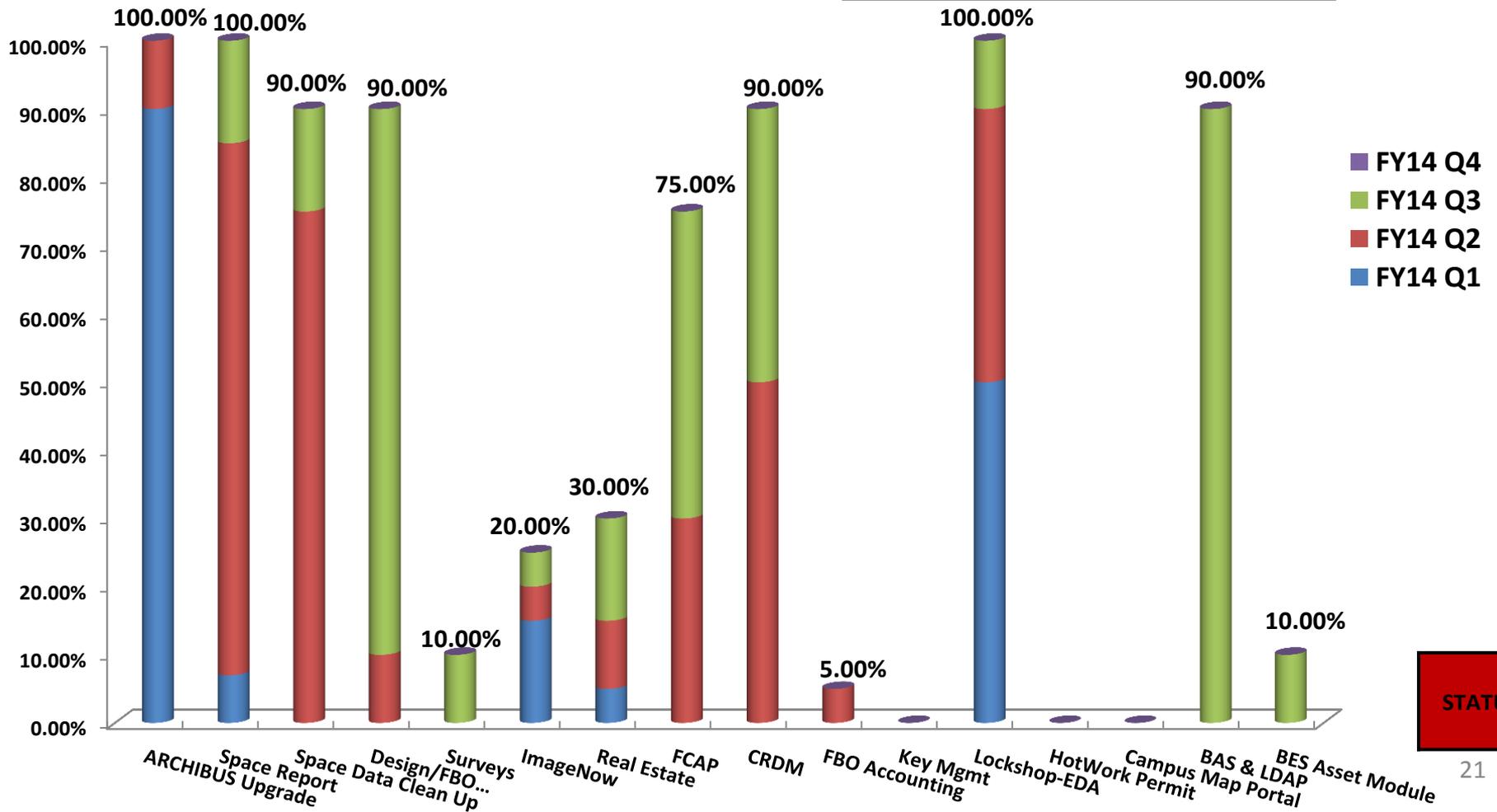
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead
FIS

Total Projects 100% Completed
FY14/ 1st Qtr Status: 0
FY14/ 2nd Qtr Status: 1
FY14/ 3rd Qtr Status: 3

Balanced Scorecard Category: Internal Business Processes



STATUS

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. Finalize BAS controls upgrade/LDAP projects by June 6, 2014.
2. Launch FCAP module for Facilities Operations use by June 30, 2014.
3. Complete 100% of Asset Module for BES by June 30, 2014.
4. Hire vacant Temporary Survey Technician position by June 30, 2014.
5. Finish ARCHIBUS Work Request Customer Training video segments, main Moodle2 ARCHIBUS training page for Beginner Work Request Customer and Key Management documentation by August 30, 2014. (Currently on hold during end of year)

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 a new GIS position March 2014
2. Completed 100% of Testing for Lockshop EDA project by February 28, 2014.
3. Trained two additional personnel on AX certification in October 2013 and increased the number of certified Building Automation System support personnel by 200%.
4. First ARCHIBUS Training video draft , Moodle2 ARCHIBUS training page and new Create WR documentation completed.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

New Improvements

- **Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:**
 - ❑ Convert Scope & Budget to format in Archibus similar to Estimating Workbook – Including all Timeline and Audit documents.
 - *Timeline: FY14 QTR 3 - FY15 QTR 2*
 - ❑ Convert current Excel Purchase Requisition (PR) to Archibus PR, and Convert current Excel Timeline to MS Project style chart.
 - *Timeline: FY15 QTR 1 - FY15 QTR 4*
 - ❑ Link Project Folders to Archibus for document reviews and access.
 - *Timeline: FY15 QTR 1 - FY15 QTR 4*
- **Customer Orientation for Design Services Processes and Archibus Design Services Project Management:**
 - ❑ Customer meet and greet to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
 - *Timeline: FY15 QTR 1 - FY15 QTR 4*
 - ❑ Project Priority List to include new column designating “true” Customer.
 - *Timeline: FY15 QTR 1 - FY15 QTR 4*
- **Archibus - Design Services Customer Survey:**
 - ❑ Started testing viable format for Customer responses via LimeSurvey – Success to date. FIS performing ARCHIBUS test.

Ongoing Improvements

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

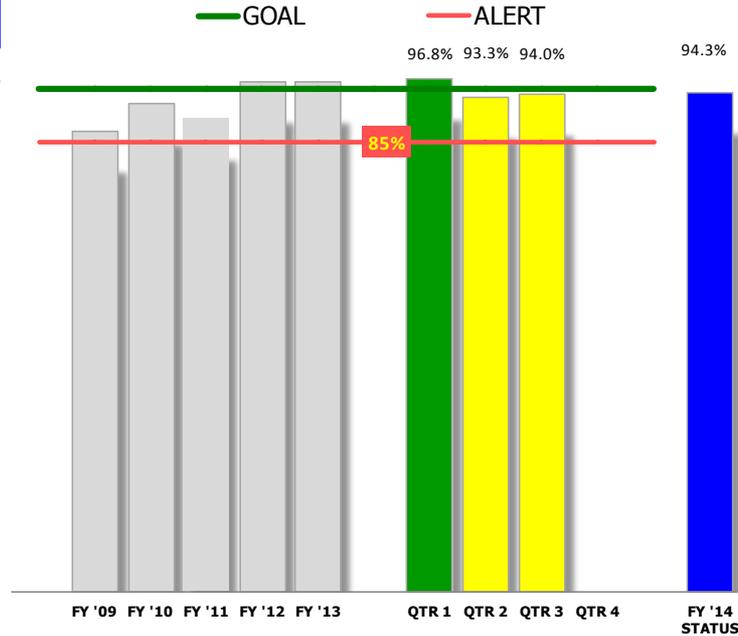
Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
QTR 1	31	30	1	96.8%
QTR 2	45	42	3	93.3%
QTR 3	83	78	5	94.0%
QTR 4	0	0	0	0.0%
FY '14 STATUS	159	150	9	94.3%



GOAL
95.0%

STATUS
94.3%

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

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

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Complete CRDM update including revision of Second Section of SOP**
 - **Complete Phase 2, CRDM, for FCI capability (FIS)**
 - **Determine O/A FCI of buildings (work begun by FO)**
 - **Recommend a plan/ prioritize projects to improve FCI by 5% by end of FY 2015.**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

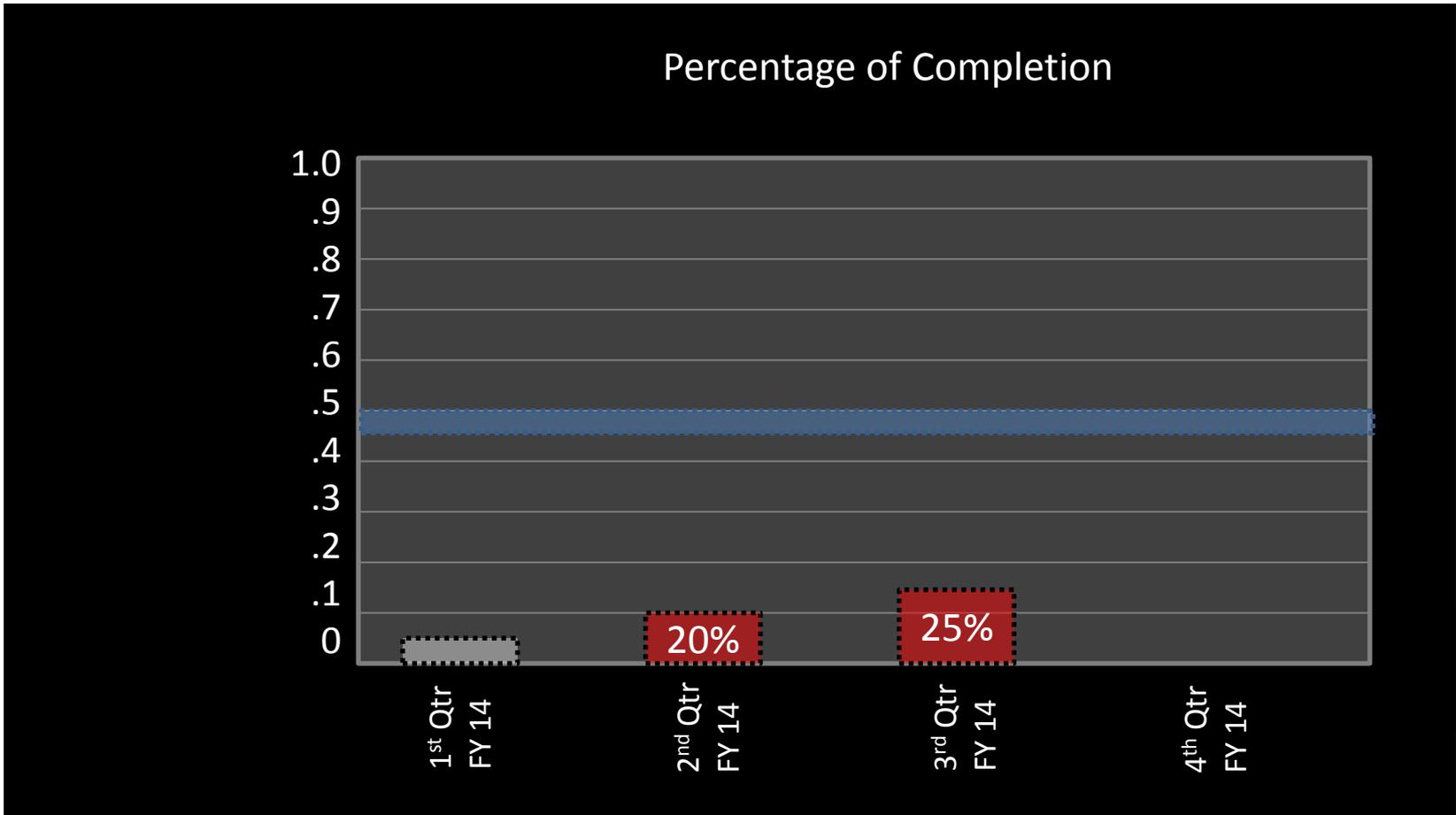
Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

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

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **There is not a “System Wide Standard”. Reference UNC Charlotte Approved Standard.**
 - **Complete space allocations/ inventory by room category in Archibus**
 - **Compare inventory to standard and report % difference.**
 - **Work with FIS to generate report by room use.**
 - **Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard by end of FY 2015.**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

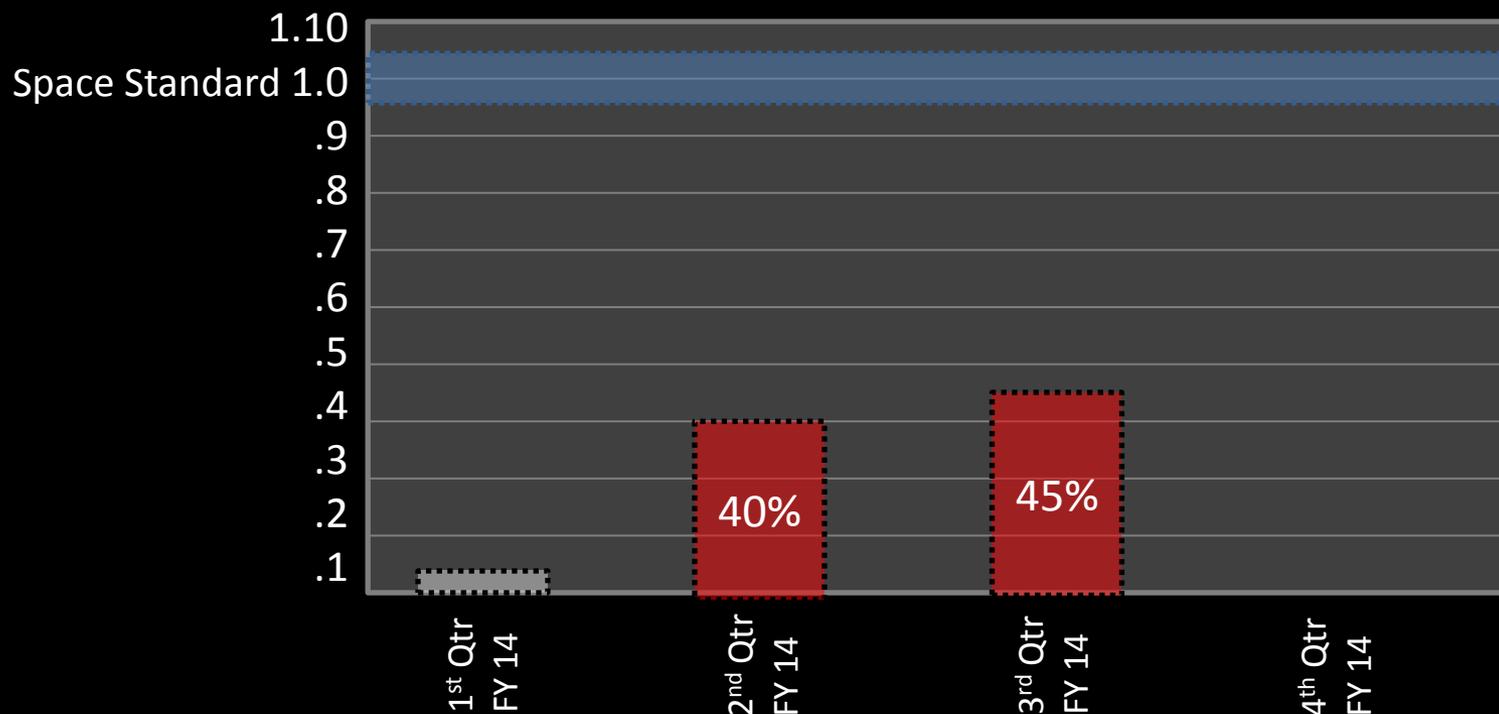
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of FY 15.**

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

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

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

- Music Annex - screened, interviewed, selected, under contract.

Actions Planned

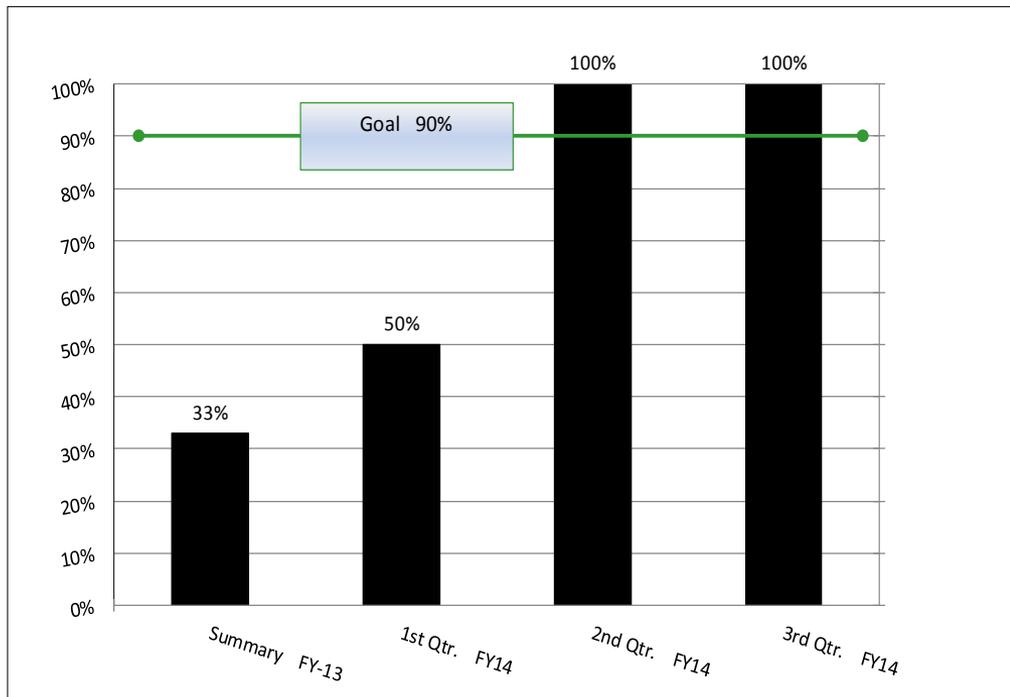
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules –
 - PMs to update the BL schedules when design agreements are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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

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



Tactic Measurement for 3rd Quarter is 100%

Facilities Management Strategic Planning Session – Third Quarter FY 2014

Lead Capital

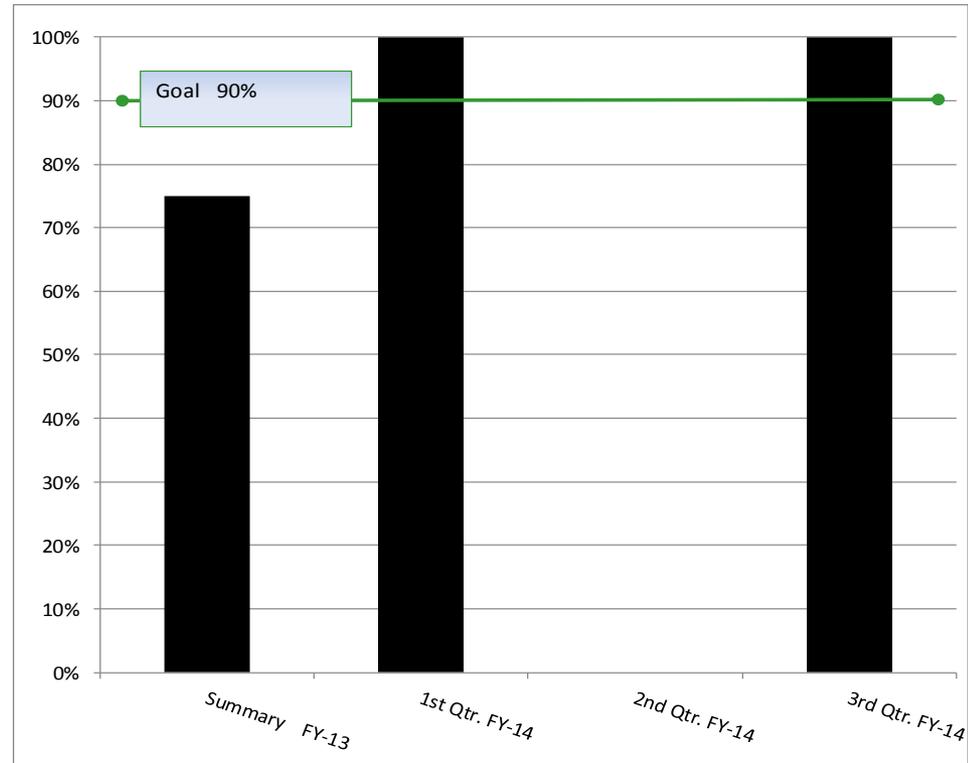
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

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



Tactic Measurement for 3rd Quarter is 100%

Status

Facilities Management Strategic Planning Session – Third Quarter FY 2014

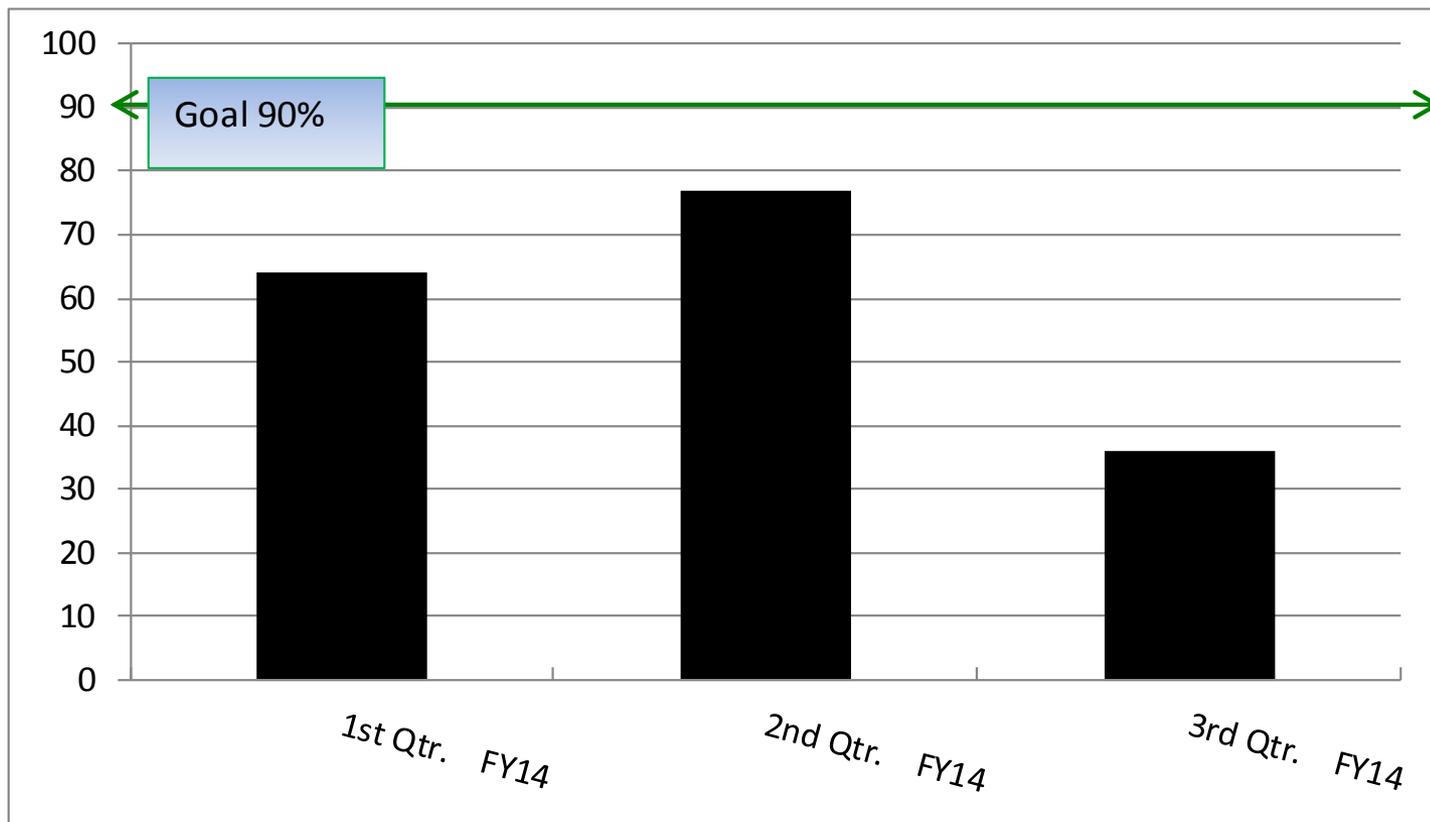
Lead
Capital

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Processes



Tactic Measurement is 36%*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.

Status

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

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

- Early site Phase 13 bid and under contract. Oak Hall Renovation started on time. Colvard Renovation bid on time.

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

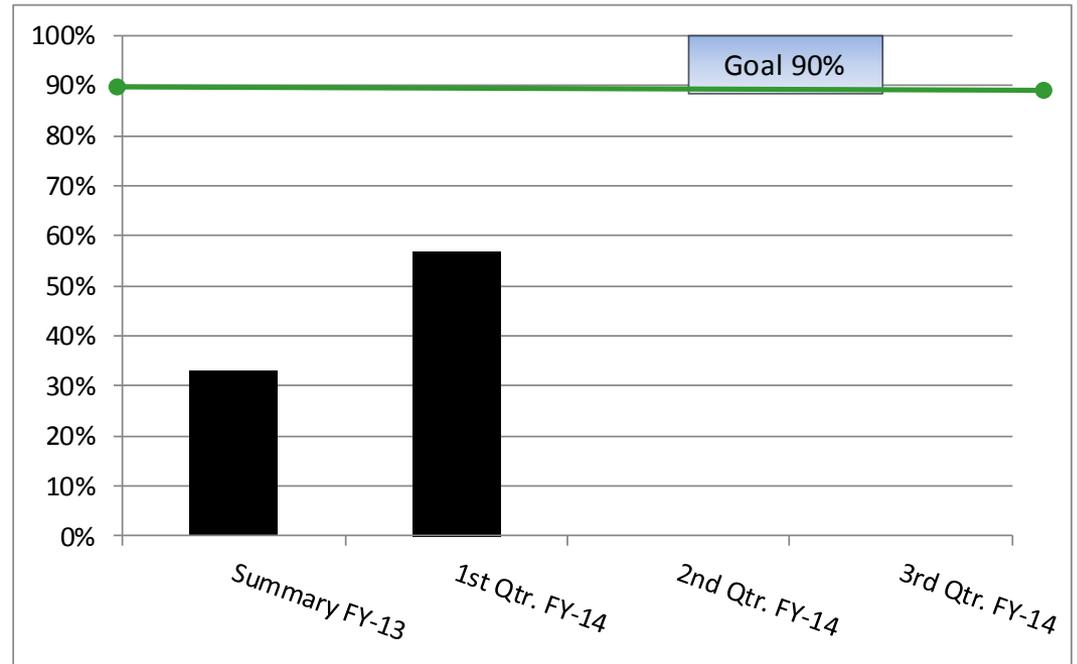
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

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



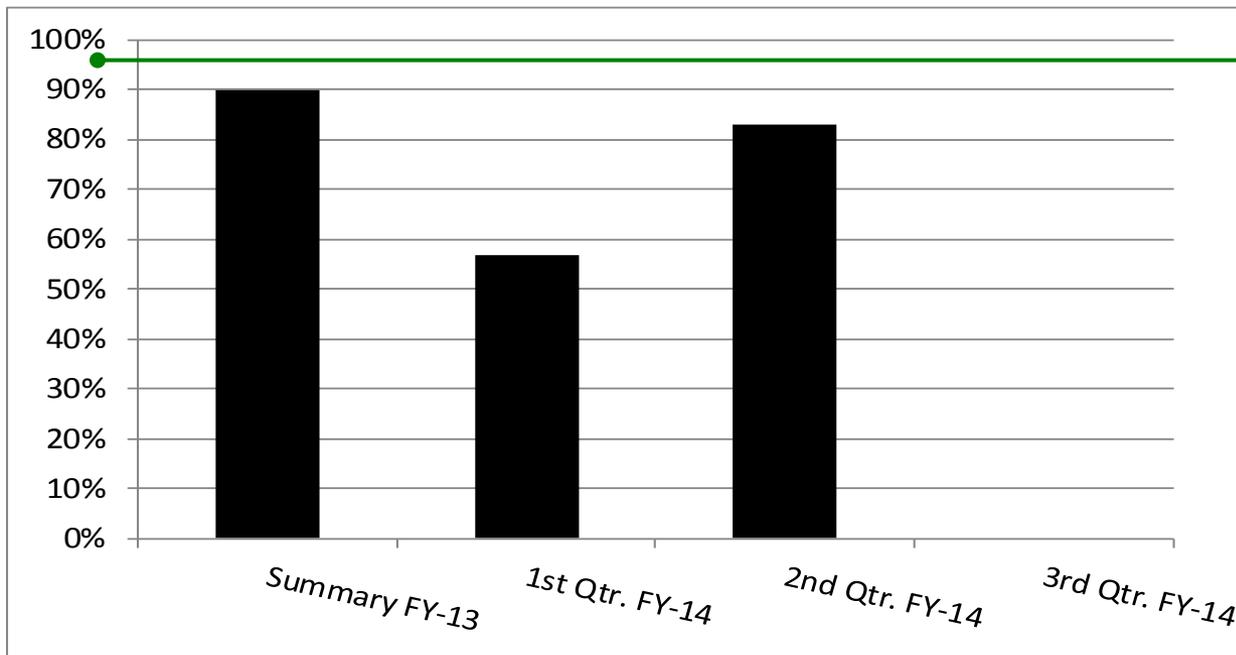
Tactic Measurement for 3rd Quarter is N/A

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process



Goal is 95%

Tactic is currently N/A for this quarter.

Status

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

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition

Balanced Scorecard Category: Internal Business Process

(Purchase) ACTION PLAN

- Continue to work with Business Affairs and the Cabinet to establish Funds to acquire real estate
- Activate Strategic Acquisition Subcommittee within the Property Review Committee (PRC)
- Determine strategic acquisitions

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition (by Lease)

Balanced Scorecard Category: Internal Business Process

(Lease) ACTION PLAN

- **Revise Lease Policy**
- **Update Real Estate Procedures Manual to include “disposition”**

STATUS



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 and satisfaction**

Tactic 3.1.1: Achieve overall customer satisfaction of 90% for FM services.

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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Survey

- Total number of customer survey questions reduced from 169 to 94. Email wording and introduction have also been reduced for clarity.
- Survey drafted and reviewed by Directors. Testing completed. **Survey launched April 23.**
- Urban Institute to present results to Directors and at All Employees Meeting – **Summer 2014**
- Directors to develop actionable items based on survey feedback for report out during Fall Strategic Planning Meeting. – **Fall 2014**

Communication Initiatives/Updates

- Update and remarket Customer Handbook, digital and print – **Summer 2014**
- Updating/QA website content – **Summer/Fall 2014**
- Forming FM Communication Group – **1st meeting Summer 2014**
- Customer facing technology - **Ongoing**
 - ARCHIBUS automated surveys
 - Website, next iteration
 - Analytics
- Launch 2nd Customer Environmental Scan – **Fall/Winter 2014**

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service and satisfaction

Tactic 3.1.1: Achieve

Measure:

Lead: FBO

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

External Marketing Campaign: “Creating A Campus of Distinction” Summer 2014

- LCD screen signage across campus, periodic rotations – “Point of Service” signage (i.e. elevator outage)
- Larger Design Services & Construction Signage
- Integration of “CCD” into other forms (email signature, workplace, documents)
- Continue to Strengthen Branding - **Ongoing**
 - Campus Wide Notifications
 - Campus Construction Reports
 - Other customer-facing materials (think: contact cards, zone contact info.)
 - Website

FM Internal Education

- Communications workshops in FM Leadership Academy. Topic 1: Writing – **Late May/Early June**
 - Operations supervisors
 - Expand FM audience and subject materials

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service and satisfaction

Tactic 3.1.1: Achieve

Measure:

Lead: FBO

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Publicity/Public Relations - Ongoing

- Continue article submissions
 - UNC Charlotte Magazine
 - Inside UNC Charlotte
 - UNC Charlotte website news/spotlights
 - FM website news
 - UNC Charlotte FB/Twitter
- Determine/nurture other partnerships (University City Partners)
- Campus Construction Report, Campus-Wide notifications, etc.

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service and satisfaction

Tactic 3.1.1: Achieve

Measure:

Lead: FBO

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Special Projects

- APPA Award for Excellence Self Assessment – **Site Visit April 28-29, 2014**
- Sustainability Magazine – **Digital launch late May or early June**
 - Approximately 70% written and edited
 - General design approved. Images being gathered.
 - Upon completion of writing, total layout to be edited and proofed.
 - Website management and support
- Assist with writing for other FM awards, announcements, etc. – **Ongoing**
- Intranet – **To be determined**

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

ACTION PLAN

- Actions Planned

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

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

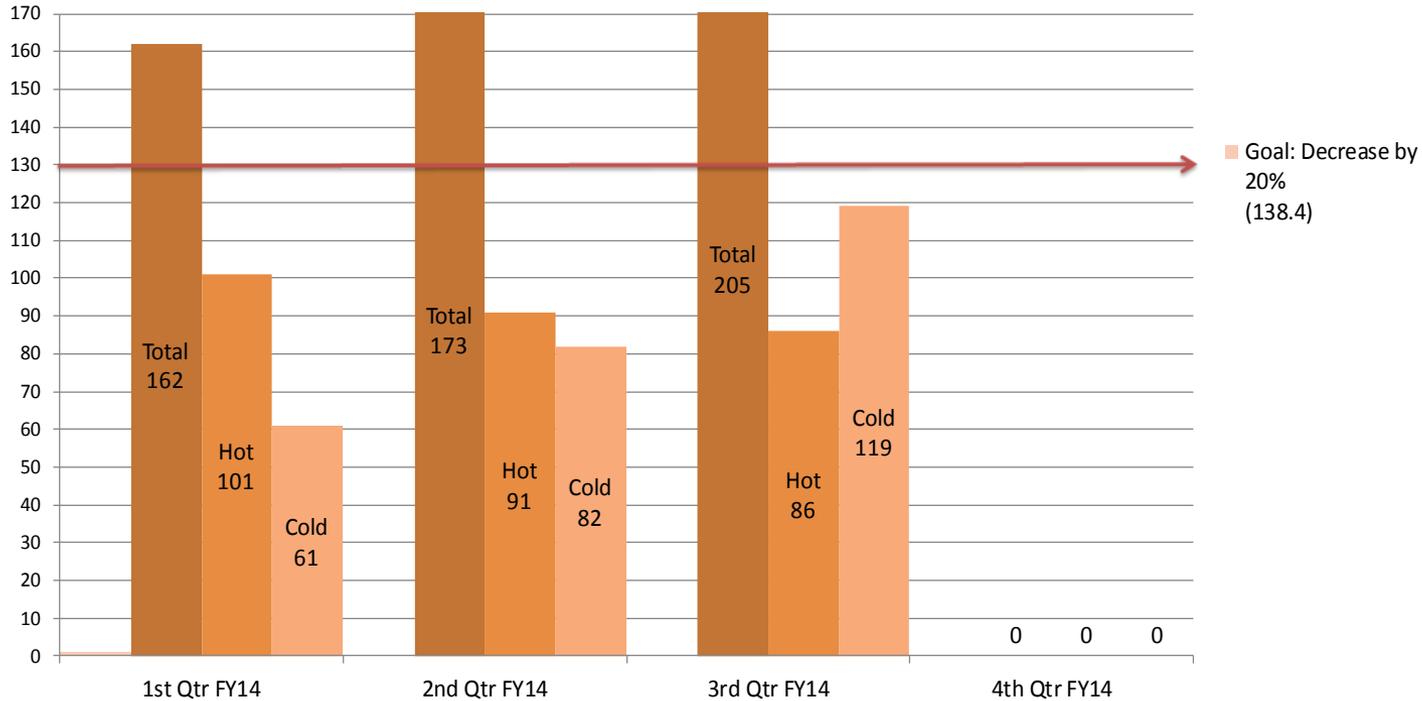
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls



STATUS



GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Working to create Survey





UNC CHARLOTTE

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

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

GOAL #4

Recruit, Develop, and Retain
Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Vacancy time of no longer than 120 calendar days - Exempt

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

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Monitor position vacancies and hiring processes to ensure 6- month abolishment threshold is not reached. **(Monthly)**
- Ensuring all position descriptions/postings contains verbiage that request necessary communication skills, computer skills, English language comprehension skills and skills that demonstrate an employee’s ability to work/interact with others to increase qualified applicant pools. **(Ongoing)**
- Monitor timeframe of applicant referral to interview to hire. Maintain communications with hiring supervisors requesting status updates. Provide assistance as needed and/or request to keep the process moving. **(Ongoing)**
- Continue to develop resources that result in increased applicant pools. To date, we are posting our positions (as appropriate) on additional free websites such as: *Learn 4 Good, Central Piedmont Community College, The Latin American Coalition, and The Job Network*. This should result in creating a more diverse and qualified pool of applicants for referral and selection. **(Began January 2014; ongoing)**
- With the new 24-Month Probationary Period, continue to monitor separation data that allows us to report employee turnover during the probationary period. **(August 22, 2015)**
- Provide assistance to hiring supervisors on appropriate verbiage when establishing selection and/or non-selection criteria in our postings and hiring proposals to ensure a quick turnaround on approvals of hiring proposals. **(Ongoing)**

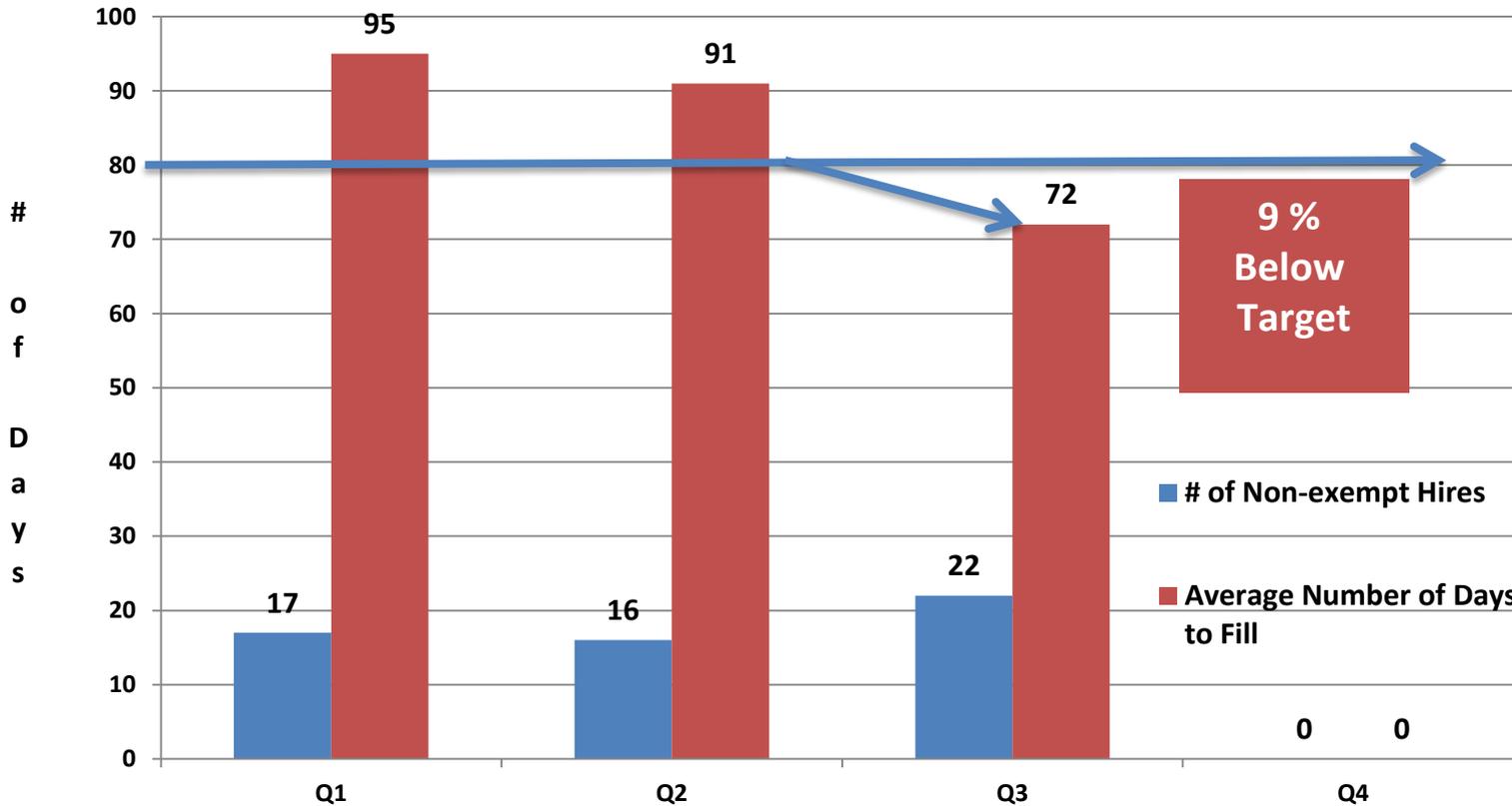


GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process

Average Number of Days to Fill Non-exempt Vacancies

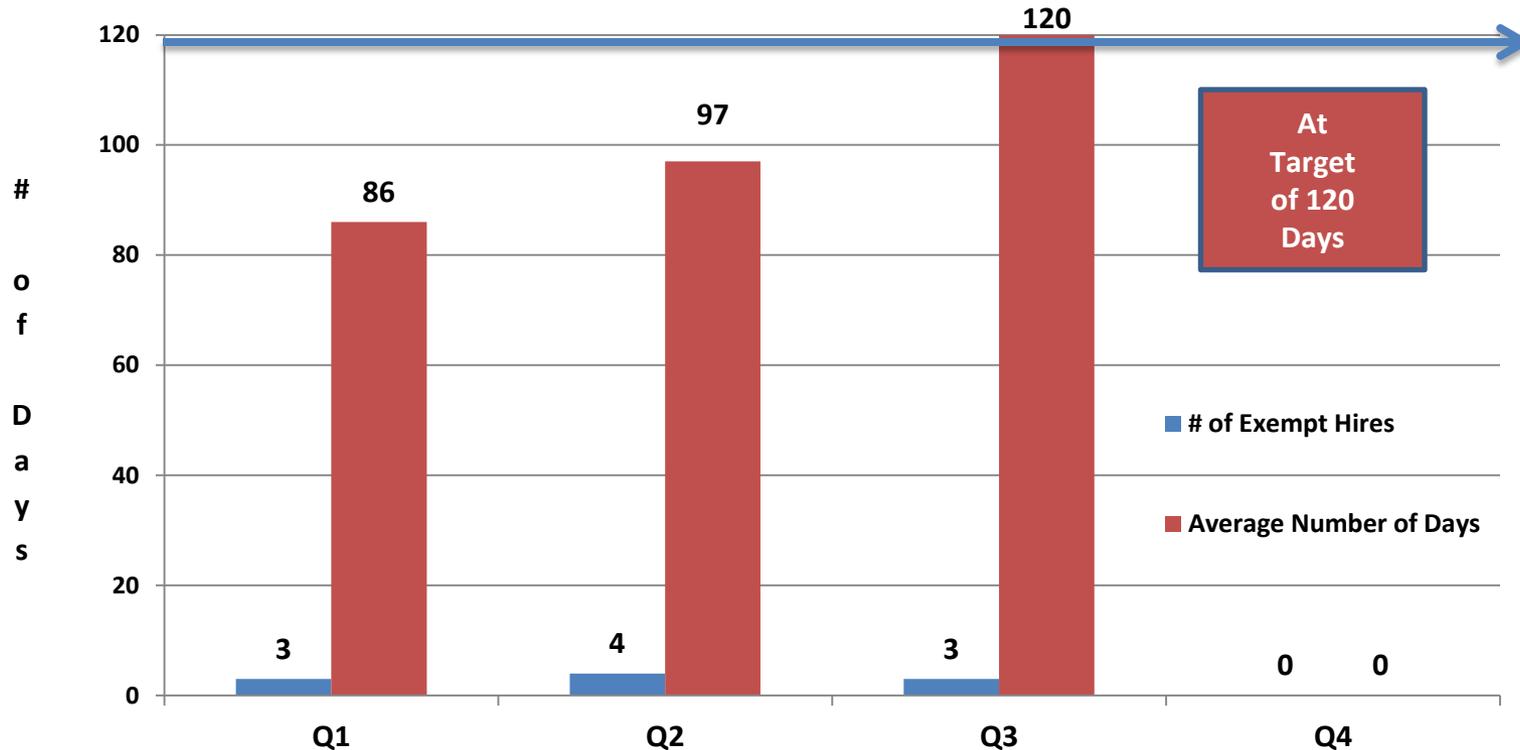


GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process

Average Number of Days to Fill Exempt (Salaried) Vacancies



STATUS

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

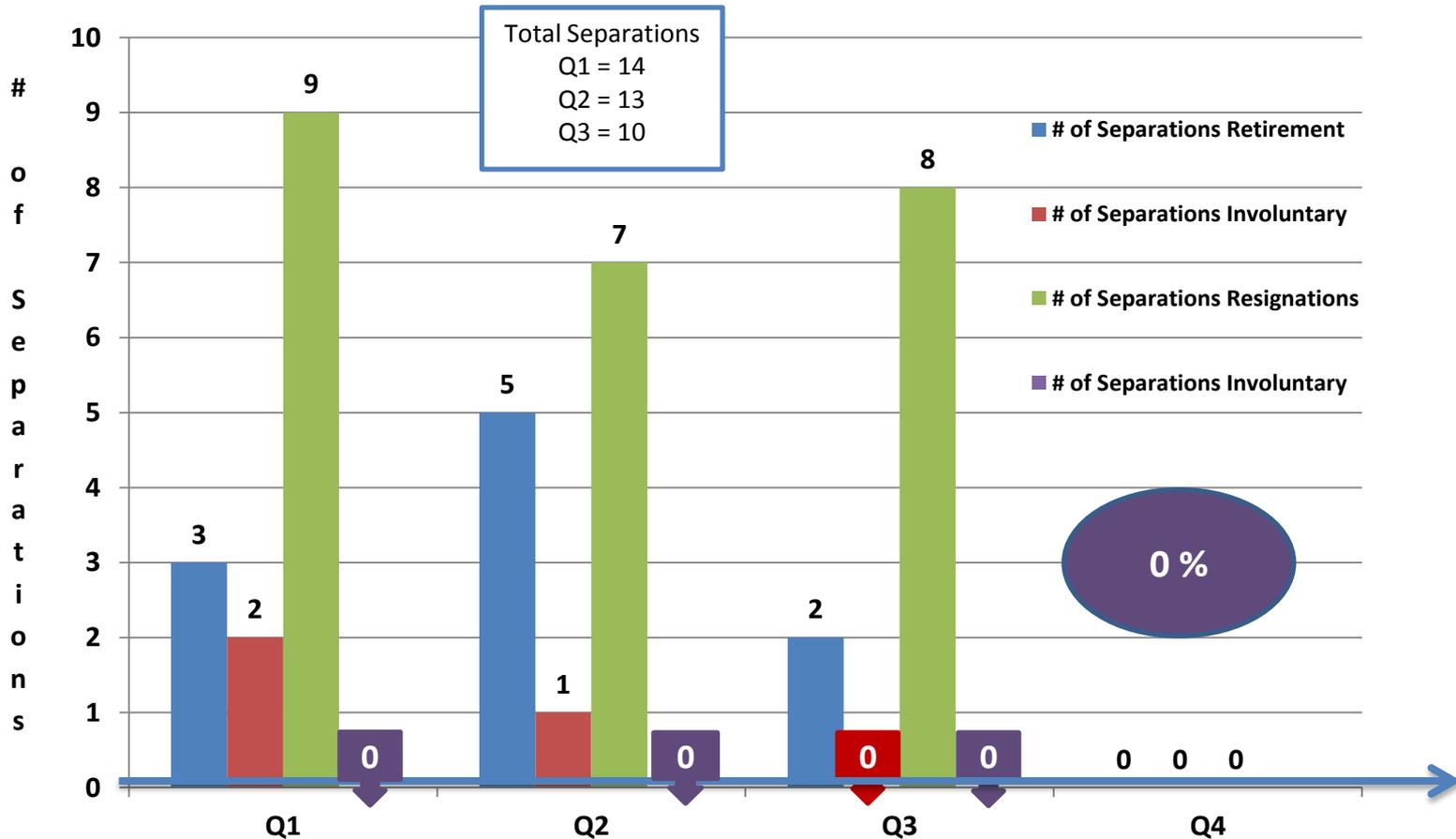
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process

Employee's Separated During FY 14



STATUS

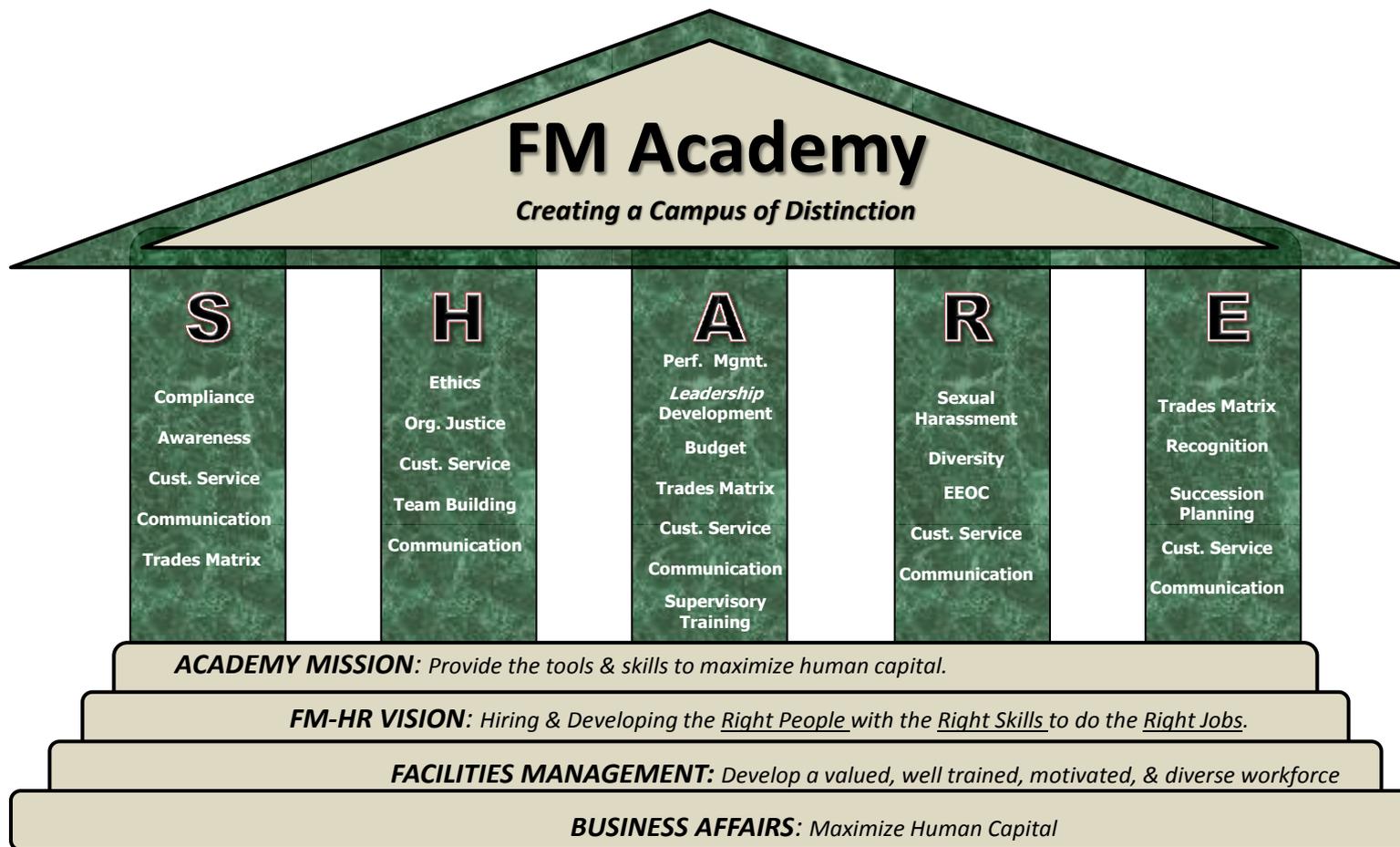


Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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



STATUS



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FM ACADEMY

ACTION PLAN

Action Item	Competed
<u>Technical</u>	
– VFD Training	July 2013
– Pump Repair & Maintenance	December 2013
– PLCs for Non-programmers	February 2014
– EPA 608 Technician Certification Exam	May 2014
– HVAC Matrix development	August 2014
“Mini-Series” training sessions (partnering with Grainger)	
– LED lighting	September 2013
– FIRE STOP	October 2013
<u>Safety Awareness</u>	
– Supervisor Safety Talks	Monthly
<u>Leadership</u>	
– APPA <i>Supervisor Toolkit</i> workshop (UNCC hosted)	March 2014
– Supervisor Writing Workshop	Fall 2014
– Cultural Awareness/Inclusion Program (<i>Chancellor's Mini Grant</i>)	Fall 2014
– Administrative Developmental Matrix	February 2014
– Training on Disciplinary Documentation	Fall 2014

STATUS



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

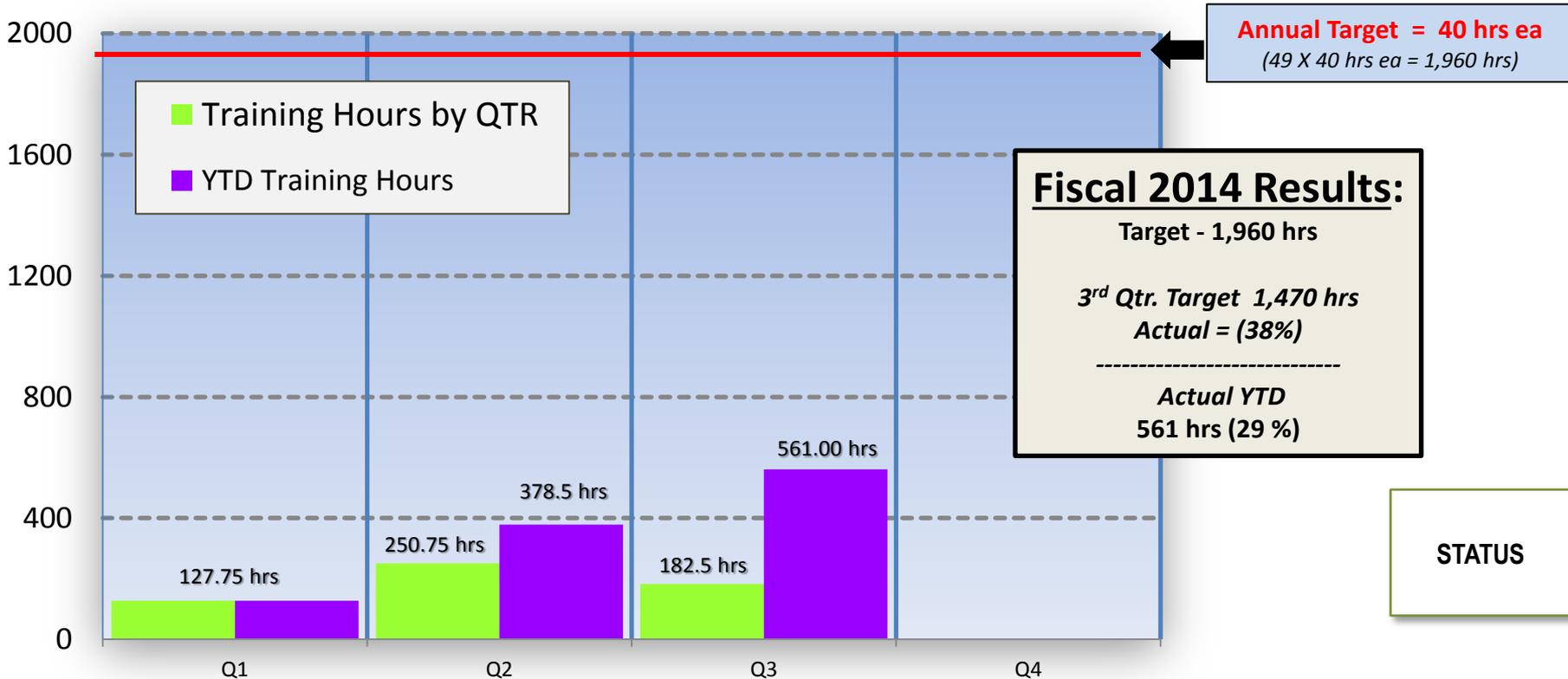
Objective 4.2: Improve Workforce Development
Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year
Measure: Average Hours of Training completed by Supervisors and Managers

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

Training
Hours

FY 14

Training Hours for Supervisors & Managers by Quarter



STATUS



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

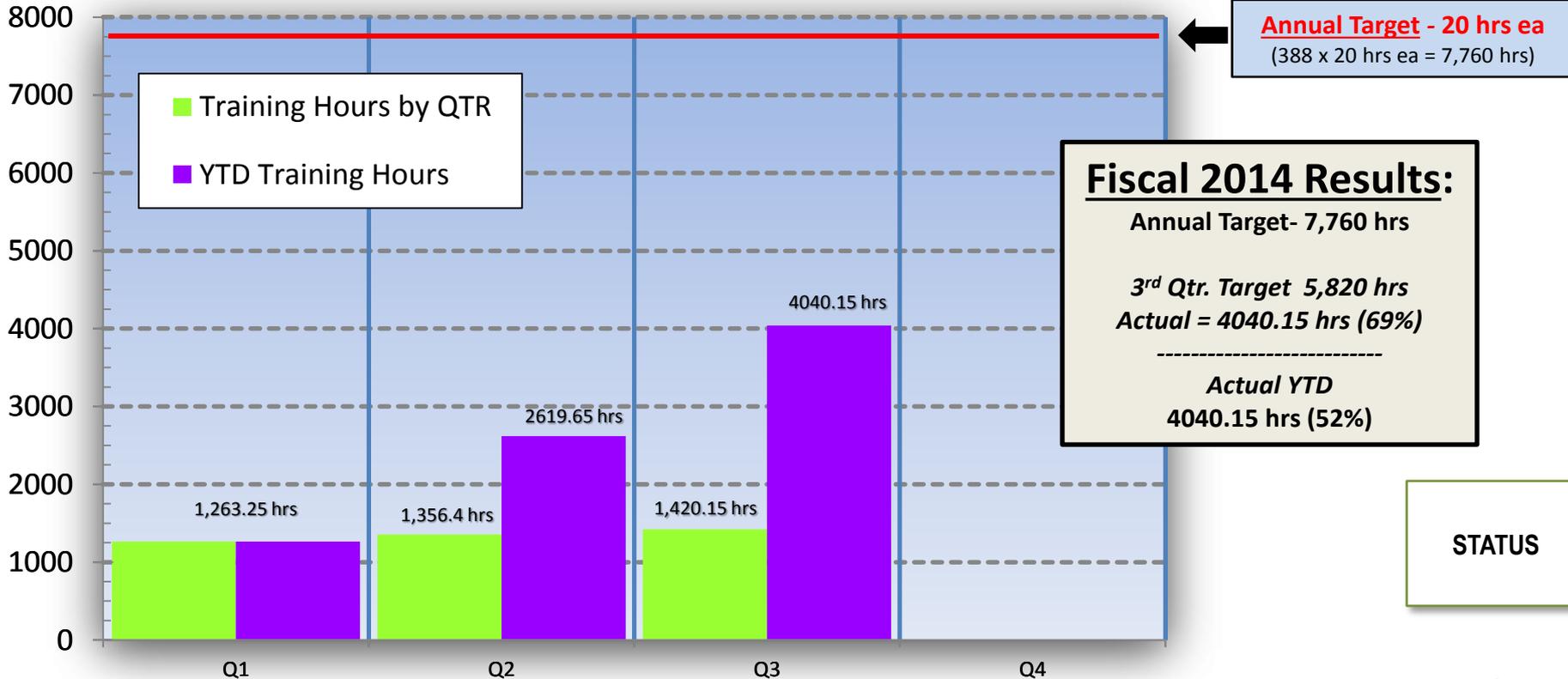
Objective 4.2: Improve Workforce Development
Tactic 4.2.2: Increase Employee Training to **20 hours/year**
Measure: Average Hours of Training completed by front line employees

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

Training
Hours

FY 14

Training Hours for front line employees by Quarter



GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Survey Results and Data Review:

- Preliminary results were presented to the Directors on January 15th and to FM at the January 2014 AEM meeting.
- Survey report distributed to all Directors. (February/March 2014).
- Directors to develop actionable items based on survey feedback for report out during April SP Meeting.

Survey Logistics:

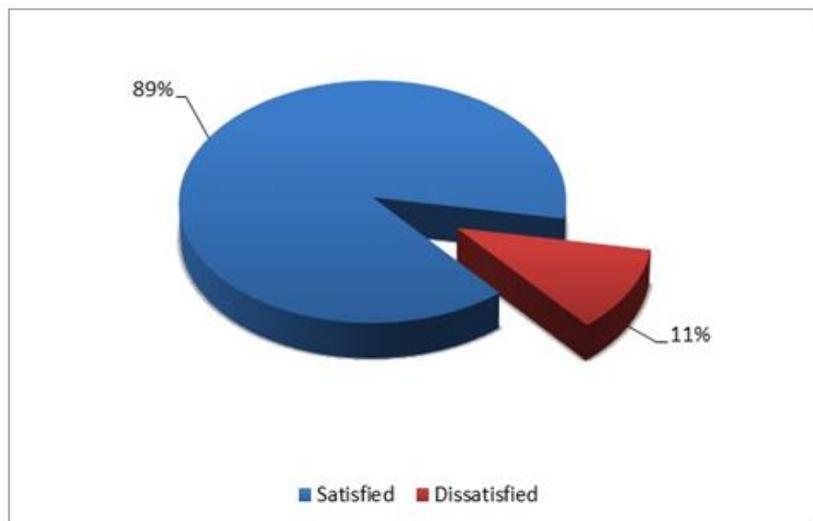
- Continue to improve practice of working with BES and FO leadership to schedule use of computer lab for employees in their respective areas for FY 15 survey - October 2014.
- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – October 2014
- Next survey should be administered in November 2014.

GOAL #4 Recruit, Develop and Retain Quality Employees

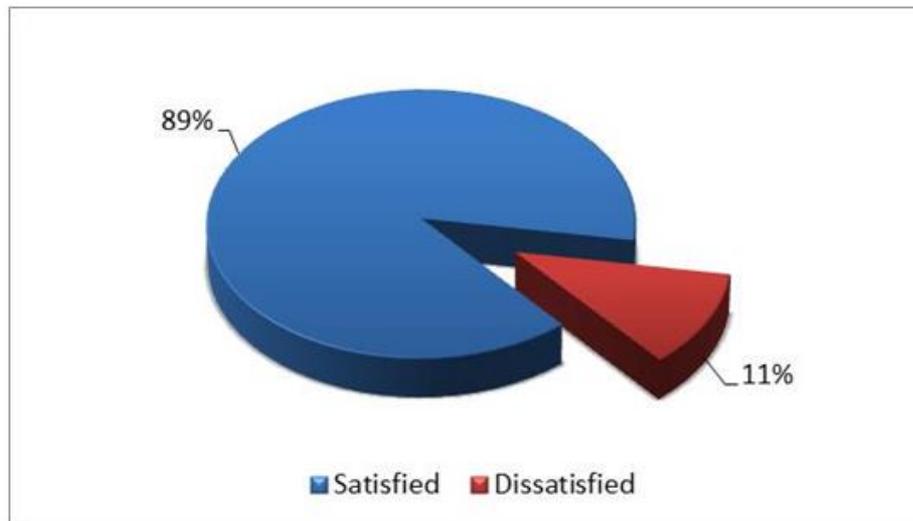
Objective 4.3: Create and Maintain a Quality Work Environment
Tactic 4.3.1: 90% of Employees satisfied or very satisfied working in FM
Measure: Annual Employee Work Climate Survey

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

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



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



Facilities Management Strategic Planning Session – Third Quarter FY 2014

Lead
FM
Operational
Units

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ON HOLD

STATUS



GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FM ACADEMY

ACTION PLAN

Action Item	Target Date
<ul style="list-style-type: none"> • Ongoing safety related activities to foster continuous awareness <ul style="list-style-type: none"> • Supervisor Safety Talks • FM Safety Fair • Safety Slogan Contest 	<p>Monthly</p> <p>April 2014</p> <p>July 2014</p>
<ul style="list-style-type: none"> • Accident/Incident review for 2013 <ul style="list-style-type: none"> • Accidents down 42% from 2012 • Minor incidents down 86% from 2012 	<p>2014 year end</p> <p>2014 year end</p>
<ul style="list-style-type: none"> • Compliance training (OSHA) <ul style="list-style-type: none"> • FM-HR, Risk Mgmt. and EHS to meet to discuss requirements • FO to meet with EHS office to discuss training • All training records sent to FM-HR Staff Dev. Specialist • Process Review Project <ol style="list-style-type: none"> 1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc. 2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD 3. Continuing current process of reporting training activities to FM Learning & Development Specialist. 	<p>March 2014</p> <p>May 2014</p> <p>Following each training</p> <p>To be determined</p>

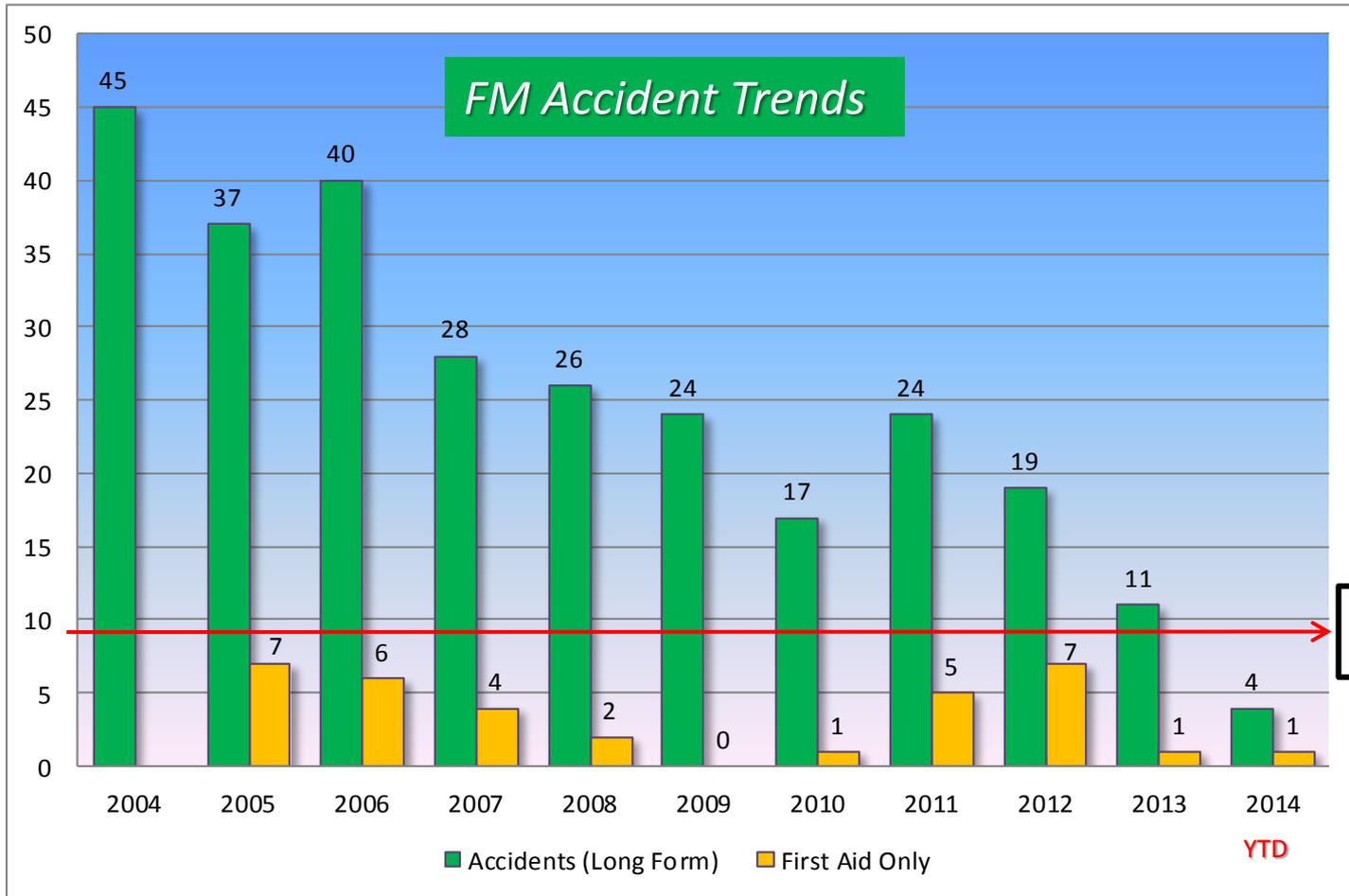


Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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



STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

Mandatory compliance training (OSHA)

- Met with EH&S/Risk Management and FO (Taylor) to discuss provision of OSHA training on campus – March 2014;
- Schedule periodic meetings with EH&S to review needs, processes, etc.
- Begin work with FO Leadership to determine OSHA mandated training topics/needs, the current status of employee training, etc. (April - May 2014);
- Identified need to perform process mapping on current OSHA training with FO Leaders; Date to begin current state mapping TBD. First meeting to be tentatively held in mid-May.
- Research training providers/vendors to help fill training gaps, as needed.

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Action Item	Target Date
• Further development of FM Academy <ul style="list-style-type: none">– Marketing Strategy & Website Development– Content Development– Vendor Selection and Delivery	July 2014 Ongoing As Needed/As Funded
• HVAC Matrix Development – meetings ongoing	August 2014



UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Finance/Budget:

- Hire Procurement/Grants Specialist Position no later than beginning of **April 2014**.
- Continue to monitor spending within operational units of FM thru end of FY - **June 30, 2014**;
- Continue work on Budget Memo and Instructions package for FY 15 – submitted for review by AVC - **March 2014**; submit to Directors - **March 2014**; Due to Business Officer – **end of April 2014**.

Supplemental Funding:

- **Announcement:** FM won the NCAPPA Award for its Recognition Program ; Amount of award is \$500.00 in discretionary funding to be used towards monetary gifts for Employee of the Quarter/Year ;
- Continue to search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC – **ongoing throughout calendar year 2014**.

GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.1:

100% of financial accounts within budget

Tactic 5.1.2:

Increase Supplemental Funding to the Department by 10% annually

Tactic 5.1.3:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Cost Accounting:

- FY 2013 APPA Facilities Performance Indicators Survey results available in March 2014; Review survey administrative cost/GSF to determine if UNC Charlotte falls within target measure;
- Devise strategy to improve cost accounting measures within all areas of Facilities Management (org code usage, account code usage, budget revisions, etc.).
- Request an accountant position for FY 15 to assist in this area.
- Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no upfront oversight by FBO (i.e., Archibus NR work orders)

Facilities Management Strategic Planning Session – Third Quarter FY 2014



GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS: March 31, 2014

ACCOUNT DESCRIPTION	2013-14 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
OVERTIME AND PREMIUM PAY	\$ 350,000	8%	\$ 231,397	\$ 118,603	\$ 350,000	\$ -	\$ - F
STUDENT AND TEMPORARY WAGES	\$ 131,500	3%	\$ 80,111	\$ -	\$ 80,111	\$ 51,389	\$ 51,389 F
PERSONAL SERVICE CONTRACTS	\$ 109,400	3%	\$ (7,825)	\$ 11,053	\$ 3,228	\$ 106,172	\$ 106,172 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 997,361	23%	\$ 622,025	\$ 269,167	\$ 891,192	\$ 106,169	\$ 106,169 F
OTHER ADMINISTRATIVE EXPENSES	\$ 81,600	2%	\$ 14,851	\$ 12,000	\$ 26,851	\$ 54,749	\$ 54,749 F
DOMESTIC TRAVEL/TRAINING	\$ 100,000	2%	\$ 76,344	\$ -	\$ 76,344	\$ 23,656	\$ 23,656 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 312,724	7%	\$ 191,825	\$ 77,038	\$ 268,863	\$ 43,861	\$ 43,861 F
OTHER PURCHASED SERVICES	\$ 299,950	7%	\$ 149,588	\$ 37,778	\$ 187,366	\$ 112,584	\$ 112,584 F
SUPPLIES	\$ 1,575,987	36%	\$ 954,610	\$ 105,118	\$ 1,059,728	\$ 516,259	\$ 516,259 F
EQUIPMENT/IT	\$ 318,493	7%	\$ 155,616	\$ 74,249	\$ 229,865	\$ 88,628	\$ 88,628 F
CAPITAL OUTLAY	\$ -	0%	\$ -	\$ -	\$ -	\$ -	\$ - F
FIXED CHARGES	\$ 28,655	1%	\$ 19,436	\$ 333	\$ 19,769	\$ 8,886	\$ 8,886 F
RECYCLING	\$ 39,695	1%	\$ 30,534	\$ 2,316	\$ 32,850	\$ 6,845	\$ 6,845 F
FACILITIES MANAGEMENT Main Operating Funds	4,345,366		2,518,512.08	707,655.62	3,226,167.70	1,119,197.89	\$ 1,119,198



GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

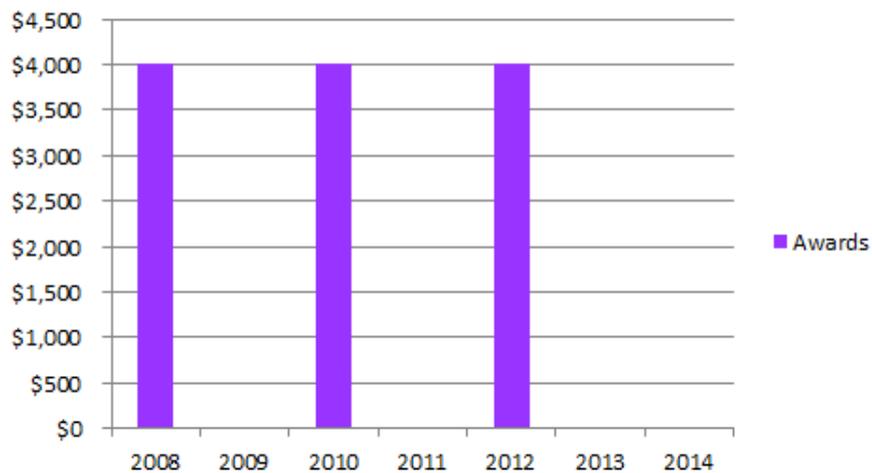
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually

Measure: Percent increase in supplemental funding

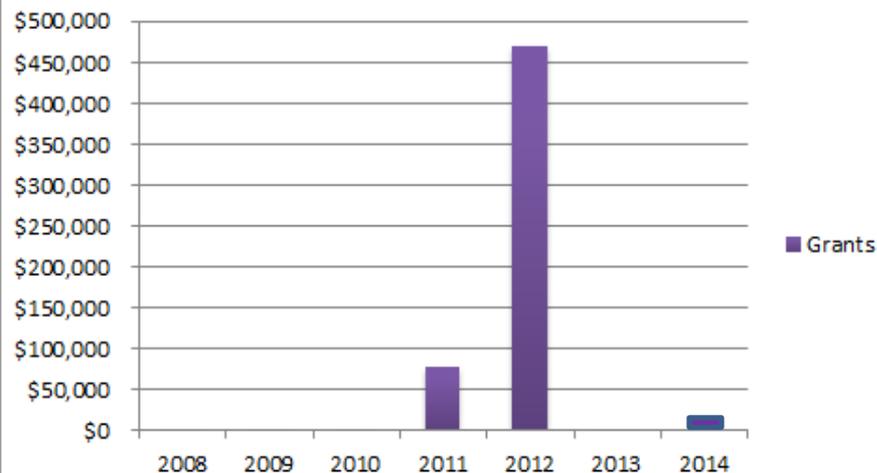
Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

Awards



Grants



GOAL #5 Promote Good Stewardship

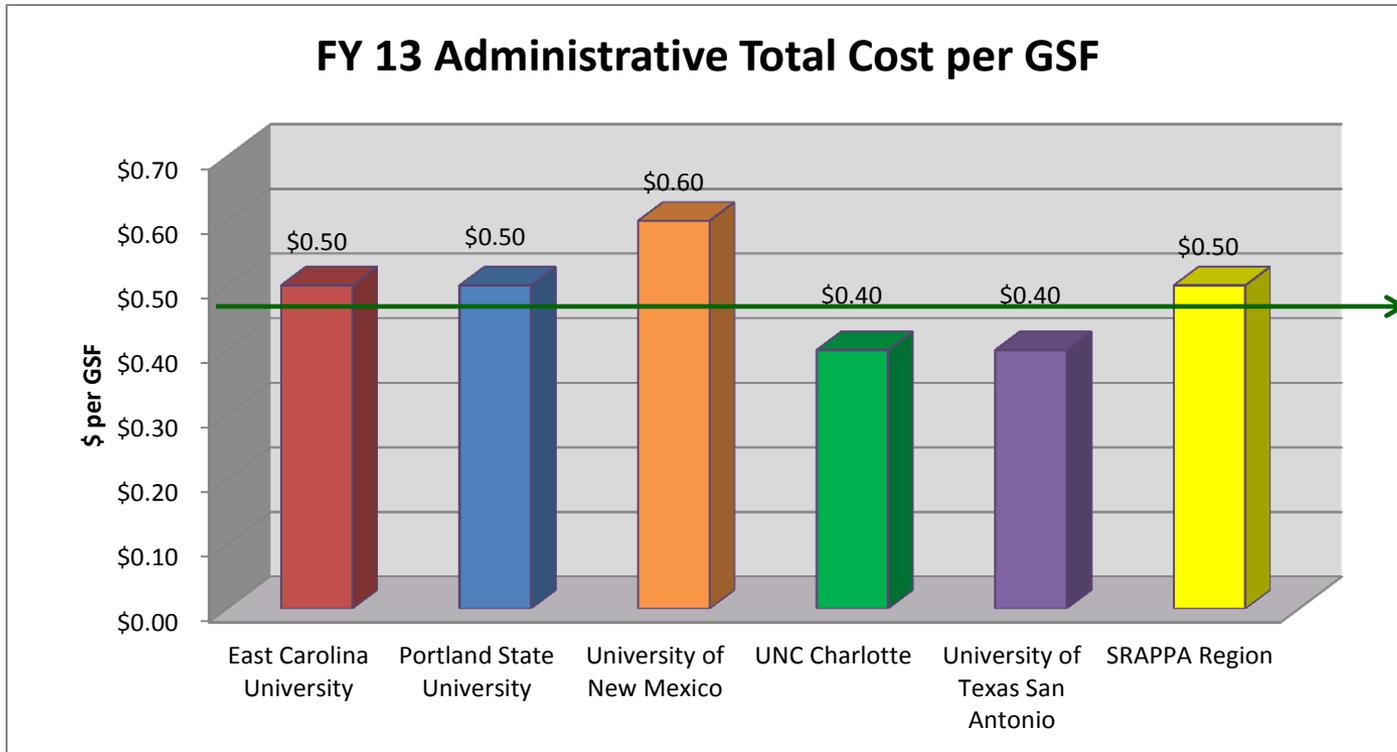
Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3: Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2014

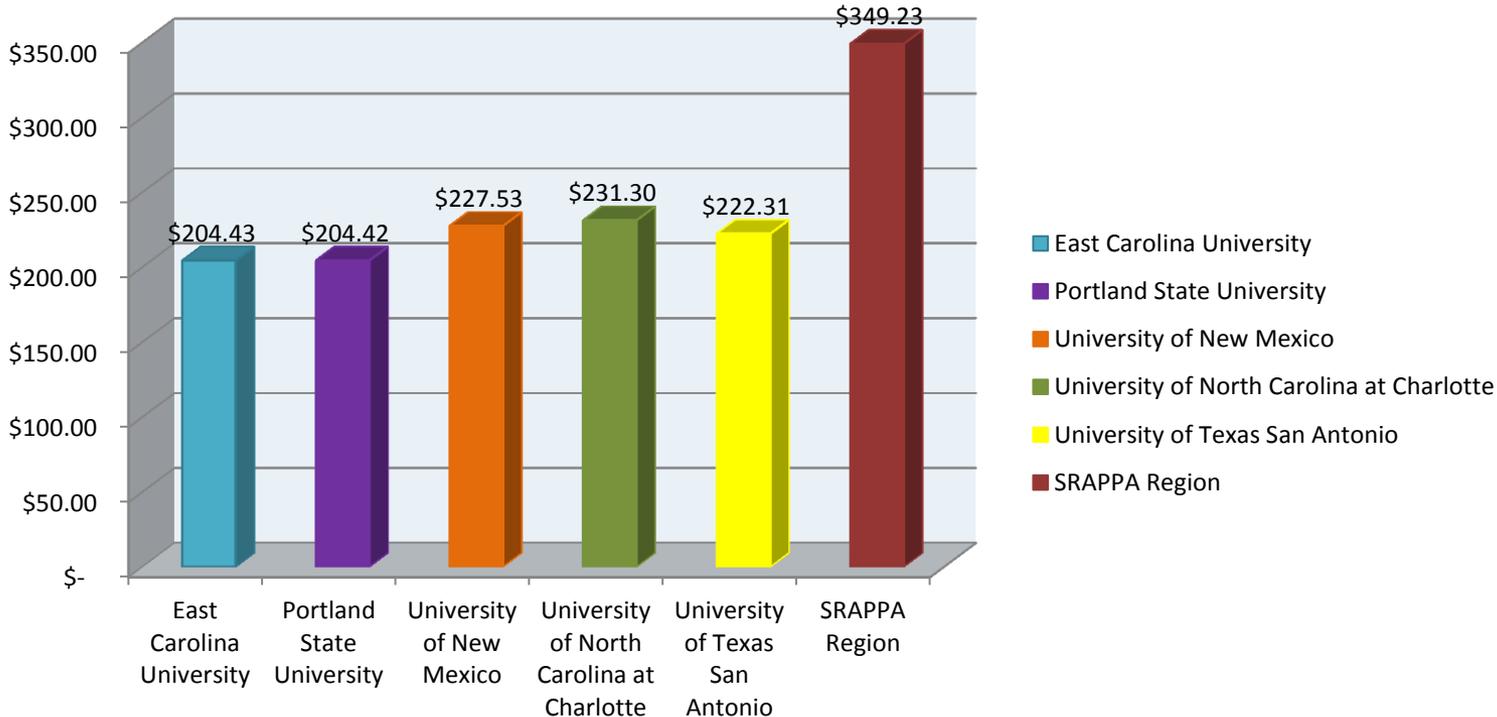
GOAL #5 –Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/Student FTE



Avg. cost/student = \$217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

Lead
BES

ACTION PLAN

- Actions Completed
 - Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
 - Received one-time funds for supply chain management project (project underway)
 - Completed hand dryer pilot study paper count in Fretwell
 - Completed hand dryer pilot study survey (of building occupants) in Fretwell
- Actions Planned
 - Complete supply chain management project in McEniry (one-time funds)
 - Review February paper use count in Fretwell
 - Review Hand dryer survey (of building occupants) in Fretwell
 - Make recommendation to continue or stop hand dryer installations
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

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

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

ACTION PLAN

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

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

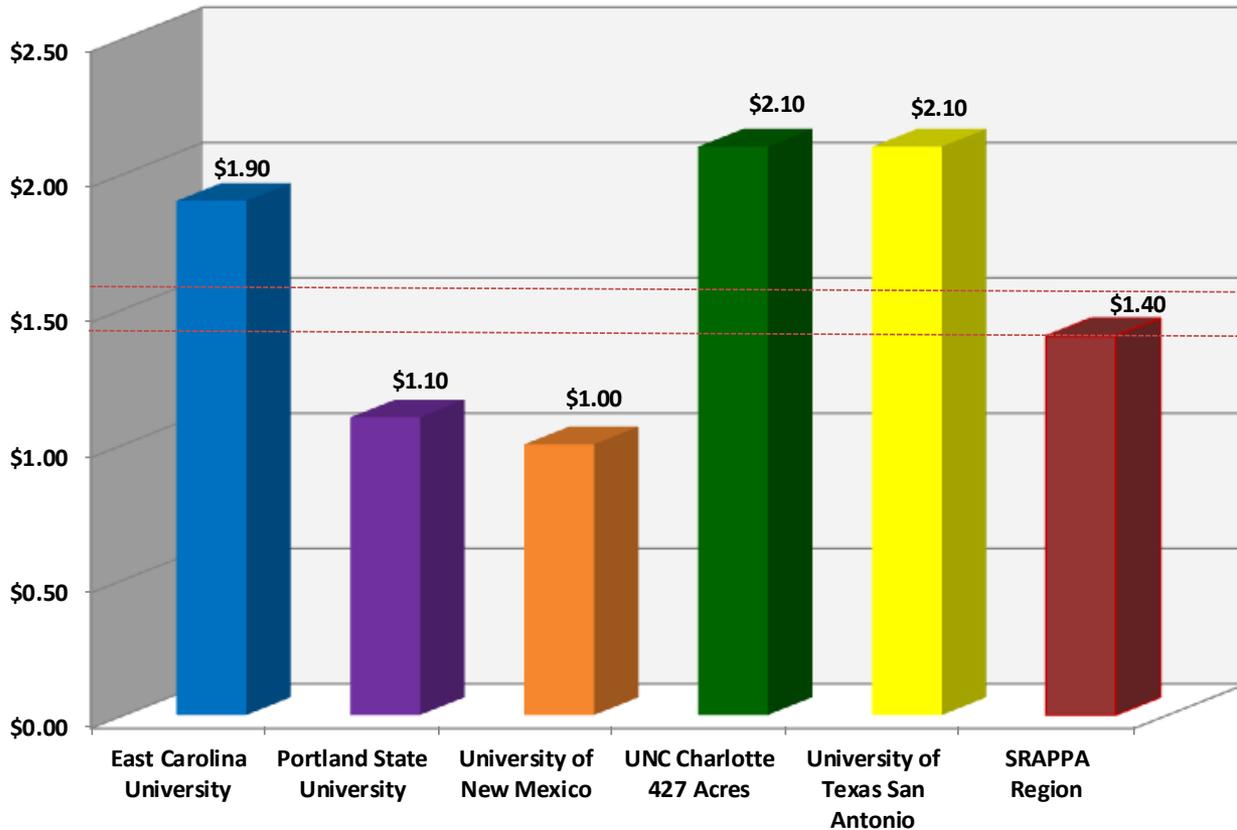
Tactic: 5.1.5: Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Maintenance Total per GSF



Avg. cost/student = \$1.64
 Goal = \$1.56
 UNC Charlotte = 28.05% above

- East Carolina University
- Portland State University
- University of New Mexico
- UNC Charlotte
427 Acres
- University of Texas San Antonio
- SRAPPA Region

STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

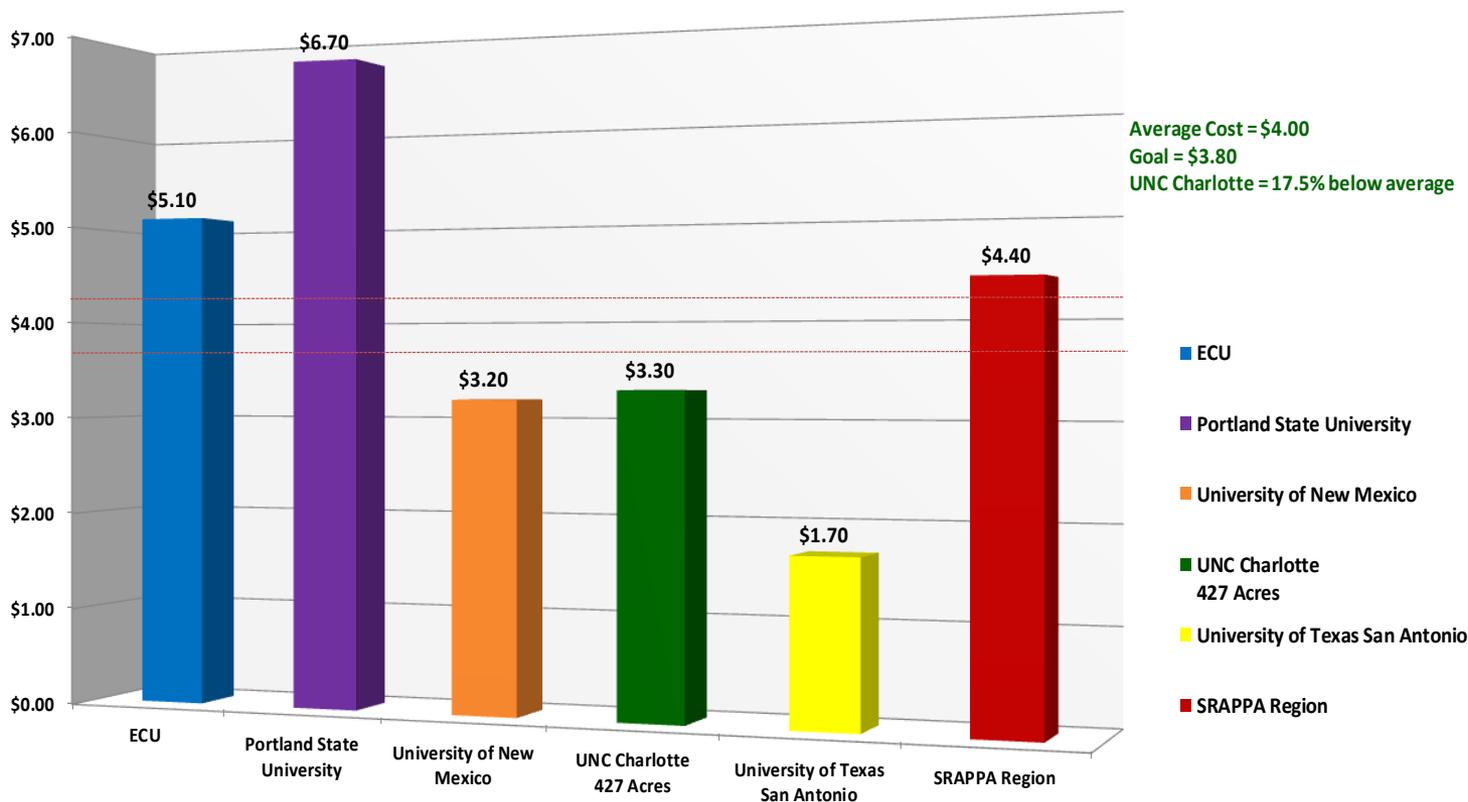
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Grounds - Total Cost per Acre



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

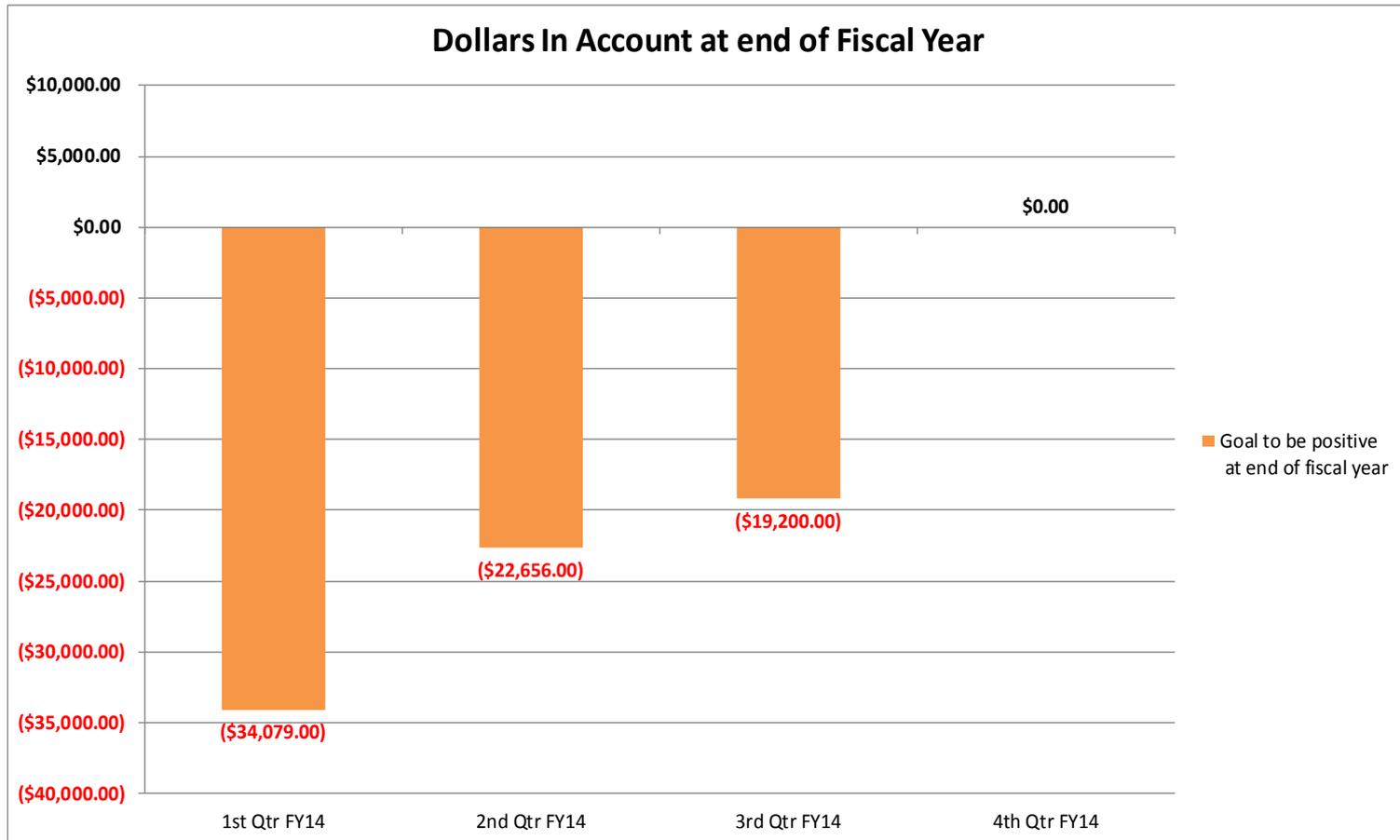
Objective: 5.1: Promote Fiscal Responsibility

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

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective



STATUS

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 -**

TOTAL recycling for quarter 37% (all totals are not in) , 37% (all totals are not in) for the year

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
- Coordinated Spring Campus Clean UPs and Tree Planting (nearly 400 volunteers, one ton collected and 130 trees planted) , provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, ZERO WASTE football scrimmage, a month of EARTH DAY activities, presented at NC Science EXPO and held our 22nd EARTH Day Festival

- **4th Quarter Actions Planned**

- Planning for MOVE OUT
- Creating summer education program for staff
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
 - Food waste audits planned for Center City Building and SAC after basketball games

- **C & D**

- **Actions Complete -**

- Overall C&D recycling rate for Capital Projects is 80%; recycling rate for informal projects is 44%.

- **4th Quarter Actions Planned**

- Continue collecting/tracking recycling information and acting as resource for contractors.



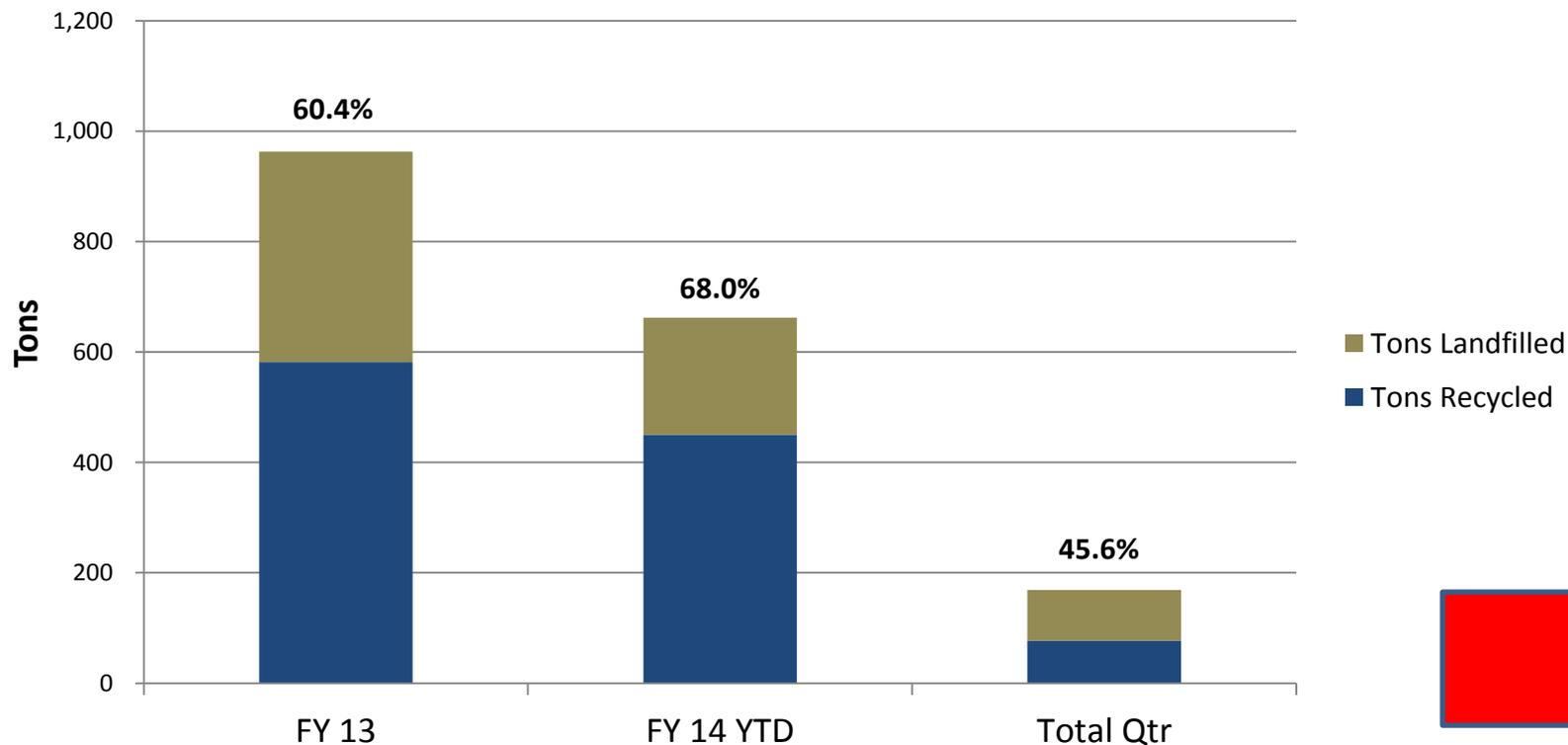
GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Tactic 5.2.1 Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

Measure: Pounds of C & D waste recycled divided by total pounds of C & D waste

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion 3rd Quarter FY14



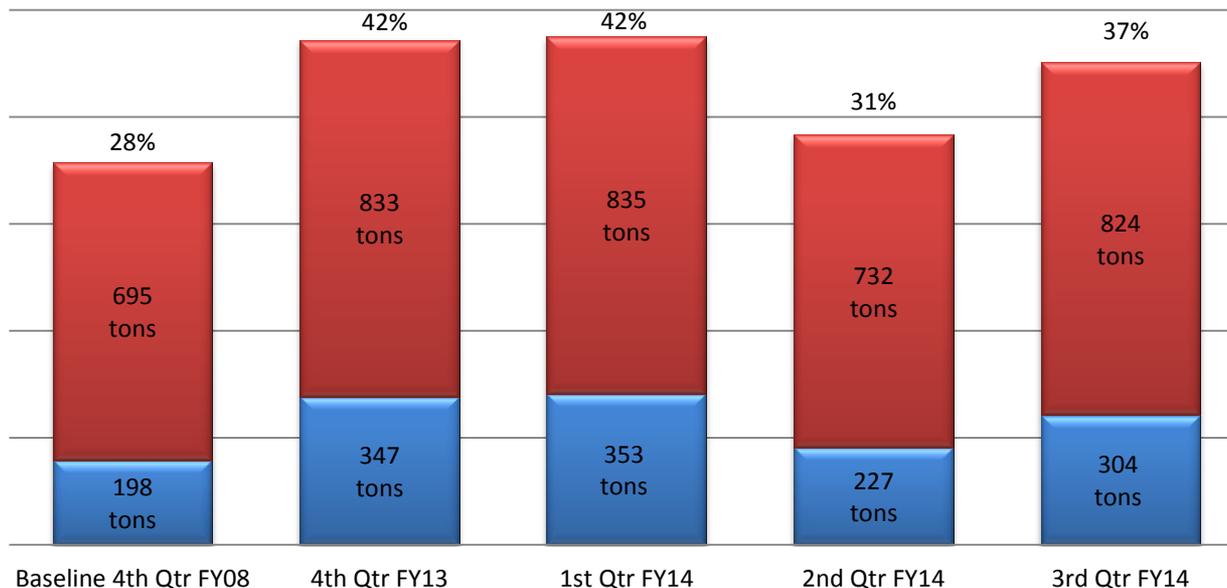


GOAL #5 – Promote Good Stewardship

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

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Complete preliminary inventory of STARS points by October 2014.**
 - **Quarterly update of implementation plan for earning further credits based on feasibility: 7/14, 10/14, 1/15, 4/15.**
 - **Achieve bronze rating by end of FY 15.**

STATUS

GOAL #5 – Promote Good Stewardship

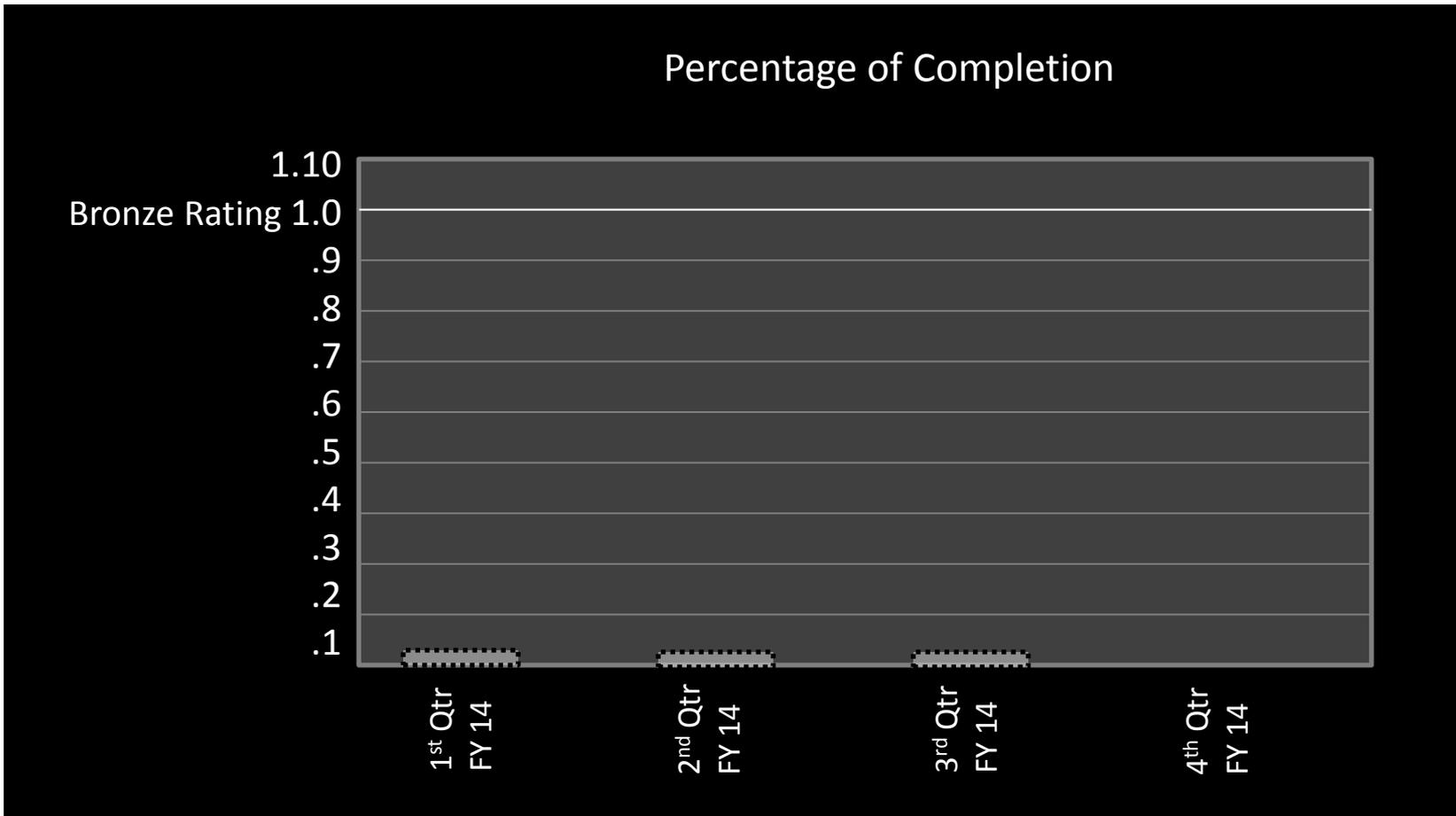
Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



Status

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Generate a list of best practices based on Sustainability and Climate Action Plans by May 2014.**
 - **Assess use of identified best practices, including timeline and probable costs for additional implementation, by October 2014.**
 - **Draft annual plan and budget by January 2015 to achieve implementation of 60% of identified best practices.**
 - **Demonstrate 60% of best practices implemented by October 2015.**

STATUS

GOAL #5 – Promote Good Stewardship

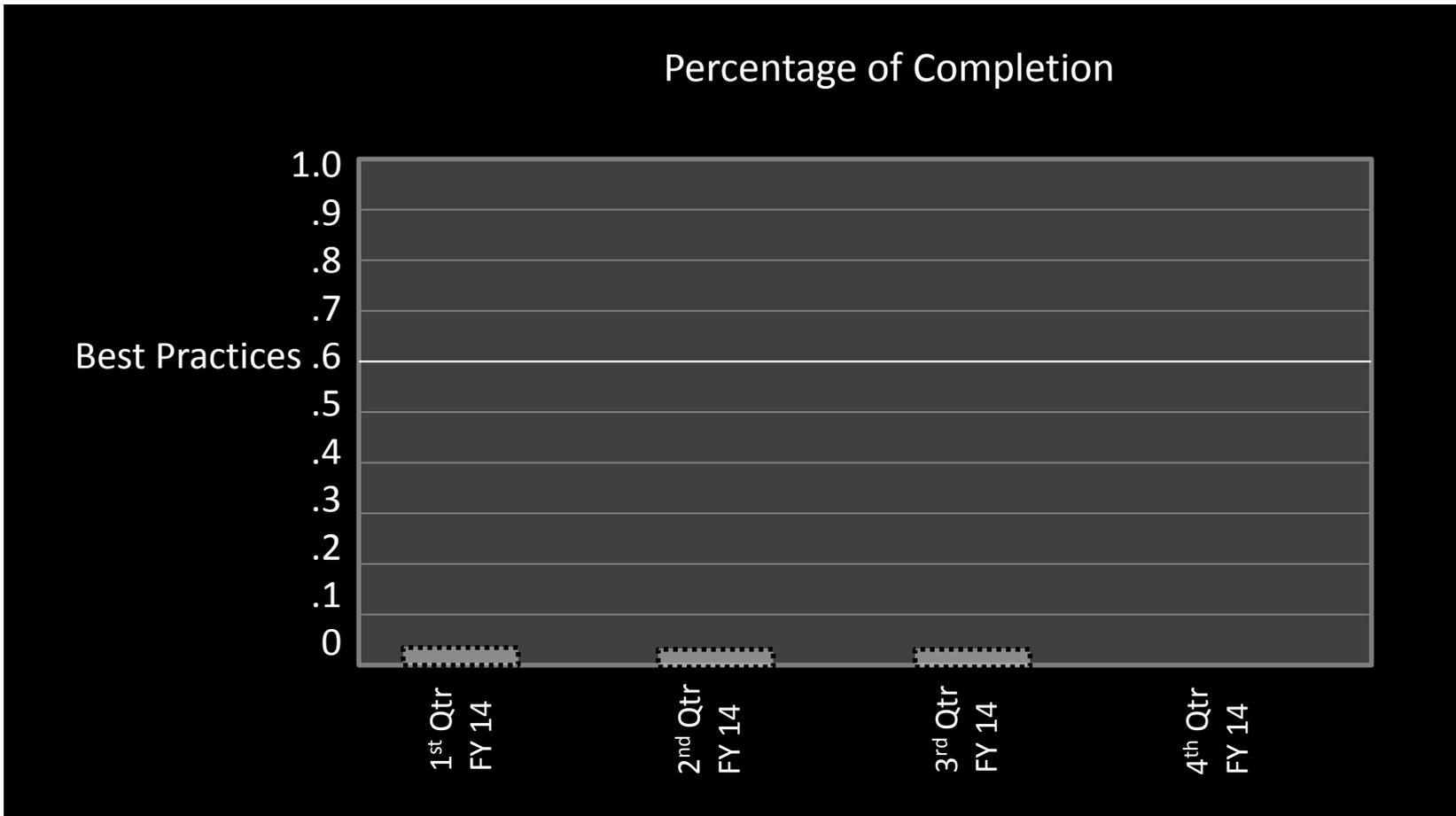
Objective: 5.2: Develop a Sustainable Campus

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

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



Status

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

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

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

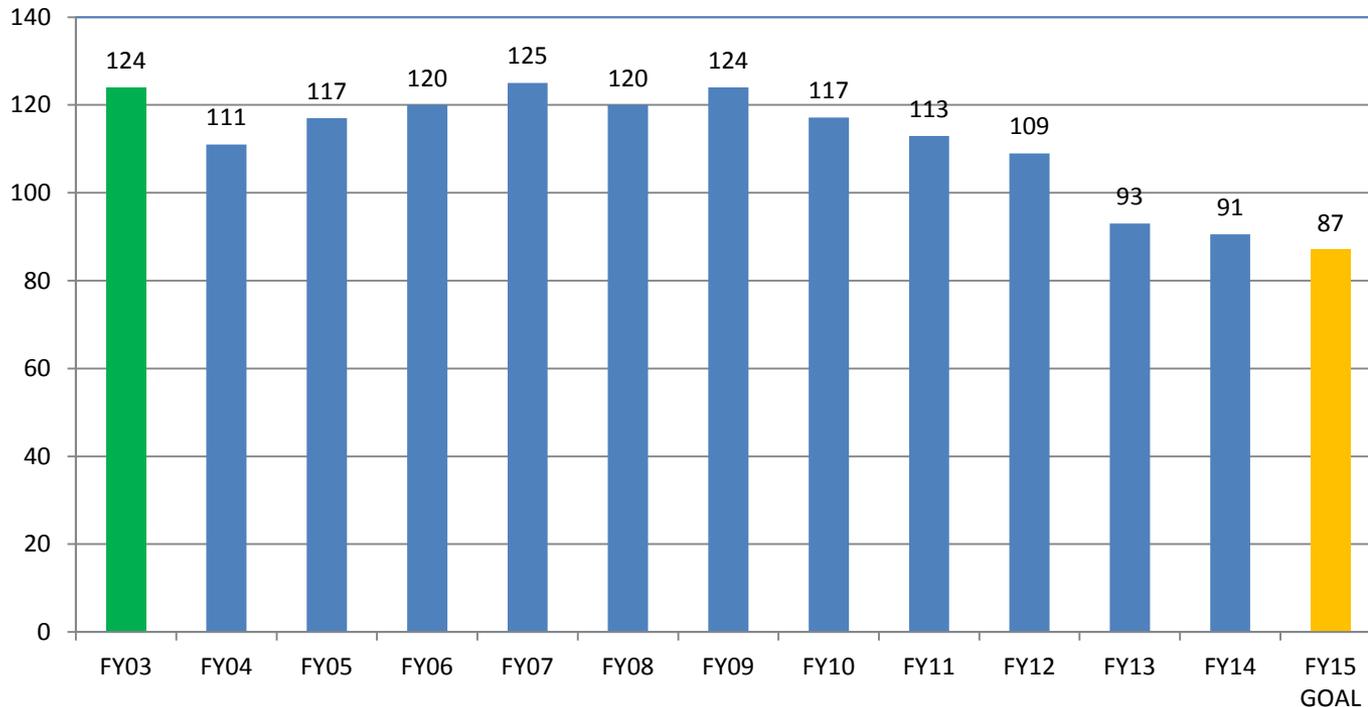
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 27%
Mandated Reduction 30%
BY FY 15

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship

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

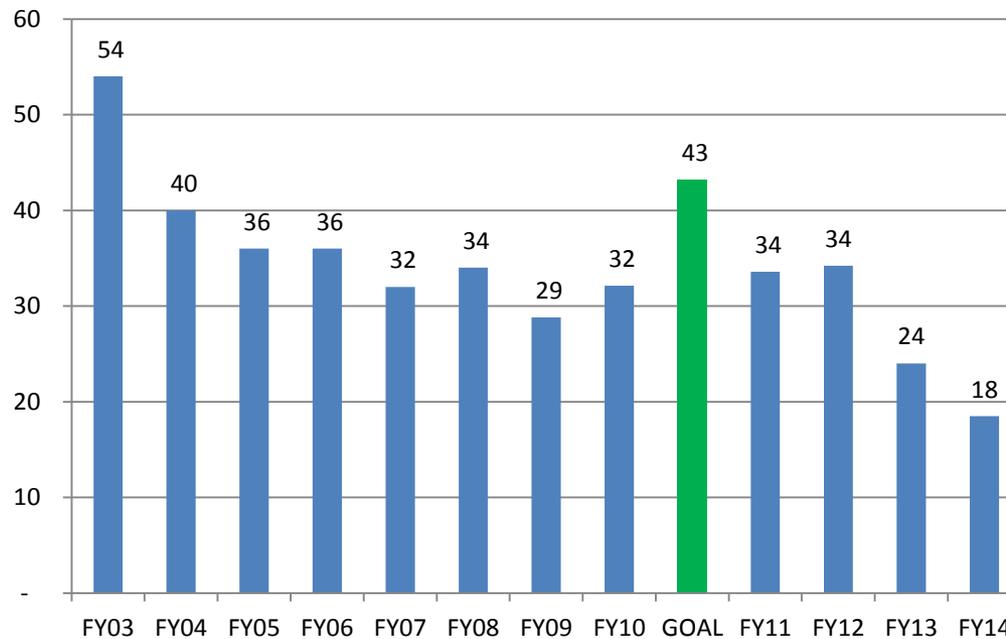
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 18 Gal/GSF



Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

Tactic 5.4.2: 5% African American Participation on Capital Projects

ACTION PLAN

- Conduct/participate in events promoting utilization of HUB firms
 - Construction Meet & Greet – October 2014
- Update Vendor Information Guide – June 30, 2014
- Compile list of HUB firms that can bid specific scopes of work – complete/ongoing
- Establish project specific HUB participation goals for single prime projects – complete/ongoing
 - Oak Residence Hall Renovation – 20% goal / 100% at bid opening
 - FM Growth Modular Units – 10% goal / 9% at bid opening
 - Colvard North Second Floor Renovations – 15% goal / 13% at bid opening
 - Sanford Lane Utility Renovation – 10% goal / 100% at bid opening
 - Campus-wide Roof Replacements – 15% goal / TBD May 2014

GOAL #5 – Promote Good Stewardship

Lead
Capital

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

Tactic 5.4.2: 5% African American Participation on Capital Projects

ACTION PLAN

- Develop guidelines to meet Good Faith Effort (GFE) requirements – completed
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded – complete/ongoing
 - Residence Hall Phase XIII – All but 4 packages completed – July 2014
 - Holshouser Hall Renovation – June 2014
 - Belk Gym Renovation – mid June 2014

GOAL #5 – Promote Good Stewardship

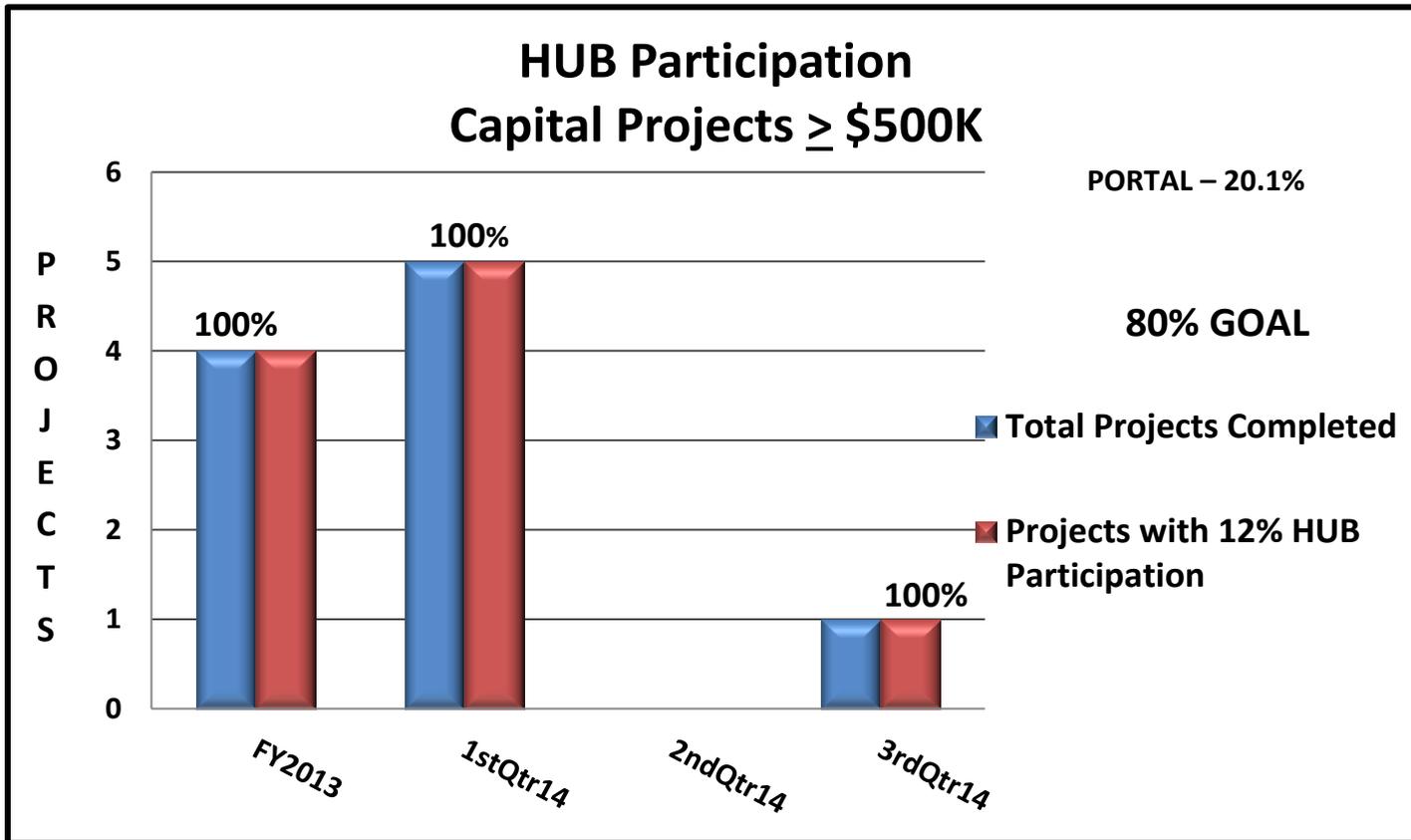
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

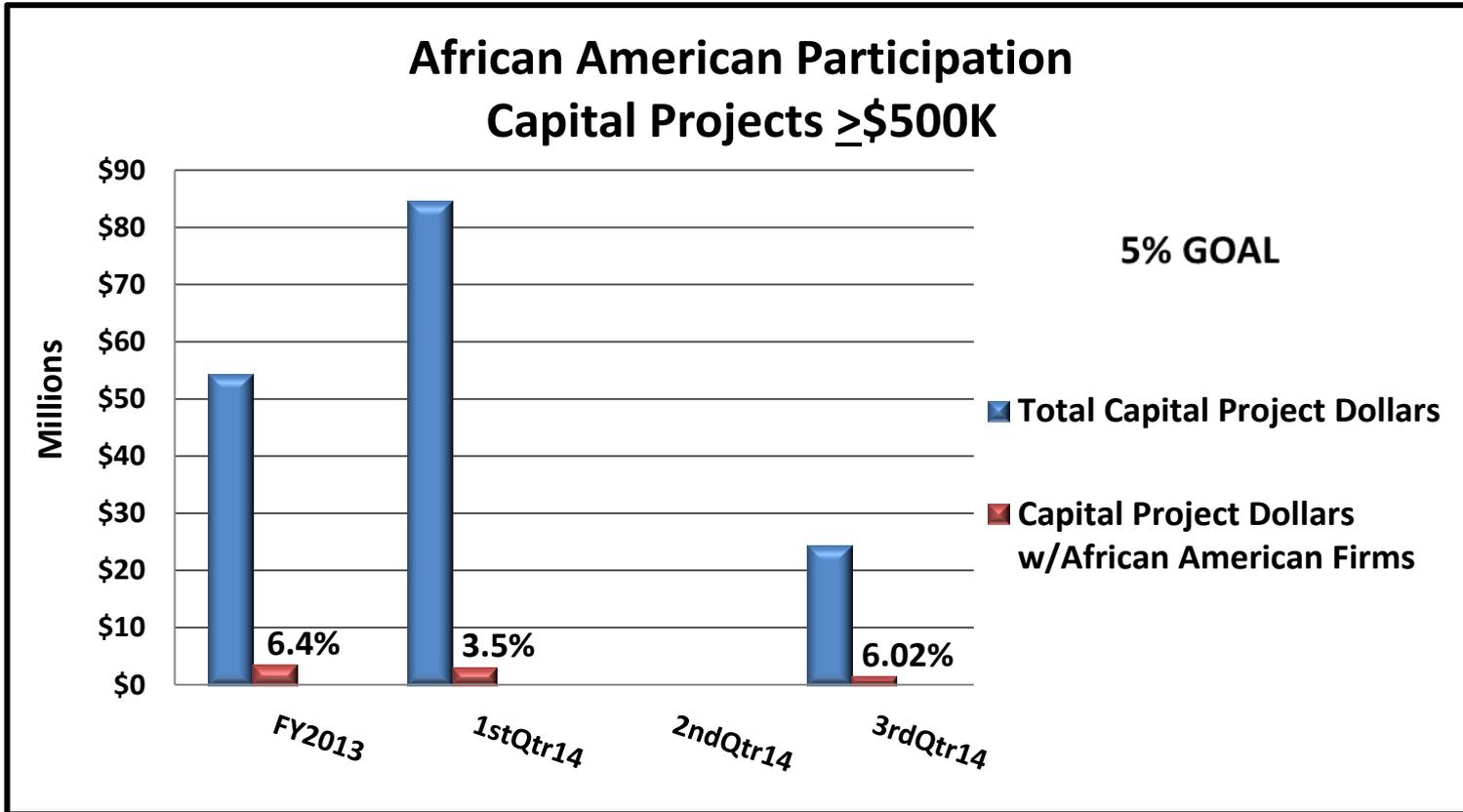
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

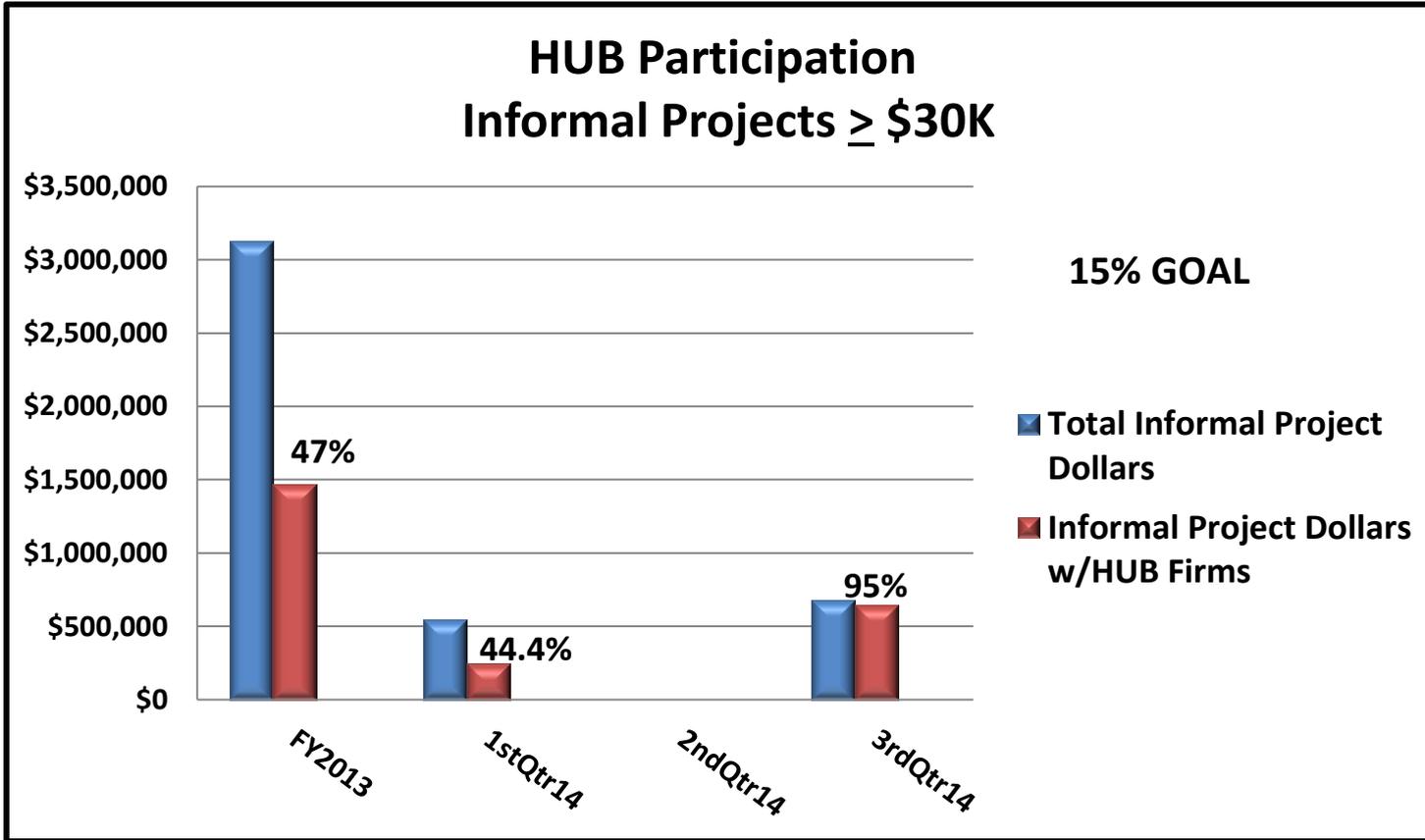
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

- Design Services' HUB participation improvement is currently focused on African American contractors & vendors.

IMPLEMENTED ACTIONS AND PLANS

- All Coordinators are encouraged to reach out to new vendors for work on our Under \$30K projects - Ongoing.
 - Added new HUB Electrical Contractor: COED Electric – African American owned.
 - Added new HUB Contractor: McFarland Building Group, LLC – African American owned.
 - Added new HUB Signage vendor: Sign Innovations – Asian American Woman owned.
 - Project Coordinators continue to review and discuss at our Design Services weekly Tuesday morning meetings.
 - Amanda acts as advisor for other Coordinators; providing new vendor contacts as they are vetted.
- Continue to refine HUB reporting information for Strategic Planning - Ongoing.
- Continue to work with FIS on reports for extracting project data from Archibus - Ongoing.

GOAL #5 – Promote Good Stewardship

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

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

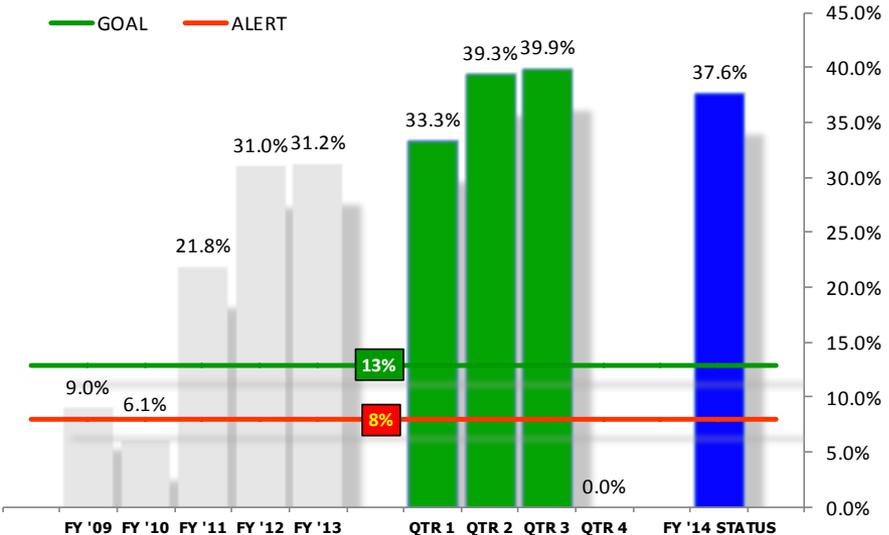
Measure: Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
QTR 1	\$ 611,428	\$ 203,778	33.3%
QTR 2	\$ 411,281	\$ 161,687	39.3%
QTR 3	\$ 840,824	\$ 335,138	39.9%
QTR 4	\$ -	\$ -	0.0%
FY '14 STATUS	\$ 1,863,533	\$ 700,603	37.6%



**GOAL
13.0%**

**STATUS
37.6%**

GOAL #5 – Promote Good Stewardship

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

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

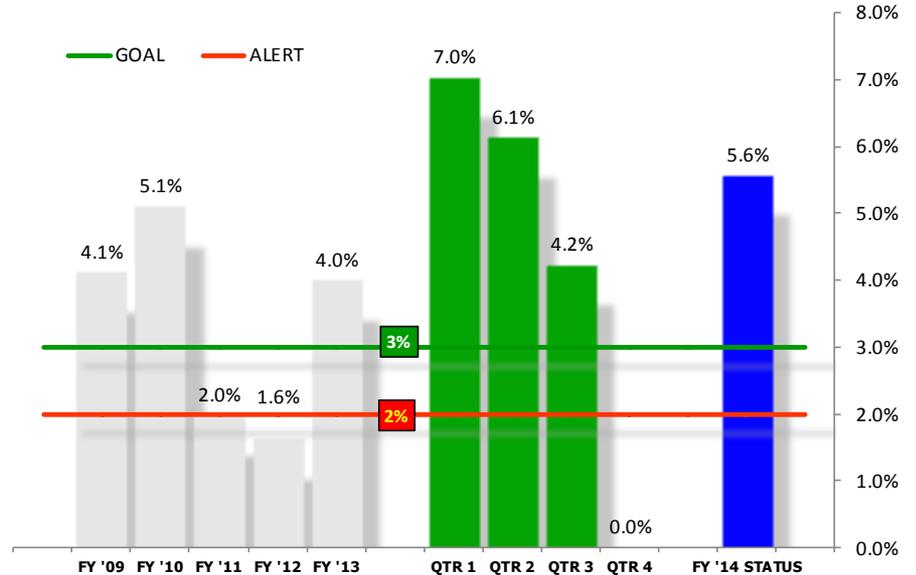
Measure: Total African American contract dollars divided by Total Contract Dollars

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
QTR 1	\$ 611,428	\$ 42,900	7.0%
QTR 2	\$ 411,281	\$ 25,172	6.1%
QTR 3	\$ 840,824	\$ 35,441	4.2%
QTR 4	\$ -	\$ -	0.0%
FY '14 STATUS	\$ 1,863,533	\$ 103,513	5.6%



**GOAL
3.0%**

**STATUS
5.6%**