



Facilities Management Quarterly Strategic Planning Session

**Third Quarter – Fiscal Year 2015
January – March 2015**

APPA Award for Excellence

UNSC Charlotte Facilities Management

WINNER

AGENDA

APPA

Facilities Operations Realignment – Lee Snodgrass

Transition to Google – Fred Brillante

Kronos Update – Melanie Witherspoon

Brainstorming Session: How to Improve Our SOP Process

Strategic Planning Metrics and Actions Plans

Next Ninety Day Look Ahead – Phil Jones

...Creating a Campus of Distinction

LEADERS



Facilities Operations Realignment

Lee Snodgrass, Director



Transition to Google

Fred Brillante, Director FIS



Kronos Update

Melanie Witherspoon

Director, Facilities Business Office



Improving Processes

Philip M. Jones

Associate Vice Chancellor



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**



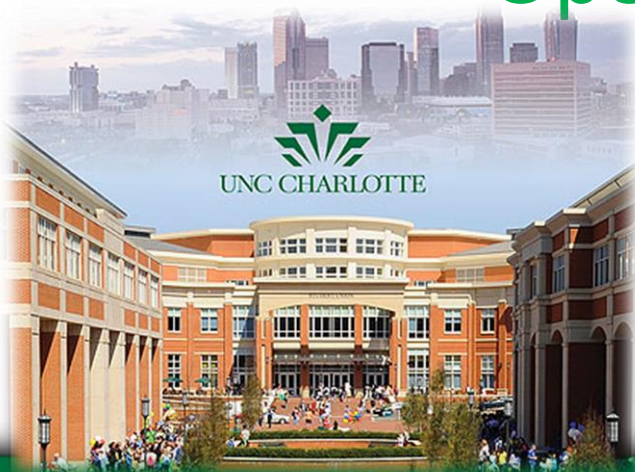
UNC CHARLOTTE

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

-- Harold Geneen, industrialist

GOAL #1

Continuously Improve
Operations of Campus



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

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

ACTION PLAN

Actions Planned

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

Actions Completed

1. Zones 5 and 6 “Operating like a business.”
2. Weekly review of work assignment completion.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

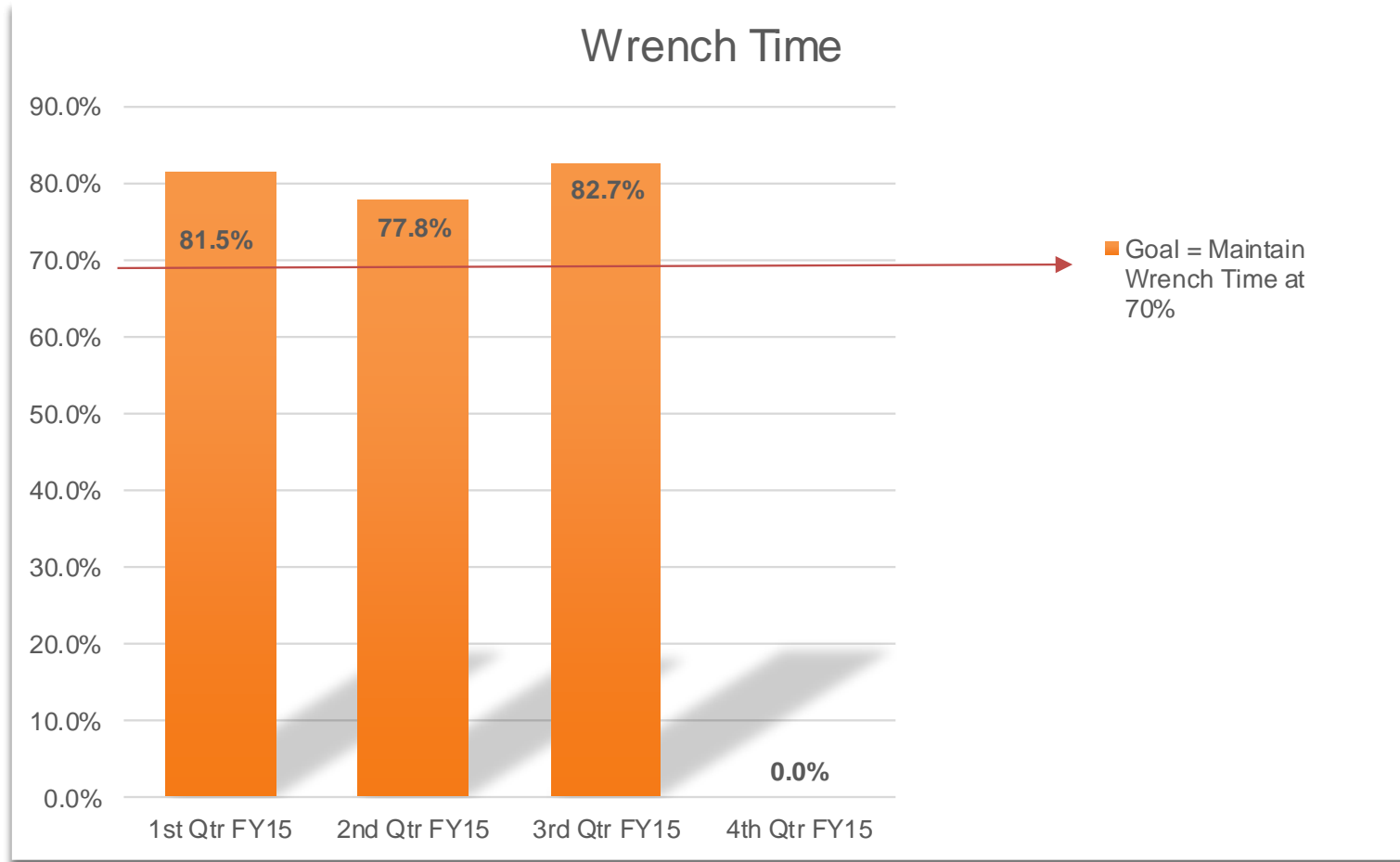
Objective: 1.1: Improve Labor Availability

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

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

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

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

ACTION PLAN

Actions Planned

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

Actions Completed

1. Promoted the use of SDI Punch-out; conducted lunch and learn July 2014.
2. Assigned additional approvers to help expedite the process.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

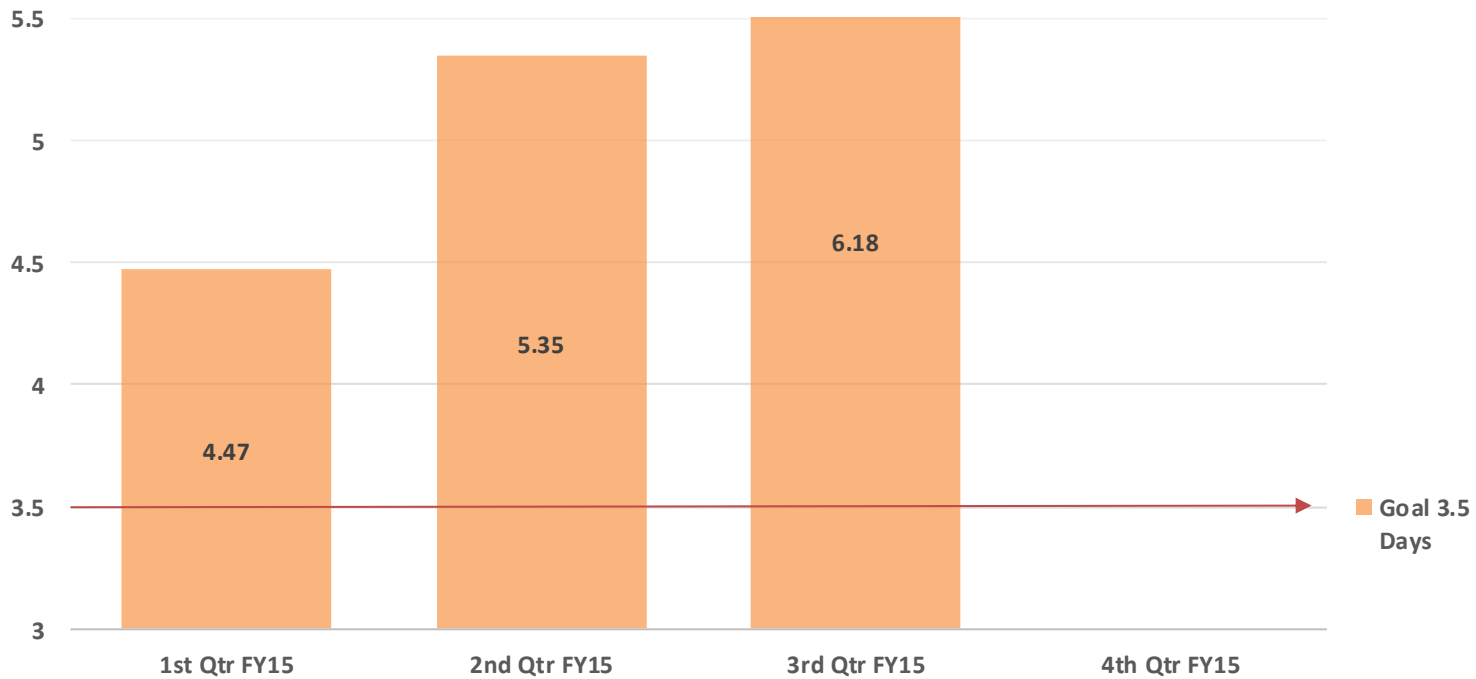
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

REDUCE AVERAGE NON-STOCK REQUISITION TO RECEIPT TIME



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

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

ACTION PLAN

Actions Planned

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

Actions Planned

1. Reviewed recurring services and scheduled services currently being completed using PM work requests; August 2014.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

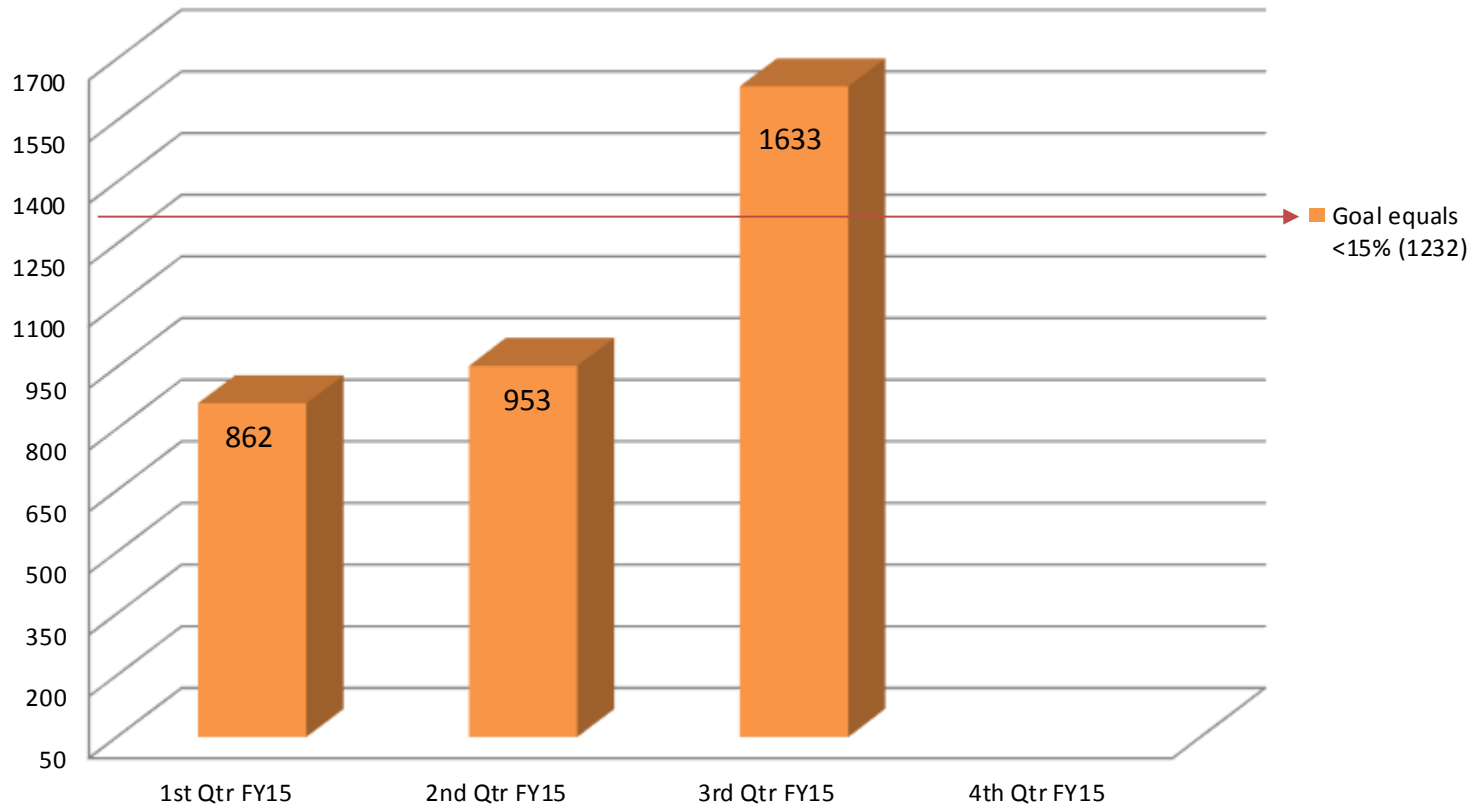
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

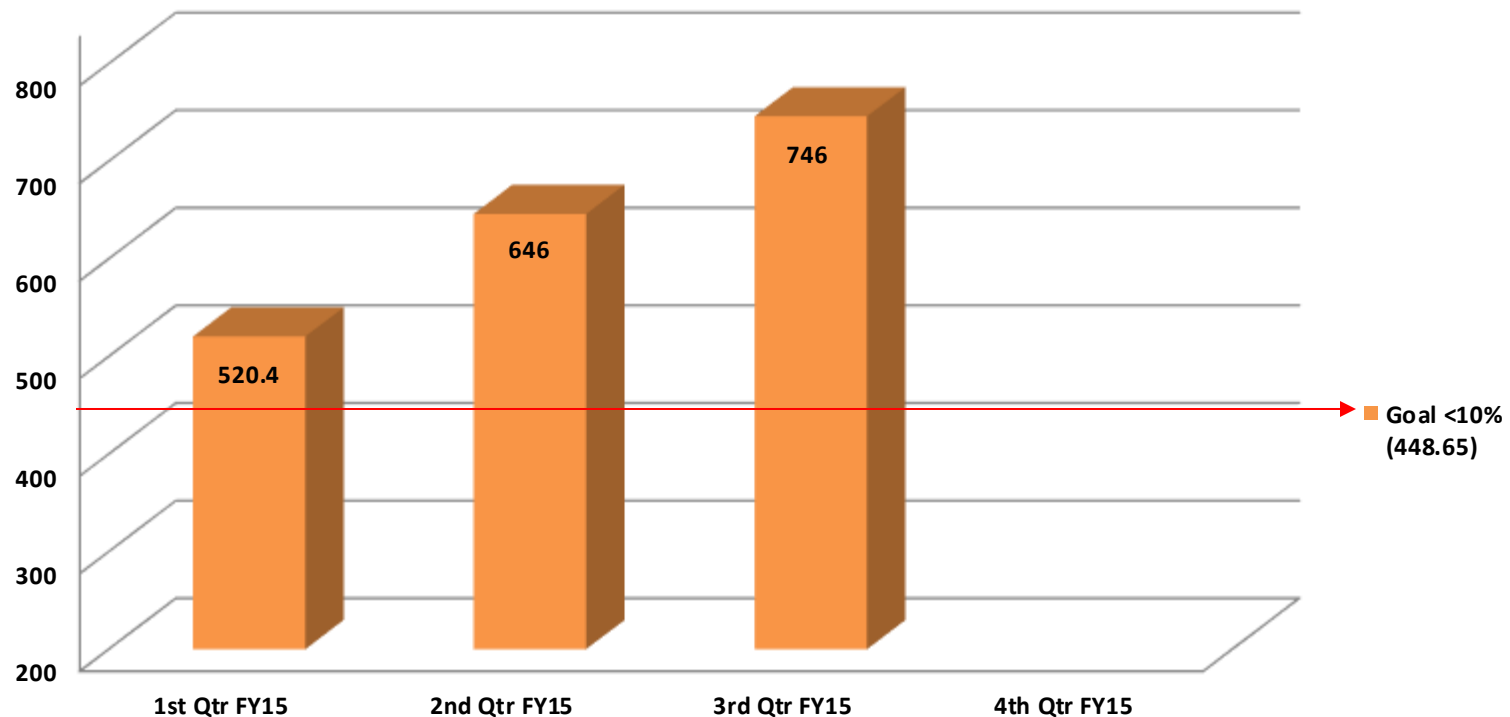
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STATUS

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
 - Trained all BES Supervisors in ARCHIBUS and 49er Mart (2/2015)
 - BES Lead Technician upgrades completed (3/1/2015)
 - Re-org zone and shift assignments completed (3/1/2015)
 - Developed and implemented new task cards for all BES Zones (3/2015)
 - Finished Re-org implementation (3/1/15)
 - Review quarterly self audits with technicians (3/1/15)
 - Conducted (OS1) Boot Camp and began (OS1) Pilot in the Friday building (3/2015)
- Actions Planned
 - Conduct (OS1) pilot building audit (May 19)
 - Conduct (OS1) decision to proceed meeting (May 19)
 - Develop In-service training curriculum and matrix (5/2015)
 - Update and Implement new Hiring Process (5/2015)
 - Review and continue quarterly self audits (6/1/15)

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Lead
BES

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

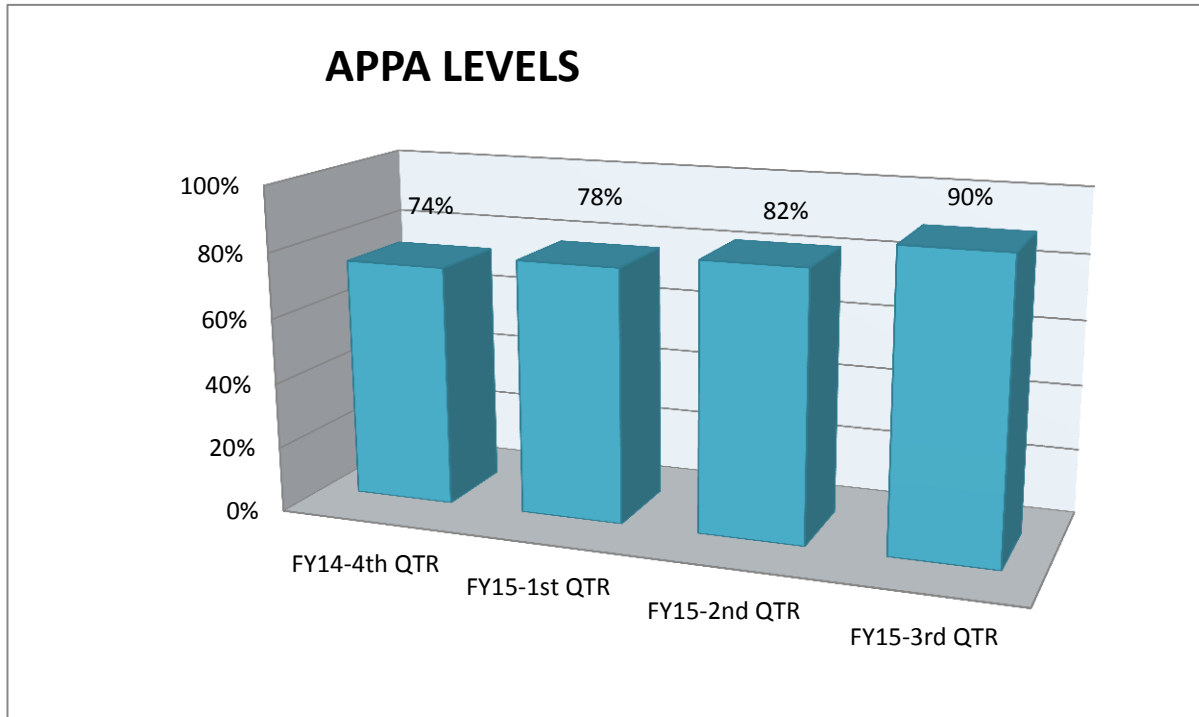
Objective: 1.4: Improve BES Processes

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

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

Lead: Building Environmental Services

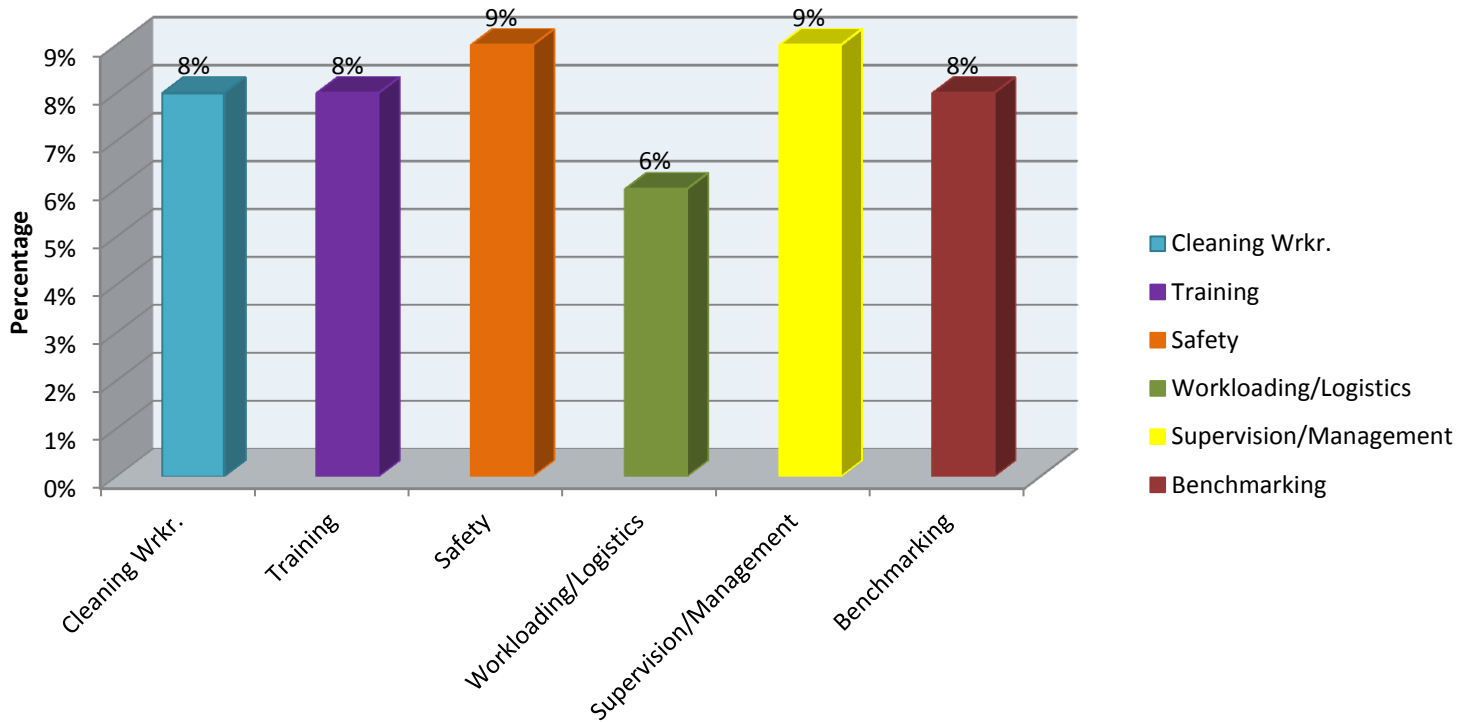
Balanced Scorecard Category: Customer Perspective

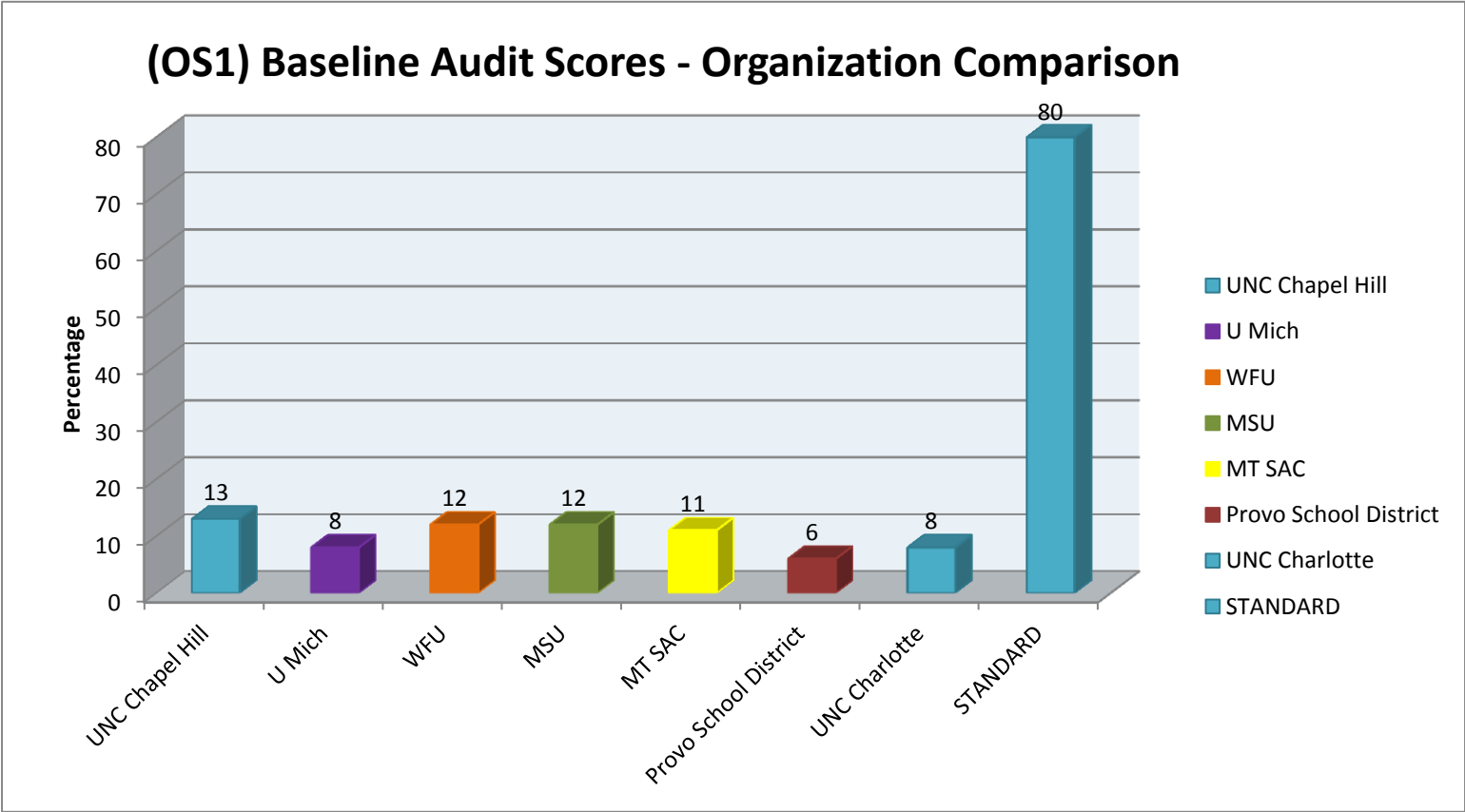


Percentage = 90%

STATUS

(OS1) Baseline Audit Scores - Job Category





GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

ACTION PLAN

Actions Planned

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

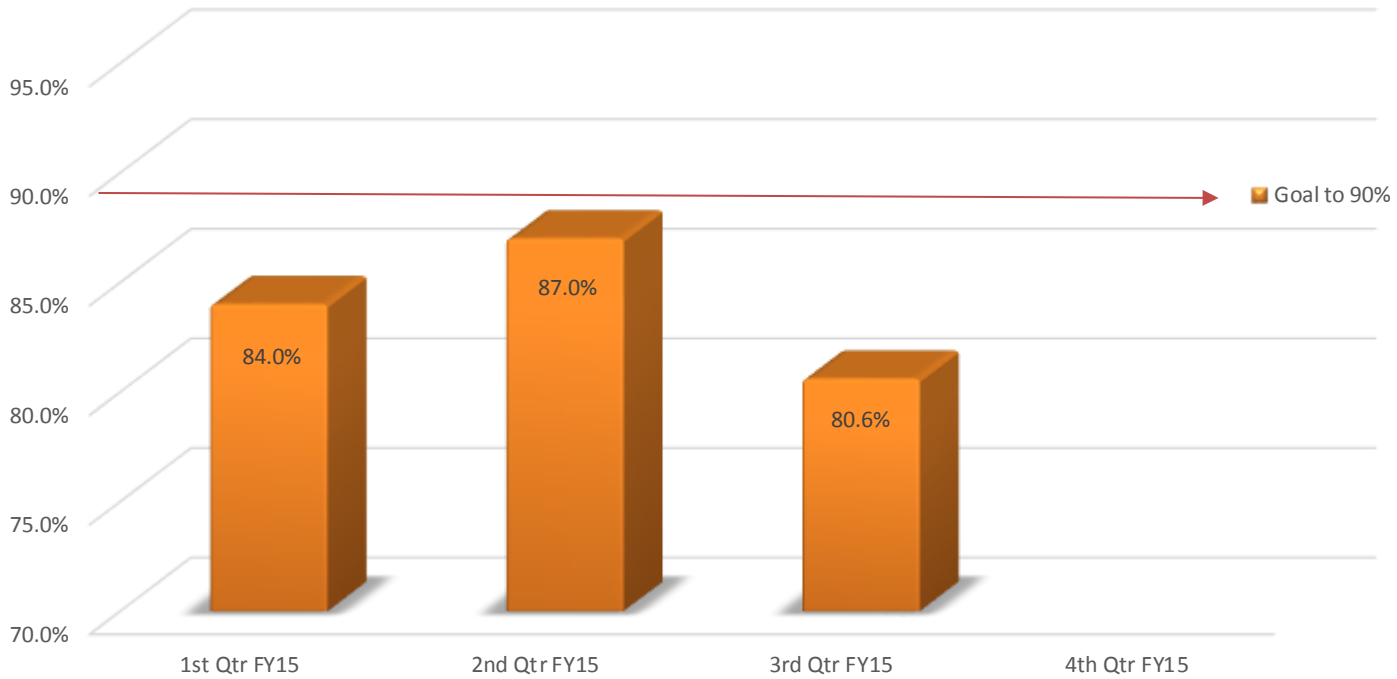
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

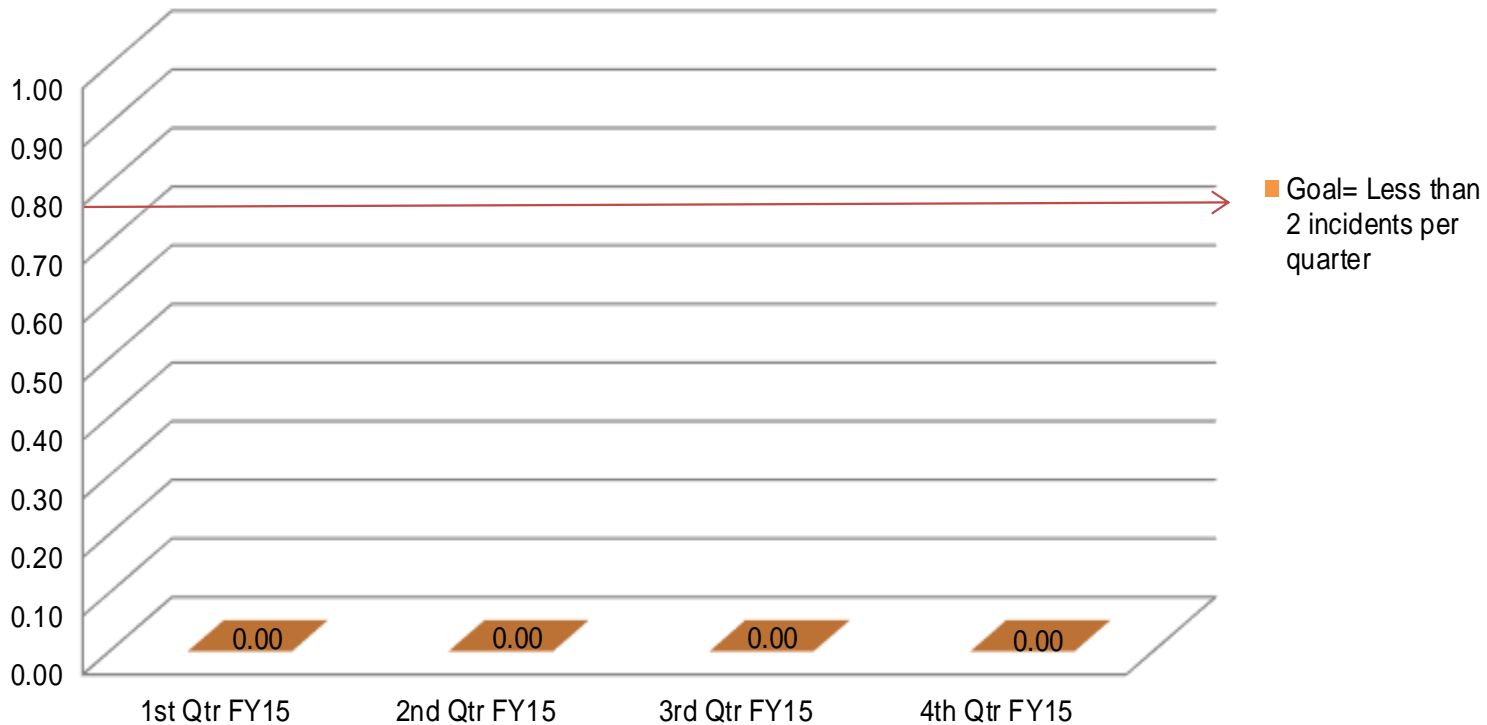
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

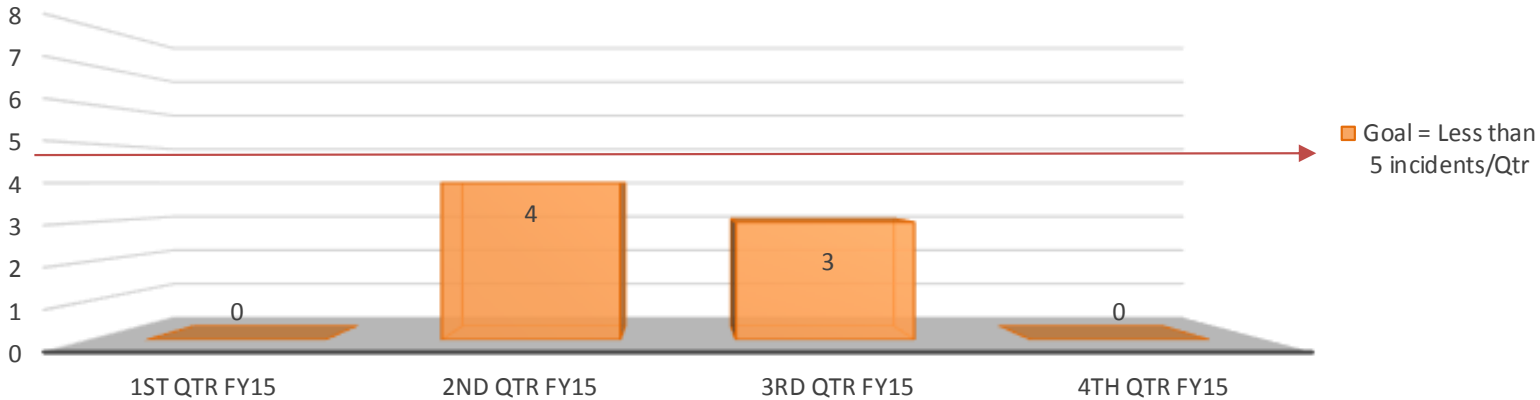
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

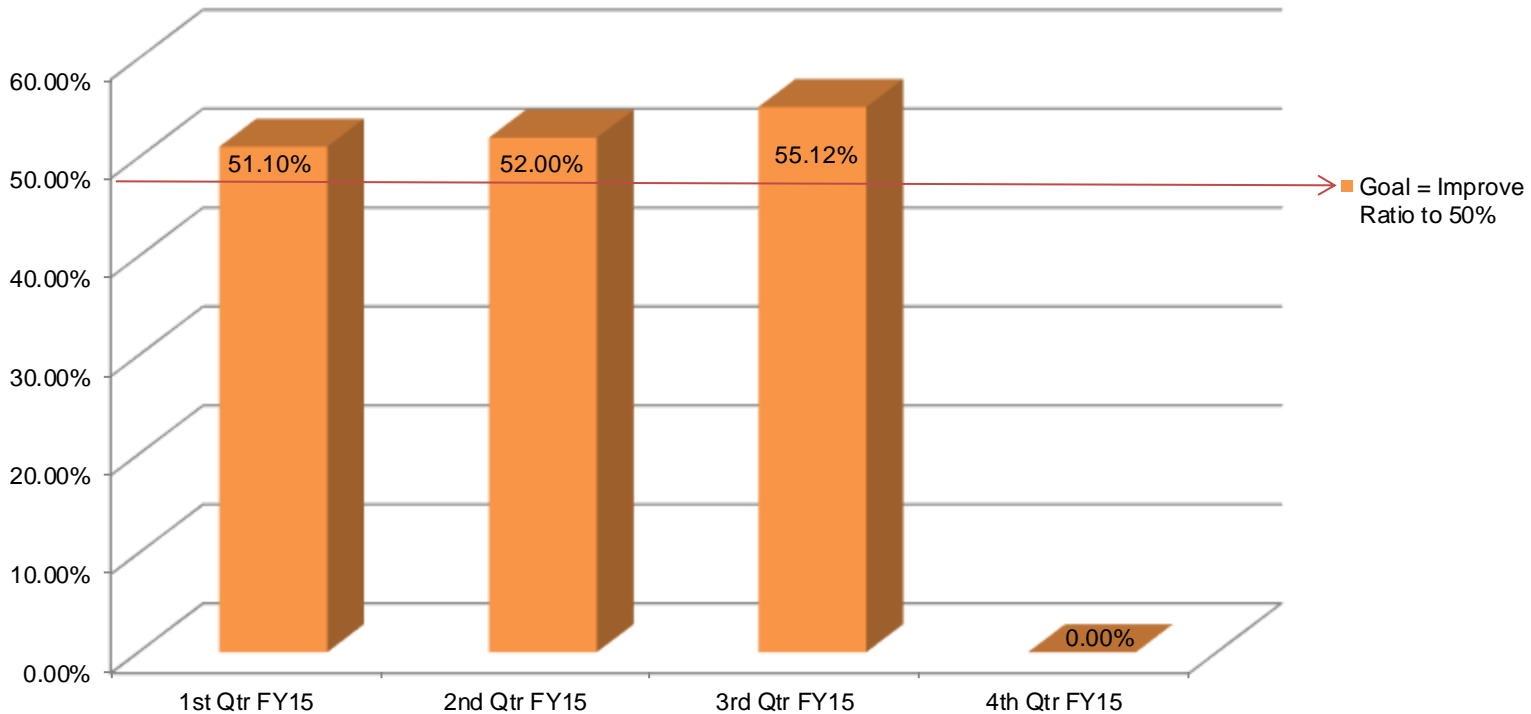
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Ratio of Preventive/Predictive Work Requests



STATUS

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



FM Prioritized Projects – FY15

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Completed:

1. Hired temporary Space Survey Technician position.
2. Hired vacant Mobile Technology position: Start date May 11, 2015.
3. Completed ARCHIBUS 21.3 upgrade by April 2015.
4. Successfully completed BES Manager/Supervisor Training March 2015.
5. Completed Development phase for the Campus Map.
6. Completed initial phases of Facilities Printer Transitions to Information Technology Services (ITS) Print Server Environment.
7. Finalized new *Labor Services Reports* for Facilities Operations.
8. Completed Gmail and Calendar Testing in prep for FM user move support.
9. Collaborated with ITS for FM Servers' Virtual Machine set up.
10. Successful Collaboration with ITS facilitated 66 FM New Computer distributions/set ups.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Planned:

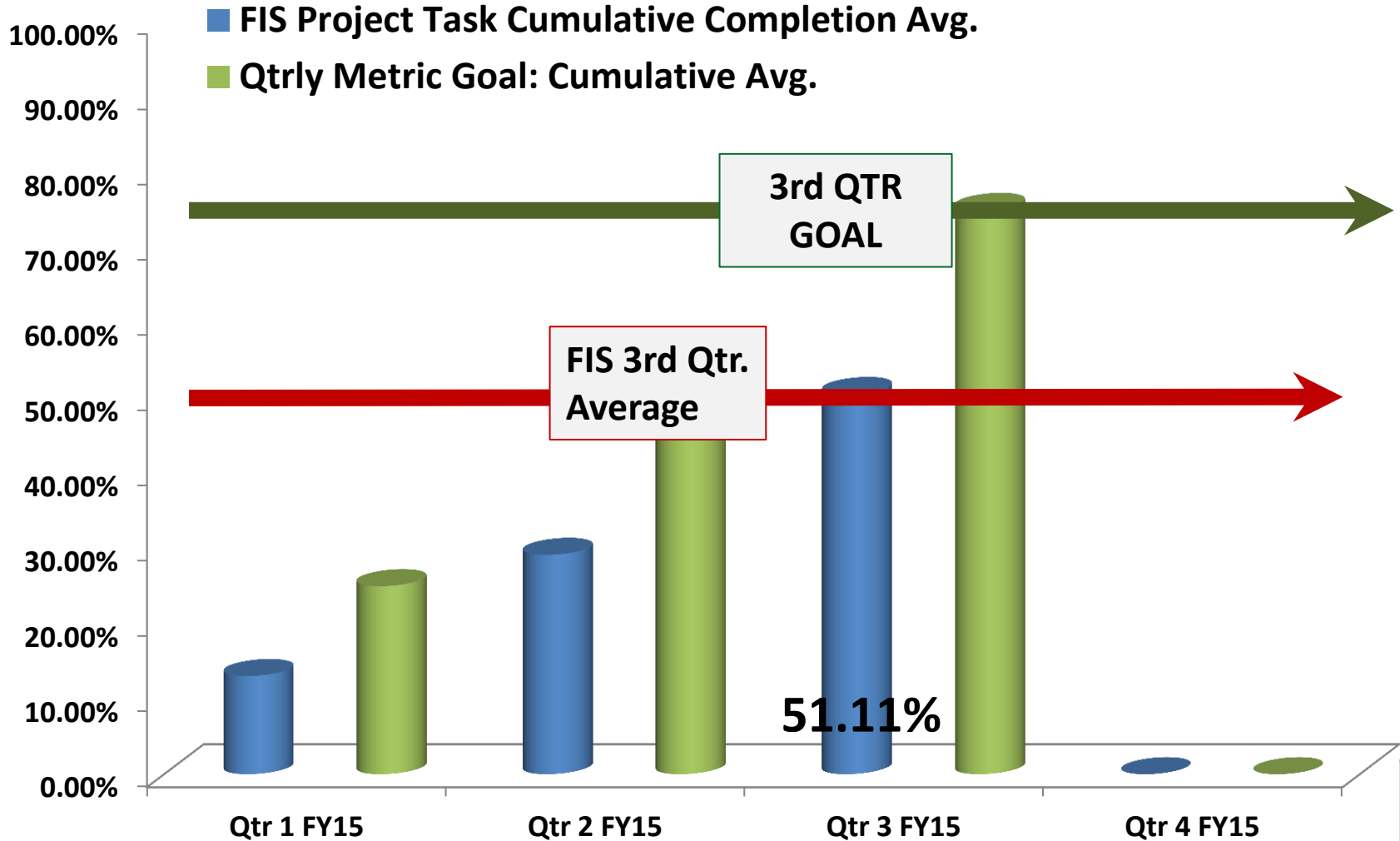
1. Hire temporary GIS Survey Technician position by May 30, 2015.
2. Complete/Finalize the Approval of the Campus Map and “Go Live” by May 30, 2015.
3. Complete Capital Upgrades and CRDM Project by June 30, 2015.
4. Complete and Finalize Building Automation 3.8 JACE upgrade for each zone/campus area by Jun 30, 2015.
5. Complete Fuel Master Upgrade by May 30, 2015.
6. Begin and Complete Design Services Enhancement by Jun 30, 2015.
7. Complete Campus Radio System Upgrade and NVR Installation Projects by Jun 30, 2015.
8. Complete GIS Mobile Utilities Mapping Project by Jun 30, 2015.
9. Continue user support for desktop Printer connectivity issues following print server move and project final close out – Jun 2015.

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

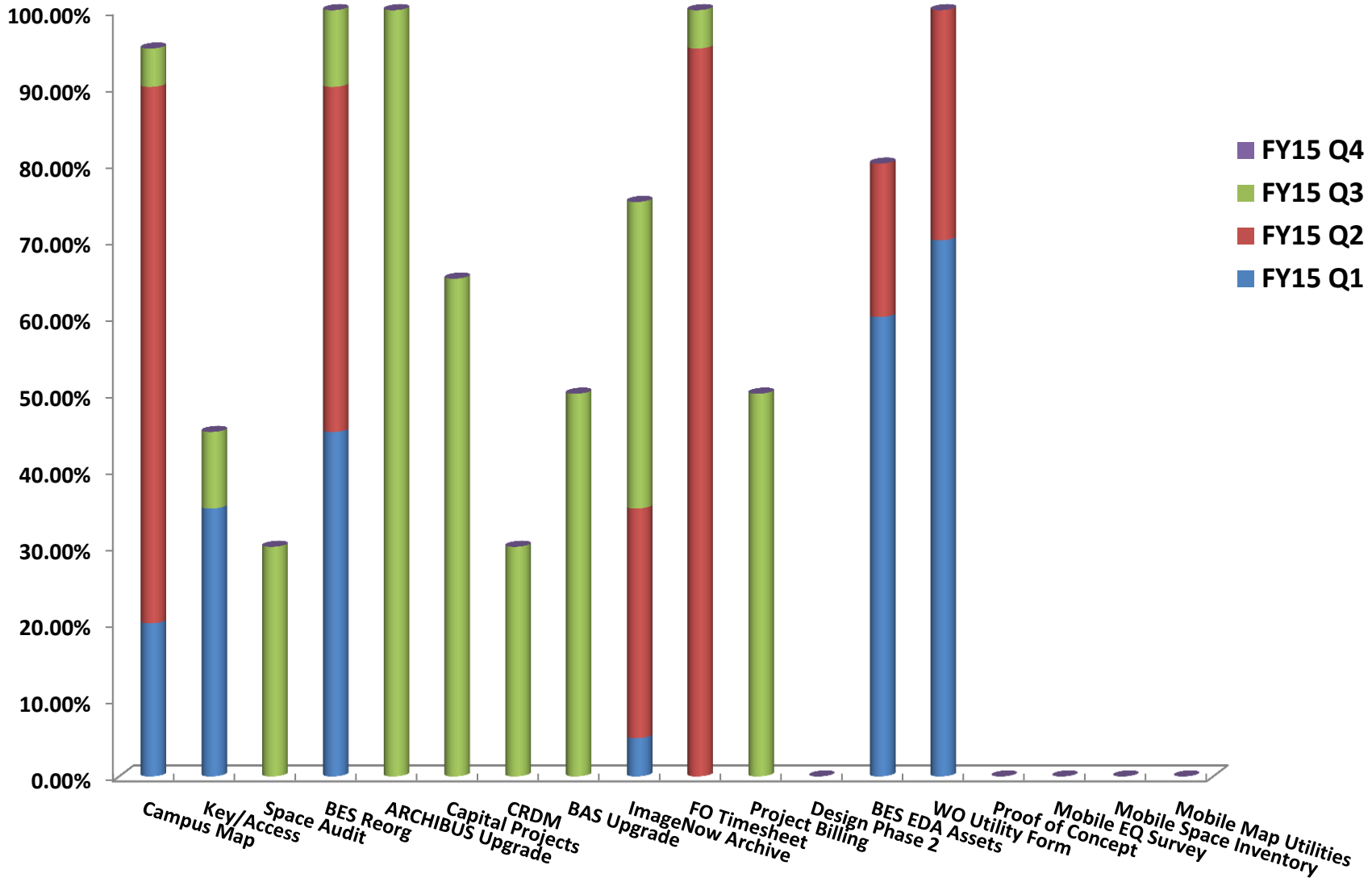
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

Lead FIS

Balanced Scorecard Category: Internal Business Processes



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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 – Slide 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.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 - Work In Progress*
- Update Estimating Workbook to improve Contingency and Fee calculations.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 – Work In Progress*
- Convert Project Timeline to format in Archibus.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 – Work In Progress*

IMPLEMENTED ACTIONS AND PLANS

Reduce and Eliminate Paper Processes – Design Services Implementations:

- Convert Excel (old) Purchase Requisition to Adobe interactive Purchase Requisitions (Commodities and Services) and Change Order.
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 - Success – It works.*

ONGOING IMPROVEMENTS

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

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Annual
GOAL
95.0%

3rd QTR
STATUS
95.3%

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

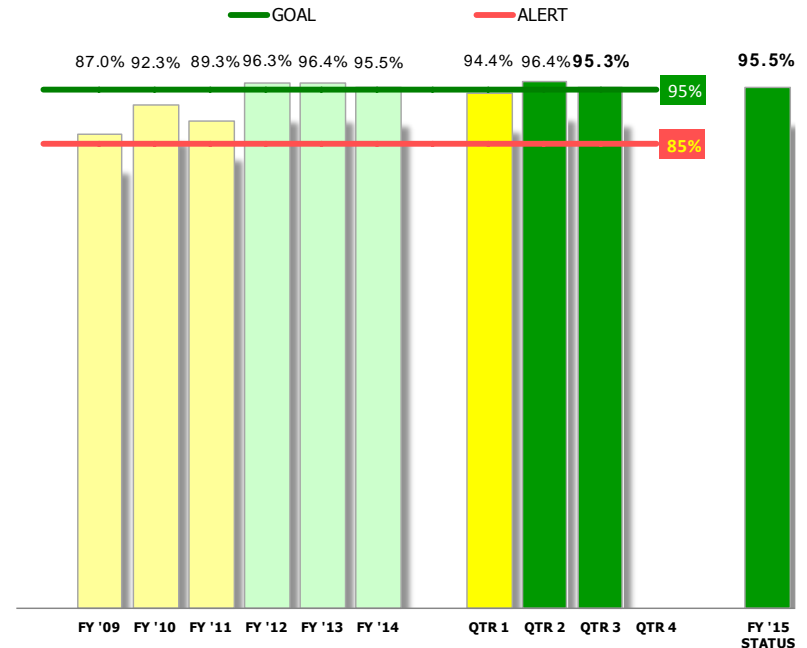
YTD
STATUS
95.5%

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)

Beneficial Occupancy Summary Graph

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
FY '14	221	211	10	95.5%
QTR 1	18	17	1	94.4%
QTR 2	28	27	1	96.4%
QTR 3	43	41	2	95.3%
QTR 4	0	0	0	0.0%
FY '15 STATUS	89	85	4	95.5%



Facilities Management Strategic Planning Session – Third Quarter FY 2015



**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

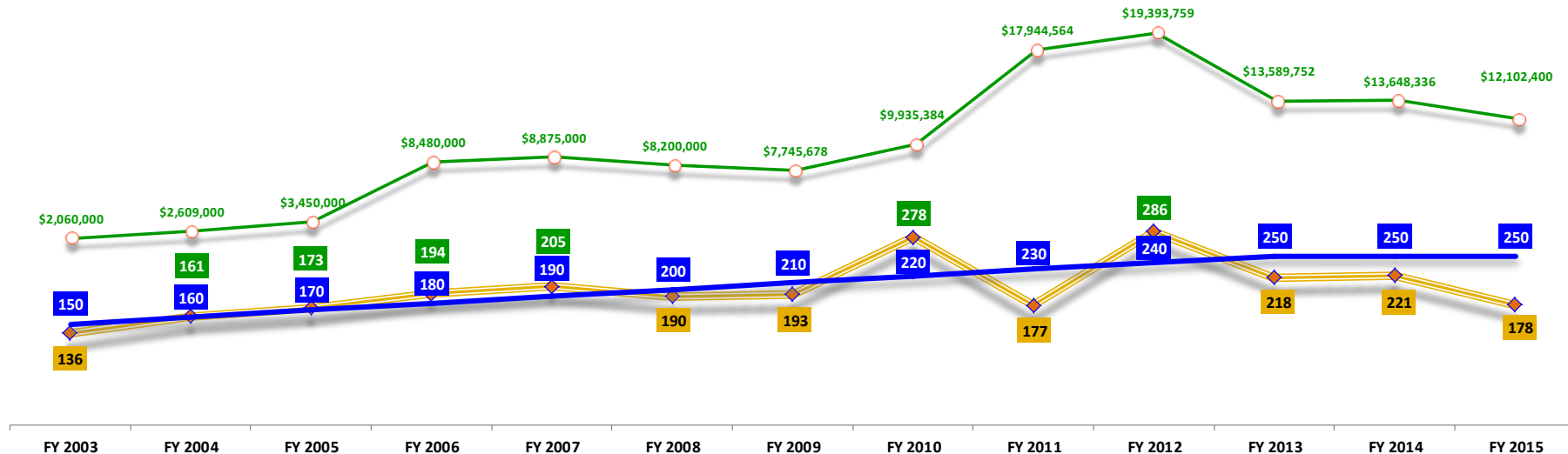
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.2: Increase Project Capacity by 10 projects per year

Measure: Number of Projects Completed

Increase Project Volume by 5-10 Projects Per Year

Fiscal Year	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015
GOAL	150	160	170	180	190	200	210	220	230	240	250	250	250
Projects Completed	136	161	173	194	205	190	193	278	177	286	218	221	178
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,745,678	\$9,935,384	\$17,944,564	\$19,393,759	\$13,589,752	\$13,648,336	\$12,102,400



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to refine the overall FCI of buildings with FCAP updates
- Re-start CRDM process by launching map and Master List – obtain feedback
- Conduct campus customer meetings (Completed March 2015)
- Conduct Committee review meetings in May 2015
- Recommend a plan / prioritize projects to improve FCI by 5% by July 2015
- FCI tracker by building which illustrates both FCAP changes and project completions to calculate movement in FCI.

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

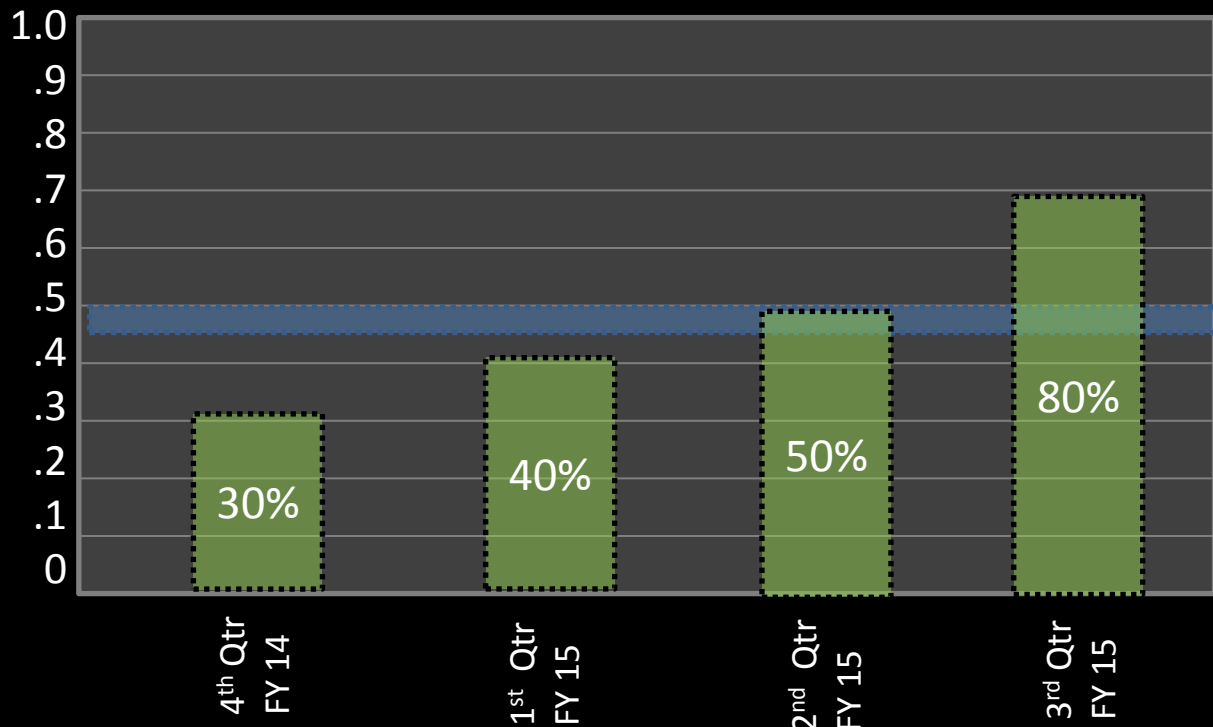
Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - **Recommendation NLT July 2015.**

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Compose comparative analysis of actual spaces vs UNC Charlotte Approved Standard by June 2015, working with AA**
- **Complete space allocations/ inventory by room category in ARCHIBUS**
- **Compare inventory to standard and report % difference by June 2015**
- **Work with FIS to generate report by room use (NLT June, 2015)**
- **Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard by end of July 2015**
- **Seek input from Director of Space Utilization**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

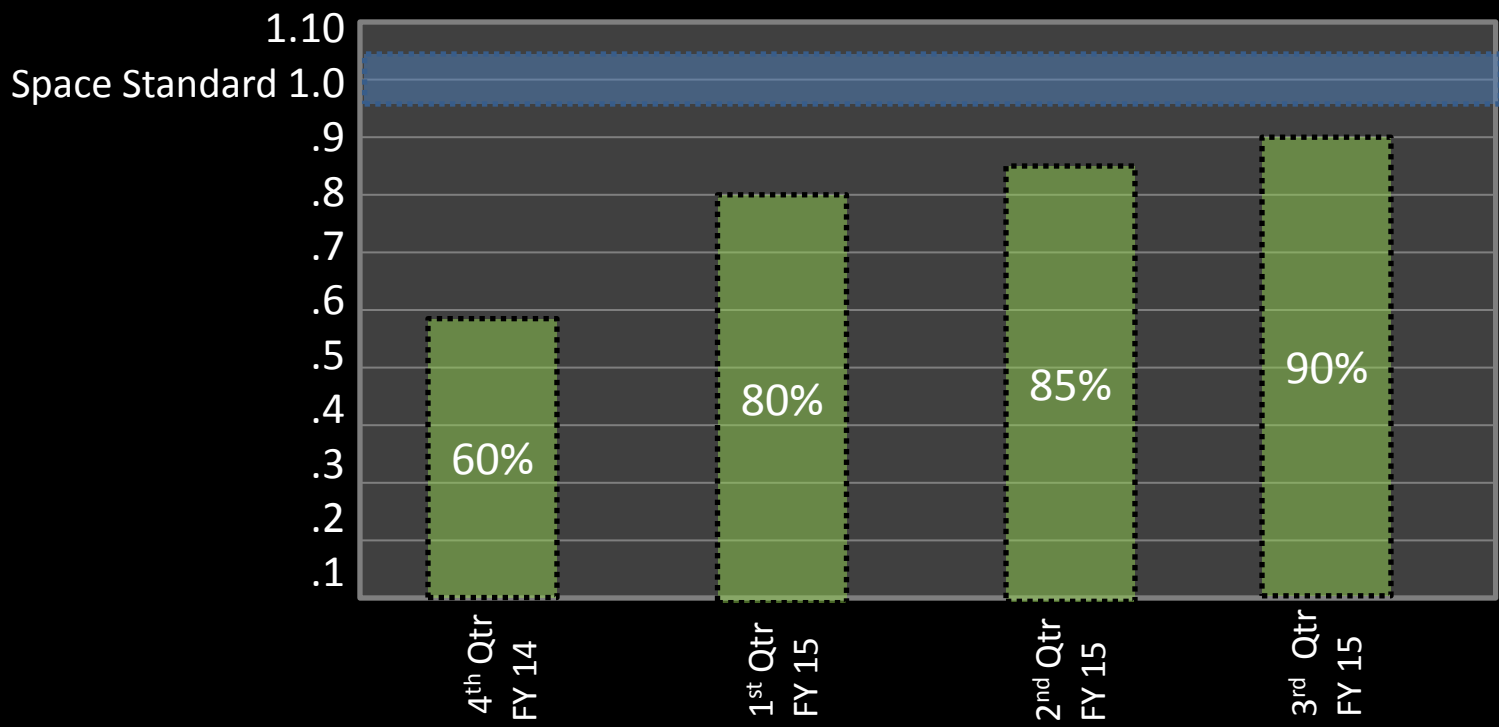
Tactic 2.4.1: 90% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of July 15.**

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **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)**
- **Complete for projects to date**

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

- RDH Renovation Advance Planning

Actions Planned

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

Facilities Management Strategic Planning Session – Third Quarter FY 2015

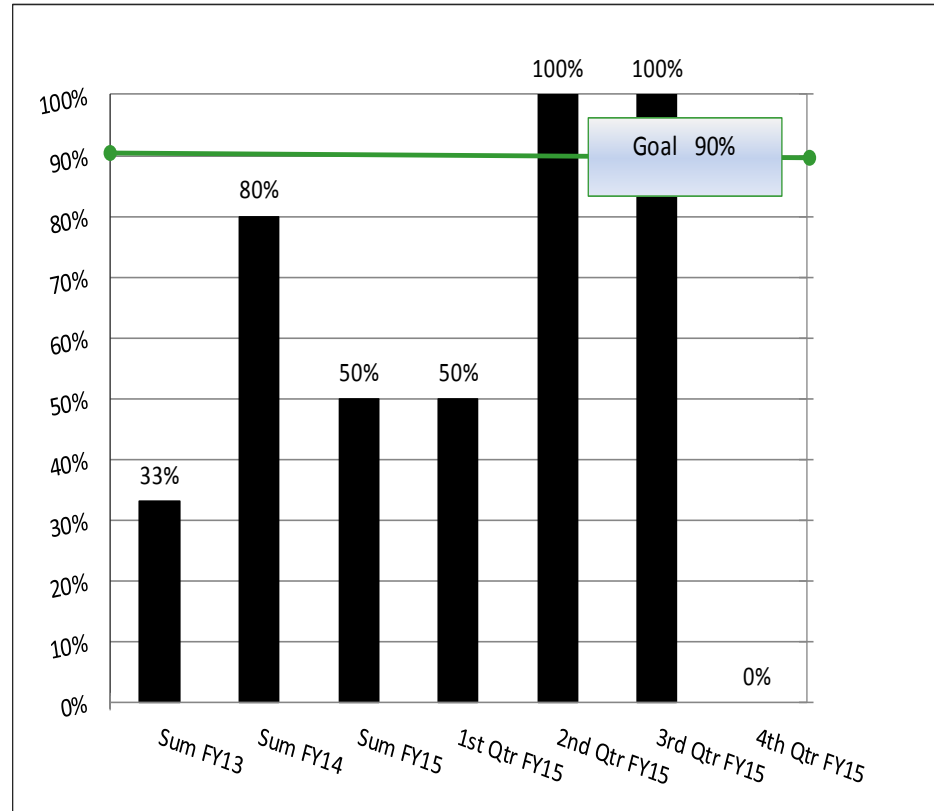
**Lead
Capital**

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract w/in 120 days	Designer not under contract w/in 120 days	% Designers under contract w/in
Summary FY-13	14	3	6	33%
Summary FY-14	7	4	1	80%
Summary FY-15	7	5	1	83%
1st Qtr. FY-15	1	1	1	50%
2nd Qtr. FY-15	4	3	0	100%
3rd Qtr. FY-15	1	1	0	100%
4th Qtr. FY-15	0	0	0	n/a%



Tactic Measurement for 3rd Quarter is 100%

Status

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Lead Capital

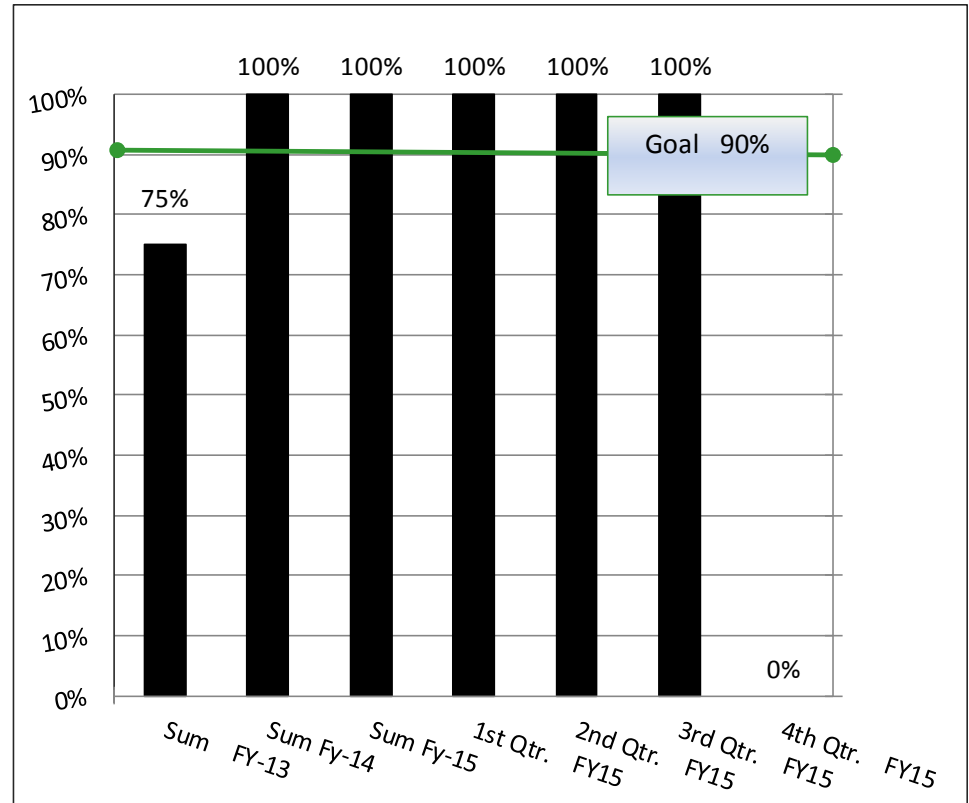
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

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



Tactic Measurement for 3rd Quarter is 100%

Status

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Lead
Capital

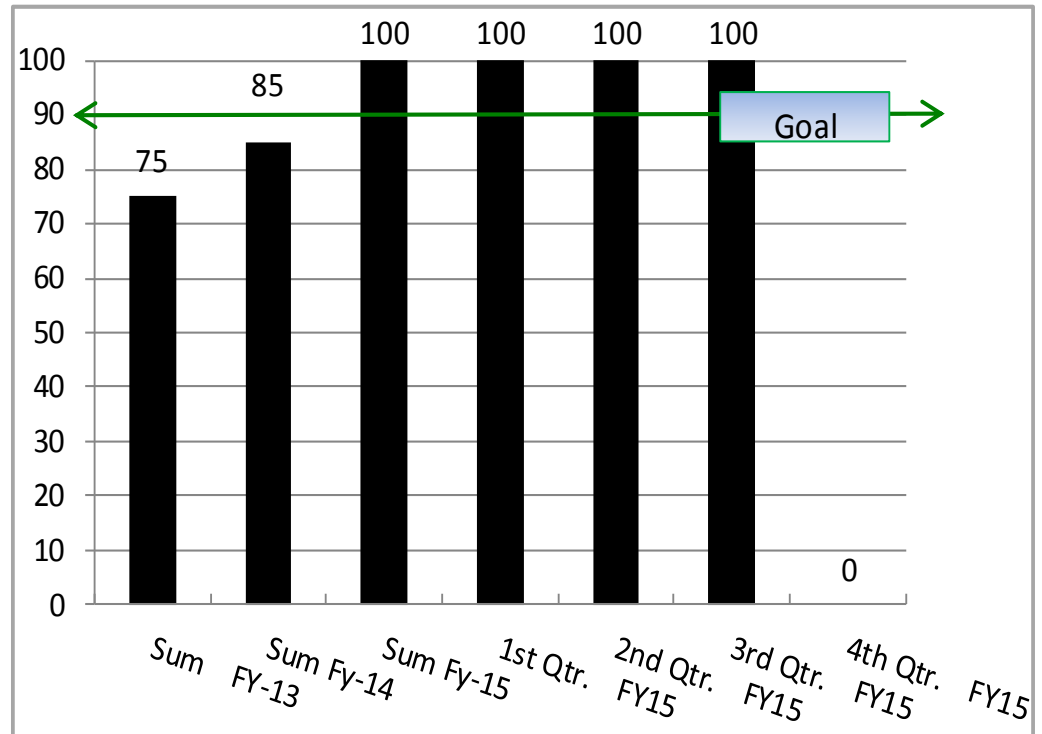
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Processes

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



Tactic Measurement for 3rd Quarter is 100%

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

- Football Lights
- Switch 55
- RUP IV Expansion

Actions Planned

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

Facilities Management Strategic Planning Session – Third Quarter FY 2015

**Lead
Capital**

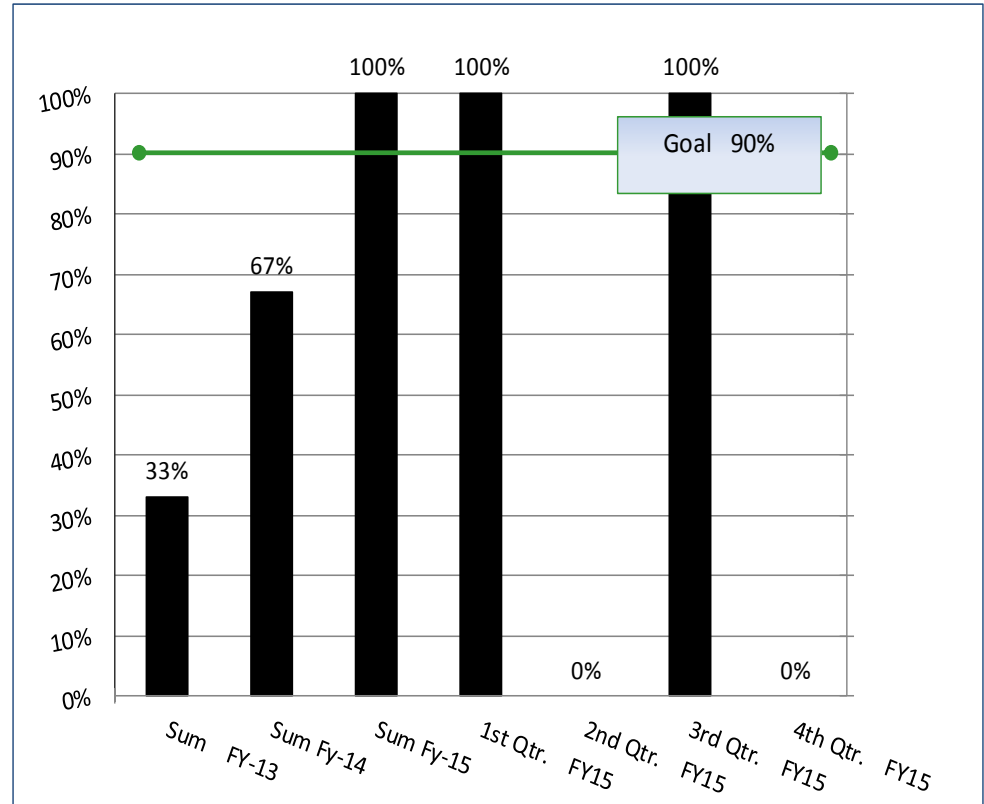
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	5	2	71%
1st Qtr. FY-15	2	0	100%
2nd Qtr. FY-15	0	2	0%
3rd Qtr. FY-15	3	0	100%
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 3rd Quarter is 100%

Status

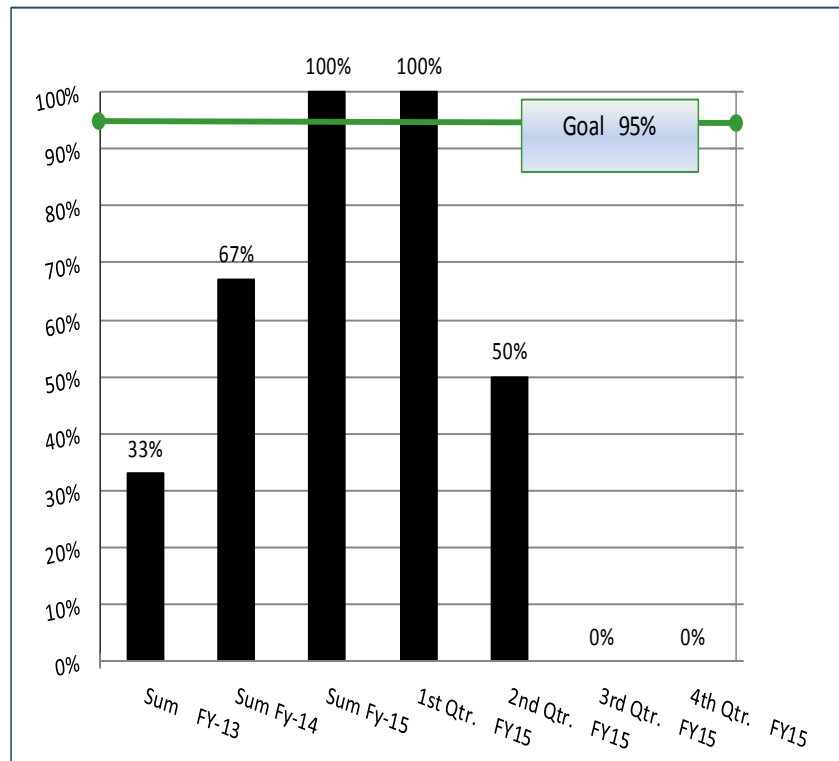
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	3	1	75%
1st Qtr. FY-15	2	0	100%
2nd Qtr. FY-15	1	1	50%
3rd Qtr. FY-15	n/a	n/a	n/a
4th Qtr. FY-15	n/a	n/a	n/a



Tactic Measurement for 3rd Quarter is n/a

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/satisfaction

Tactic 3.1.1:

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

Measure:

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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Survey

- Customer interview feedback to be shared with Directors **On Hold**
 - Questions will relate to how FM can help customers get their work done better and/or faster via website, projects, etc.
 - Ask feedback for following scenario: a customer service center entering and managing work requests
- Action plans, based on interviews and 2014 Customer Survey to be developed by Directors. **On Hold**
- Next Urban Institute survey projected: **FY 2016**

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:

Continuously improve customer service/satisfaction

Tactic 3.1.1:

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

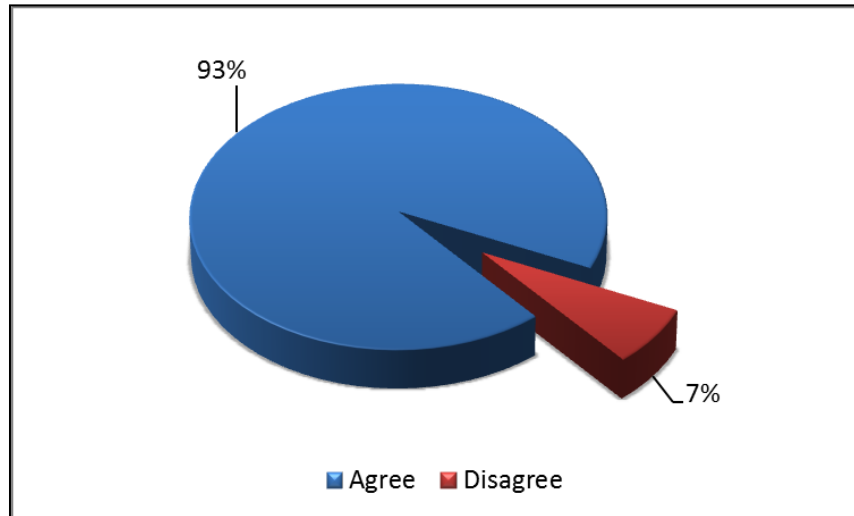
Measure:

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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

2014 Survey Overall Satisfaction: 93%



GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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. Support Capital to get buildings commissioned and retro-commissioned (ie, Kennedy Building).
2. Work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification. Continue to develop controls section and cross-train with Zones.
2. Worked with other FM team members to establish a communication plan for temperature related building issues; communicated this plan no later than 1 August 2014 and updated as needed.
3. Continue to include Energy Manager in Bi-Weekly Operations' meetings.
4. Implemented Customer Satisfaction Survey.
5. Stayed engaged with performance of ESCO contract; kept customers informed; walked the buildings and worked with the Energy Manager to keep customers informed; daily communication.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

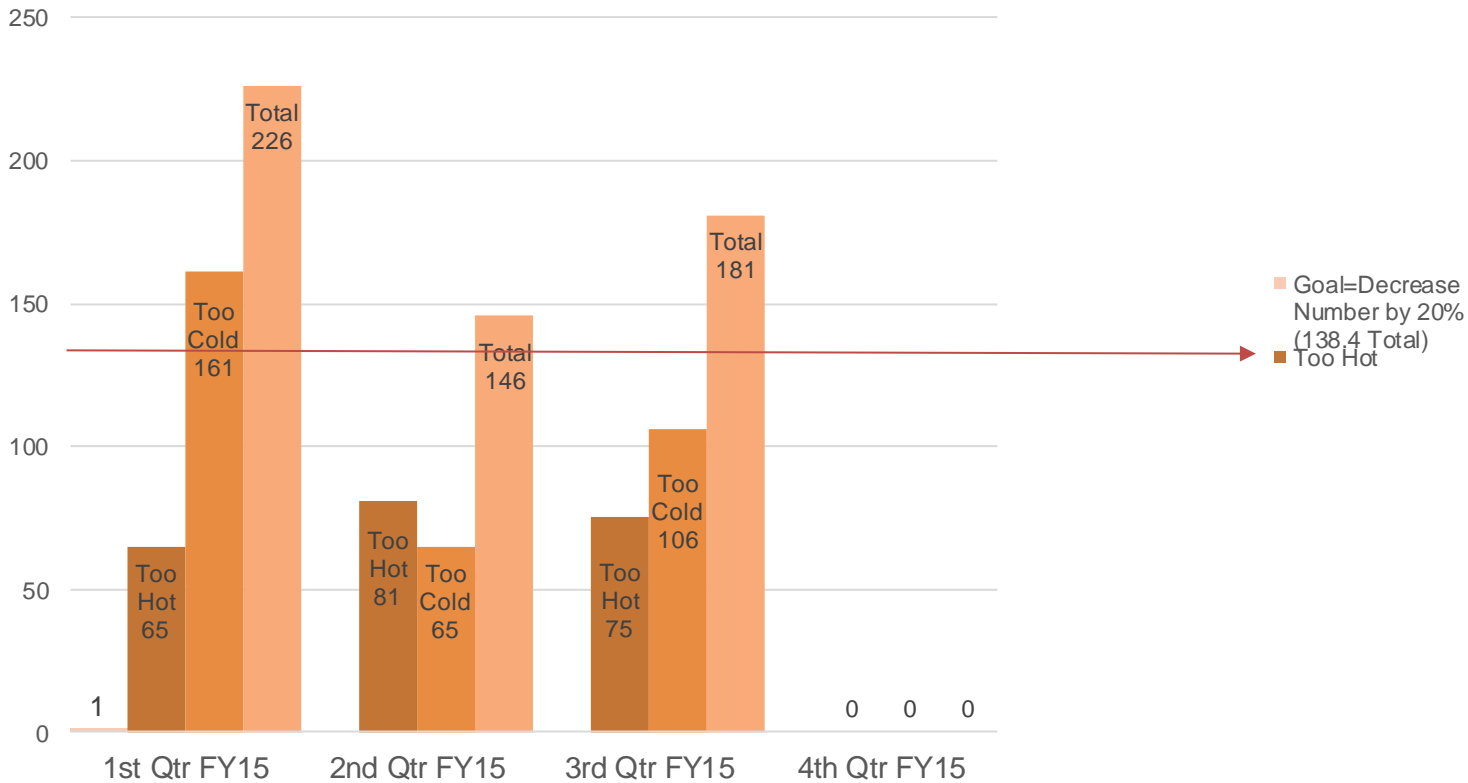
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Project Customer Questionnaire

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:

- Customer responses via Lime-Survey – Working with FIS to improve report downloads.
 - ✓ *Timeline: FY15 QTR 4 - Work In Progress*

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

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
 - ✓ *Timeline: FY16 QTR 1 - FY16 QTR 2 – Planning Stages.*

IMPLEMENTED ACTIONS AND PLANS

- Project Priority List to include new column designating “true” Project Customer.
 - ✓ *Timeline: FY15 QTR 1 - FY15 QTR 2 – Success – It works.*
- Customer responses via Lime-Survey – Success to date.
 - ✓ *Timeline: FY15 QTR 1 - FY15 QTR 2 – Success – It works.*

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Annual GOAL 90%	3rd QTR. STATUS 78%	Lead Design Services
YTD STATUS 89%		

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

Lead: Design Services

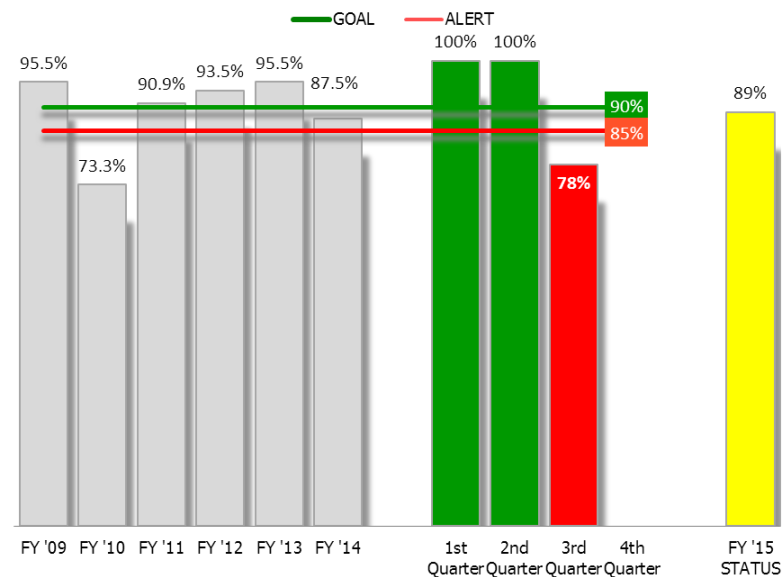
Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied
Measure: Results from Project Related Customer Surveys

90% of Informal Project Customers are More than Satisfied or Satisfied

Customer Service Survey Summary Graph

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY '09		22	18	3	0	95.5%
FY '10		30	17	5	0	73.3%
FY '11		33	24	6	2	90.9%
FY '12		31	27	2	0	93.5%
FY '13		22	18	3	0	95.5%
FY '14		24	19	2	0	87.5%
FY - 2015						
1st Quarter	27	5	5	0	0	100%
2nd Quarter	18	4	4	0	0	100%
3rd Quarter	21	9	6	1	2	78%
4th Quarter						
FY '15 STATUS						89%



Customers Comments:

- “The Project Coordinator was pro-active, engaged, listened to our concerns and kept us informed of all important issues.”
- “Coordinator went "the extra mile" to make things work with the end-user, the institution and contractors.”
- “The Project Coordinator was attentive, courteous, and displayed great communication skills (especially with follow-up).”
- “Even if there is not any movement on the project, I expect an email just to keep the communication lines open.”
- “This project seems to have taken a long time to complete; I sent an email to notify about some typos... this is in process now.”

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

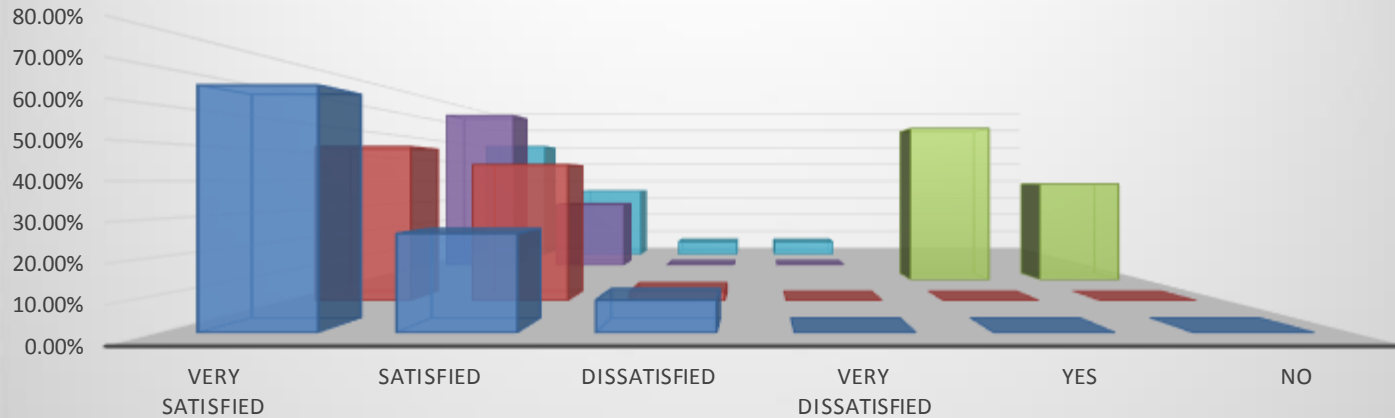
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Customer Service Satisfaction



	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Yes	No
■ How satisfied were you with the time it takes for Fac Ops staff to respond to you issue?	65.25%	26.16%	8.59%	0.00%	0	0
■ How satisfied were you with the resolution of your issue or concern?	51.45%	45.47%	3.08%	0.00%	0	0
■ Was there follow-up? Yes/No					61.25%	38.75%
■ How satisfied were you with our staff's courteousness and professionalism?	71.25%	28.75%	0.00%	0.00%		
■ How satisfied were you with your overall experience?	58.85%	34.45%	6.70%	6.70%		

95.41%
Satisfied

STATUS

GOAL #3 Foster a Customer Focused Organization

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

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

ACTION PLAN

Publicity/Public Relations:

- **Campus Construction Reports*:** Goal to prepare and distribute approx. every six weeks. Last one sent March 3, 2015; On Hold
- **Press Releases:** Write and distribute through several media channels. Continual through On Hold
 - Clean fuel grants, energy savings, Aperture sculpture, etc.
- **Publicity documentation and analytics*:** Will report annually. Next is On Hold

Internal Communications:

- **Intranet** Begin content review and user feedback. (note: level 0 security information) On Hold
- **Regularly scheduled communications meetings** with BES and Operations On Hold
 - Bimonthly meetings for both. Had first meeting with Operations in March, 2015, prior to Shelly's departure. BES meetings have been held for several months now.
- **Focus group meeting facilitator** for employee communications survey review. Group participants being identified.
 - Meeting On Hold; Completion and results: On Hold
- **Workshops*:** Expand FM audience and subject materials On Hold
- **Communications Policy Update:** Proposed policy given to Melanie and Jennifer On Hold

GOAL #3 Foster a Customer Focused Organization

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

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

ACTION PLAN

Customer Communication Initiatives (interrelated):

- **Launch 2nd customer feedback interviews On Hold**
 - Share results with Directors **On Hold**
 - Results will assist with customer survey action plans to be developed by Directors **On Hold**

- **External Marketing Campaign*:** “Creating A Campus of Distinction”
 - Project Signage launch **This launched in February, 2015, as scheduled.**
 - Operations and Design Services have implemented and now manage.
 - Solicit feedback/input from Directors **On Hold**
 - Execute campaign tactics (testimonials, LCD signage, website, etc.) **On Hold**

- **SOP review, development On Hold**

- **Customer Handbook* update, launch and remarket; digital and print On Hold**

- **Website and QA* On Hold**
 - Review web comm. key QA issues/reminders
 - Review requested pages from different units for content/QA
 - User testing

- **Customer Facing technology Scheduled to launch March, 2015**
 - Communication plans and user testing assistance with Campus Map and CRDM report

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

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Special Projects:

- **Sustainability Magazine Launch** Launched March 3, 2015
 - Limited print to occur in late Mar./Early April (see Mike Lizotte)
- **Traffic communications committee (joint partnership with U. Communications):** Research, write and provide upcoming and current campus and perimeter traffic/transportation-related projects to campus stakeholders.
 - Quarterly e-newsletter, articles, announcements, etc. **On Hold**
- **Editing/writing award submissions.** As requested **On Hold**
 - Campus Tree USA Designation/Award: Submitted Dec. 2014; anticipated response March 2015.
 - Notified as award winner in February, 2015. To be announced in sync with Arbor Day and Campus Clean Up.
- **Presentation assistance** as requested
- **Communication Plans:** BES and Operations key announcements, FIS new campus map, CRDM program, customer handbook **On Hold**
- **Personnel:** Temporary position request submitted and approved through FY 15 budget process **On Hold**

* = Areas where temp. communication position would assist to help meet timeframes and deliverables.



UNC CHARLOTTE

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

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

GOAL #4

Recruit, Develop, and Retain
Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Vacancy time of no longer than 120 calendar days - Exempt

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

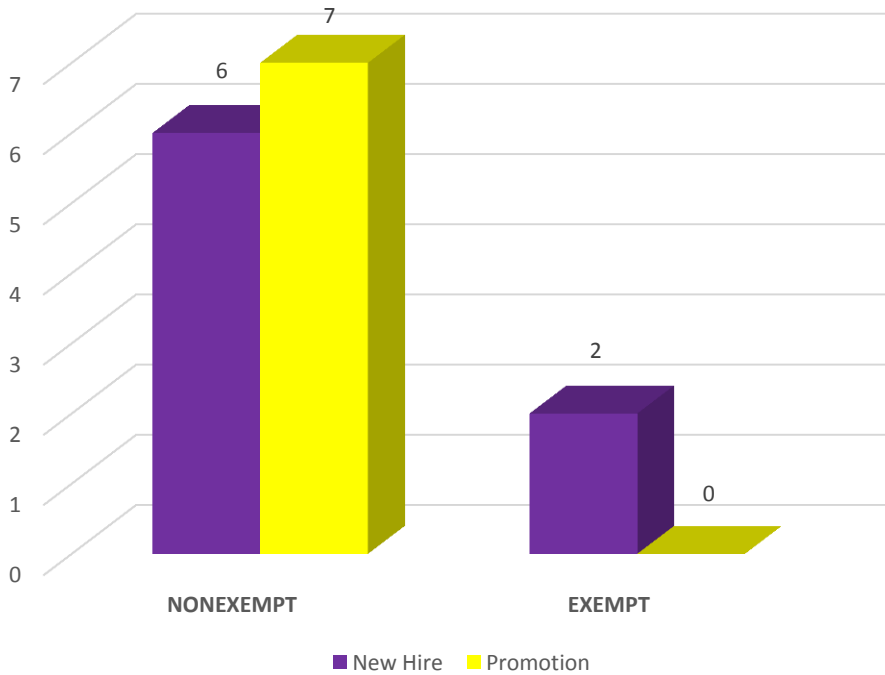
1. Increase the pool of qualified applicants. **As appropriate through June 30, 2015**
2. Ensure a qualified diverse applicant pool. **As appropriate through June 30, 2015**
3. Ensure efficiency in processing position vacancies and position management activities. **As appropriate through June 30, 2015**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

GOAL #4 Recruit, Develop and Retain Quality Employees

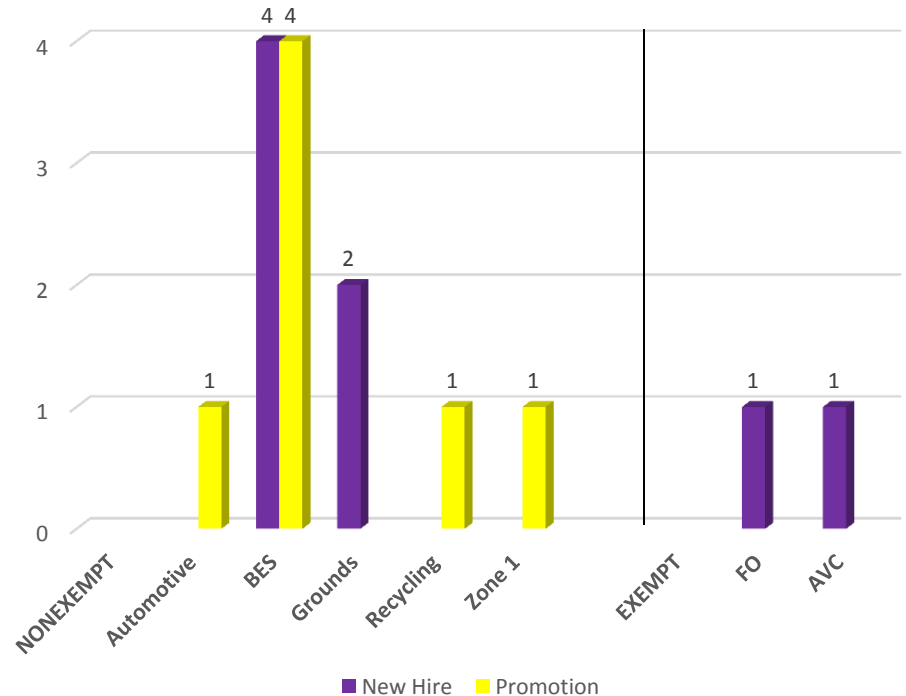
Objective 4.1: **Recruit a Qualified Workforce in a Timely Fashion**
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/Promotions 3rd Quarter FY 15



FM New Hire/Promotions 3rd Quarter FY 15



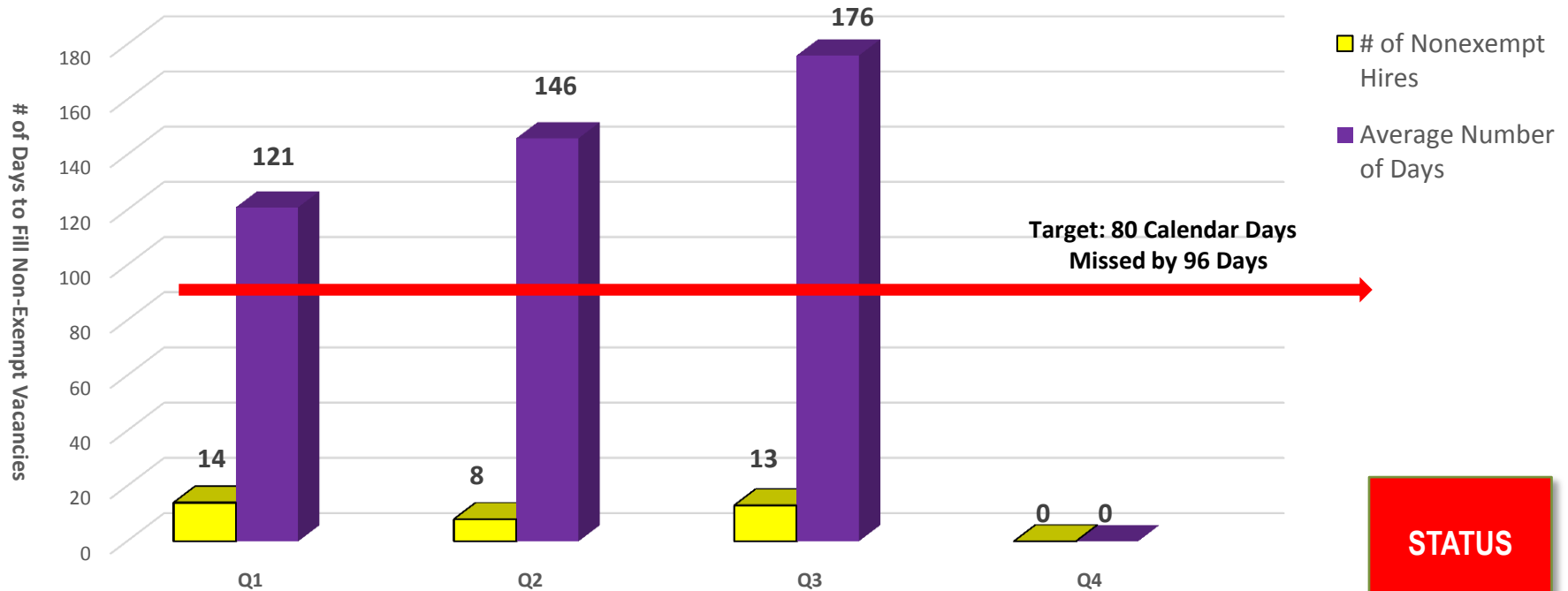
Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

Average Number of Days to Fill Nonexempt Vacancies FY 2015



STATUS

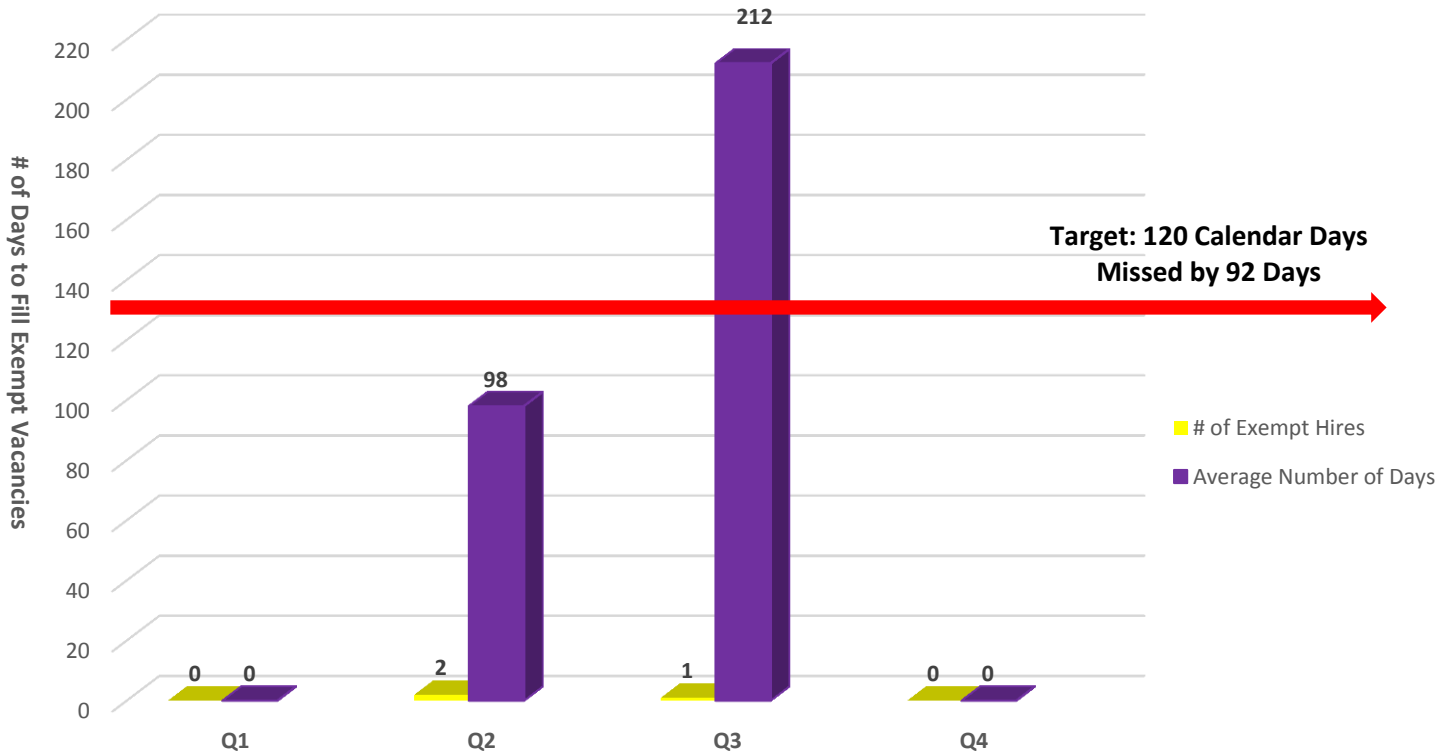
Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

Average Number of Days to Fill Exempt (Salaried) Vacancies FY 2015



STATUS

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

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Measure:

Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

Recruitment / Retention thru 06/30/15

Ensure all new hiring supervisors attend “Targeted Selection” training.

- There are many steps in recruitment. Interviewing and reference verifications are essential practices that help eliminate problem performers from being hired.

Culture of Engagement

- Increase employee awareness regarding (their) access to HRMS Started July, 2014 , supervisors are requested to review with employees steps to access HRMS for their Position Description - Work Plan Performance Evaluation.

Professional Development

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

Position Description

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

Mentioning

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

Employee Relations thru 06/30/15

Discipline

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

Documentation

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

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

Supervisors Need to Know

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

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

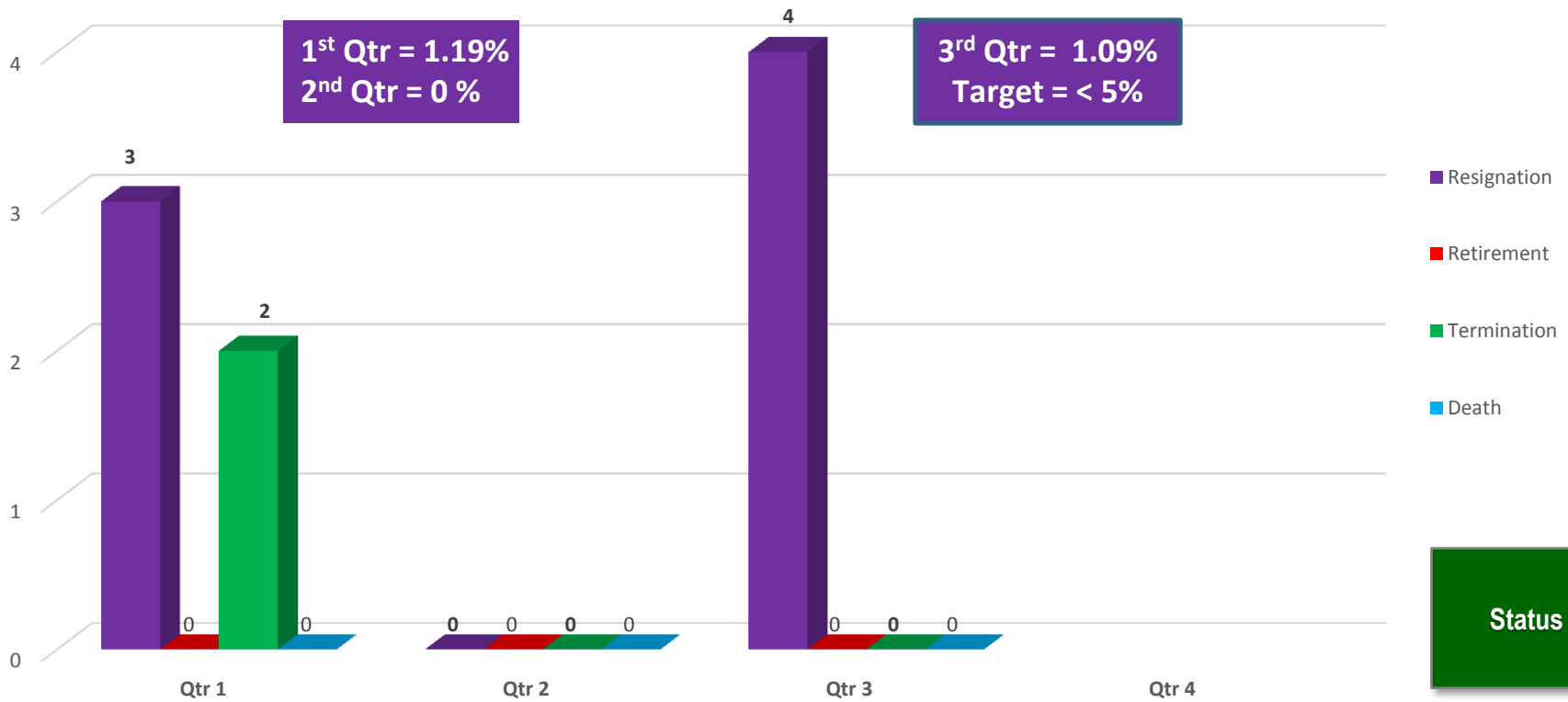
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

FM Separations of Probationary Employees per Quarter FY 2015



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%

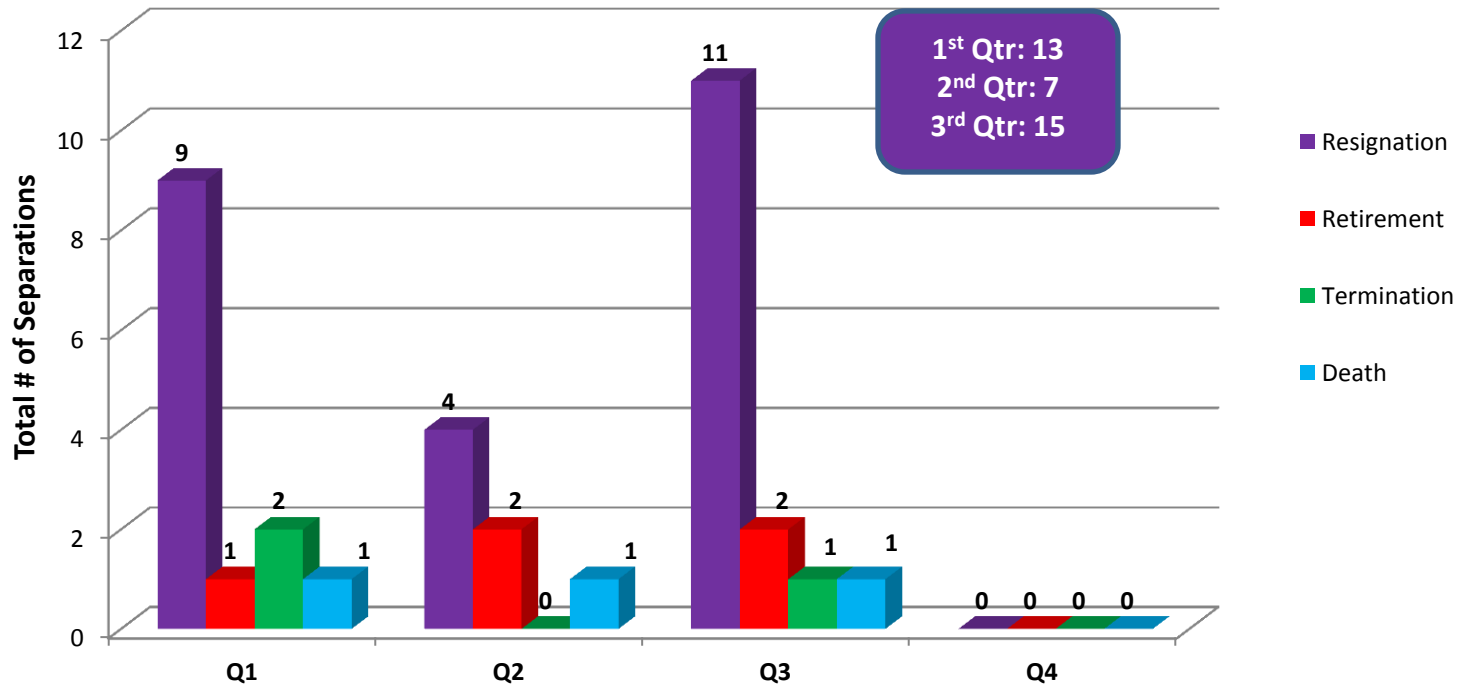
Measure:

Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

FM Total Separations Per Quarter FY 2015



GOAL #4 Recruit, Develop and Retain Quality Employees

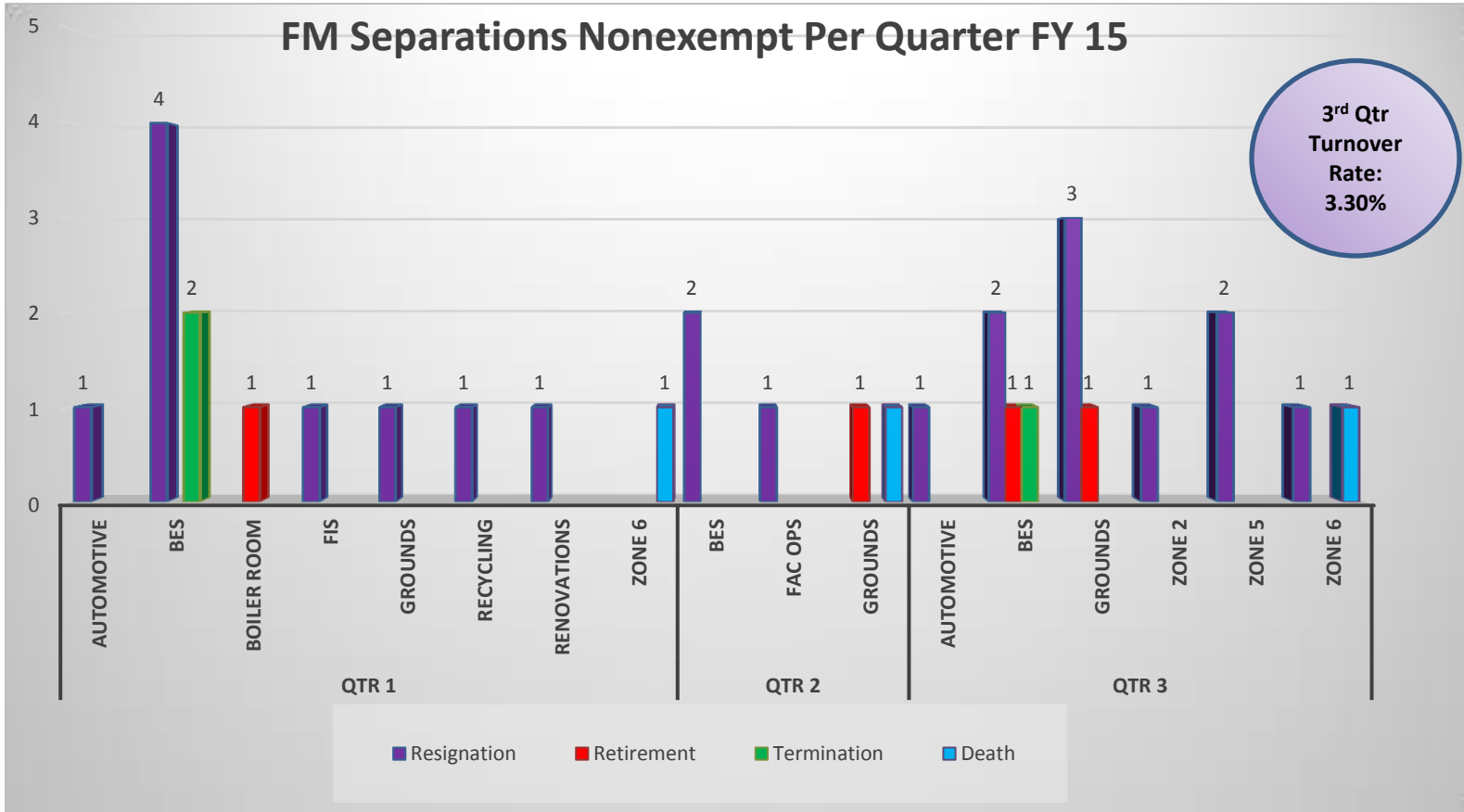
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Measure: 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

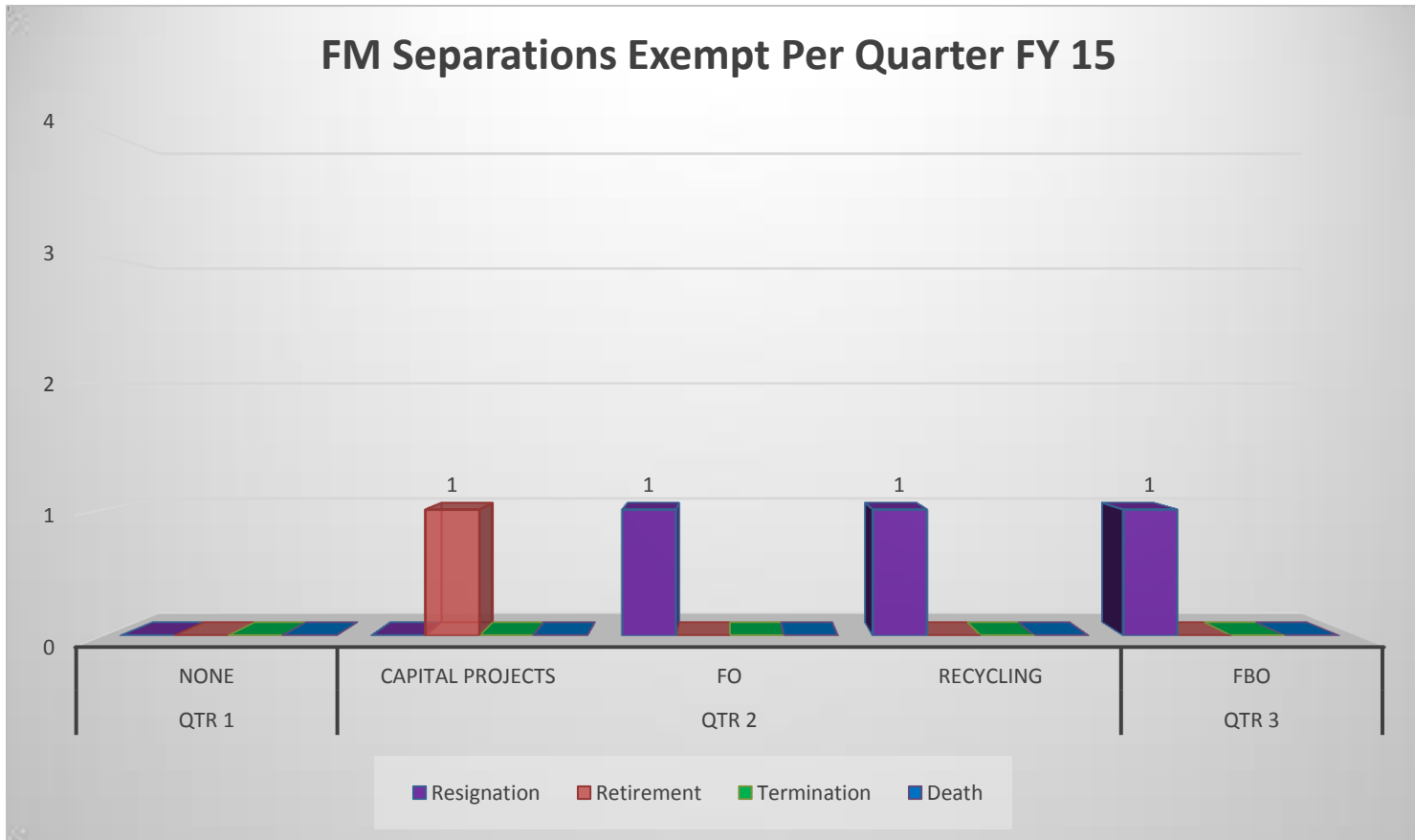
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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



Status

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FM ACADEMY

ACTION PLAN

Action Item	Planned/Completed
<u>Technical</u>	
– Trouble Shooting Mechanical Drives Systems & Rotating Equipment	June 2015
<u>Safety</u>	
– Supervisor Safety Talks	Monthly
– Forklift, Aerial & Telescopic Compliance Training (EHS)	April 2015
– Blood Borne Pathogens (EHS)	May 2015
<u>Leadership</u>	
– APPA Leadership Academy	May 2015
– Documentation & Disciplinary Process	Spring 2015
– NEO redesign	June 2015
– Cultural IQ Training	TBD
<u>Externally Driven Initiatives</u>	
– Kronos implementation/training - Sub pilot in FM building (<i>Financial services</i>)	Jan 2015
– Niner Talent (formerly People Admin) version 7.35 upgrade/training (<i>Main HR</i>)	July 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2:

Improve Workforce Development

Tactic 4.2.1:

Increase Supervisor/Manager Training to 40 hours/year

Tactic 4.2.2:

Increase Employee Training to 20 hours/year

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN

- Meet with each director to discuss staff learning & development needs.
- Biweekly attendance at F/O staff meetings for timely information exchange on training, licensure, etc.
- Monthly meetings with BES/R Education Coordinator on upcoming plans, new strategies, etc.
- Developing relationship with consultant (Joanna Roop) on future training opportunities.
 - Reviewed DDI courses for potential deliverables. - 2015
 - Meetings with consultant to discuss course details – January 2015
 - Developing new Cultural IQ course; Details presented to AVC - TBD
- FM-HR develop FM Academy “**Lending Library**” to provide learning resources for FM employees.
 - Inventory completed
 - Developing check-out procedures – Spring 2015
 - Determine best location to house materials – Spring 2015

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

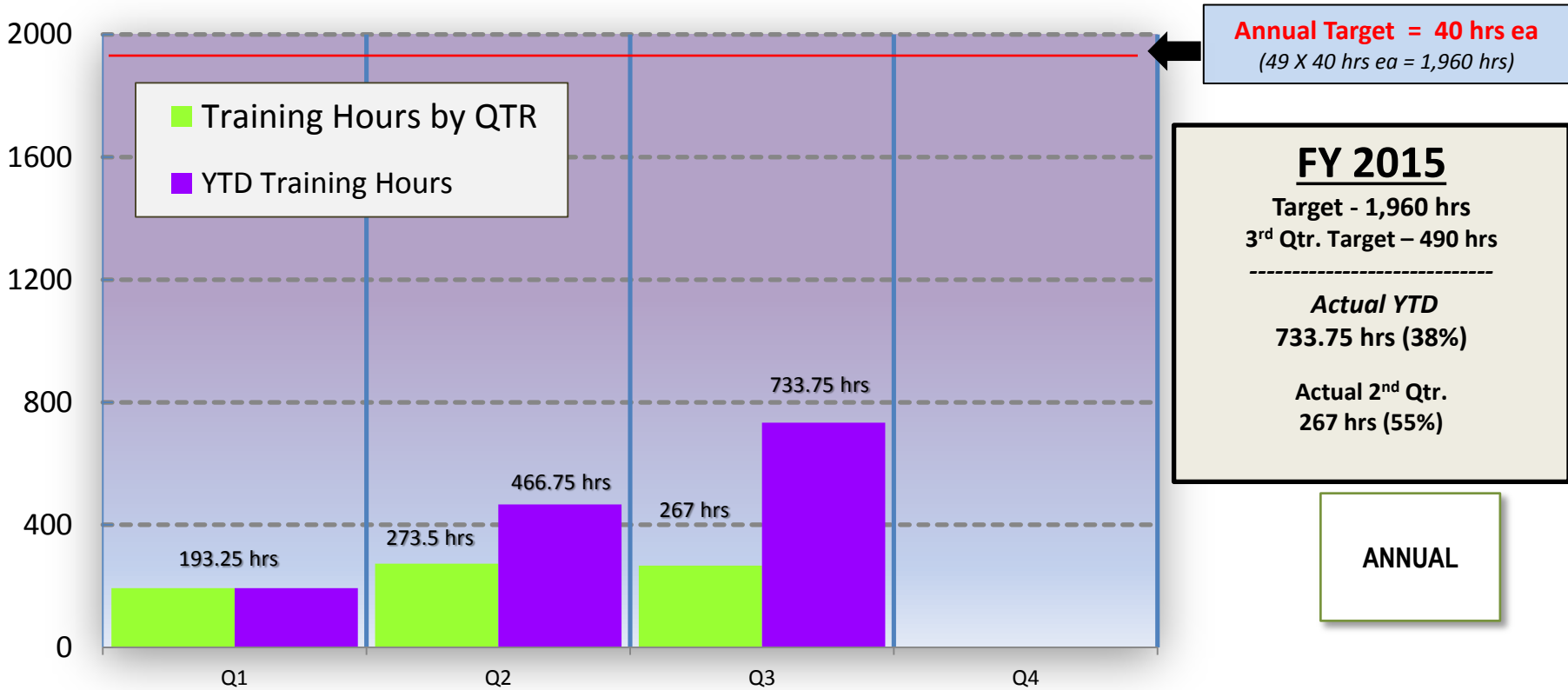
Objective 4.2: Improve Workforce Development
Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year
Measure: Average Hours of Training completed by Supervisors and Managers

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

Training
Hours

FY 15

Training Hours for Supervisors & Managers by Quarter



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

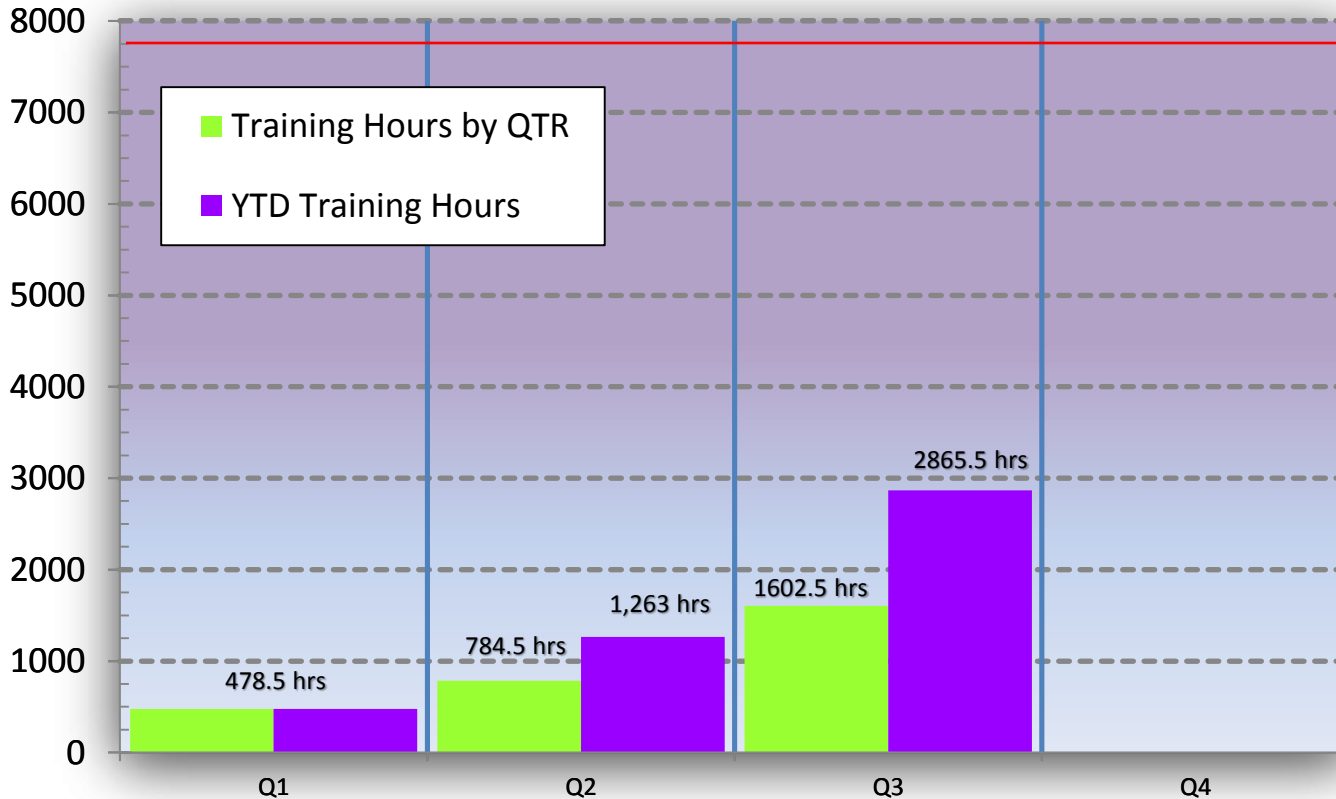
Objective 4.2: Improve Workforce Development
Tactic 4.2.2: Increase Employee Training to **20 hours/year**
Measure: Average Hours of Training completed by front line employees

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

Training
Hours

FY 15

Training Hours for front line employees by Quarter



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

FY 2015
 Annual Target - 7,760 hrs
 3rd Qtr. Target – 1,940 hrs

Actual YTD
 2865.5 hrs (37%)

 Actual 3rd Qtr.
 1602.5 hrs (83%)

ANNUAL

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Survey Results and Data Review:

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

Survey Logistics:

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

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FM ACADEMY

ACTION PLAN

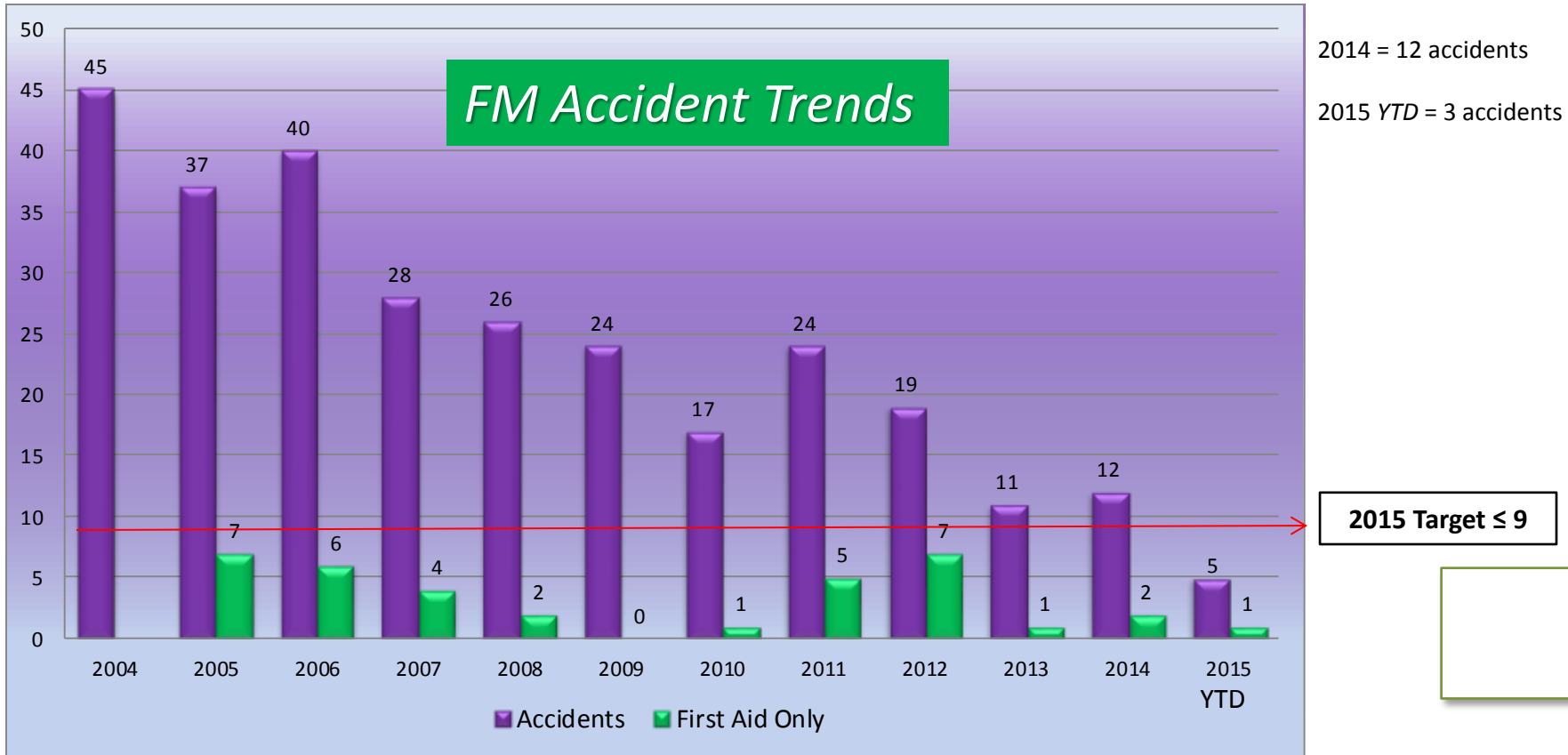
Action Item	Target Date
<ul style="list-style-type: none"> Safety related activities <ul style="list-style-type: none"> CPR/1st Aid training Supervisor Safety Talks FM Safety Fair Safety Slogan Contest, <i>New Slogan 7/2014 – “<u>Start Safe, Work Safe, Finish Safe</u>”</i> 	<p>Jan 2015</p> <p>Monthly</p> <p>May 2015</p> <p>July 2015</p>
<ul style="list-style-type: none"> Accident/Incident totals YTD (calendar year) <ul style="list-style-type: none"> Accidents - 5 Minor incidents - 1 	<p>2015 YTD</p> <p>2015 YTD</p>
<ul style="list-style-type: none"> Compliance training (OSHA) <ul style="list-style-type: none"> Lift training (boom style) Fork lift training Blood Borne Pathogen (BBP) training Process Review Project <ol style="list-style-type: none"> Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD All training records sent to FM-HR Staff Dev. Specialist 	<p>Apr 2015</p> <p>Apr 2015</p> <p>May2015</p> <p>Ongoing</p> <p>Continuous</p>

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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



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

ACTION PLAN

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

- Supervisor Safety Talks (SST) - monthly
- 5th Annual FM Safety Fair - May 6, 2015
- 7th Annual FM Safety Slogan Contest. *“Start Safe – Work Safe – Finish Safe”*

Compliance Training

- Periodic meetings with EH&S to review needs, processes, etc.
 - Lift-truck, Aerial lift, Telescopic Boom lift training (April 2015)
 - Bloodborne Pathogen training (May 2015)
- Identified need to perform process mapping on current OSHA training with FO Leaders;
- Research training providers/vendors to address training gaps, as needed

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Action Item	Target Date
<ul style="list-style-type: none"> • FM Academy development <ul style="list-style-type: none"> – Website Development – Content Development – Vendor Selection and Delivery 	<p>Complete</p> <p>Ongoing</p> <p>As Needed/As Funded</p>
3rd Quarter Training	
<ul style="list-style-type: none"> • Air Conditioning & Refrigeration 	Mar 2015
4th Quarter Training	
<ul style="list-style-type: none"> • Hosting APPA Leadership Academy (Level one) • Troubleshooting Mechanical Drive Systems & Rotating Equipment 	<p>May 2015</p> <p>Jun 2015</p>



UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Finance/Budget:

- Continue periodic review of Labor Services July 1st thru June 30th;
- Compile and submit FM-wide budget requests for AVC Review - **April 28th**;
- Develop operating reserve templates for Music Annex (Band) and HRL “trees” for submission to OSBM – Working with Budget Office; Date TBD

Supplemental Grant/Award Funding:

- NC State Energy Office Grant for Electric Stations; \$13K in matching funds set aside for grant not needed;
- Campus Tree USA Designation/Award Submittal completed - Winner!
- Developed award submittal for innovative/effective practices: Submitted on-time (11/30/14; Anticipated notification March 2015; No word to date.
- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2015;

GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Cost Accounting:

- Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2015
 - Improve org code usage – July 2014 and July 2015, on-going when possible; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org;
 - Home Org completed for KRONOS pilot;
 - Timesheet org complete
 - Funding org to be addressed in July 2015
 - Understanding the impact of personnel decisions on budget – on-going through-out FY.
 - Implement budget revision process through June 30, 2015 - **underway**
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - **1st of each month;**
- Requested an entry-level accountant position for FY 15 to Improve and monitor 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); **July 2014**

GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.3:

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

Measure:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN

FY 14 APPA Survey:

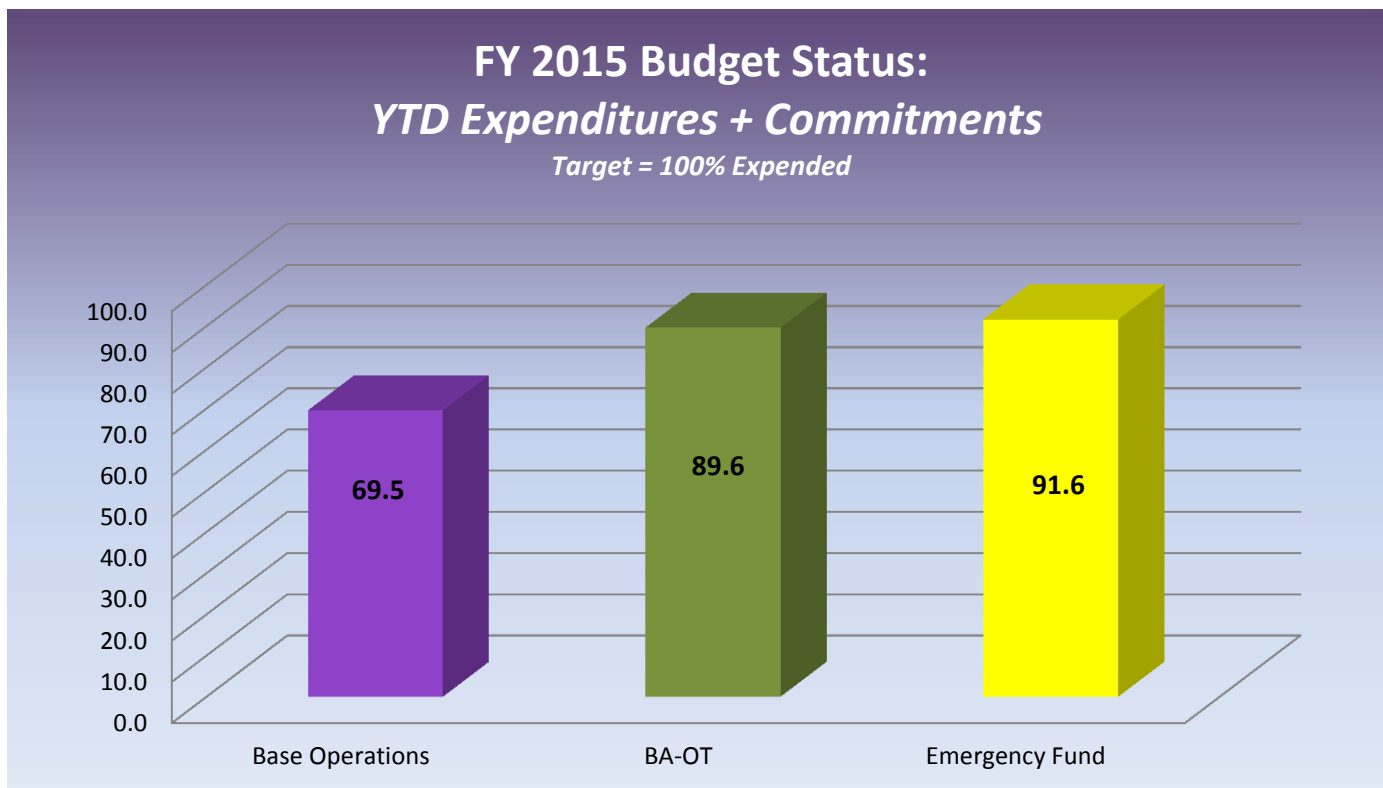
- Survey results received late March 2015;
- Target for Admin Cost/GSF = \$0.525; Actual result = \$0.40
- In-depth review of peer institutions regarding organizational structure to begin after year-end closeout to determine if administrative units are staffed appropriately to manage growth of FM organization as well as university as a whole.
- Data collection for FY 15 survey is proposed for late summer 2015 but is dependent upon receipt of survey instructions/questions from APPA.

Lead
FBO

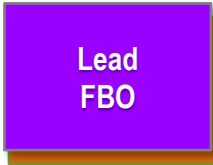
GOAL #5 Promote Good Stewardship

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



ANNUAL



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



GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.3:

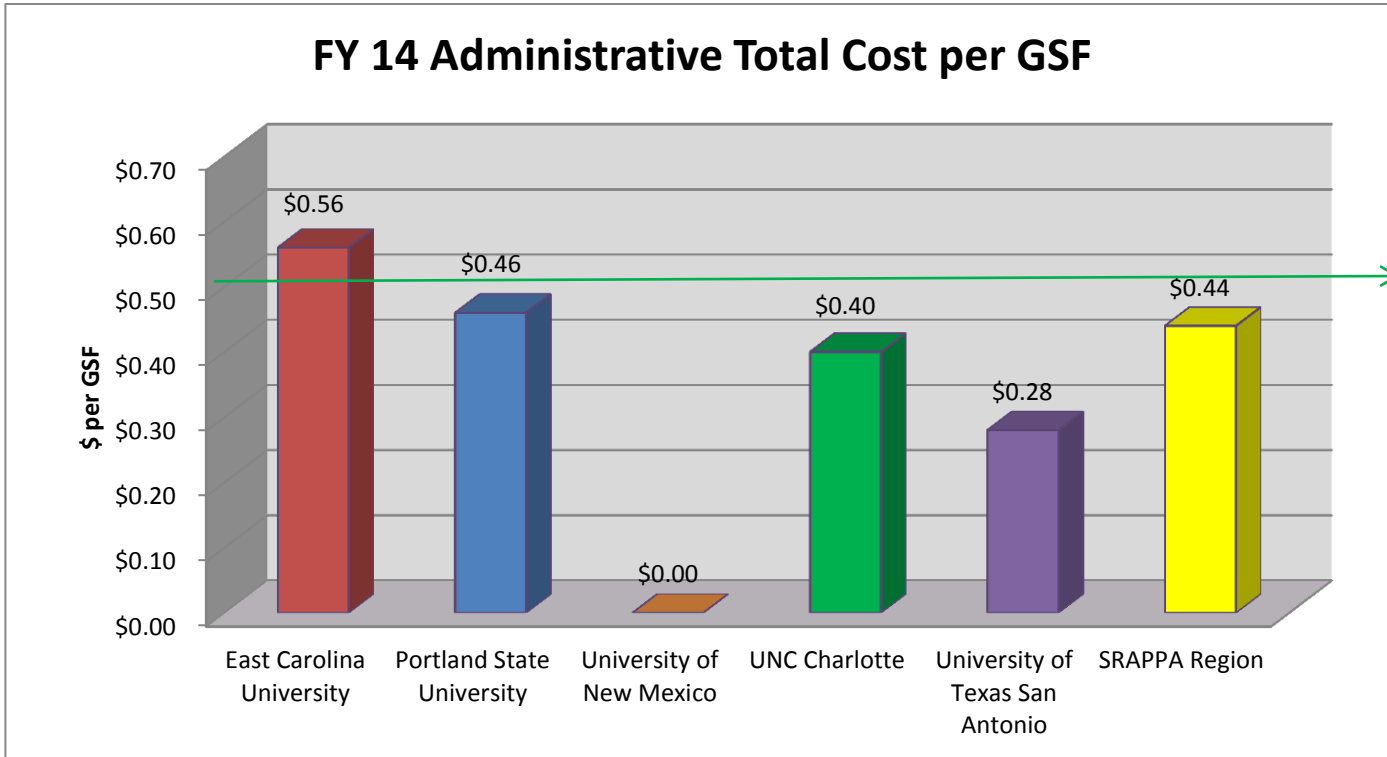
Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Measure:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



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 Completed
 - Recommending that we stop hand dryer installations in academic buildings
 - Completed physical portion of supply chain management project in McEniry
- Actions Planned
 - Completed logistic portion of supply chain management project in McEniry
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey

Facilities Management Strategic Planning Session – Third Quarter FY 2014

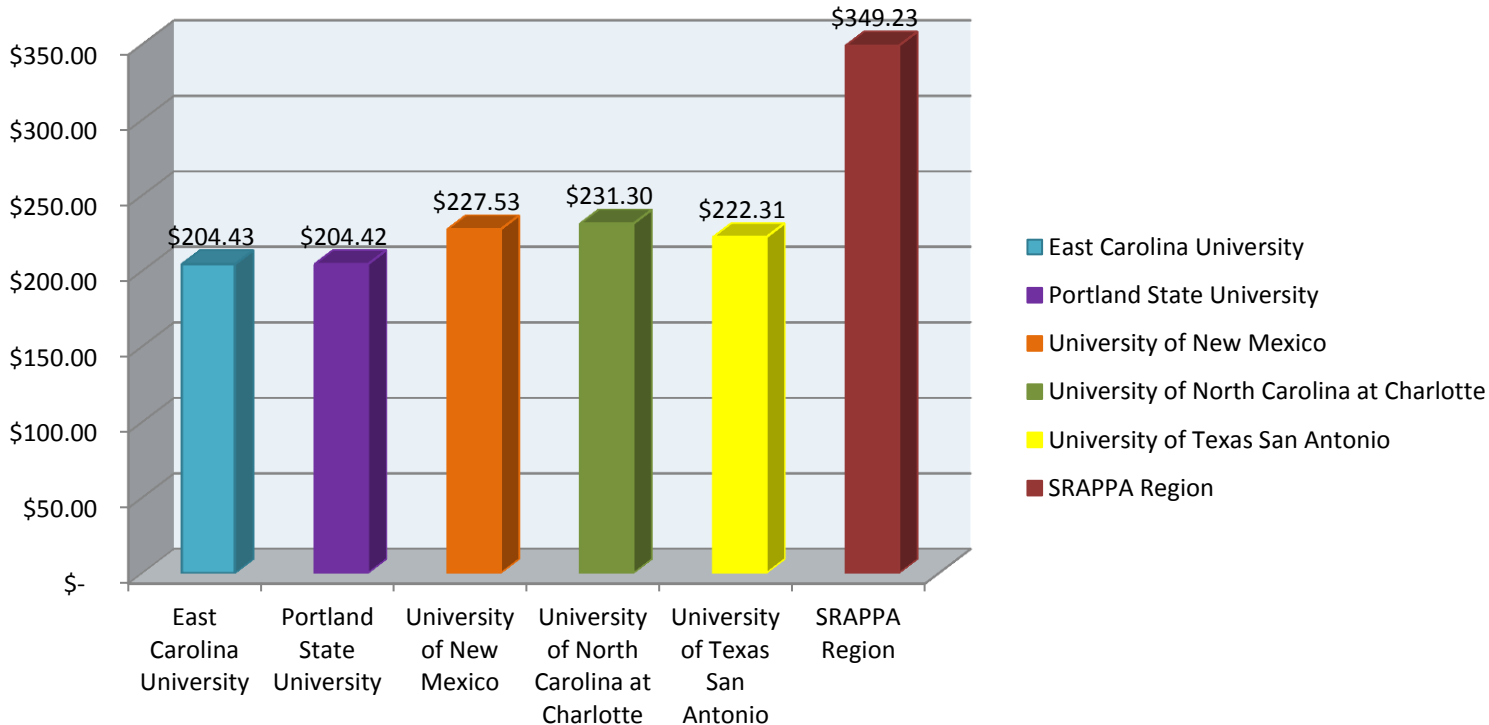
GOAL #5 –Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/Student FTE



Avg. cost/student = \$217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

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

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

ACTION PLAN

Actions Planned

1. Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not to Charge) by June 2015.
2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
3. Monthly review of Labor Service accounts with FBO to identify gaps and improve processes.

Actions Completed

1. Identified opportunities to expand reimbursable work in an effort to support labor services funds by Nov 2014.
2. Realigned the labor services positions to ensure maximum utilization of resources by Jan 2015.

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

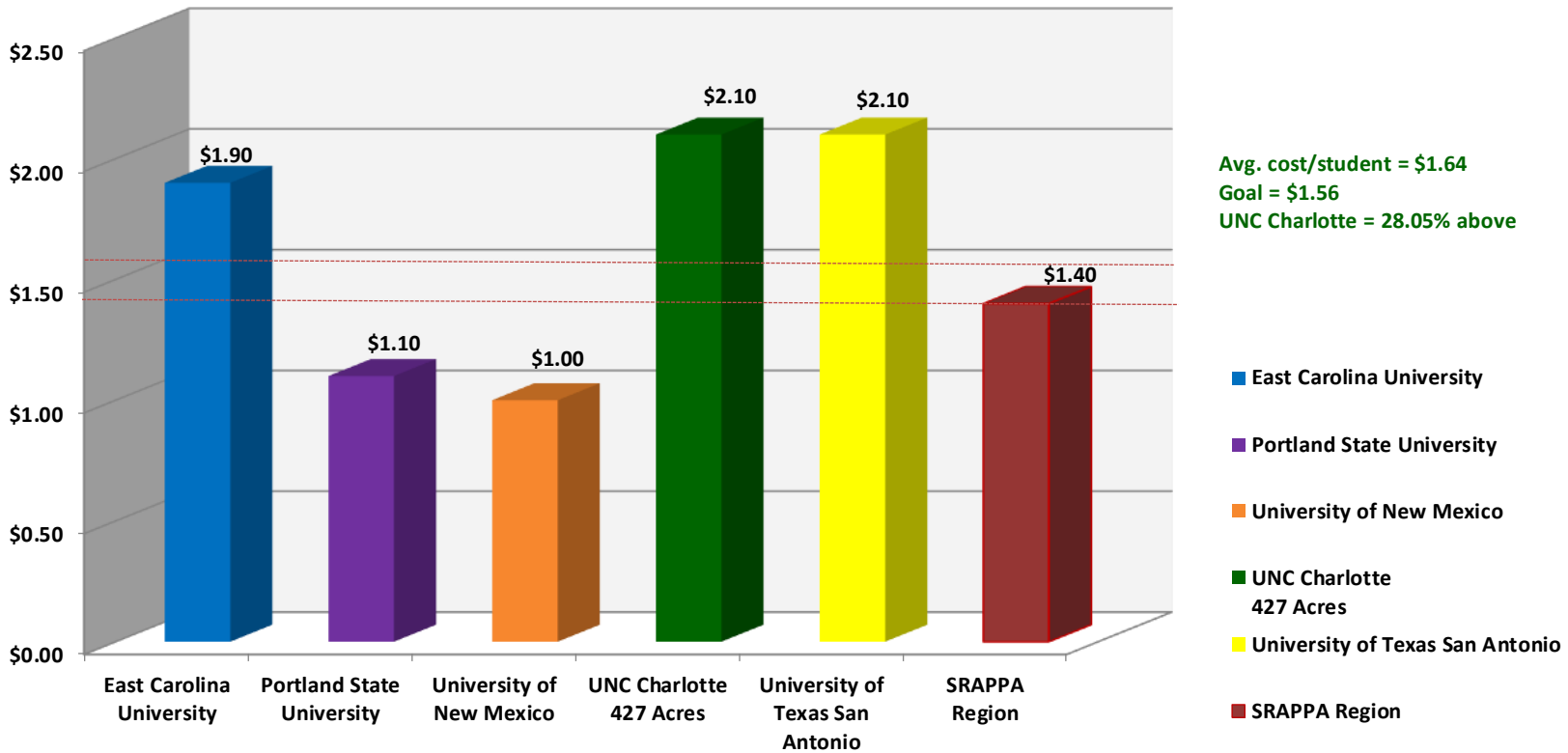
Tactic: 5.1.5: Achieve total Maintenance cost/GSF \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Maintenance Total per GSF



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

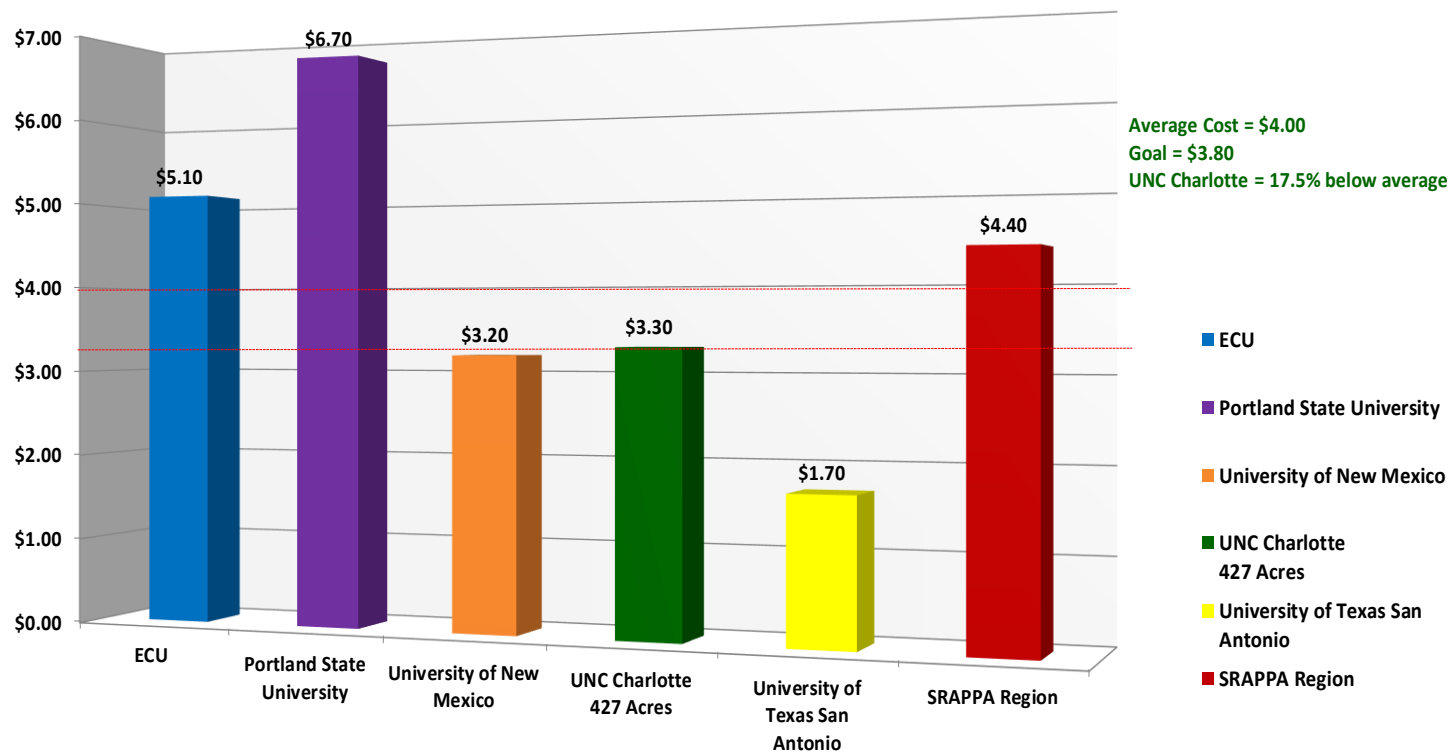
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Grounds - Total Cost per Acre



STATUS

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

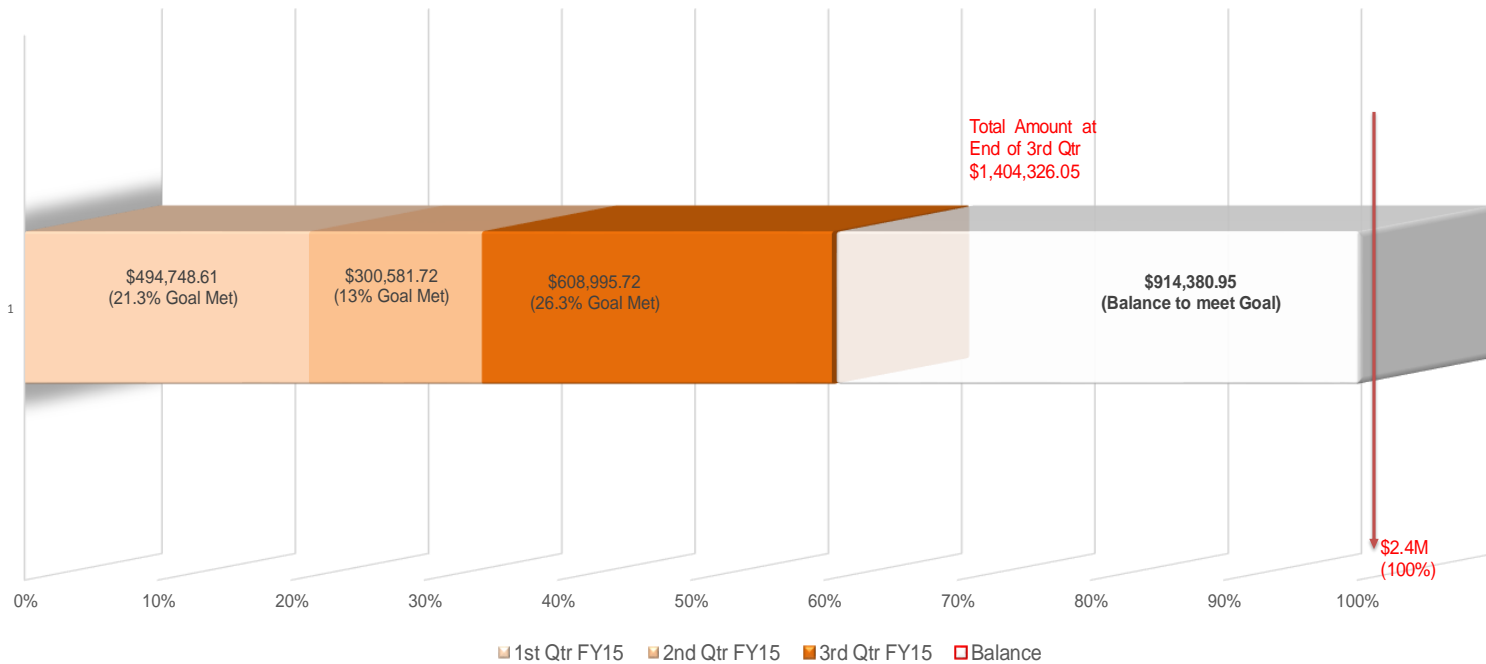
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2015



Objective 5.2: Develop a Sustainable Campus

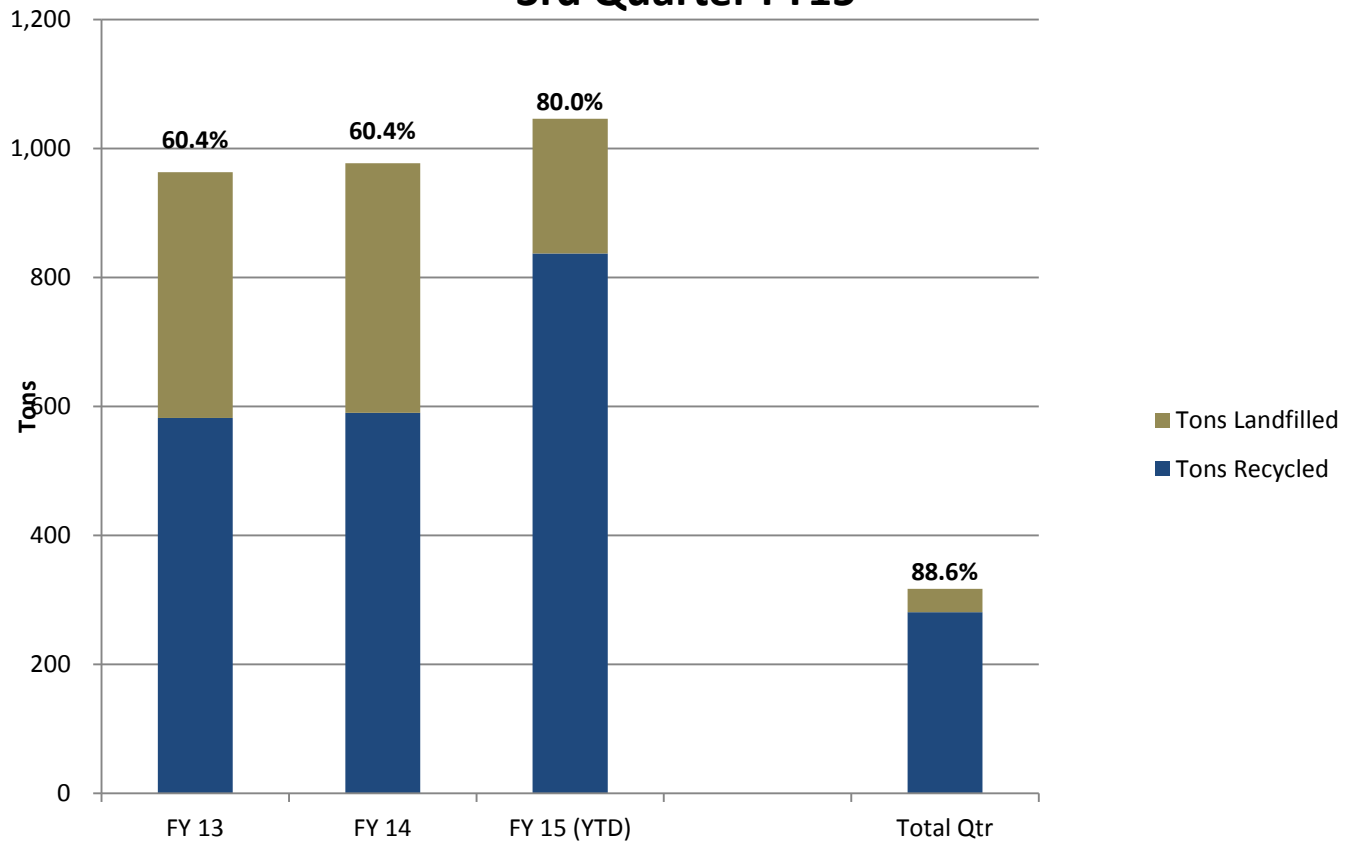
Tactic 5.2.1

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

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

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion 3rd Quarter FY15



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

- Staff attended Carolina Recycling Association Conference and NC APPA
- Began working more with HRL on plans to be able to increase recycling rates in residence halls
- Composting program implemented at South Village Dining
- Began process of creating zero-waste events at Center City Building
- Recycling Coordinator position filled

4th Quarter Actions Planned

- Work on recruiting for C&D Coordinator position
- Conduct spring tree planting, campus cleanup, and Earth Day events
- Conduct move-out collections
- Conduct waste audits in housing quads where there are no recycling bins (continue working with HRL to pair up all trash and recycling bins)
- 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream

Facilities Management Strategic Planning Session – Third Quarter FY 2015



Tactic 5.2.2

Increase Percent of Solid Waste Diversion on Campus to 45%

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Only have about one month of data at this time.



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Assess additional actions list for achieving STARS Silver (completed – documentation actions only).**
- **Quarterly update of implementation plan for earning further credits based on feasibility: 5/15.**
- **Achieve silver rating by end of FY 15.**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

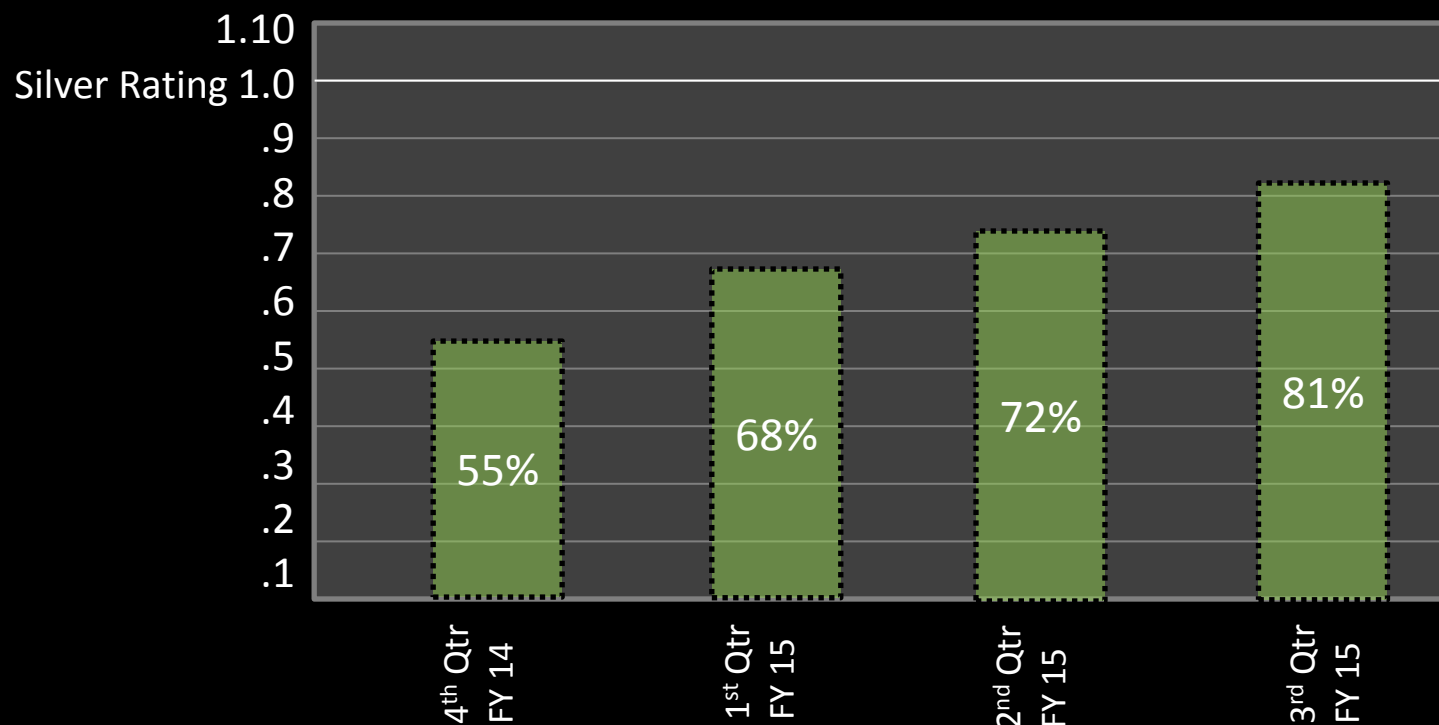
Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

Percentage of Completion



STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Apply 7 themes for implementing best practices:**
 1. **Assessment (June STARS Submission)**
 2. **Faculty Development for Curriculum (May Workshop for Faculty)**
 3. **Campus as a Laboratory (CGI: \$28k for studies, supplies)**
 4. **Outreach Communications (CGI: \$5k for signs)**
 5. **Design Standards (CGI: \$92k for biking, water, recycling, gardens, etc.)**
 6. **Standard Operating Procedures (CGI: \$15k for EV monitoring)**
 7. **Purchasing Practices**

- **Reach 60% of best practices implemented by July 2015:**
 - **In-house certifications (e.g. Green Office)**

STATUS

GOAL #5 – Promote Good Stewardship

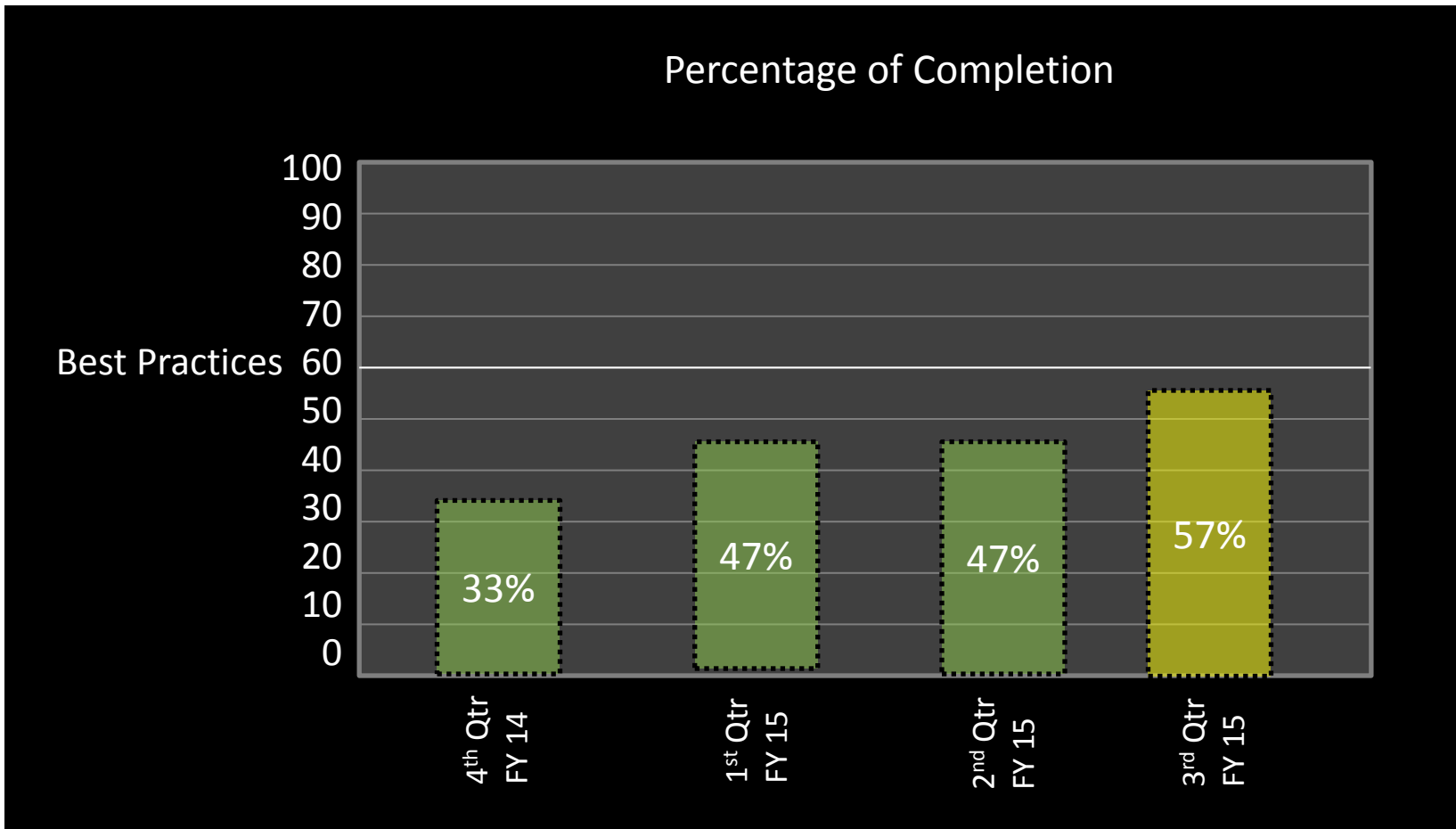
Objective: 5.2: Develop a Sustainable Campus

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

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

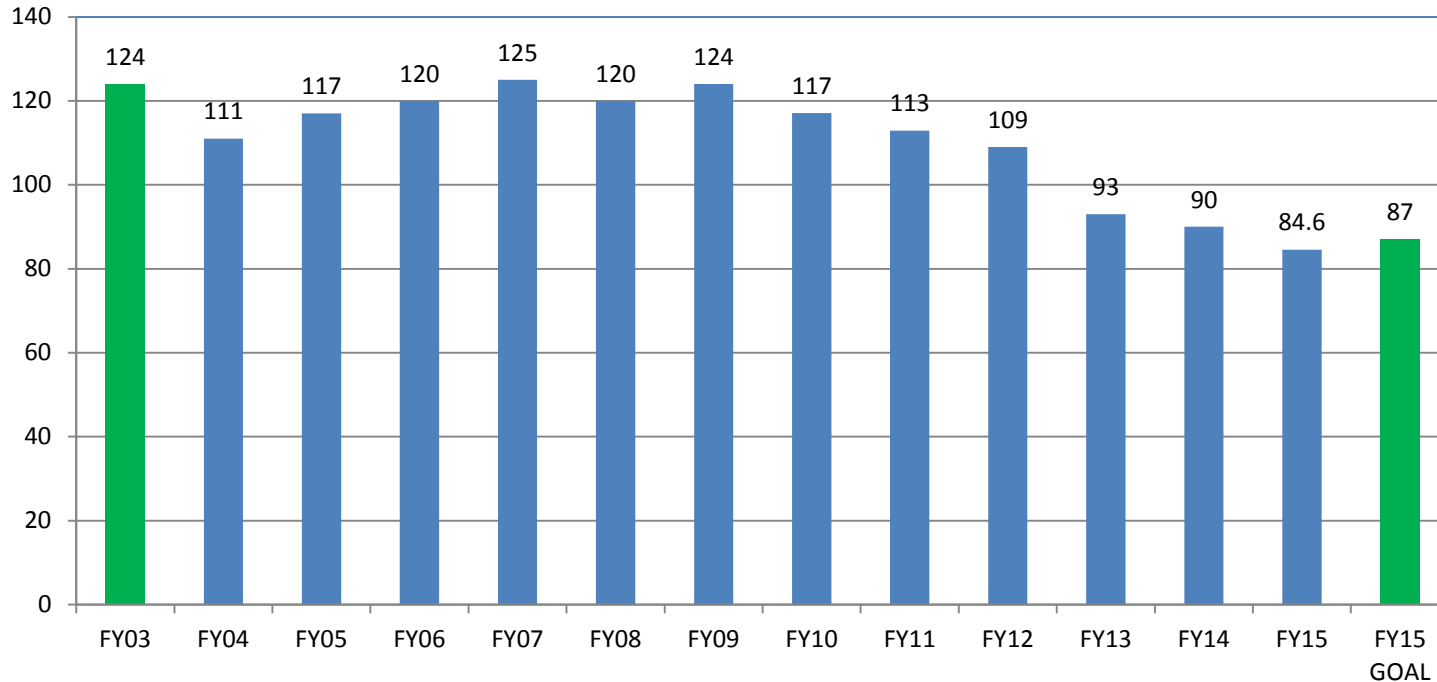
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 32%
Mandated Reduction 30%
BY FY 15

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship

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

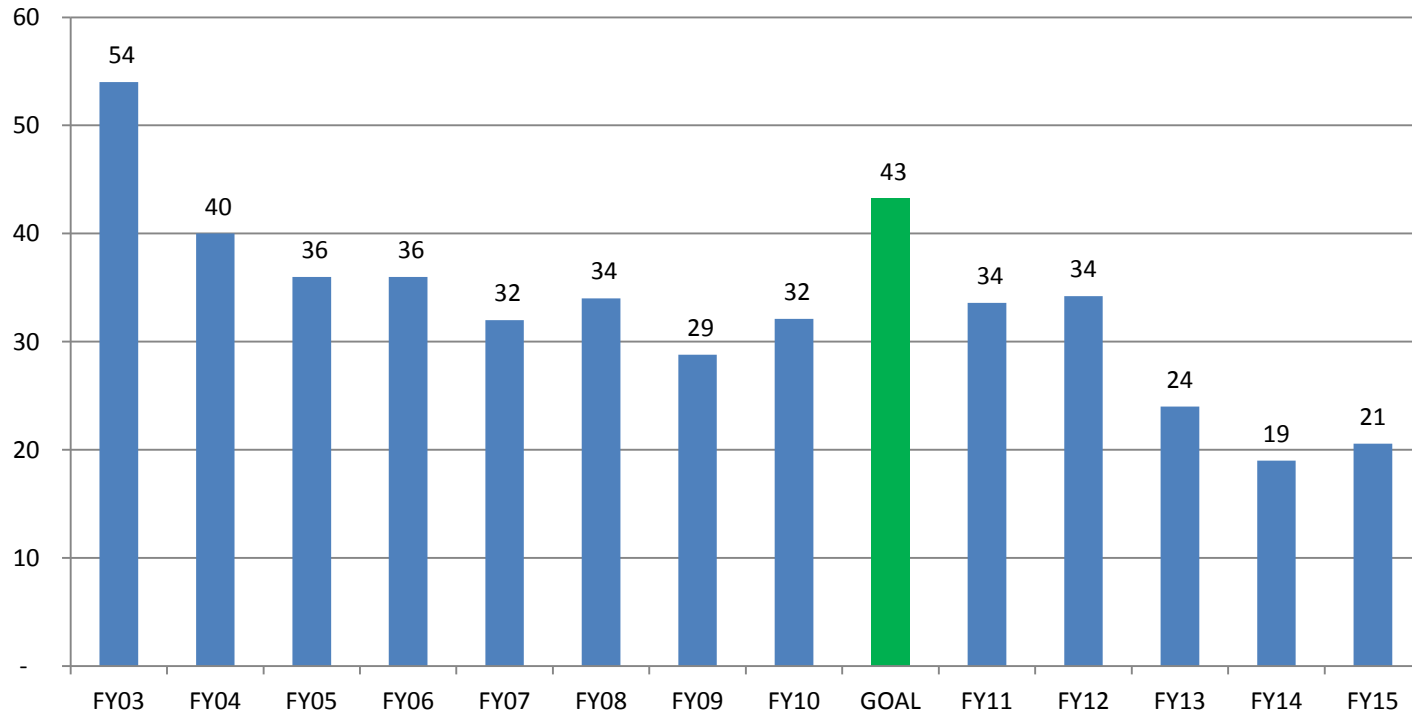
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF



GOAL #5 – Promote Good Stewardship

Lead
Capital

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

Tactic 5.4.2: 5% African American Participation on Capital Projects

ACTION PLAN

- Working with SCO to revise new Prequalification Policy
- Establish/emphasize project specific HUB participation goals for single prime projects
 - CID Roadway Improvements Phase 2 – 15% goal – *Goal Exceeded*
 - South Entrance Intersection Improvements – 15% goal
 - CID Phase 2 Campus Wi-Fi – 10% goal
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded
- Work with internal/external groups to identify skilled HUB contractors

GOAL #5 – Promote Good Stewardship

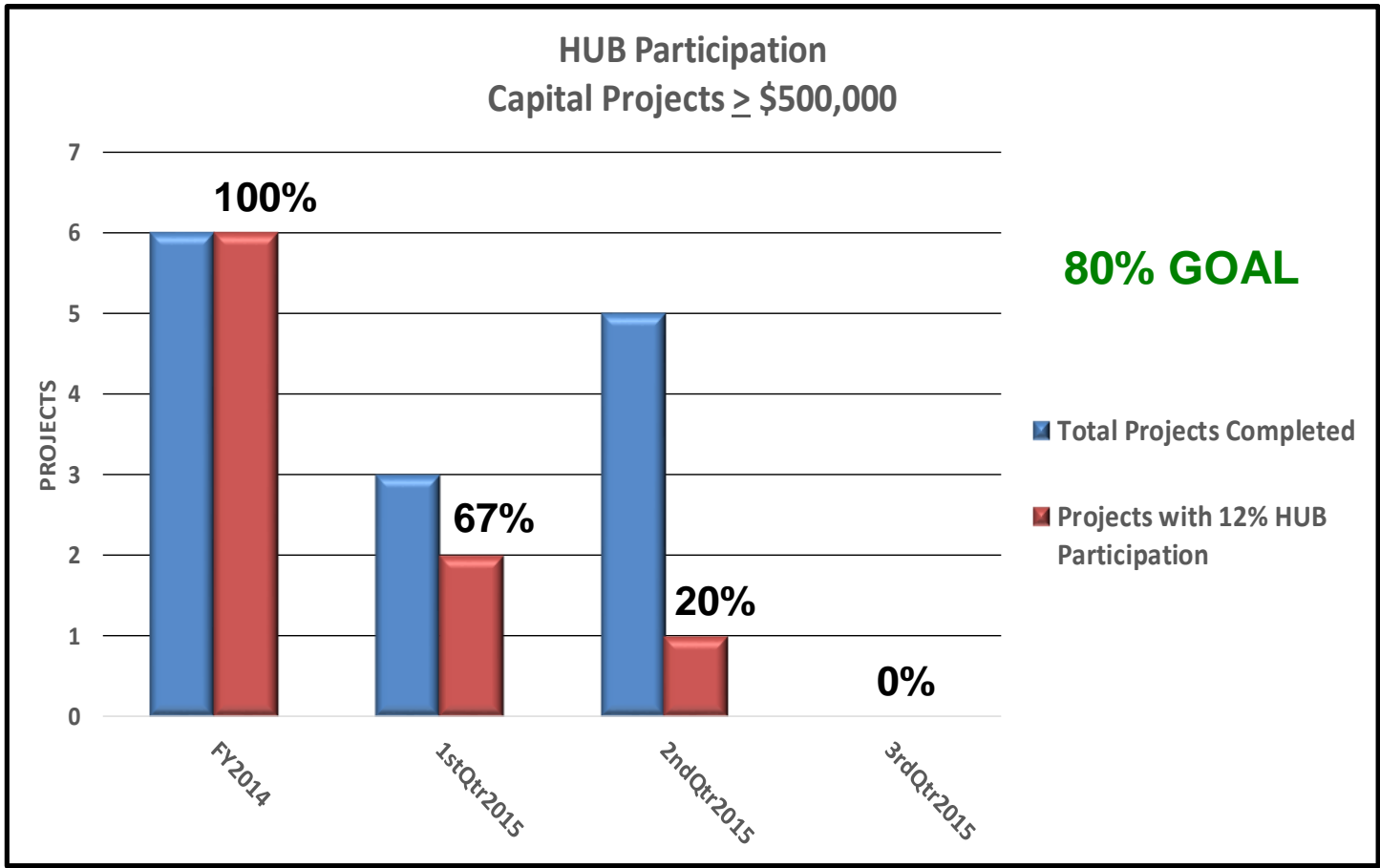
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

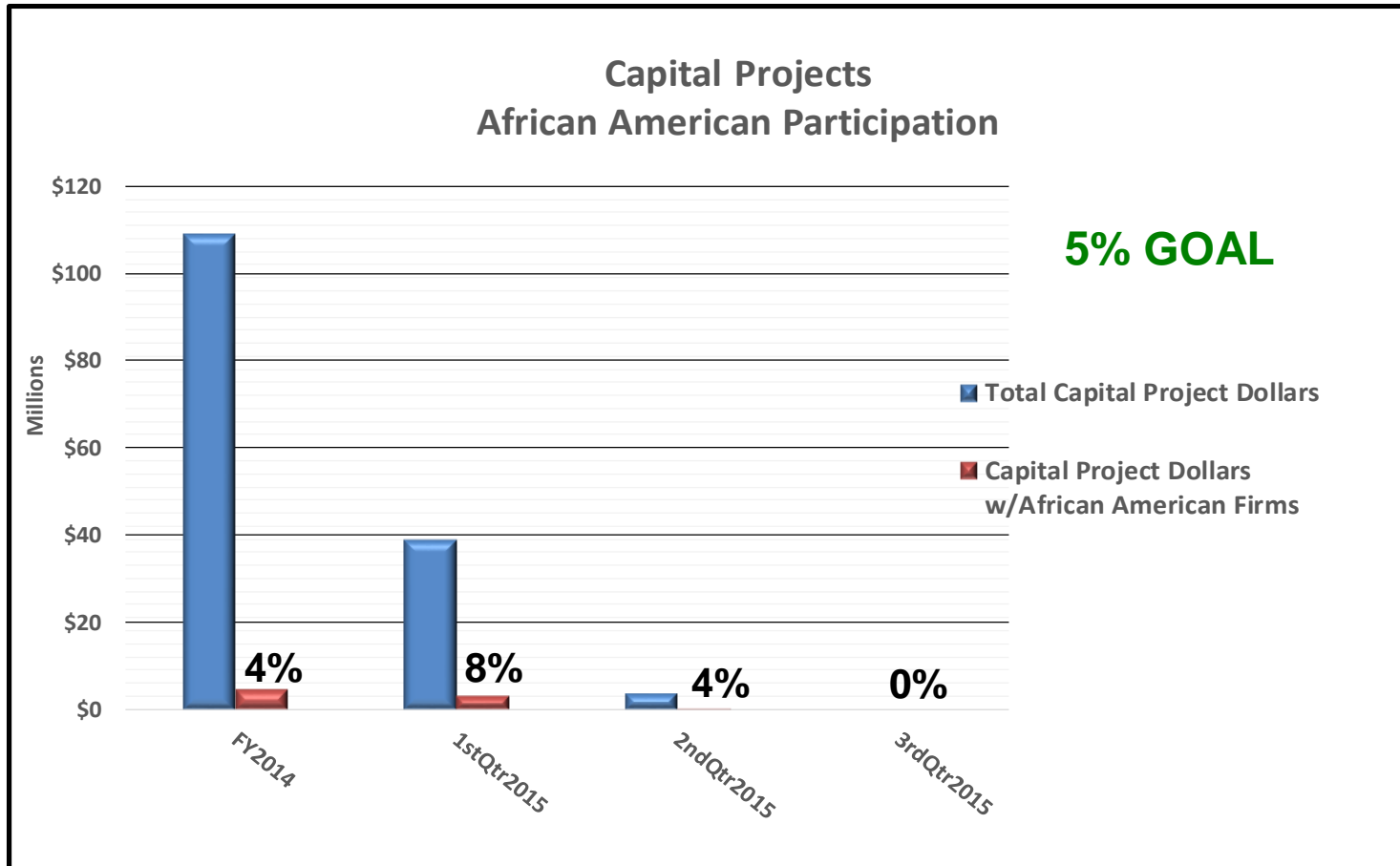
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

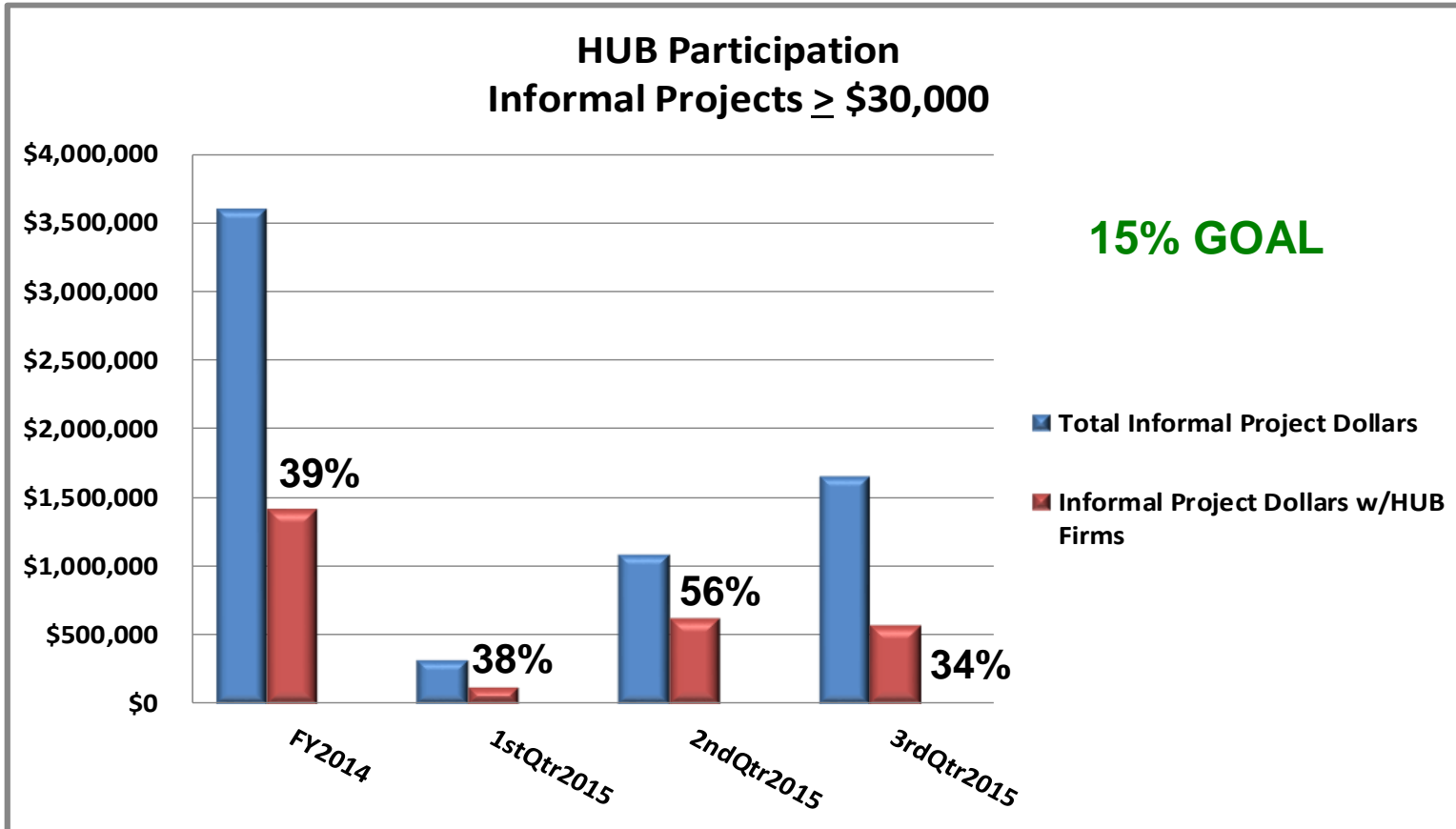
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

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

- **Recently met with ROPER Construction LLC – General Contractor – (March 24, 2015).**

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

ONGOING IMPROVEMENTS

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

- **Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.**

Facilities Management Strategic Planning Session – Third Quarter FY 2015

Annual GOAL 13.0%	3rd QTR. STATUS 49.5%	Lead Design Services
YTD STATUS 41.6%		

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

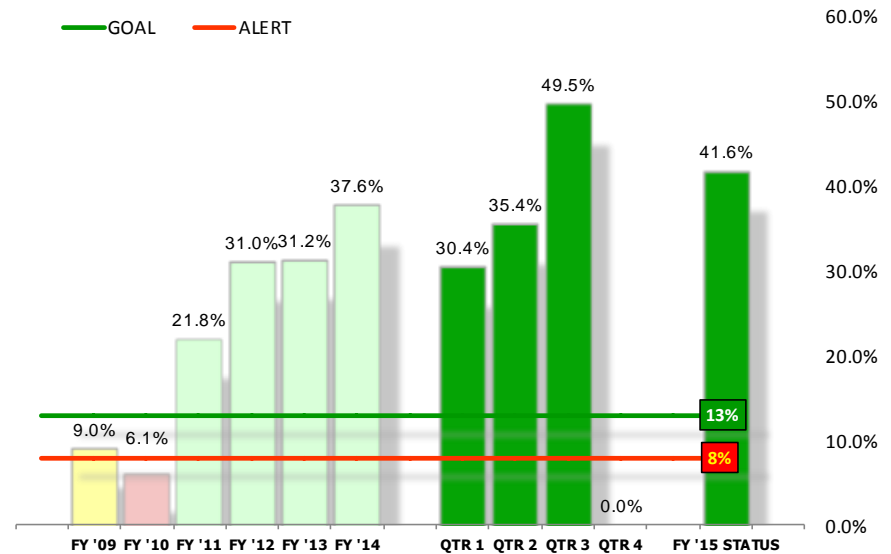
Balanced Scorecard Category: Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
FY '14	\$ 1,863,533	\$ 700,603	37.6%
QTR 1	\$ 495,625	\$ 150,457	30.4%
QTR 2	\$ 296,965	\$ 105,061	35.4%
QTR 3	\$ 937,226	\$ 464,038	49.5%
QTR 4	\$ -	\$ -	0.0%
FY '15 STATUS	\$ 1,729,816	\$ 719,556	41.6%

13% Overall HUB Participation – Summary Graph



Facilities Management Strategic Planning Session – Third Quarter FY 2015

Annual GOAL 3.0%	3rd QTR. STATUS 4.1%	Lead Design Services
YTD STATUS 2.7%		

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

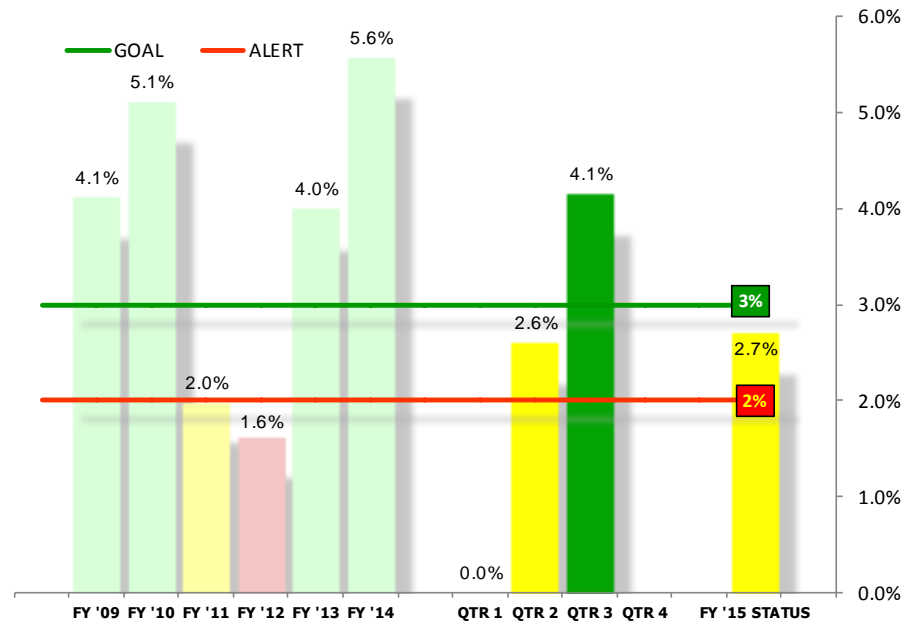
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.5: 3% African American participation on Informal projects below \$30,000
Measure: Total African American Contract Dollars on all Projects below \$30,000 (**Construction only**) divided by Total Contract Dollars

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
FY '14	\$ 1,863,533	\$ 103,513	5.6%
QTR 1	\$ 495,625	\$ -	0.0%
QTR 2	\$ 296,965	\$ 7,695	2.6%
QTR 3	\$ 937,226	\$ 38,800	4.1%
QTR 4	\$ -	\$ -	
FY '15 STATUS	\$ 1,729,816	\$ 46,495	2.7%

3% African American Participation – Summary Graph



Ninety Day Look Ahead

Philip M. Jones

Associate Vice Chancellor