



**Facilities Management  
Quarterly Strategic Planning Report  
Third Quarter – Fiscal Year 2016  
January – March 2016**

*...Creating a Campus of Distinction*





UNC CHARLOTTE

# Facilities Management's Goals

**Goal 1 - Continuously Improve Operation of Campus Facilities**

**Goal 2 - Create a Reliable and Sustainable Physical Infrastructure**

**Goal 3 - Foster a Customer Focused Organization**

**Goal 4 - Recruit, Develop, and Retain Quality Employees**

**Goal 5 - Promote Good Stewardship**

*...Creating a Campus of Distinction*



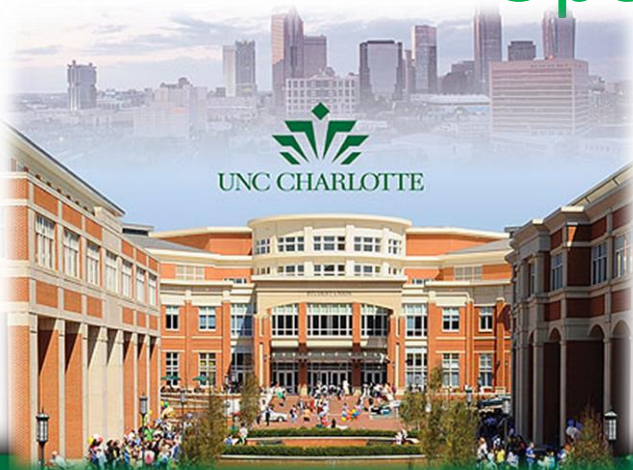
UNC CHARLOTTE

"When a team outgrows individual performance and learns team confidence, excellence becomes a reality.

-- Joe Paterno

# GOAL #1

Continuously Improve  
Operations of Campus



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

**Objective: 1.1: Improve Labor Availability**

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

## ACTION PLAN

### Actions Planned

1. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.
5. Work with FBO and FIS to select company for the RFP “Work Order Process Improvement”

### Actions Completed

1. PILOT PROGRAM: Checks and balances for all reimbursable work orders using hard copy spreadsheet
2. Weekly review of work assignment completion.
3. Work with FBO and FIS to finalize RFP “Work Order Process Improvement”
4. Completed initial training in all Zones “Operating like a business.”
5. Adjusted break schedule to maximize efficiency.

Lead  
F. O.

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

**Objective: 1.1: Improve Labor Availability**

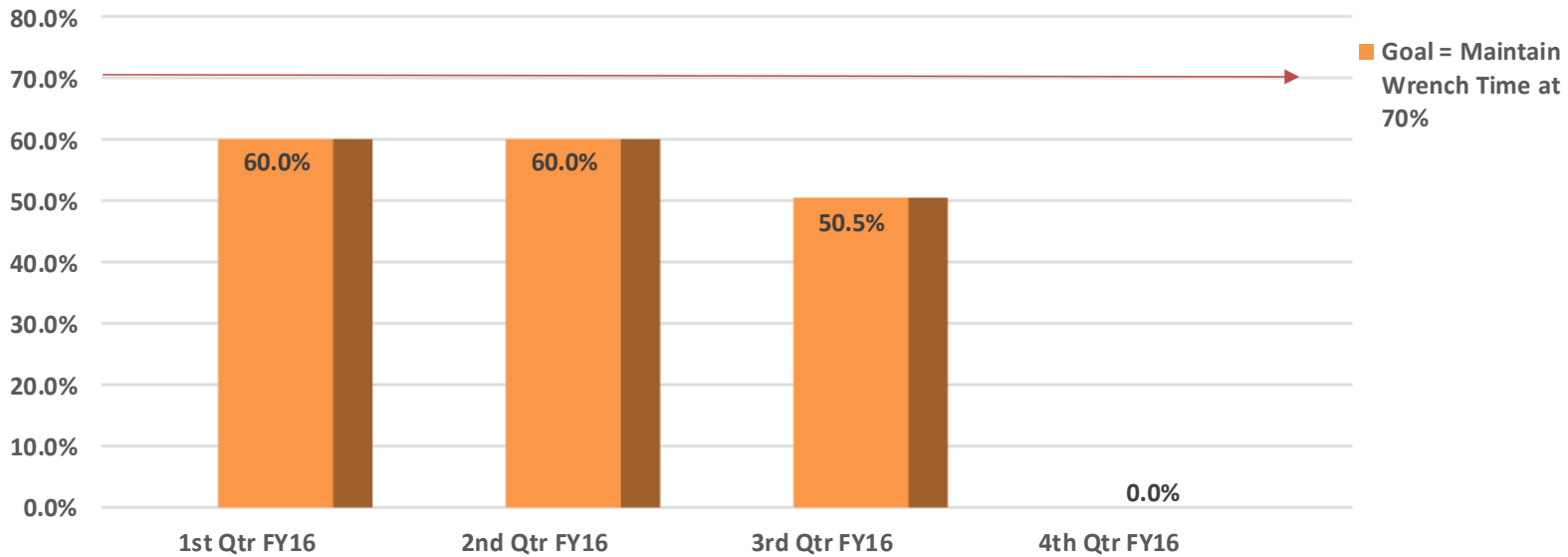
**Tactic: 1.1.1: Maintain “Wrench” Time at 70%**

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

**Lead:** Facilities Operations

**Balanced Scorecard Category:** Internal Business Process

Wrench Time



STATUS

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

**Objective: 1.2: Improve Logistics Efficiency**

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

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

## ACTION PLAN

### Actions Planned

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

### Actions Completed

1. Assigned additional approvers to help expedite the process.
2. Streamlined stock inventory

Lead  
F. O.

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

**Objective: 1.2: Improve Logistics Efficiency**

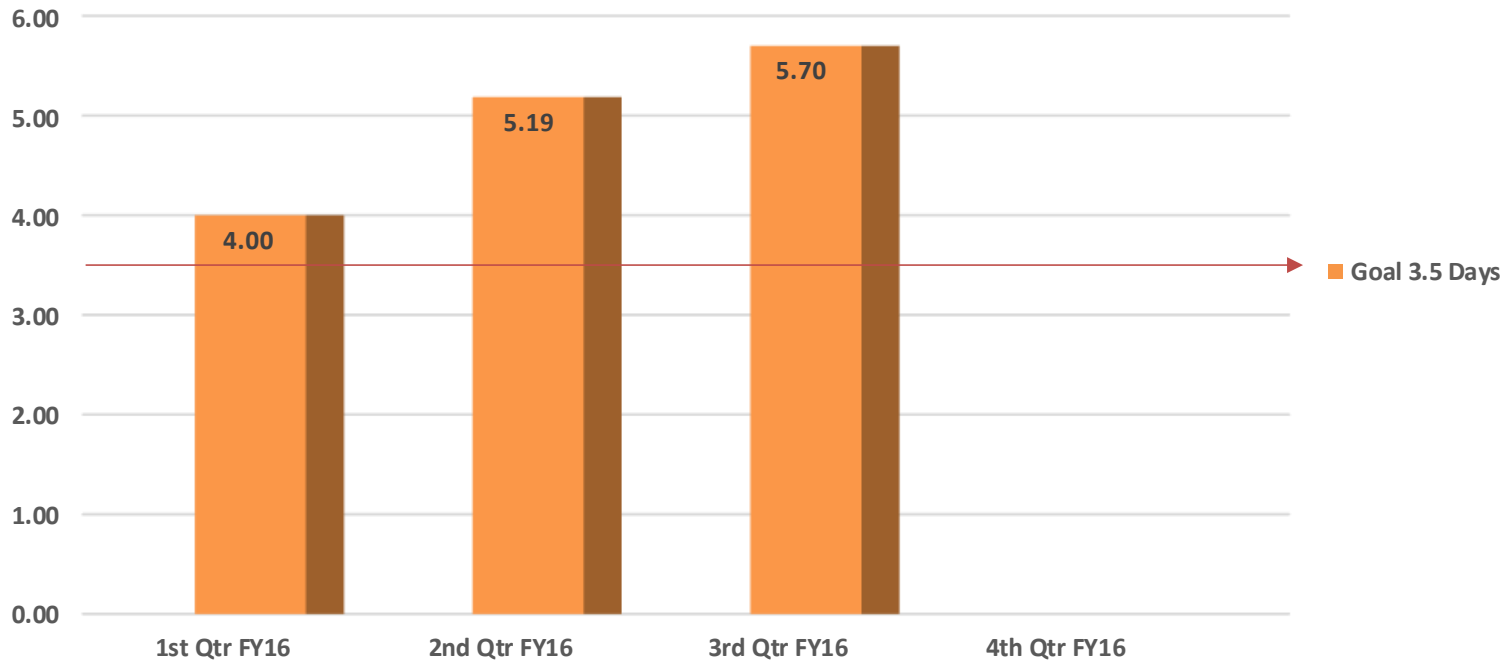
**Tactic: 1.2.2:** Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

### Reduce Average Non-stock Requisition to Receipt Time



**STATUS**

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

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

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

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

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

## ACTION PLAN

### Actions Planned

1. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request.
2. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs; adjust work flow process for efficiency.
3. Weekly meeting with Zone Supervisors to monitor 30 Day Report.
4. Continue to communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented Sept 2015.
5. Supervisors meeting with technicians on a daily basis.
6. Finalize work flow diagram
7. Continue to identify key players in work flow management.
8. Identify ways to maximize utilization of ARCHIBUS.

### Actions Completed

1. Reduced active work orders on 30 Day Report by 30%.
2. Identified key players in work flow management.



Lead  
F. O.

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

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

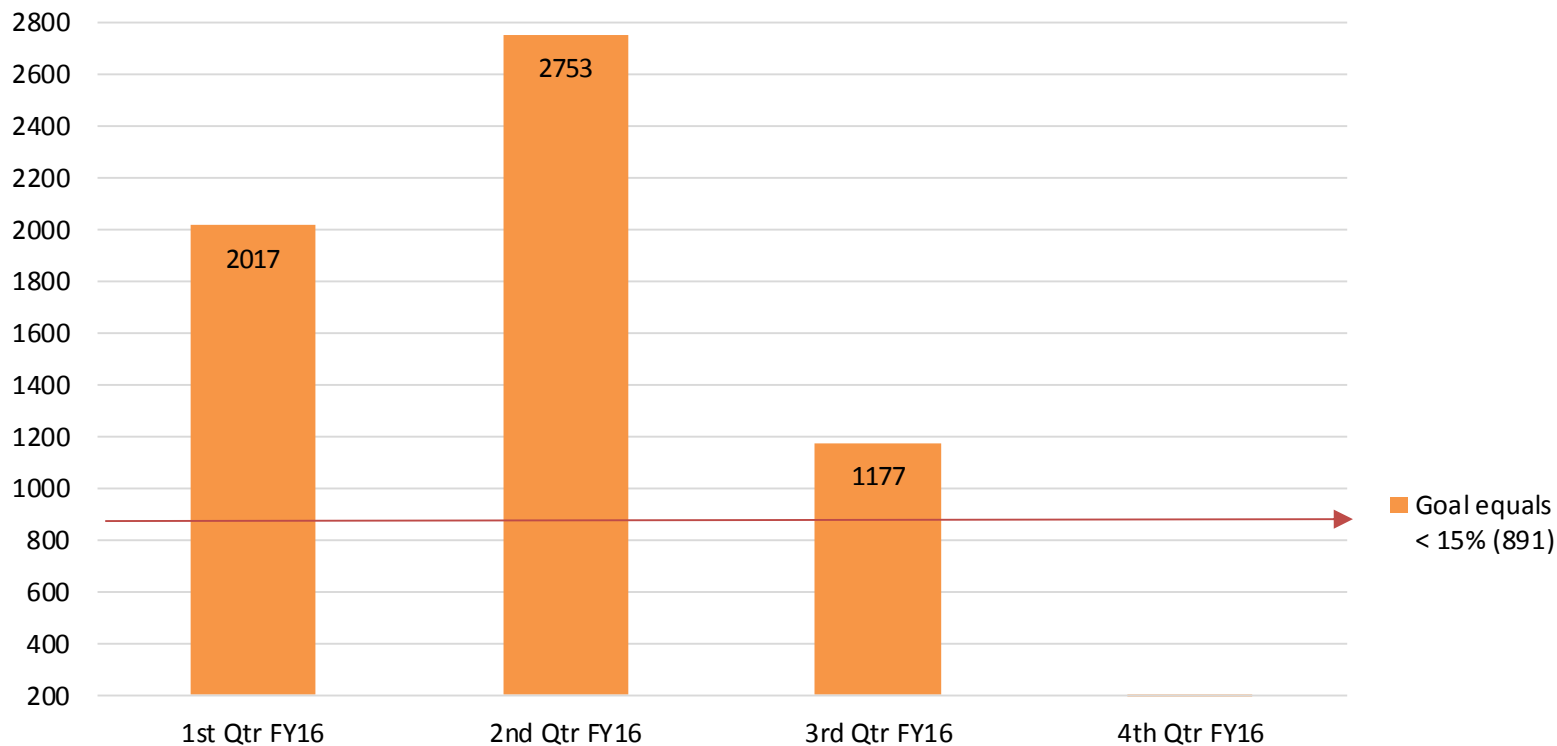
**Tactic: 1.3.1:** Decrease Number of Work Orders Over 14 Days Old by 15%

**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**

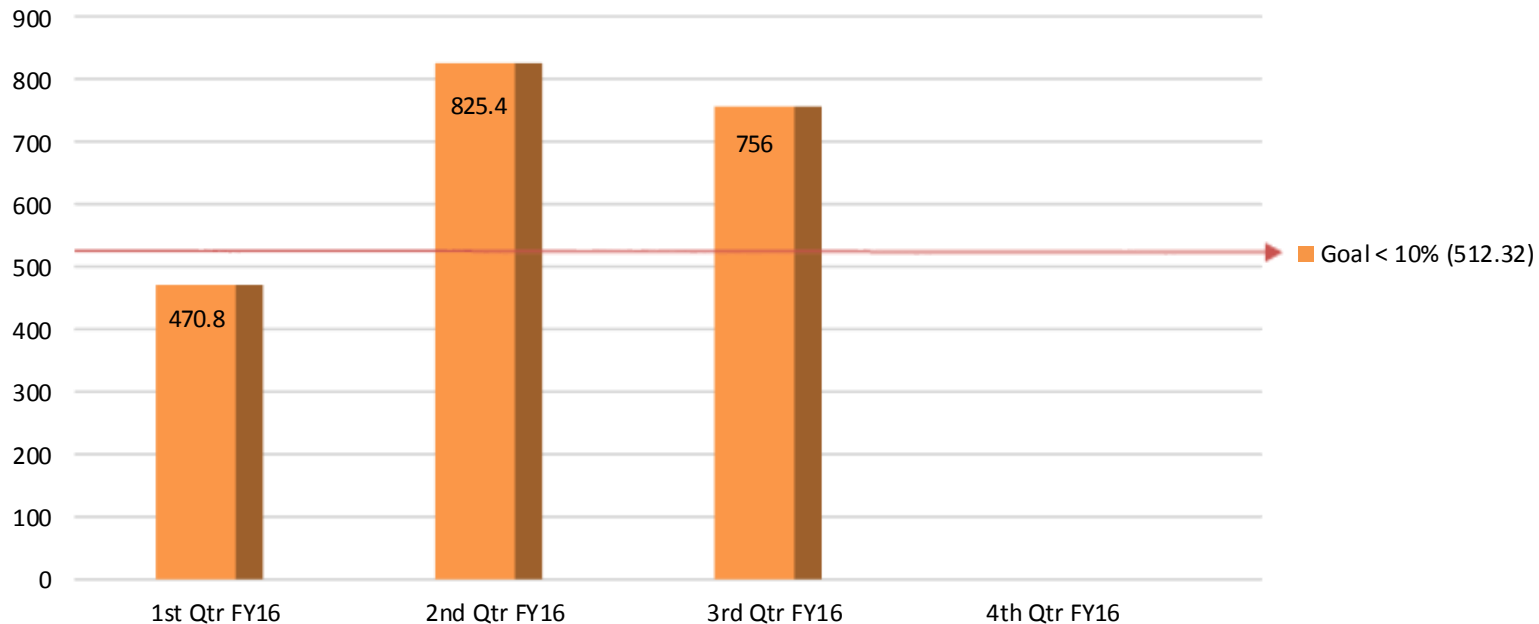
**Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%**

**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

**ACTION PLAN**

- **Actions Completed**

- Full utilization of Daily Logs via Google Forms by Zone Supervisors and Lead Technicians (2/2016)

- **Actions Planned**

- Implement new quarterly self-audit process in ARCHIBUS – Monthly inspection of PMs per building (5/2016)
- Update Hiring Process/Flow Chart (5/2016)
- Develop BES&R internal web-based portal – working with NiCole Lynch and Frank Stewart (5/2016)
- Attend Workloading Training (6/2016)
- Workload McEniry building (8/2016)
- Implement cleaning for Health Model with zones (8/2016)
- Implement In-service training curriculum and matrix (12/2016)
- Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)

## Facilities Management Strategic Planning Session – Third Quarter FY 2016

Lead  
BES

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

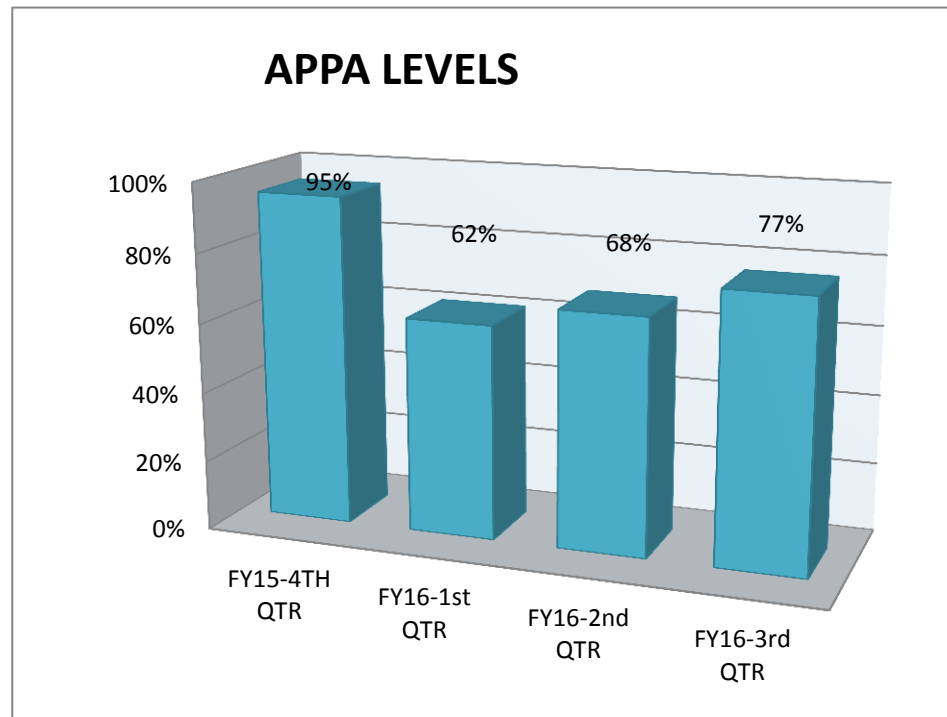
**Objective: 1.4:** Improve BES Processes

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

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

**Lead:** Building Environmental Services

**Balanced Scorecard Category:** Customer Perspective



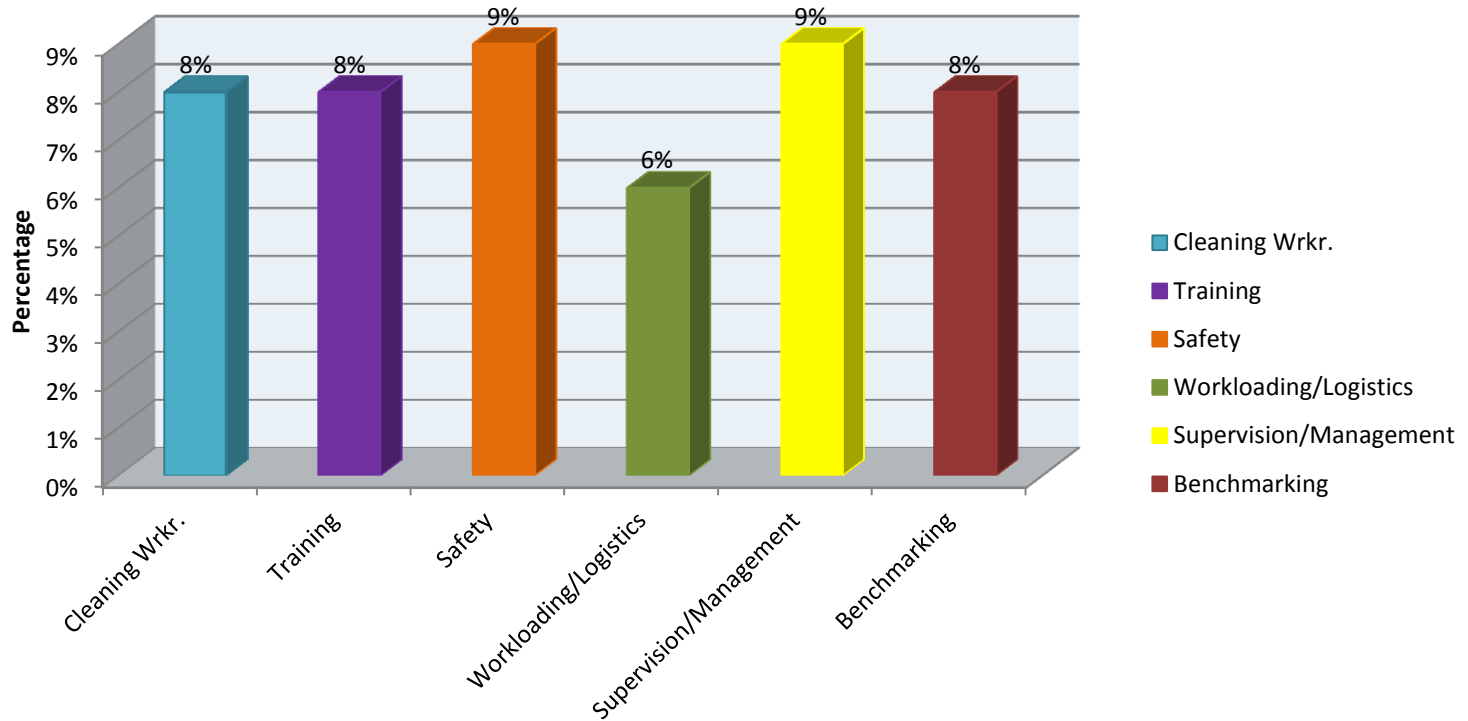
Percentage = 77%

STATUS

**GOAL #1 – Continuously Improve Maintenance and Operations**

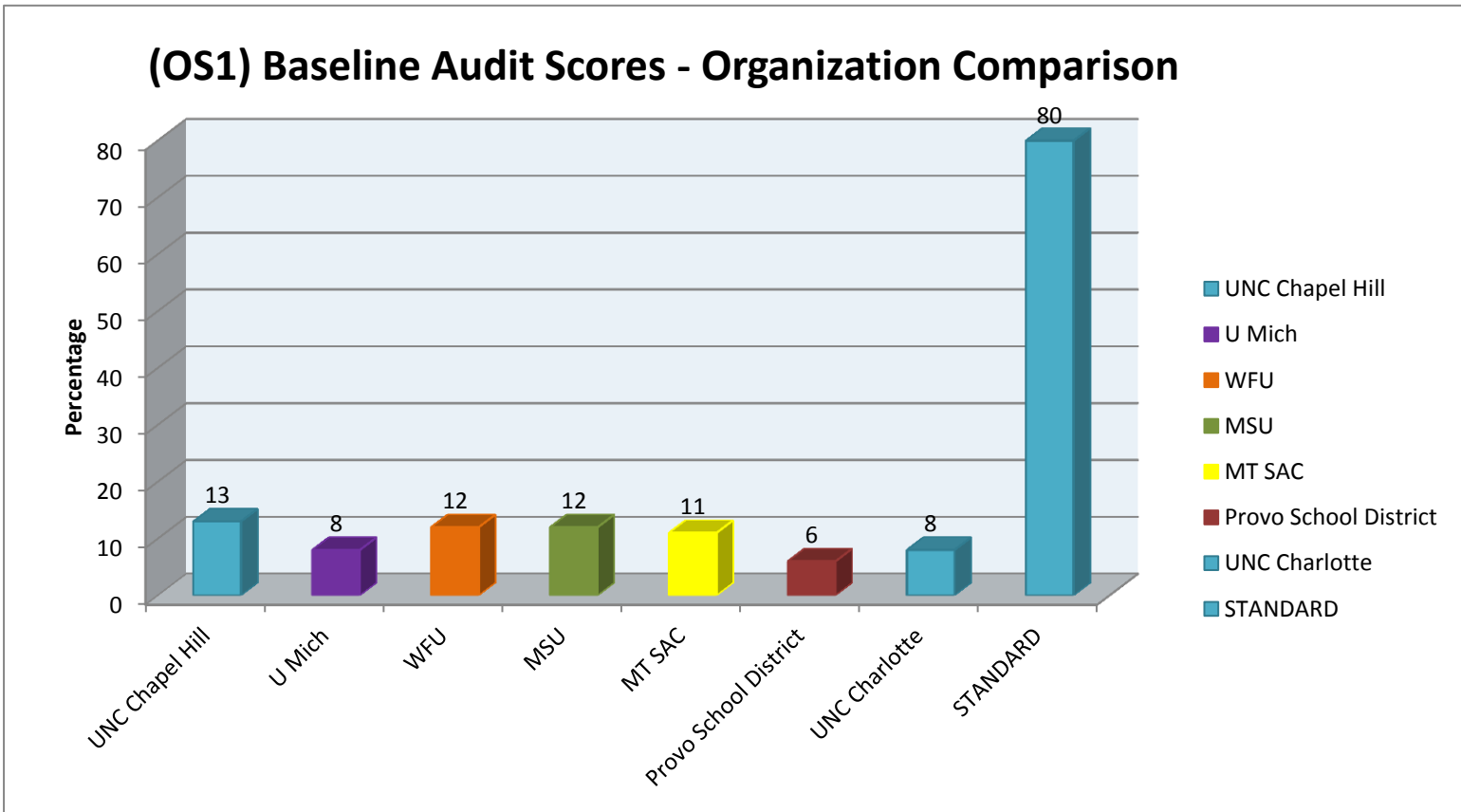
**Objective: 1.4:** Improve BES Processes  
**Tactic 1.4.1:** Achieve APPA Level 2 in 98% of Buildings

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



**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



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

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

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

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

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

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

## ACTION PLAN

### Actions Planned

1. Reorganize PM Program
2. Complete conversion from old PM Module to new PM Module.
3. Continue expansion of PM Program and predictive maintenance program. Work with key customers.
4. Restructure the ARCHIBUS PM Equipment Manager module.
5. Meeting with customers to review and discuss PM implementation.
6. Continue to identify non-traditional equipment that requires PM
7. FCAP is identifying and prioritizing equipment conditions and needs, for replacement. This information is used to support CRDM projects.
8. Continue to emphasize and update the Customer Handbook; get out and see the customer; swiftly and accurately report outages.

### Actions Completed

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

Lead  
F. O.

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

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

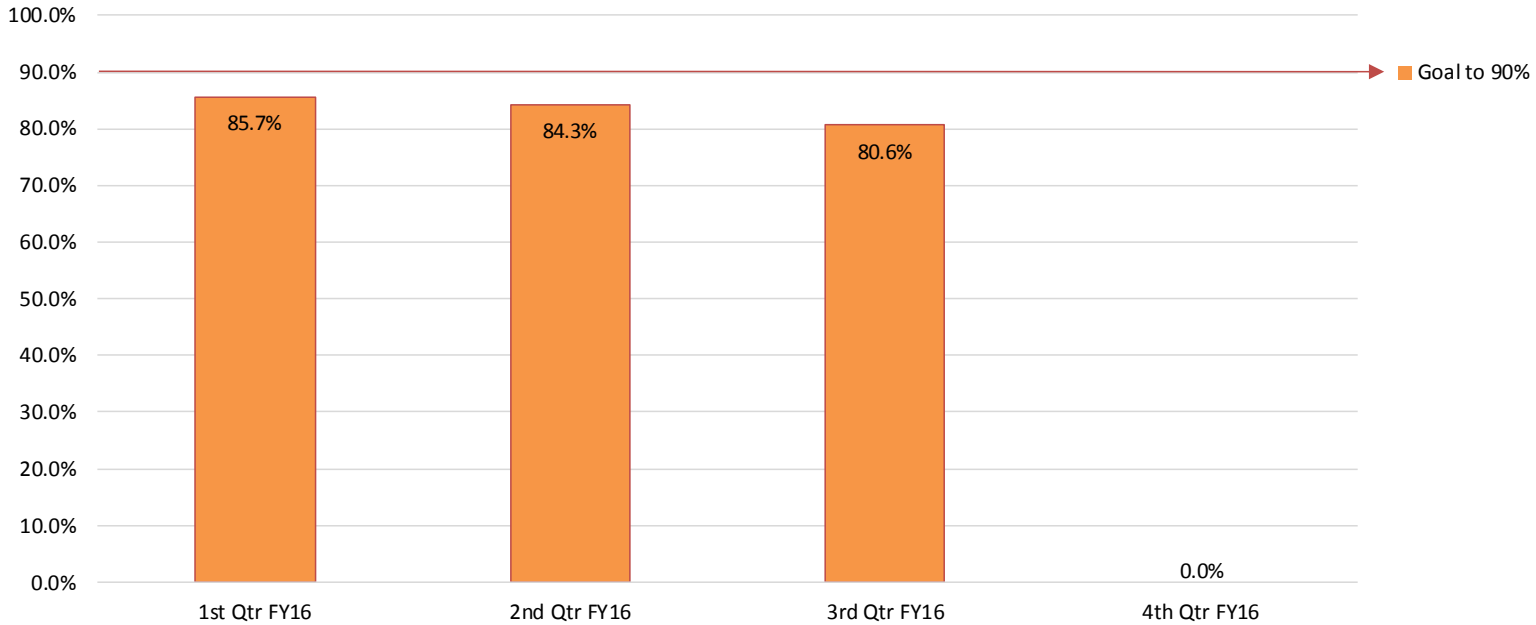
**Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

### Improve Completion of PM Work Orders



**STATUS**



Lead  
F. O.

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

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

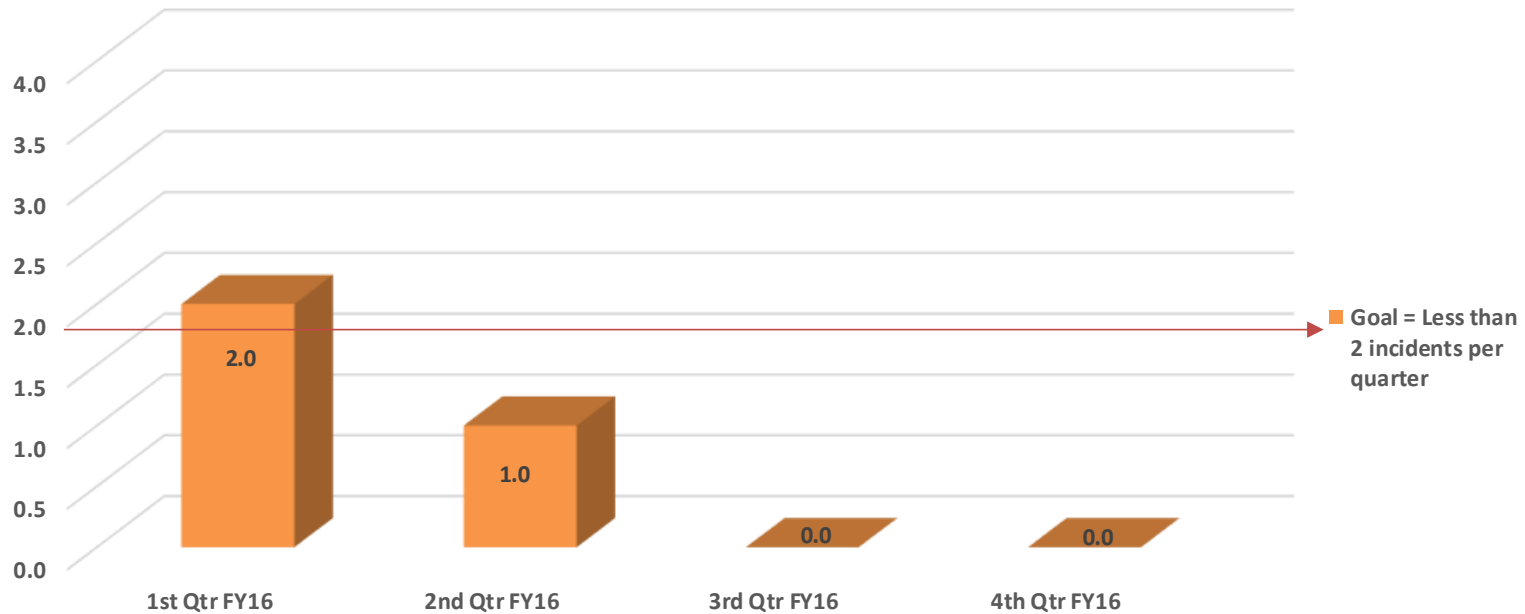
**Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

### Unscheduled Equipment Replacement Projects



STATUS

Lead  
F. O.

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

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

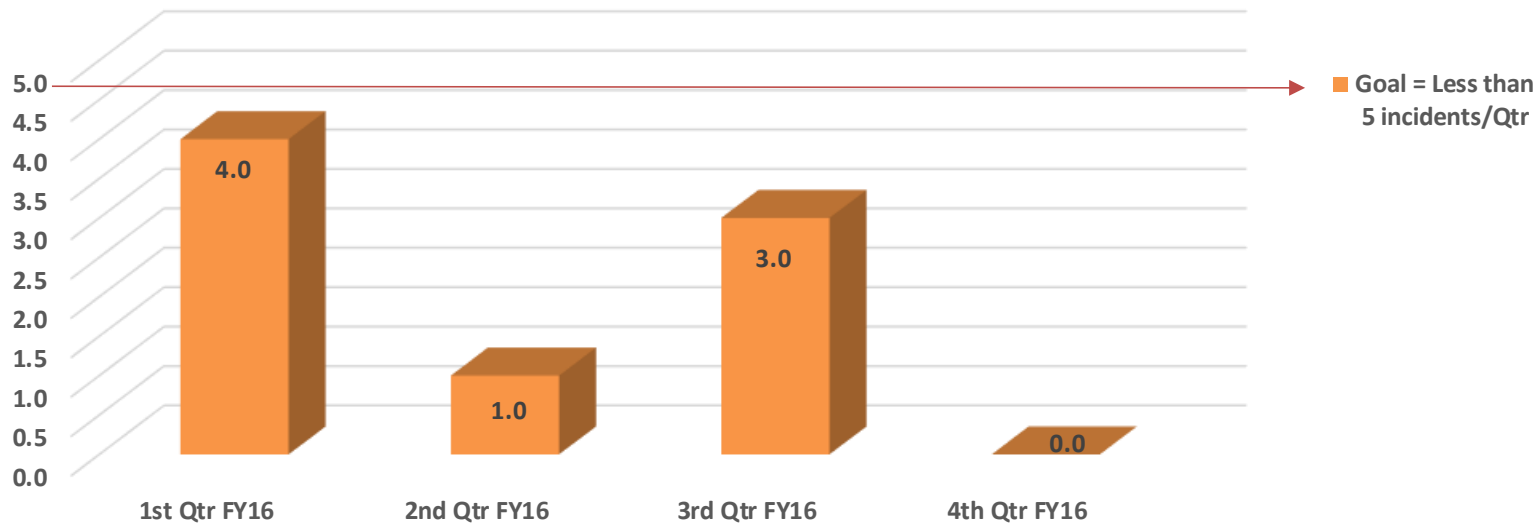
**Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter**

**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

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

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

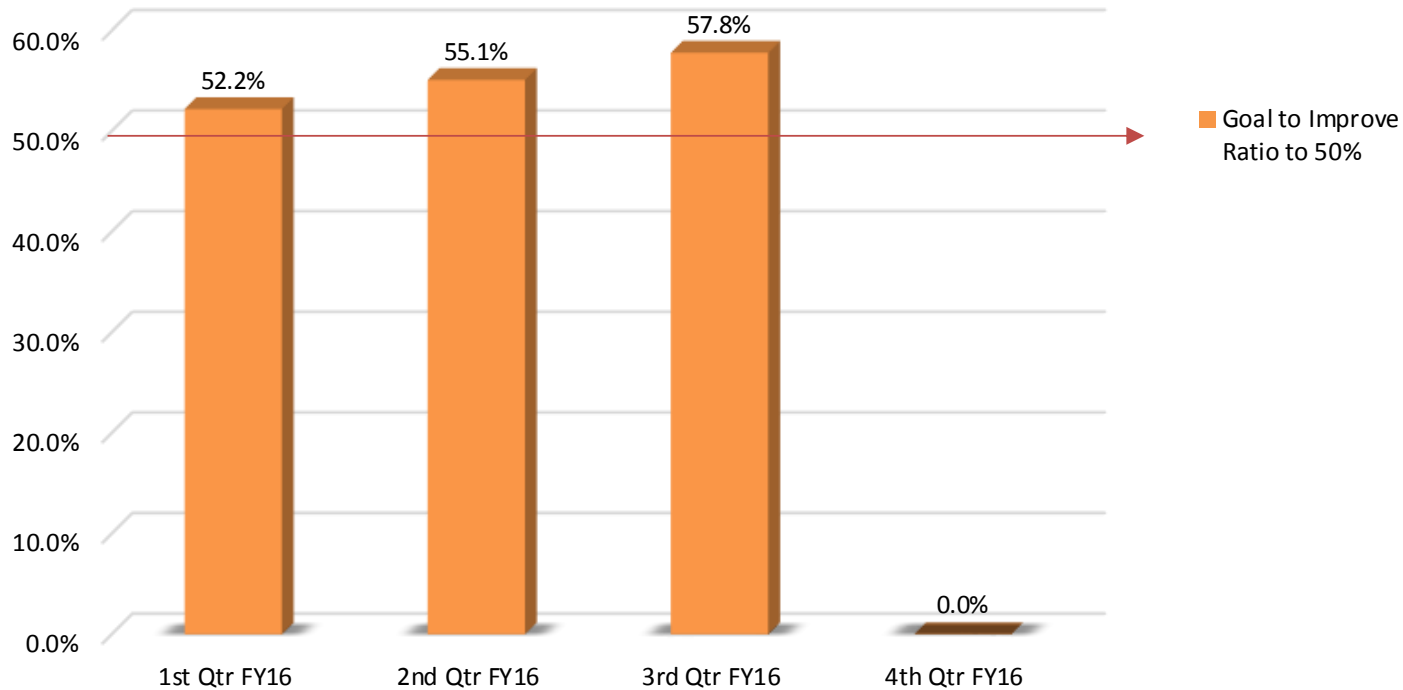
**Tactic: 1.5.4:** Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

**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





UNC CHARLOTTE

Great leaders help their people see how they can directly impact the company's objectives and their own personal goals.

Chip Conley

## GOAL #2

Create a Reliable and Sustainable Physical Infrastructure



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

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

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

**ACTION PLAN**

**Actions Planned:**

1. Complete final phase of Open Options Script Improvements for Blackboard Data Pull by May 16, 2016.
2. Complete Pull API for SDI Enhancements by April 30, 2016.
3. Finalize All Testing and Go Live with GIS Outages/Construction Notifications by May 30, 2016.
4. Finalize Building Automation Niagara N4 Template by May 30, 2016.
5. Complete Building Wayfinding System Proof of Concept by June 30, 2016.
6. Complete and Finalize End of year Projects / Invoicing by June 5<sup>th</sup>.
7. Finalize FY Building Automation System Building upgrade projects by June 1, 2016.
8. Complete all Wireless Radio Repairs by June 1, 2016.
9. Schedule & Roll Out approximately 100 BA-Funded Computer Replacements by July 30, 2016.
10. Transition off of Agentry to ARCHIBUS mobile by June 30, 2016.

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

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

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

**ACTION PLAN**

**Actions Completed:**

1. Completed and Deployed Mobile Recycling project.
2. Finalized Real Estate Updates.
3. Went Live with Motor Fleet Options and Motor Fleet Moodle2 Customer Training portal updates.
4. Finalize Real Estate Lease application updates.
5. Complete SDI Enhancements and Worked with SDI and FO to Identify Billing and Document Trend Issues for resolution.
6. Completed Niagara Training for Building Automations Niagara (N4).

# FM Prioritized Projects – FY16

1. **ARCHIBUS Real Estate Leases and Suites** –Completed Feb 2016
2. **Access and Key Management** – **Roll over**; Estimated Completion Jun 2016
3. **FO Refrigeration – Asbestos** – Estimated Completion May 2016
4. **Motor Fleet Options Updates** – Completed Feb 2016
5. **Mobile Recycling** – **Roll over**; Completed Mar 2016
6. **Mobile BES Equipment Survey** – **Roll over**; Completed Apr 2016
7. **Mobile Space Survey** – **Roll over**; Completed Dec 2015
8. **Mobile Map Utilities Field Units** – **Roll Over**; Completed Nov 2015
9. **GIS Departmental Map Search** – New Estimated Completion May 2016
10. **ARCHIBUS Moodle 2 Training** – Motor Fleet, Project & Customer – Estimated Completion June 2016
11. **NVR Upgrade Phase 2** – Estimated Completion Apr 2016
12. **GIS Construction Outage Alerts/Notifications** - New Estimated Completion June 30, 2016
13. **GIS Wayfinding Digital Signage System** New Estimated Completion June 2016
14. **FCAP Mobile** – Estimated Completion May 2016
15. **JIRA FIS Project Management** – Completed Apr 2016
16. **Building Automation System (BAS) Website Updates** – Estimated Completion May 2016
17. **ARCHIBUS Mobile Proof of Concept** – **Roll over**; Completed Oct 2015
18. **BIM Belk Gym** – **Roll over**; Completed Dec 2015
19. **GIS Space Mgmt. Set Up** – **Roll Over**; Completed Feb 2016
20. **SDI Enhancements** – **Roll Over**; New Estimated Completion May 2016
21. **Neo Terra Radio** – New Estimated Completion Apr 2016
22. **ARCHIBUS Shibboleth** – Estimated Completion May 15, 2016
23. **Open Options Scripting Updates** – New Estimated Completion June 1, 2016
24. **End of Year BAS Projects** – Estimated Completion June 2016
25. **FY Radio System Repairs** – Estimated Completion June 2016

## Projects Moved to FY17

1. **ImageNOW Phase 2: Capital**
2. **Mobile PM & WR for iPad**
3. **GIS Master Plan Map**
4. **ARCHIBUS Work Order Process Reinvention Support**
5. **ARCHIBUS Upgrade**
6. **ARCHIBUS Testing Framework**
7. **ARCHIBUS Training Workflow**

Lead  
FIS

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

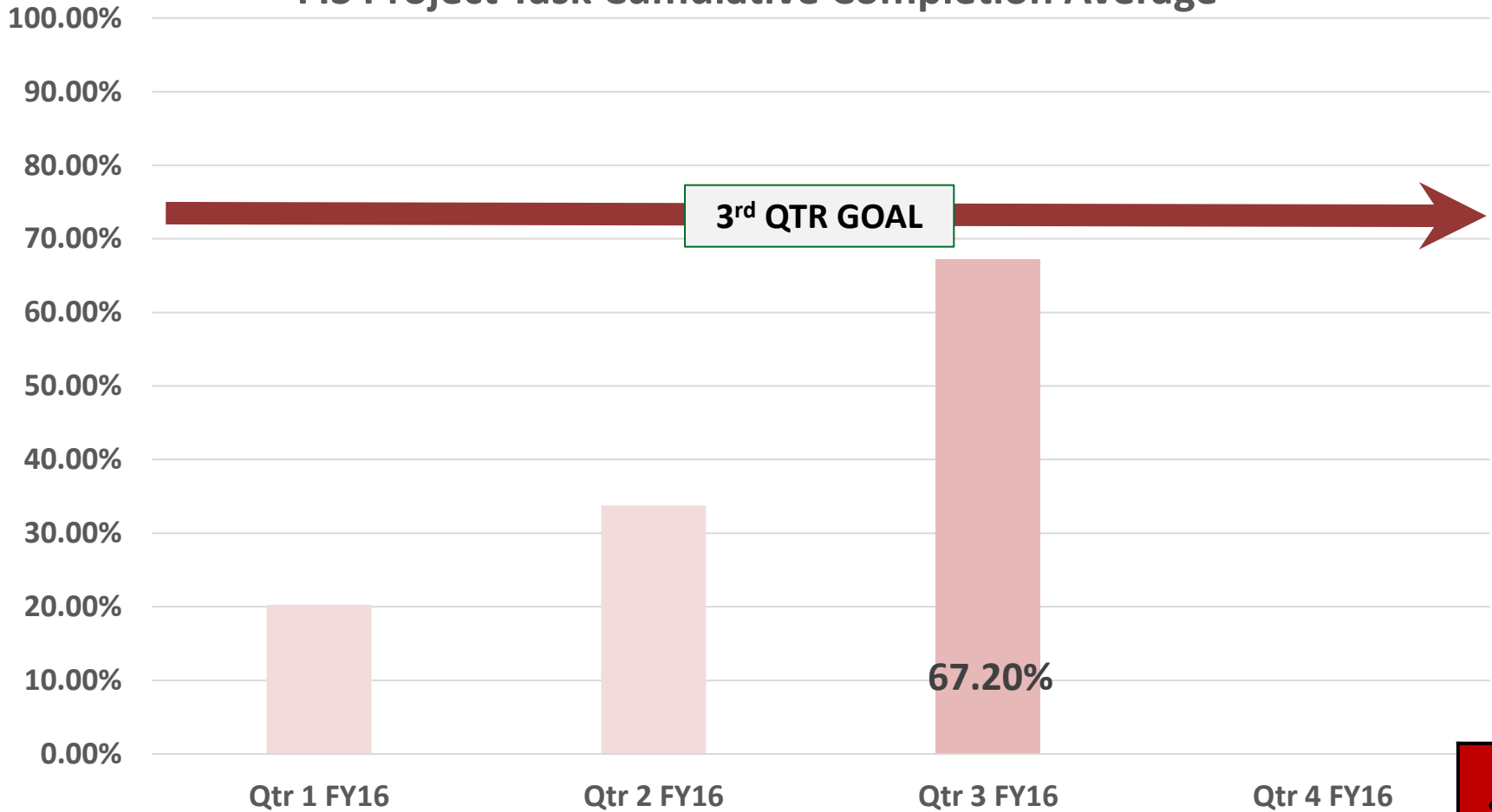
**Objective:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

**Balanced Scorecard Category:** Internal Business Processes

### FIS Project Task Cumulative Completion Average



STATUS



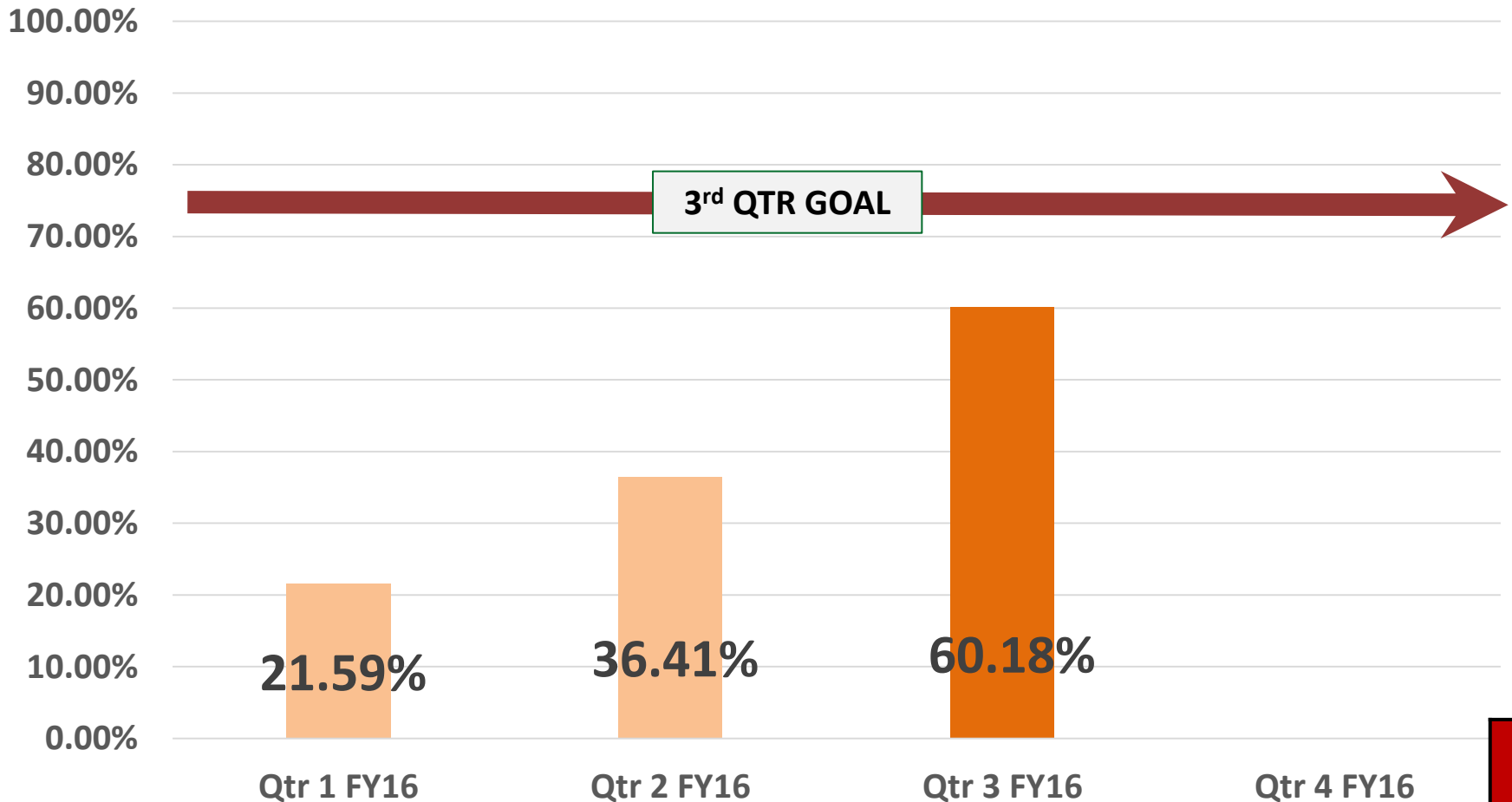
Lead  
FIS

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

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

**Balanced Scorecard Category:** Internal Business Processes

## FIS Weighted Project Completion Average



STATUS

**Facilities Management Strategic Planning Session – Third Quarter FY 2016**

**Lead  
FIS**

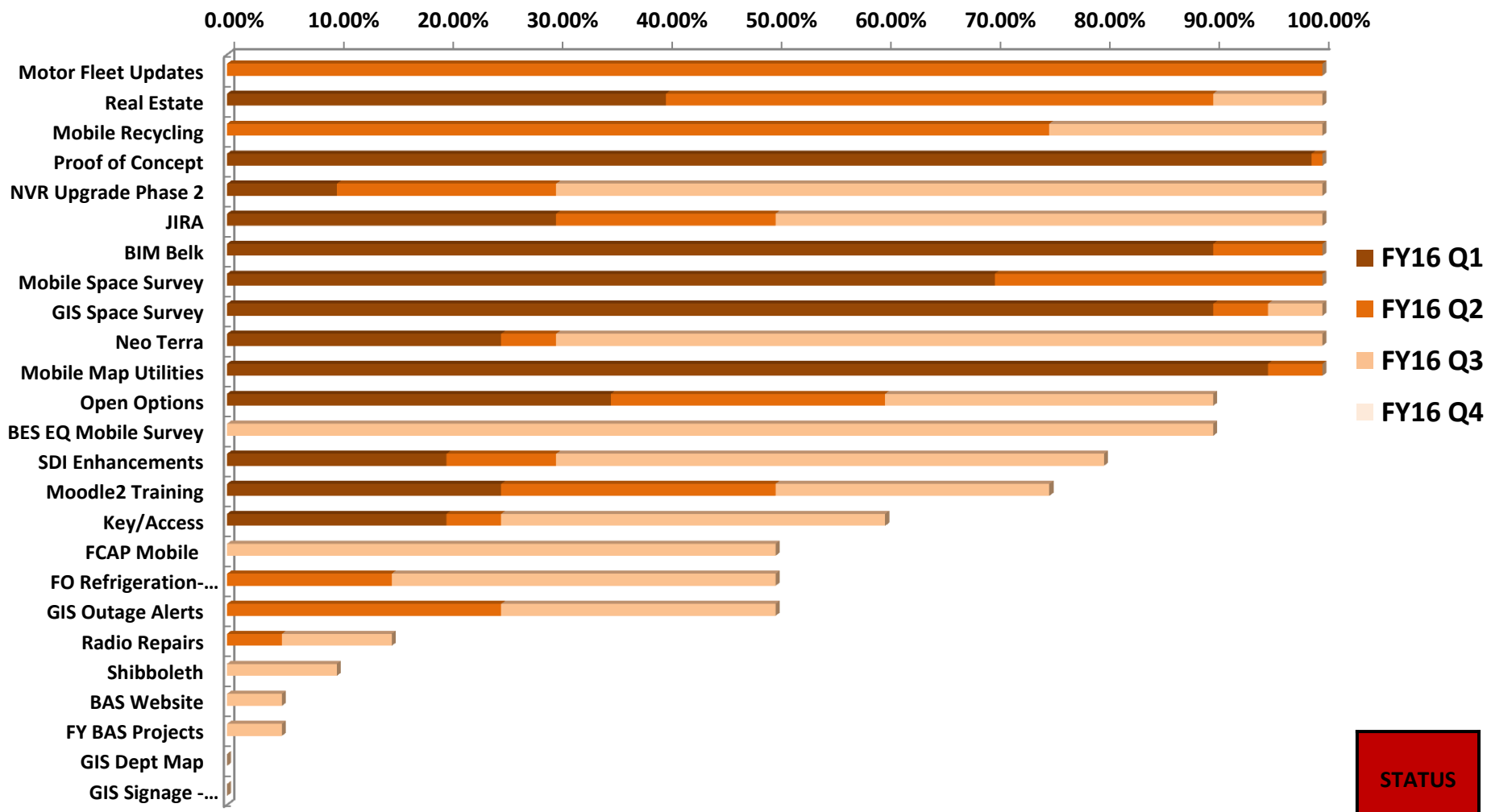
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

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

**Balanced Scorecard Category:** Internal Business Processes



**STATUS**

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

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

**Lead:** Design Services

**Balanced Scorecard Category: Customer**

<b>Tactic 2.2.1:</b>	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
<b>Measure:</b>	Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)
<b>Tactic 2.2.2:</b>	Review Project Capacity - Goal 250 projects per year.
<b>Measure:</b>	Number of Projects Completed (Annual Goal)

**ACTION PLANS FOR IMPROVEMENT**

NEW IMPROVEMENTS

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

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

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

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

ONGOING IMPROVEMENTS

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

Facilities Management Strategic Planning Session – Third Quarter FY 2016

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Current Status 95.6%	Annual Goal 95.0%	QTR 3 Status 90.9%	Lead - Design Services
-------------------------	----------------------	-----------------------	------------------------

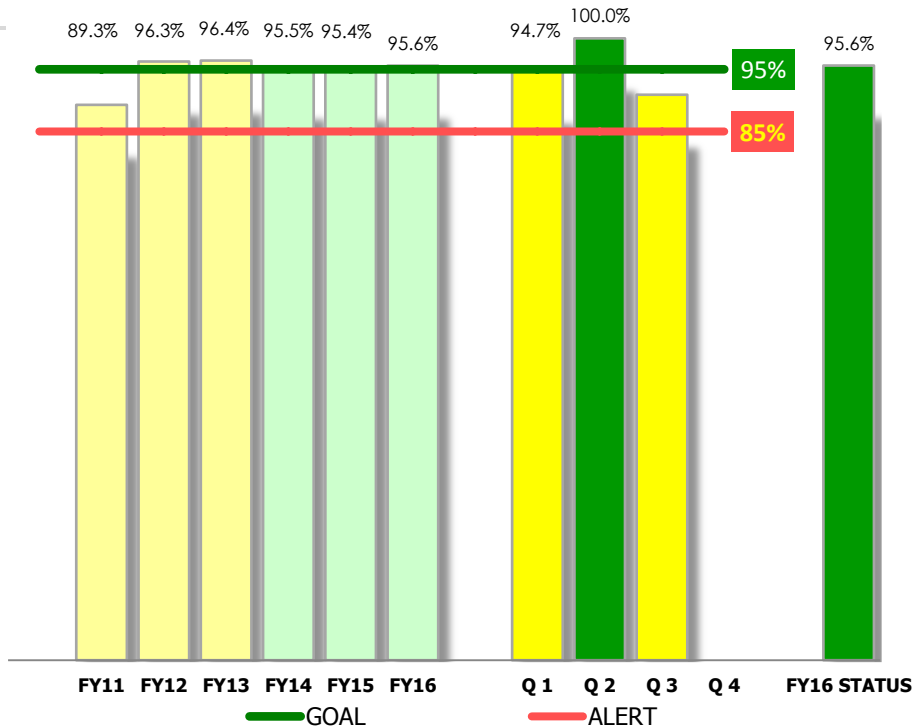
Lead: Design Services

Balanced Scorecard Category: **Customer**

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

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

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
FY16	68	65	3	95.6%
Q 1	19	18	1	94.7%
Q 2	27	27	0	100.0%
Q 3	22	20	2	90.9%
Q 4	0	0	0	0.0%
<b>FY16 STATUS</b>	<b>68</b>	<b>65</b>	<b>3</b>	<b>95.6%</b>



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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

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

**STATUS**

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

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

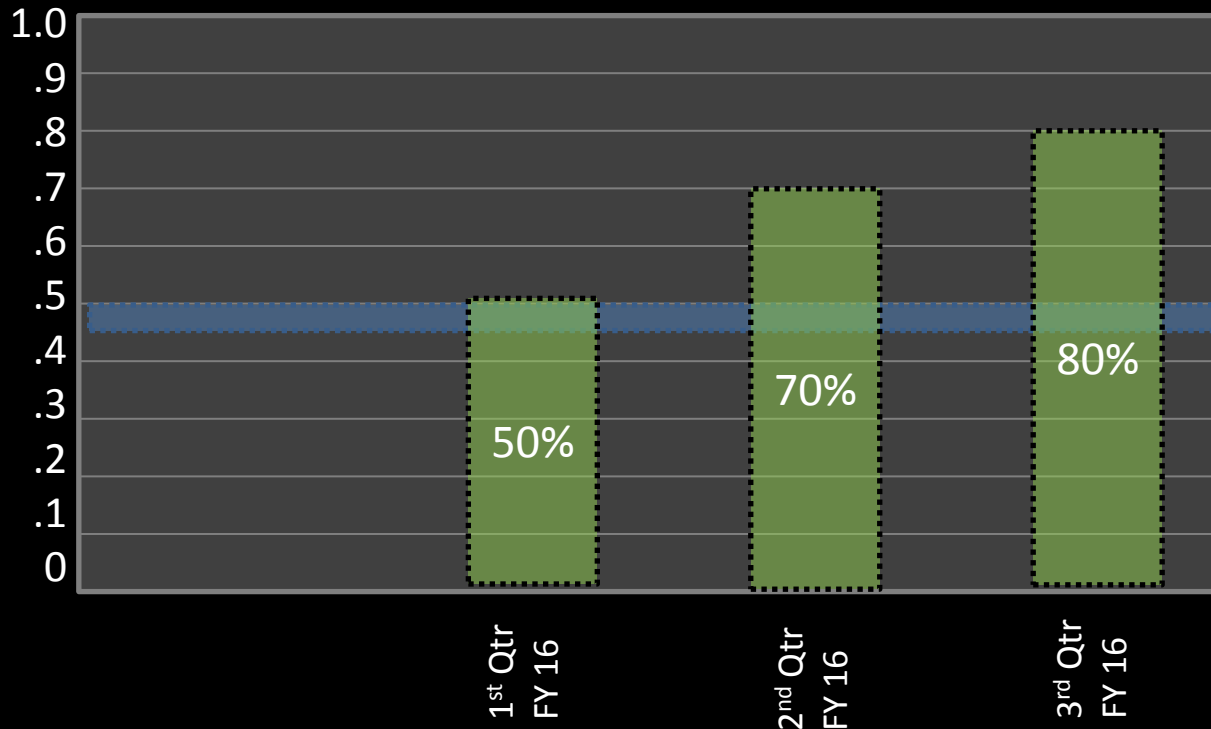
**Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2016.**

**Measure:** Average Building FCI for campus

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

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

**STATUS**

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

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

**ACTION PLAN**

Actions Completed

- Design completed within original fee: Belk Track Resurfacing, Campus Generators, Campus Infrastructure Renewal Atkins, East Village Utilities, RDH Renovations

Actions Planned

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

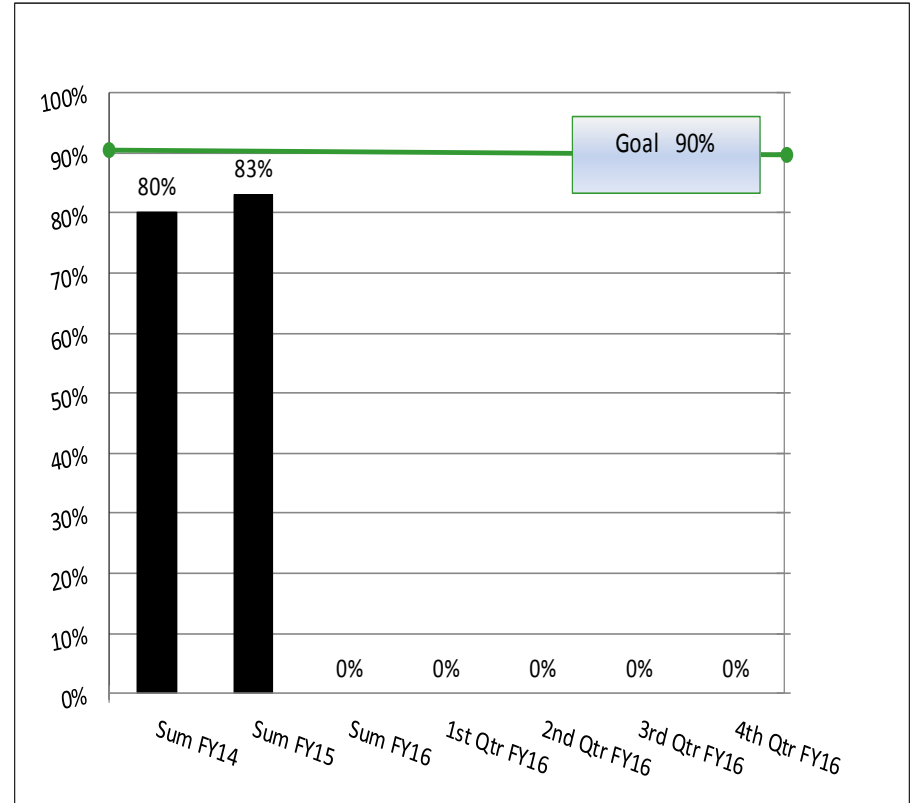


**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**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-14	7	4	1	80%
Summary FY-15	7	5	1	83%
Summary FY-16	0	0	0	N/A
1st Qtr. FY-16	0	0	0	N/A
2nd Qtr. FY-16	0	0	0	N/A
3rd Qtr. FY-16	0	0	0	N/A
4th Qtr. FY-16	0	0	0	



**Status**

Tactic Measurement for 3<sup>rd</sup> Quarter is N/A

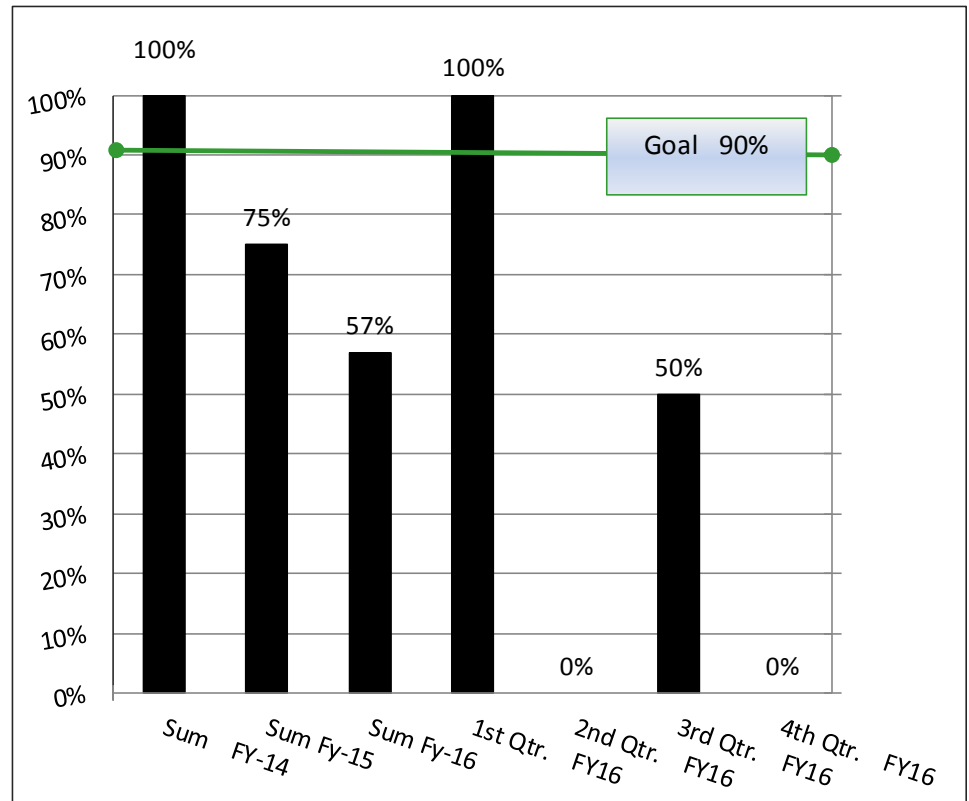
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**Objective 2.5** Improve the Capital Planning and Design Process  
**Tactic 2.5.3** 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-14	8	0	100%
Summary FY-15	3	1	75%
Summary FY-16	4	3	57%
1st Qtr. FY-16	1	0	100%
2nd Qtr. FY-16	0	0	N/A
3rd Qtr. FY-16	3	3	50%
4th Qtr. FY-16			



Tactic Measurement for 3<sup>rd</sup> Quarter is 50%

**Facilities Management Strategic Planning Session – Third Quarter FY 2016**

**Lead Capital**

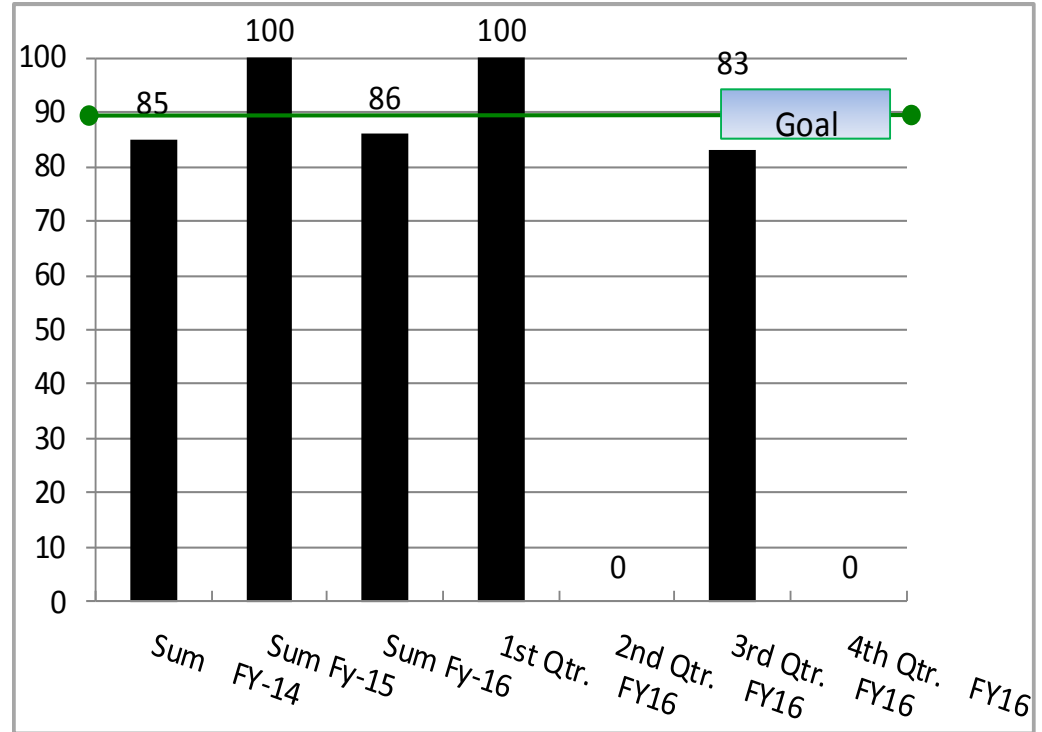
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

**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-14	6	1	85%
Summary FY-15	3	0	100%
Summary FY-16	6	1	86%
1st Qtr. FY-16	1	0	100%
2nd Qtr. FY-16	0	0	N/A
3rd Qtr. FY-16	5	1	83%
4th Qtr. FY-16			



**Status**

Tactic Measurement for 3<sup>rd</sup> Quarter is 83%

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

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

## ACTION PLAN

### Actions Complete

- Campus WiFi
- 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 2016

**Lead Capital**

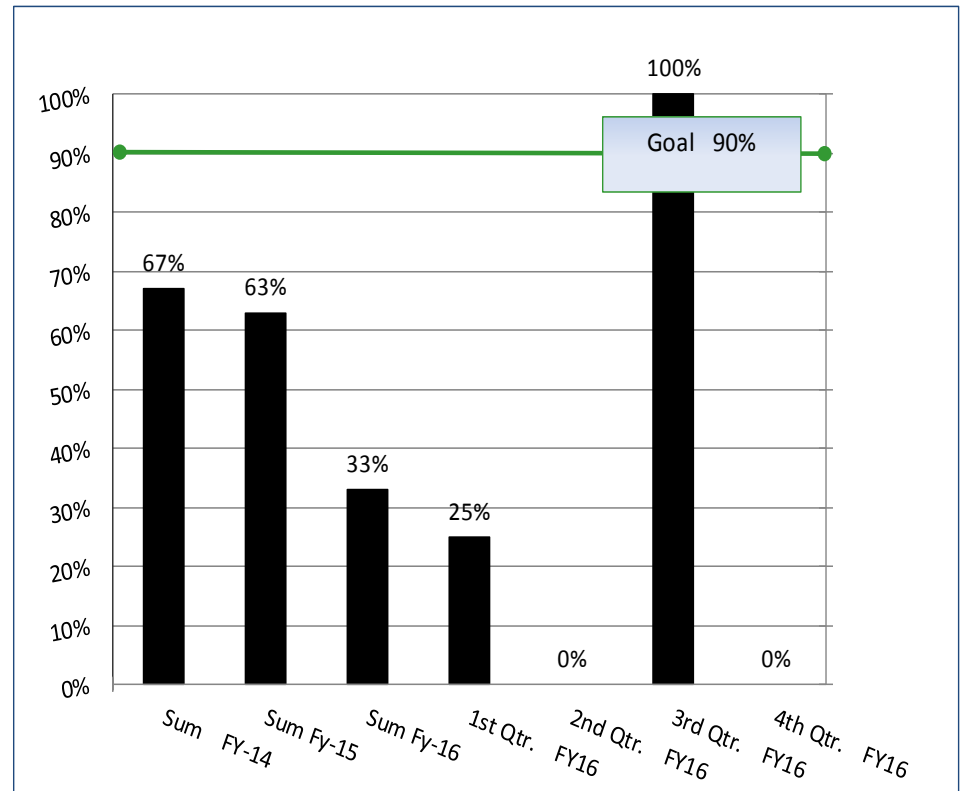
### GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

**Balanced Scorecard Category:** Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-14	6	3	67%
Summary FY-15	5	3	63%
Summary FY-16	2	4	33%
1st Qtr. FY-16	1	3	25%
2nd Qtr. FY-16	0	1	0%
3rd Qtr. FY-16	1	0	100%
4th Qtr. FY-16			



**Status**

Tactic Measurement for 3<sup>rd</sup> Quarter is 100%

# Facilities Management Strategic Planning Session – Third Quarter FY 2016

**Lead Capital**

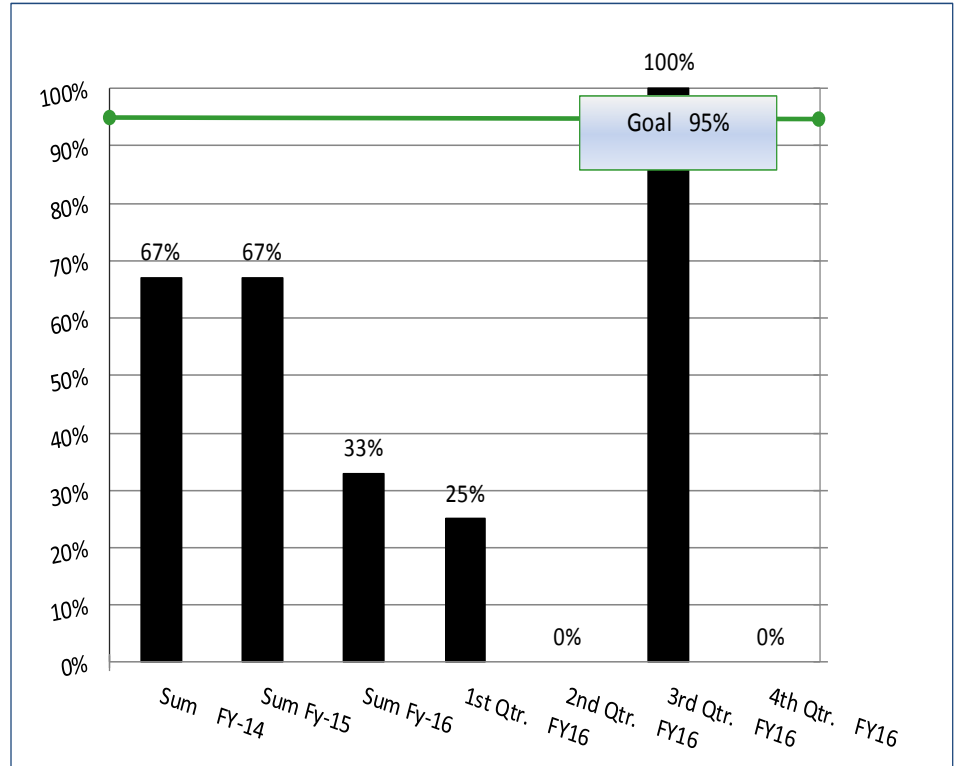
## GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

**Objective 2.6** Improve the Capital Construction Process  
**Tactic 2.6.2** 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-14	6	3	67%
Summary FY-15	4	2	67%
Summary FY-16	2	4	33%
1st Qtr. FY-16	1	3	25%
2nd Qtr. FY-16	0	1	0%
3rd Qtr. FY-16	1	0	100%
4th Qtr. FY-16			



**Status**

Tactic Measurement for 3<sup>rd</sup> Quarter is 100%



UNC CHARLOTTE

In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance... you thrive on that.

Bill Gates

## GOAL #3

Foster a Customer Focused Organization



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

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

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

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN FOR IMPROVEMENT**

Customer Satisfaction Survey

- Urban Institute to administer survey April 11 – 29, 2016.

Publicity/Public Relations:

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

Internal Communications:

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



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

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

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

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

## ACTION PLAN

### Actions Planned

1. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Hire Lead BAS Technician (June 2016)
4. Continue to include Energy Manager in Bi-Weekly Operations' meetings
5. Continue daily monitoring of building temperatures within Zones.
6. Develop Utilities Team; hire Utility Manager and Retro Commissioning Supervisor (July 2016)
7. Working with Capital; Retro-commissioning 3 buildings(Cameron, McEniry, Smith) – June 2016
8. Working with Capital; Mechanical Systems Upgrade Project (Kennedy)
9. Develop and implement customer follow-up plan

### Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Updated temperature policy
3. Improved condensate return for main Steam Plant

Lead  
F. O.

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

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

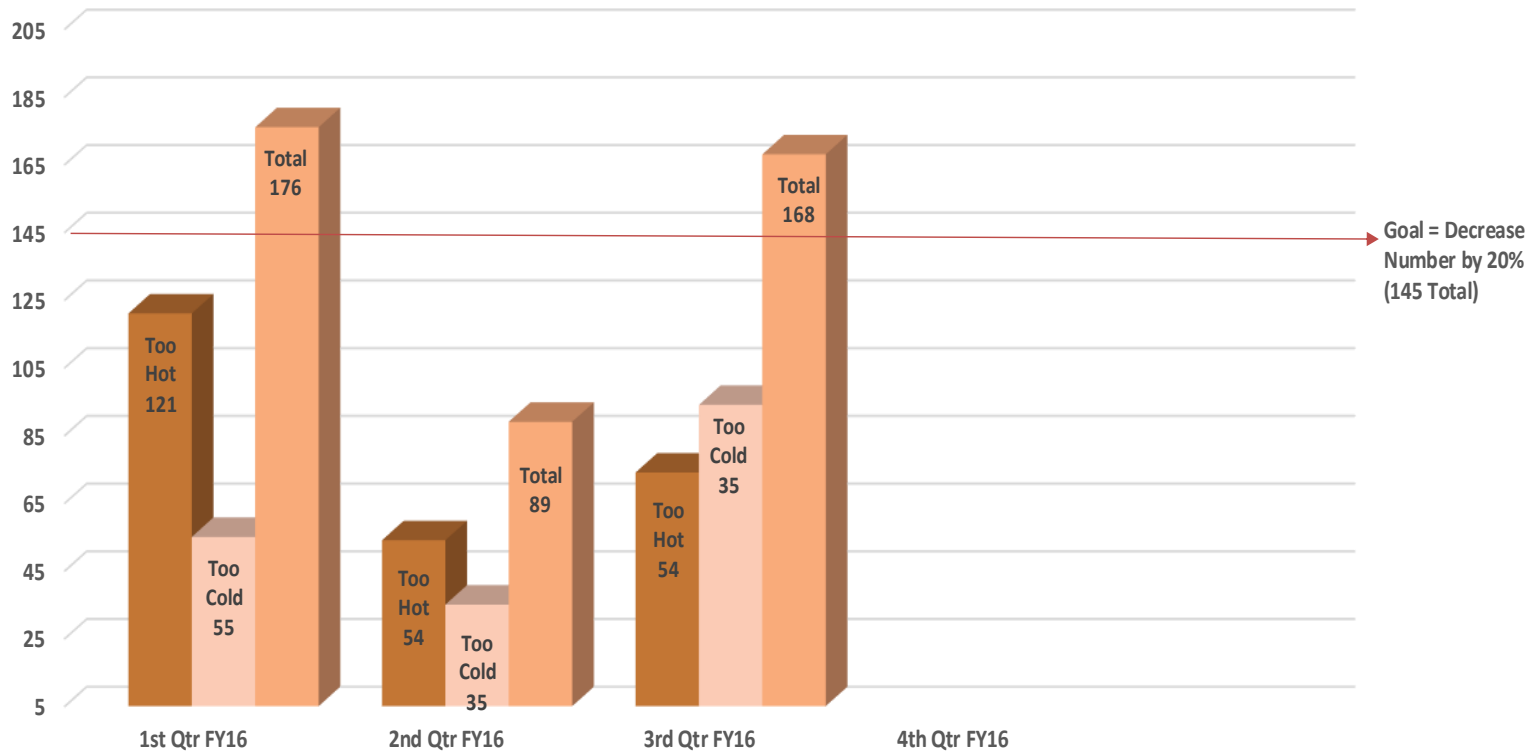
**Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%**

**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:** Customer

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

**ACTION PLANS FOR IMPROVEMENT**

**ARCHIBUS - Design Services Customer Survey:**

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

- **After project is complete, stop by and meet with Customer to review how the renovated space is performing.**
  - ◊ More and more team members are taking this action.
  
- **Keeping the communication lines open by email, phone and face to face works wonders.**
  - ◊ Although email is efficient, we are finding some level of telephone and face to face interaction must occur.
  
- **When possible, hold weekly meetings on job site to discuss progress with Customer.**
  - ◊ This is proving to be widely accepted and very useful.

Current Status 100.0%	Annual Goal 90.0%	QTR 3 Status 100.0%	Lead - Design Services
--------------------------	----------------------	------------------------	------------------------

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

**Objective: 3.1: Continuously Improve Customer Service/Satisfaction**

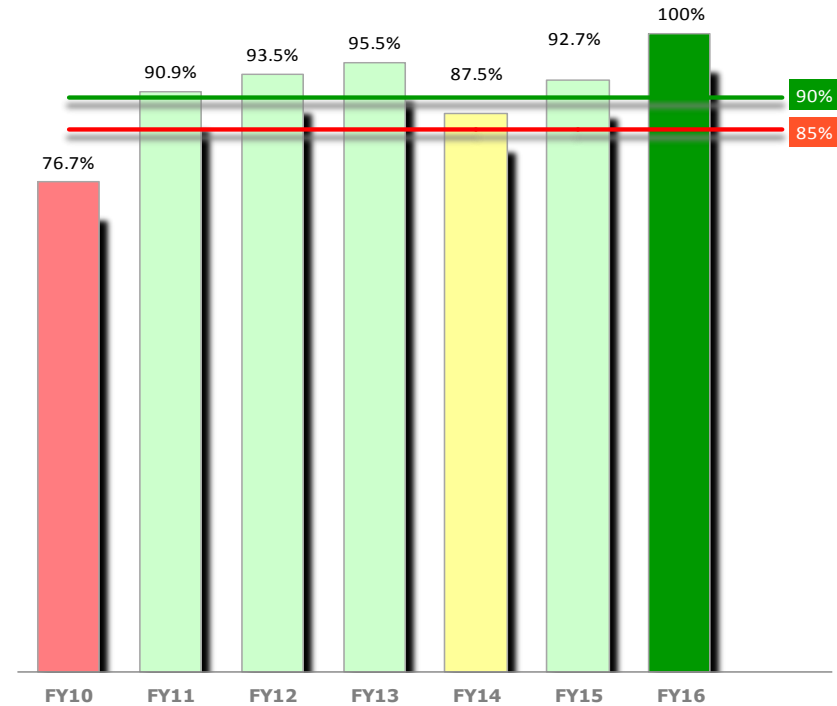
**Lead:** Design Services

**Balanced Scorecard Category: Customer**

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

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

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less then Satisfied	Percent Satisfied
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
<b>FY16</b>	<b>29</b>	<b>13</b>	<b>9</b>	<b>4</b>	<b>0</b>	<b>100%</b>
<i>1st Quarter</i>	17	10	7	3	0	100%
<i>2nd Quarter</i>	12	3	2	1	0	100%
<b>3rd</b>	<b>22</b>	<b>6</b>	<b>5</b>	<b>1</b>	<b>0</b>	<b>100%</b>
<i>4th Quarter</i>						
<b>3rd</b>	<b>22</b>	<b>6</b>	<i>RESPONSE RATE</i>			27.3%



**Customers Comments:**

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

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

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

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

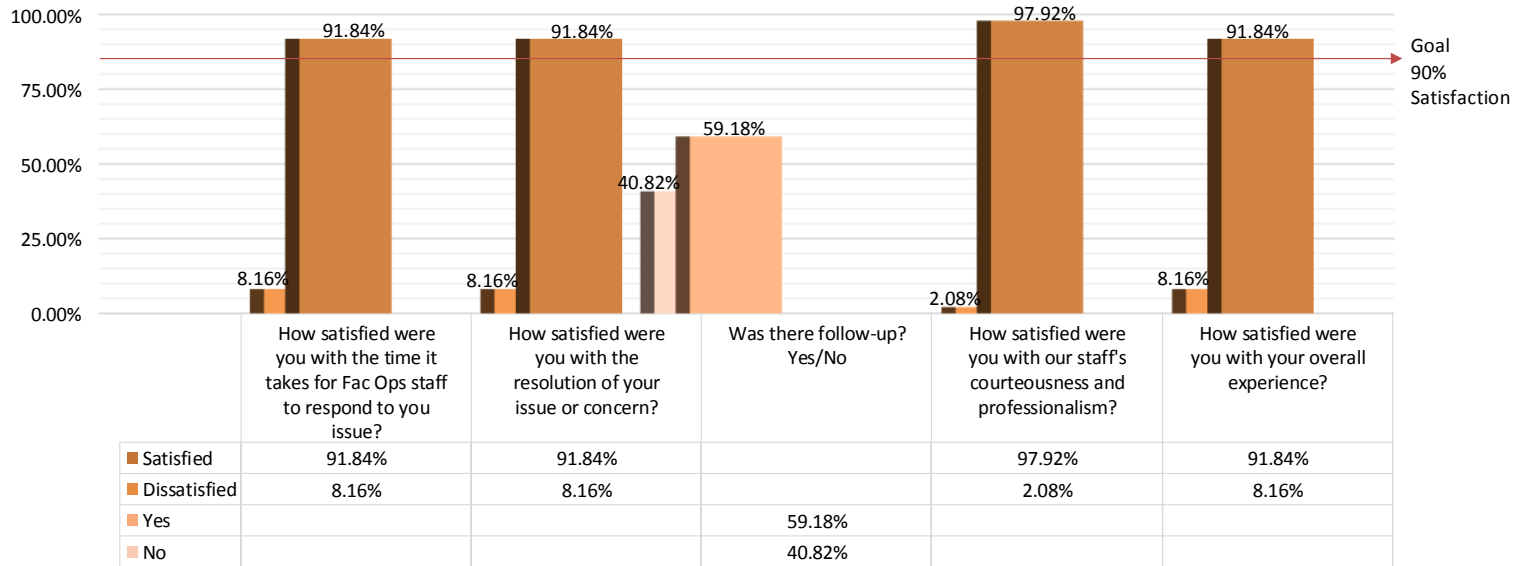
**Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Improve Customer Service Satisfaction



**GOAL #3** Foster a Customer Focused Organization  
**Objective 3.1:** Continuously improve customer service/satisfaction

<b>Tactic 3.1.5:</b>	Build brand awareness
<b>Measure:</b>	Action Plan Only

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

## ACTION PLAN FOR IMPROVEMENT

### Customer Communication Initiatives (interrelated):

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

### Special Projects:

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



UNC CHARLOTTE

Start with good people, lay out the rules, communicate with your employees, motivate them and reward them. If you do all those things effectively, you can't miss.

Lee Iacocca

## GOAL #4

Recruit, Develop, and Retain  
Quality Employees



**GOAL #4**

**Recruit, Develop and Retain Quality Employees  
Recruit a Qualified Workforce in a Timely Fashion**

**Objective 4.1:**

**Tactic 4.1.1:**

Vacancy time of no longer than 80 calendar days – Nonexempt  
Vacancy time of no longer than 120 calendar days - Exempt

**Tactic 4.1.2:**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**ACTION PLAN FOR IMPROVEMENT**

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



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

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

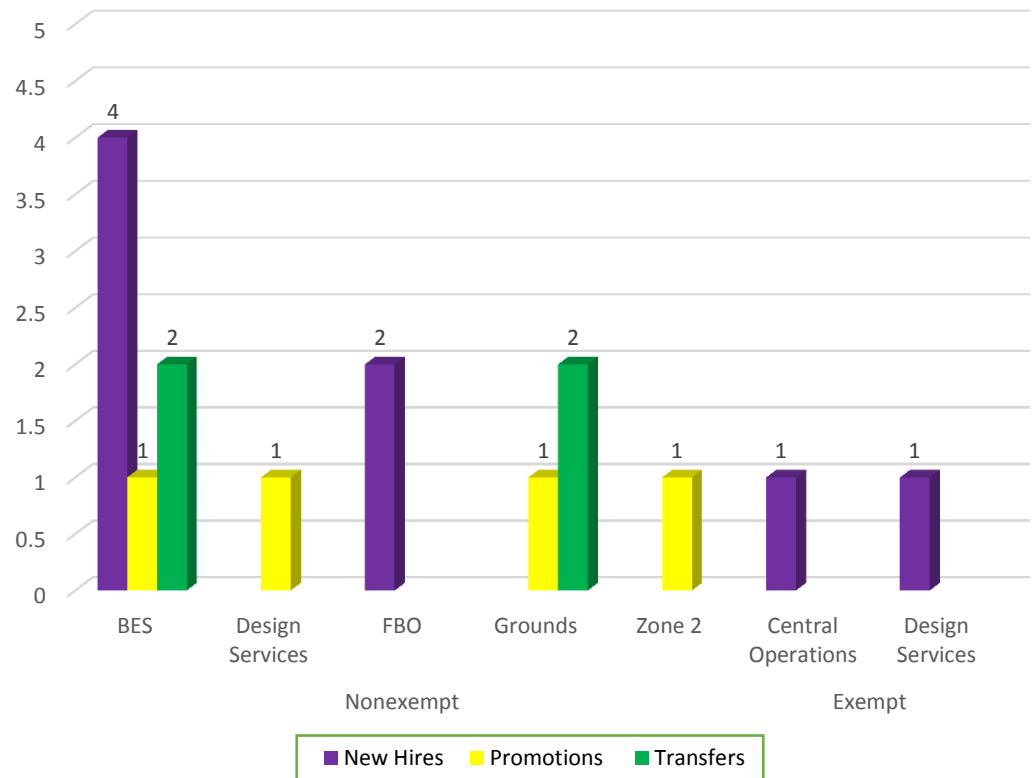
**Tactic 4.1.1:** Vacancy time of no longer than 80 calendar days – Nonexempt  
 Vacancy time of no longer than 120 calendar days - Exempt  
**Measure:** Days needed to fill vacant positions

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

FM New Hire/ Promotion 3rd Quarter FY 2016



FM New Hires / Promotions per Department 3rd Quarter FY 2016



Lead  
FBO

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

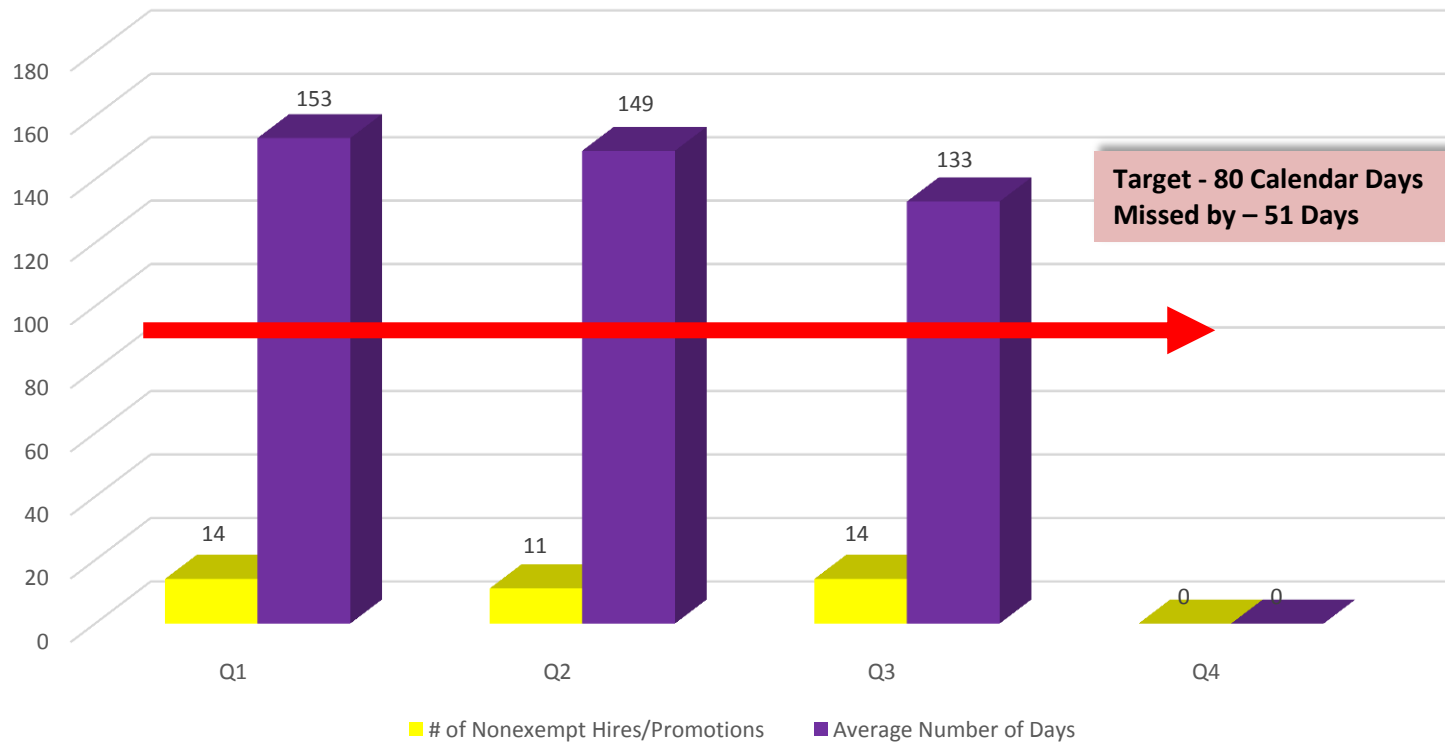
**Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**Average Number of Days to Fill Nonexempt Vacancies - FY 2016**



**STATUS**

Lead  
FBO

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

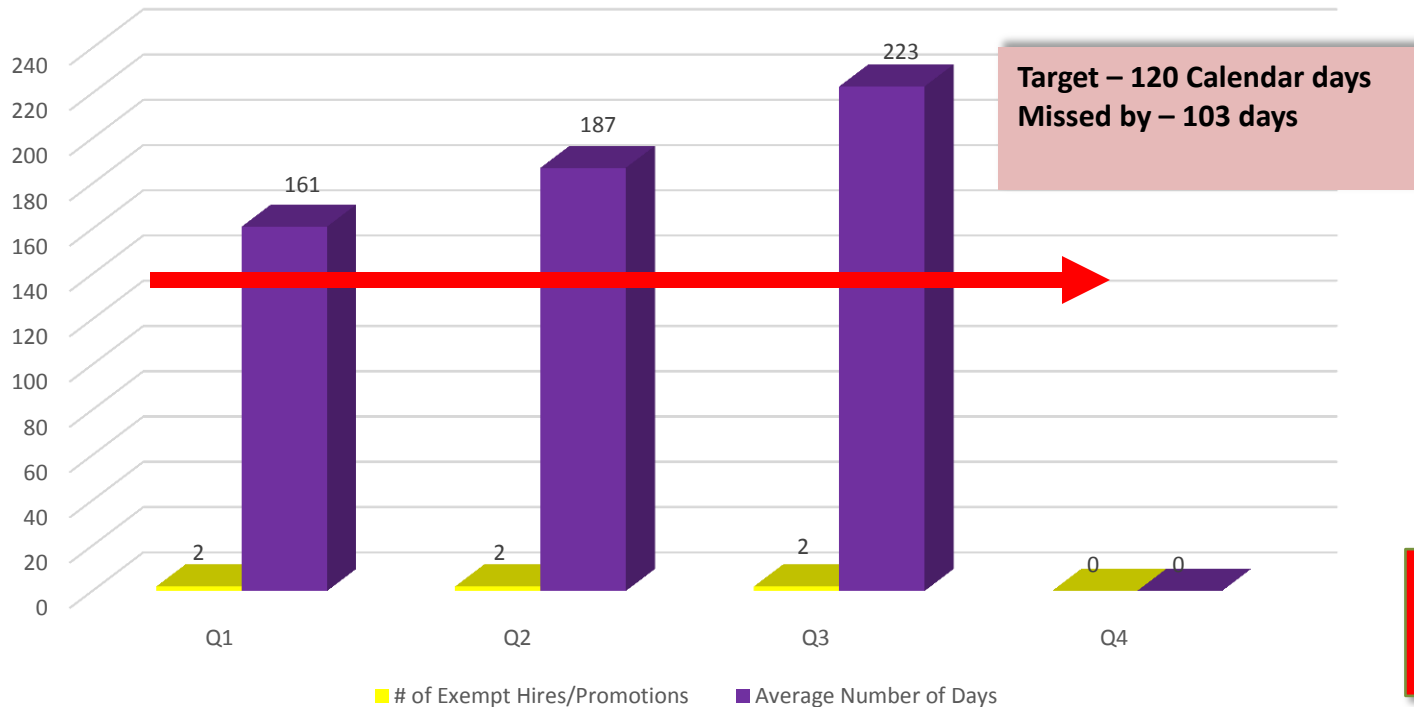
**Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion**

<b>Tactic 4.1.1:</b>	Vacancy time of no longer than 80 calendar days – Nonexempt Vacancy time of no longer than 120 calendar days - Exempt
<b>Measure:</b>	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 2016



**STATUS**

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

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

**Measure:**

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**ACTION PLAN FOR IMPROVEMENT**

*ONGOING AND CONTINUOUS – Through June, 2016*

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

Lead  
FBO

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

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

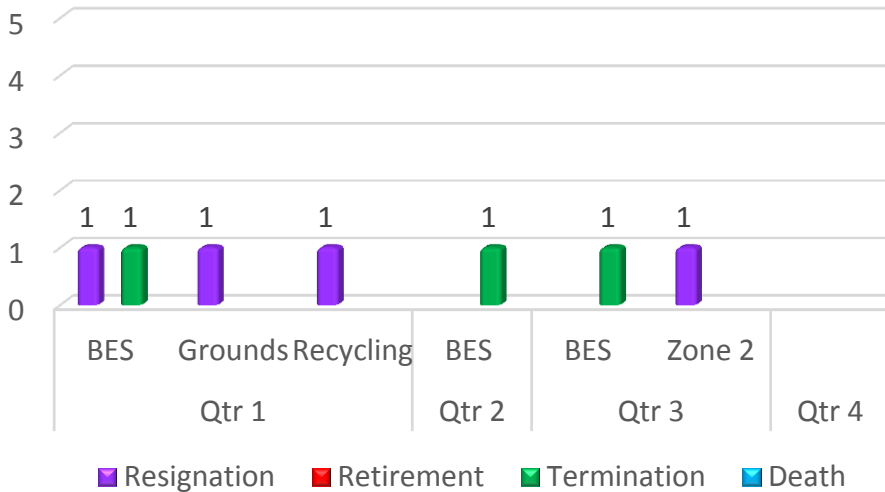
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

**Measure:** Percent Employees Separated before end of probationary period.

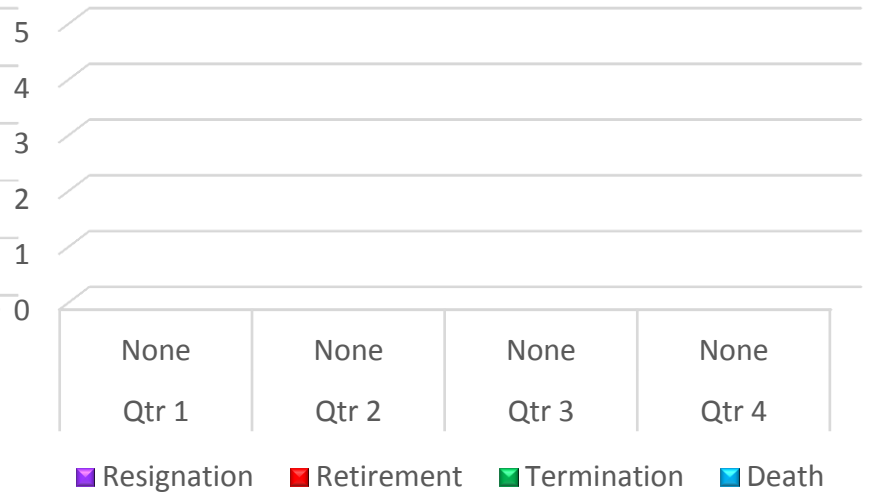
**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**Separations by Department During Probation Nonexempt FY 2016**



**Separations by Department During Probation Exempt (Salaried) FY 2016**



Status

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

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

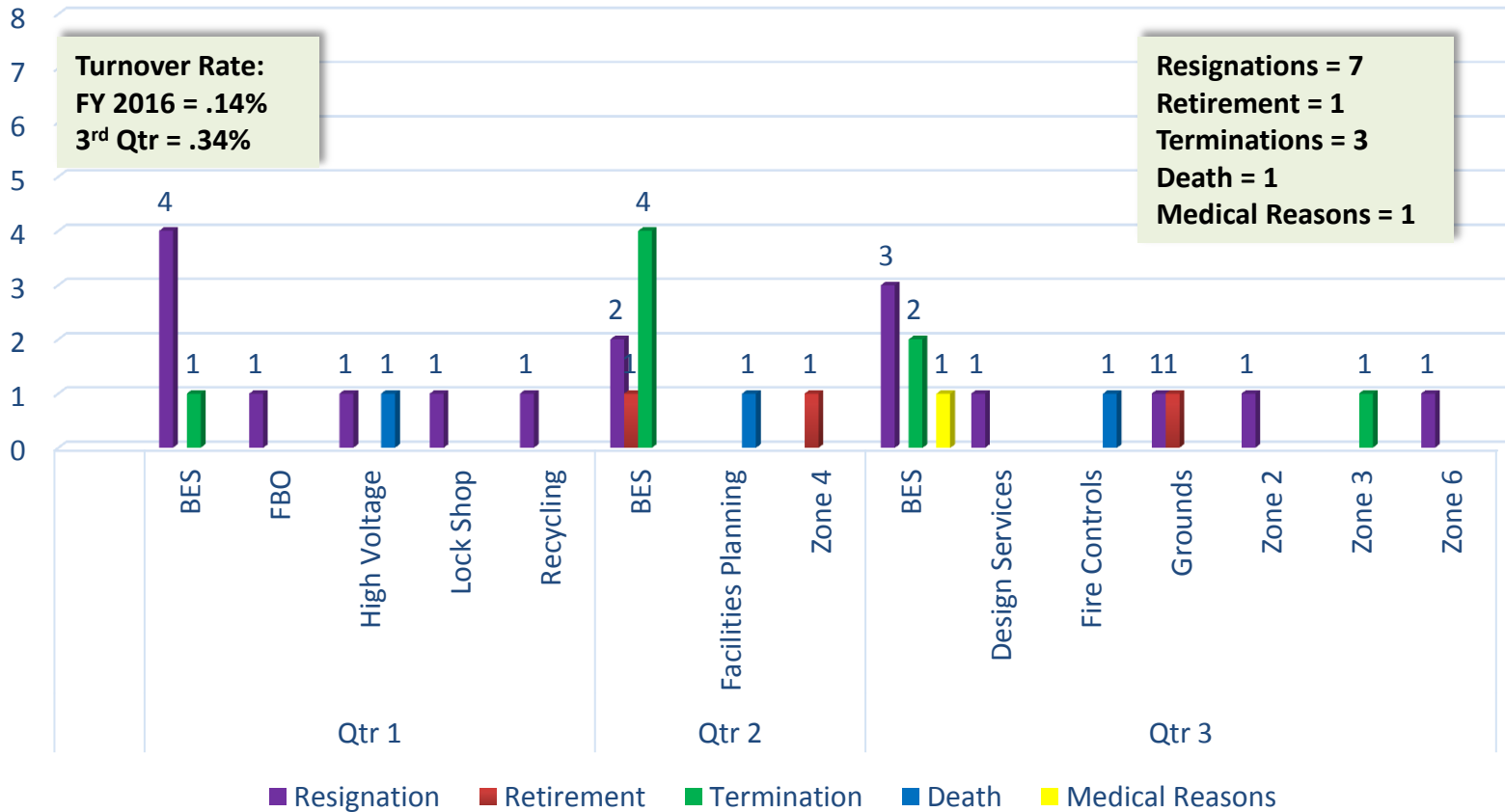
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

### Separations FY 2016 Nonexempt





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

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

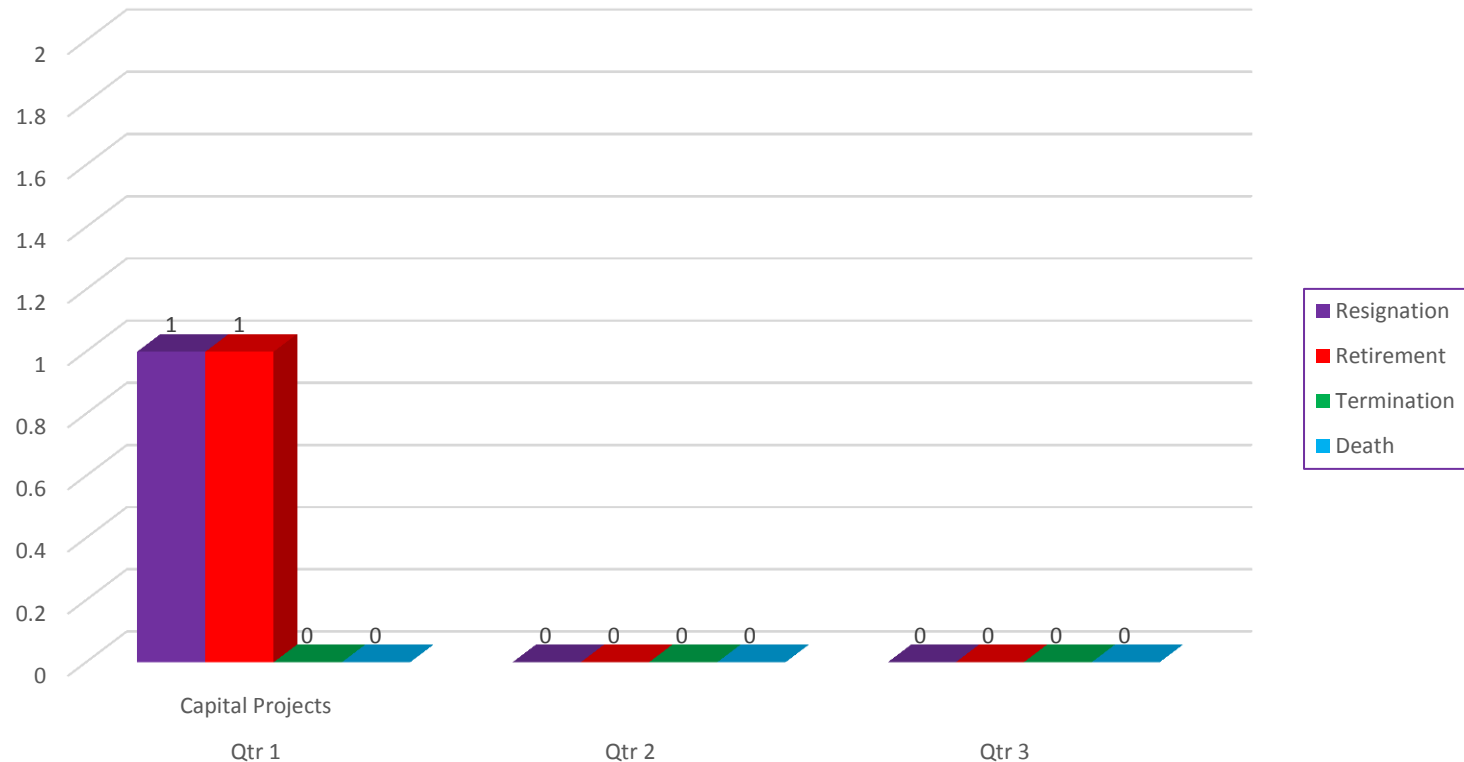
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

### Separations FY 2016 Exempt





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

**Objective 4.2: Improve Workforce Development**

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

**Lead:** Facilities Business Office

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

**ACTION PLAN FOR IMPROVEMENT**

**FM ACADEMY**

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

**Technical**

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

**Safety**

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

**Leadership**

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

**Externally Driven Initiatives**

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



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

**Objective 4.2: Improve Workforce Development**

<b>Tactic 4.2.1:</b>	Increase Supervisor/Manager Training to 40 hours/year
<b>Tactic 4.2.2:</b>	Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office

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

**ACTION PLAN FOR IMPROVEMENT**

Departmental Development

- Attend staff meetings with FO and BES to support L&D needs.
- Identify and source vendors for training delivery;
  - Focusing on areas of: Leadership, Technical, Administrative, Safety
- Communicate upcoming training events to FM employees;
- Review objective metrics with AVC for next FY.

Lending Library Initiative

- Review and update current procedures for use of library materials; expected release of procedures in April 2016.
- Working with FM Communication Officer on marketing/promotional strategy.

NEO Review and Revamp

- Develop and publish a new FM acronym guide for new employees;
  - As of March 31<sup>st</sup>:
    - Published to FM webpage
    - Included in FM-NEO materials
- Developing new FM NEO format to include Unit Directors and/or designee:
  - AVC briefed
  - Next steps: Proposed changes will be presented to Directors for discussion

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

**Objective 4.2: Improve Workforce Development**

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

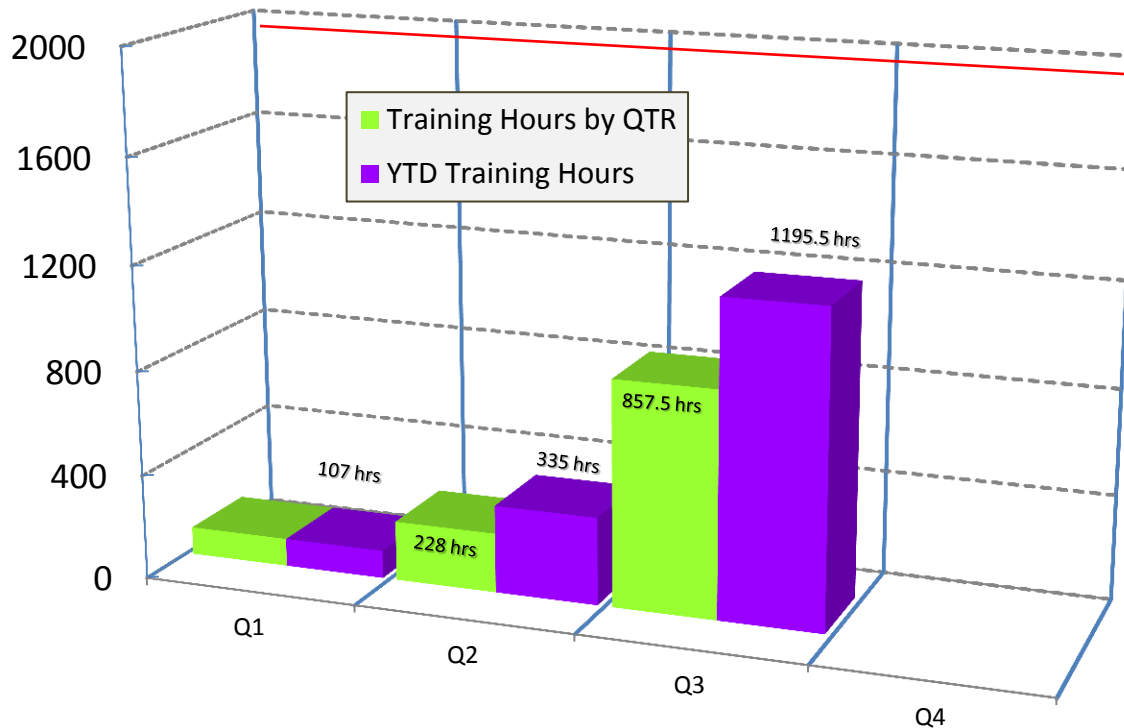
**Lead:** Facilities Business Office

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

Training  
Hours

**FY 16**

*Training Hours for Supervisors & Managers by Quarter*



Annual Target

**FY 2016**  
 Target - 1,960 hrs  
 3<sup>rd</sup> Qtr. Target – 490 hrs  
 -----  
 Actual YTD  
 1195.5 hrs (61 %)  
 Actual 3<sup>rd</sup> Qtr.  
 857 hrs (175 %)

ANNUAL

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

**Objective 4.2: Improve Workforce Development**

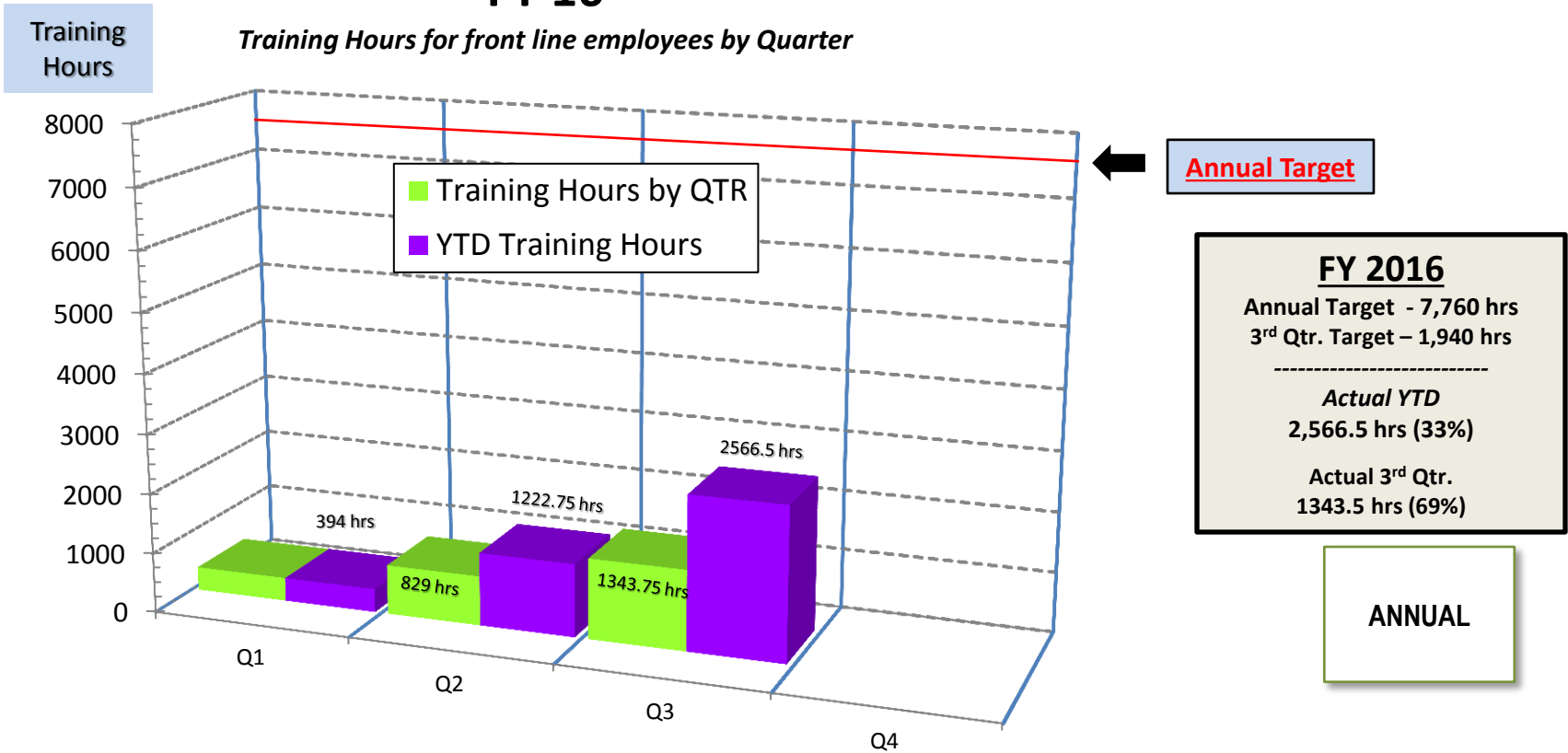
**Tactic 4.2.2:** Increase Employee Training to **20 hours/year**  
**Measure:** Average Hours of Training completed by front line employees

**Lead:** Facilities Business Office

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

**FY 16**

*Training Hours for front line employees by Quarter*



**Annual Target**

**FY 2016**  
 Annual Target - 7,760 hrs  
 3<sup>rd</sup> Qtr. Target - 1,940 hrs  
 -----  
 Actual YTD  
 2,566.5 hrs (33%)  
 Actual 3<sup>rd</sup> Qtr.  
 1343.5 hrs (69%)

**ANNUAL**

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

**Objective 4.3: Create and Maintain a Quality Work Environment**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN FOR IMPROVEMENT**

Survey Logistics:

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

Lead  
FM Wide

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

**Objective 4.4: Improve Employee Safety**

- |                      |   |
|----------------------|---|
| <b>Tactic 4.4.1:</b> | Reduce the number of reportable accidents by 20%        |
| <b>Tactic 4.4.2:</b> | 98% of Mandatory Compliance Training completed annually |

**Lead:** FM Wide

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

**ACTION PLAN FOR IMPROVEMENT**

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

**Efforts to reduce accidents:**

Safety Training Provided FY16 YTD – 881 hours

- |  |            |
|--|------------|
| • Safety Training Taskforce (Collaborative initiative with EHS)        | Ongoing    |
| • Arc Flash Awareness Training (Grainger, March 2016)                  | March 2016 |
| • Electrical Troubleshooting & Preventive Maintenance                  | June 2016  |
| • Electrical Safety (High Voltage & Electricians)                      | June 2016  |
| • Initiate Safety related activities                                   |            |
| • FM Safety Committee meeting  | Bi-monthly |
| • Supervisor Safety Talks ( <i>12-month topics posted to website</i> ) | Monthly    |
| • Safety Slogan Contest - " <u><i>Safety Pays In Many Ways</i></u> "   | July 2016  |
| • Current Stats for Accident/Incident Totals (FY16)                    |            |
| • Accidents - 6  | 2016 FY    |
| • Minor incidents – 0  |            |
| • February & March – Zero Accidents!!                                  |            |

Lead  
FM Wide

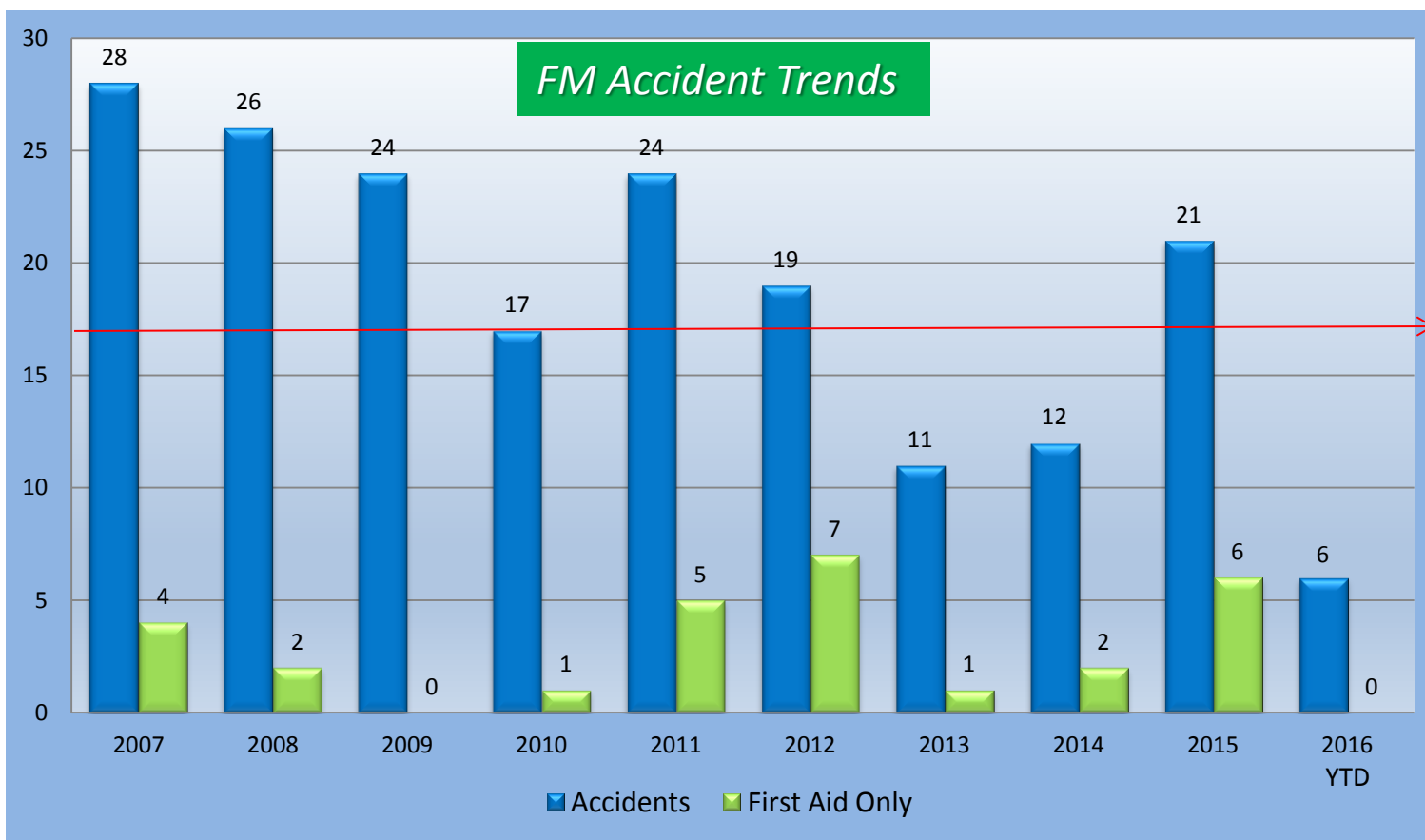
**GOAL #4 Recruit, Develop and Retain Quality Employees**

**Objective 4.4: Improve Employee Safety**

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

**Lead:** FM Wide

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



2016 Continuous Improvement Target ≤ 17

STATUS

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

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

**Lead:** Facilities Business Office

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

**ACTION PLAN FOR IMPROVEMENT**

Action Item	Target Date
<b>FM Academy</b>	
<ul style="list-style-type: none"> <li>• Web Content Development, working with NiCole Lynch, FM Communications Officer, for updates on Learning &amp; Development webpage.                             <ul style="list-style-type: none"> <li>– Online training evaluation form posted to FM website</li> <li>– Supervisor Safety Talk (SST) topics 2016 calendar published</li> <li>– Commonly used FM Acronyms listing (published Feb 2016)</li> <li>– Training vendor sourcing &amp; selection (as needed/as funded)</li> <li>– Updates to website on upcoming L &amp; D events</li> </ul> </li> </ul>	Ongoing
<b>Leadership</b>	
<ul style="list-style-type: none"> <li>• Hosting APPA leadership workshops onsite*. Level 1 completed May 2015                             <ul style="list-style-type: none"> <li>– *APPA Leadership Academy (Level II)</li> <li>– *APPA Leadership Academy (Level III)</li> <li>– *APPA Supervisor Toolkit</li> <li>– APPA Leadership Academy (Level IV in FL)</li> <li>– Updates to FM Leadership Development Matrix</li> </ul> </li> </ul>	Feb 2016 Mar 2016 June 2016 Sept 2016 In Process
<b>Technical</b>	
<ul style="list-style-type: none"> <li>• Working with Materials Management on RFP process to secure onsite training providers.                             <ul style="list-style-type: none"> <li>– Electrical Troubleshooting &amp; Preventive Maintenance</li> <li>– Interscope Plus Training (Capital &amp; Design Services)</li> <li>– Electrical Safety (High Voltage &amp; Electricians)</li> <li>– Investigate Apprenticeship Program</li> </ul> </li> </ul>	Mar 2016 April 2016 June 2016 In Process



UNC CHARLOTTE

Transparency, honesty, kindness,  
good stewardship, even humor,  
work in businesses at all times.

John Gerzema

## GOAL #5

# Promote Good Stewardship





**GOAL #5 Promote Good Stewardship**

**Objective 5.1: Promote Fiscal Responsibility**

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

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN FOR IMPROVEMENT**

Finance/Budget:

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

Supplemental Grant/Award Funding:

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

**GOAL #5 Promote Good Stewardship**

**Objective 5.1: Promote Fiscal Responsibility**

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

**Balanced Scorecard Category:** Financial Perspective

**ACTION PLAN FOR IMPROVEMENT**

Cost Accounting – Ongoing Improvements

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

**GOAL #5 Promote Good Stewardship**

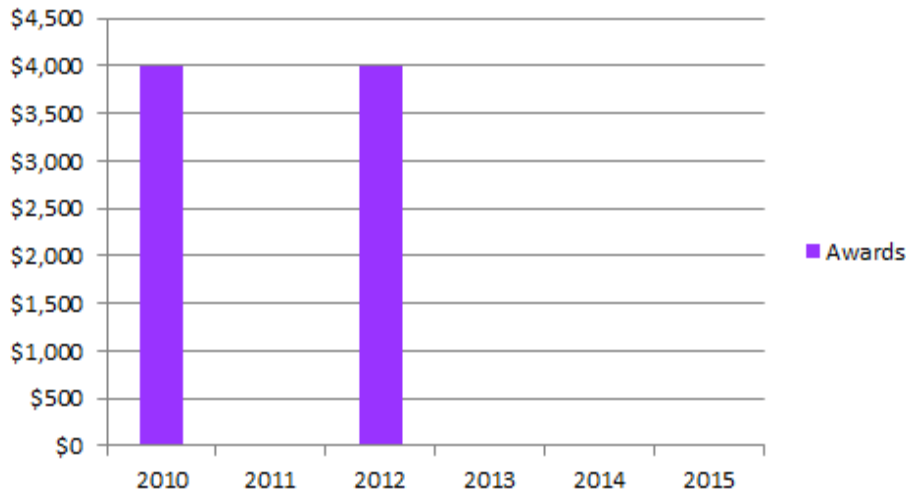
**Objective 5.1: Promote Fiscal Responsibility**

**Tactic 5.1.2:** Increase Supplemental Funding to the Department by 10% annually  
**Measure:** Percent increase in supplemental funding

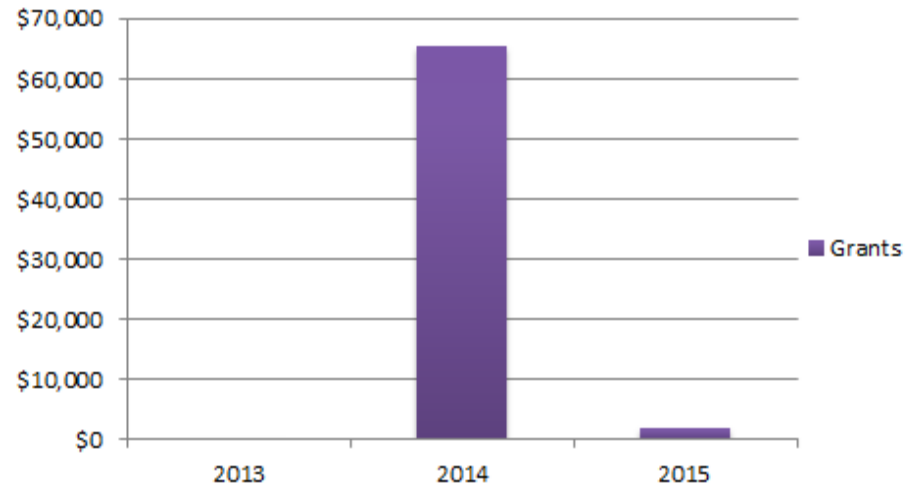
**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

**Monetary Awards**



**Grants**



ANNUAL

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

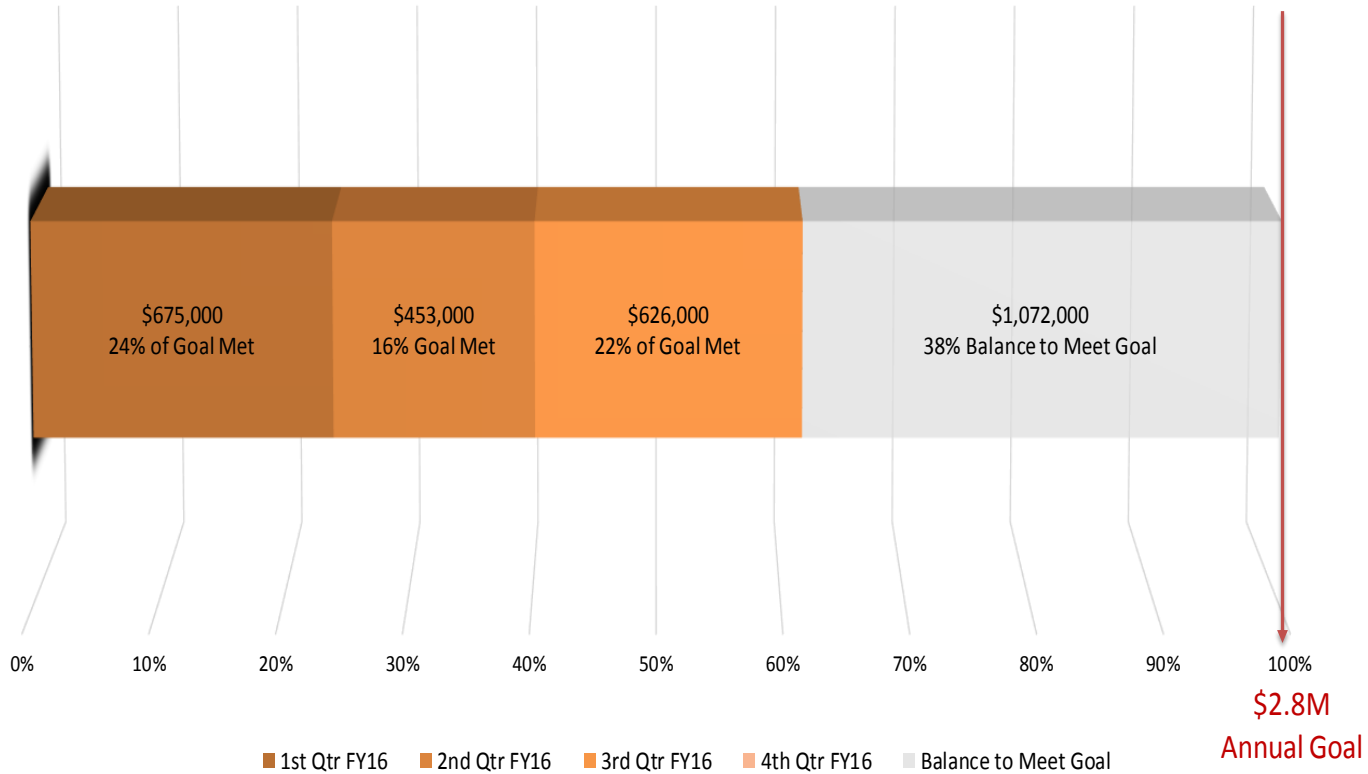
**Tactic: 5.1.7:** All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

**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 2016



Objective 5.2: Develop a Sustainable Campus

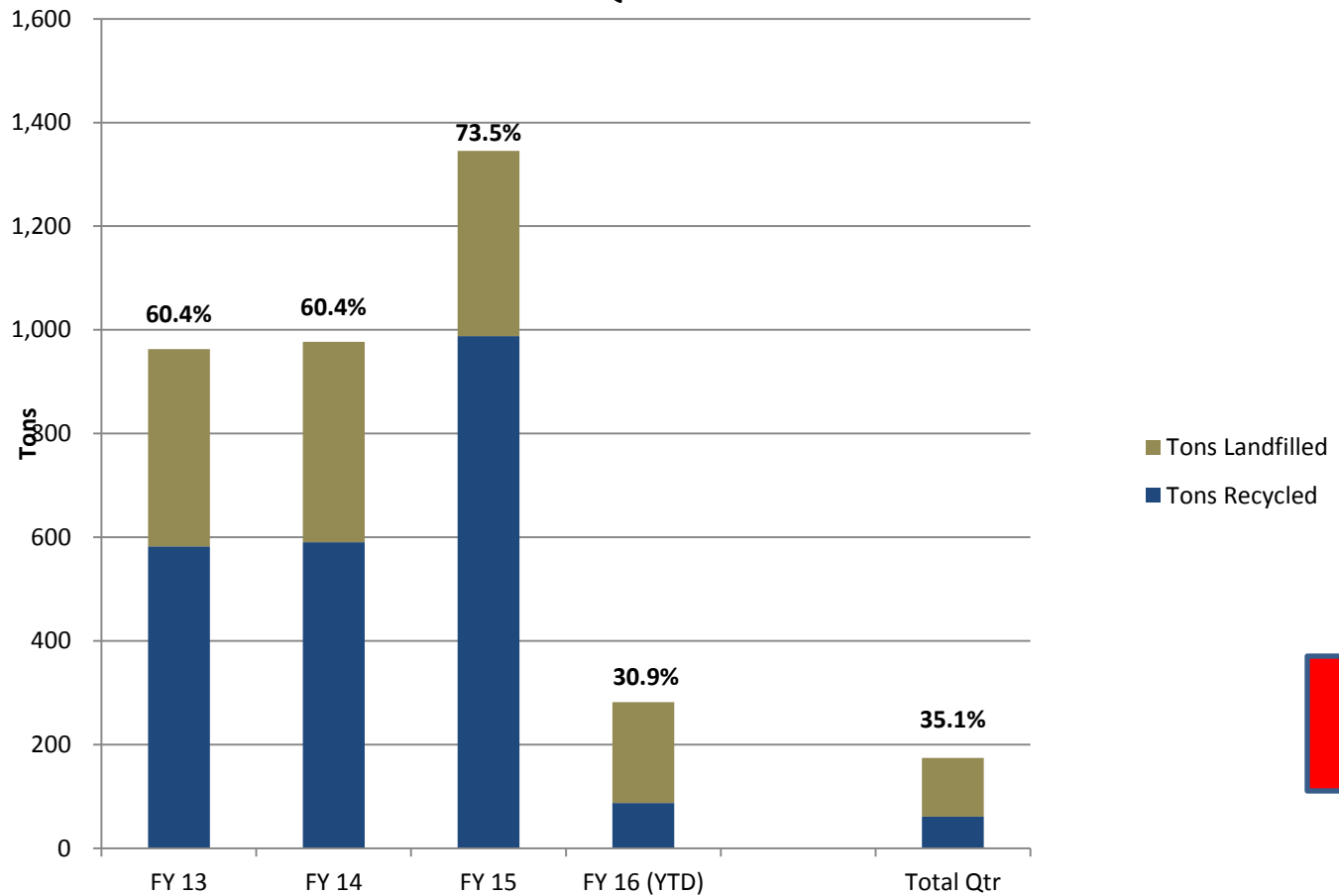
## Tactic 5.2.1

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

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

Balanced Scorecard Category: Innovation and Learning Perspective

## Construction & Demolition Debris Diversion 3rd Quarter FY16



**STATUS:**  
3rd Qtr

**GOAL #5 – Promote Good Stewardship**

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

**ACTION PLAN**

• **Waste Reduction and Recycling**

**Actions Complete**

- Continuing work with HRL to increase recycling rates in residence halls.
- Continuing training new C&D Coordinator.
- Planned Spring Campus Cleanup, Tree Planting, and Earth Day.
- Departmental training - waste audits on our Recycling roll-offs at ReCommunity (February 15 – this resulted in a 50% decrease of our \$\$/per ton)
- Increase social media presence – Twitter, Facebook, Instagram – strong effort to post every day (every other day at the least).
- Well on our way to completing our storage structure for universal waste!!!!



**4th Quarter Actions Planned**

- Begin using our universal waste storage building.
- Continue work on increasing social media presence – Twitter, Facebook, Instagram.
- Place about 25 recycling bins in housing quads (continue working with HRL to pair up all trash and recycling bins)
- Increase education component – beginning with HRL and creating signage to place this summer.
- Continue work on long-term recycling plan.

# Facilities Management Strategic Planning Session – Third Quarter FY 2016



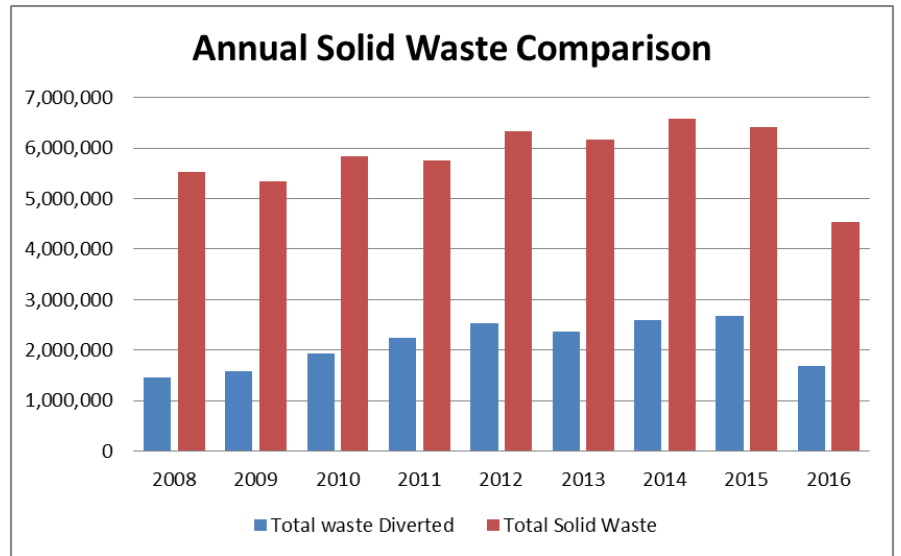
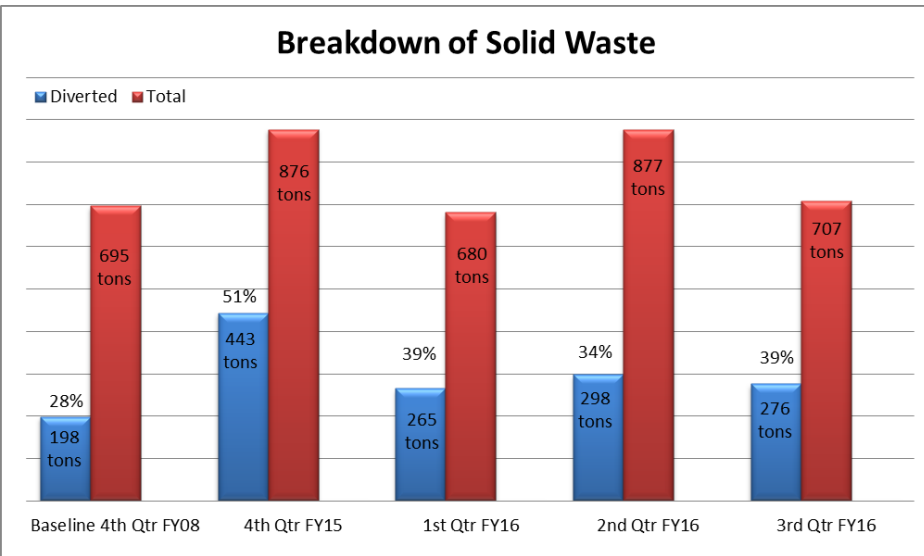
## Tactic 5.2.2

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

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



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



**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

**ACTION PLAN**

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

**STATUS**



**GOAL #5 – Promote Good Stewardship**

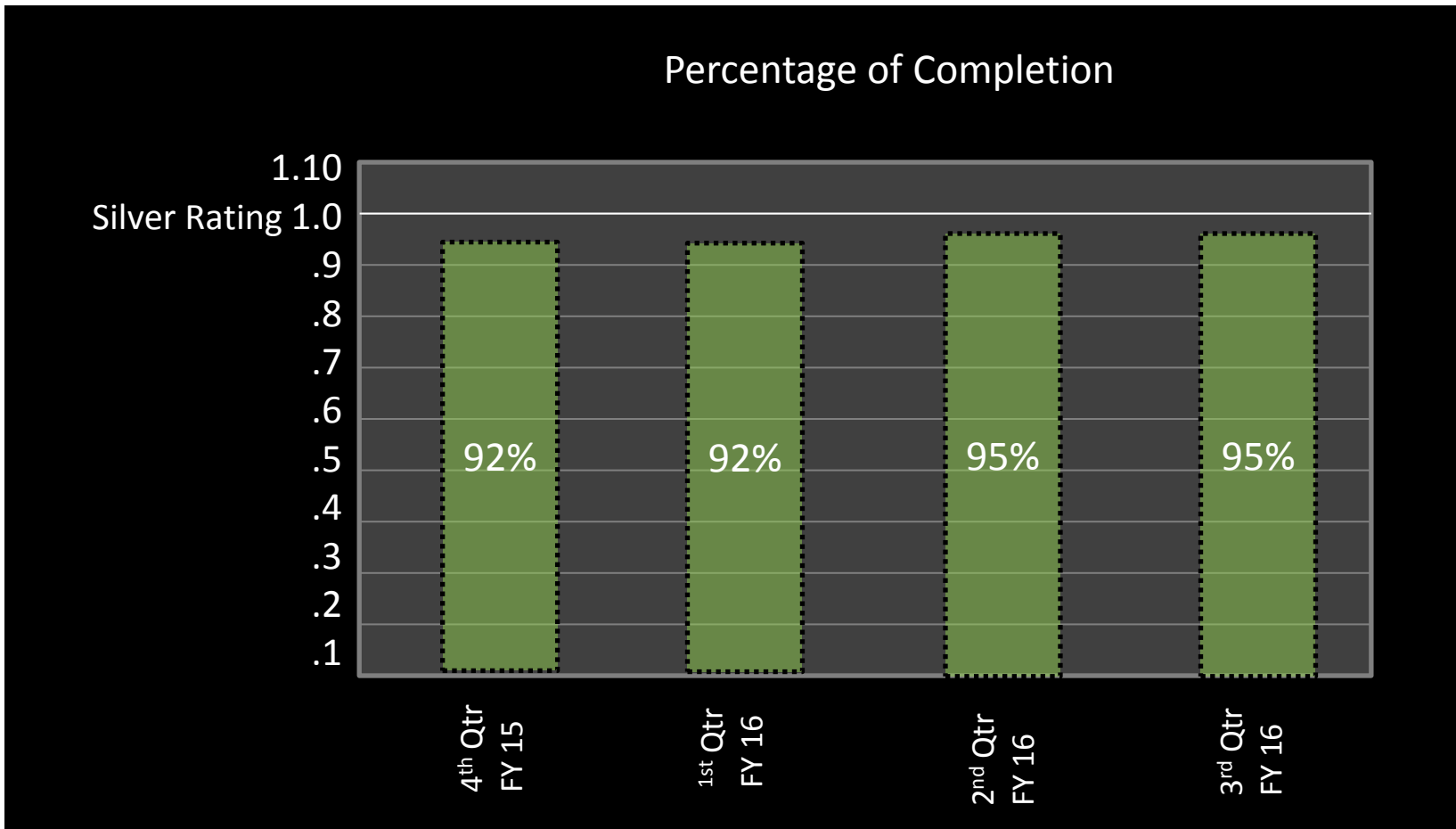
**Objective: 5.2: Develop a Sustainable Campus**

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

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

**Lead:** Facilities Planning

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



STATUS

**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

**ACTION PLAN**

- **Apply 7 themes for implementing best practices:**
  1. **Assessment (June STARS Submission)**
  2. **Faculty Development for Curriculum (May Workshop for Faculty)**
  3. **Campus as a Laboratory (CGI: \$28k for studies underway, supplies)**
  4. **Outreach Communications (Website development; CGI: \$5k for signs)**
  5. **Design Standards**
    - **CGI: biking, water, recycling; completed \$56k underway)**
    - **CFAT: \$64k for car-charging stations, ordered equipment**
  6. **Standard Operating Procedures (CFAT \$15k and CGI \$15k for EV monitoring)**
  7. **Purchasing Practices (Need to start new Task Force)**
- **Estimated 63% of best practices implemented by (>60% in July 2015; COMPLETED):**
  - **Continue: In-house certifications (e.g. Green Office)**

STATUS

**GOAL #5 – Promote Good Stewardship**

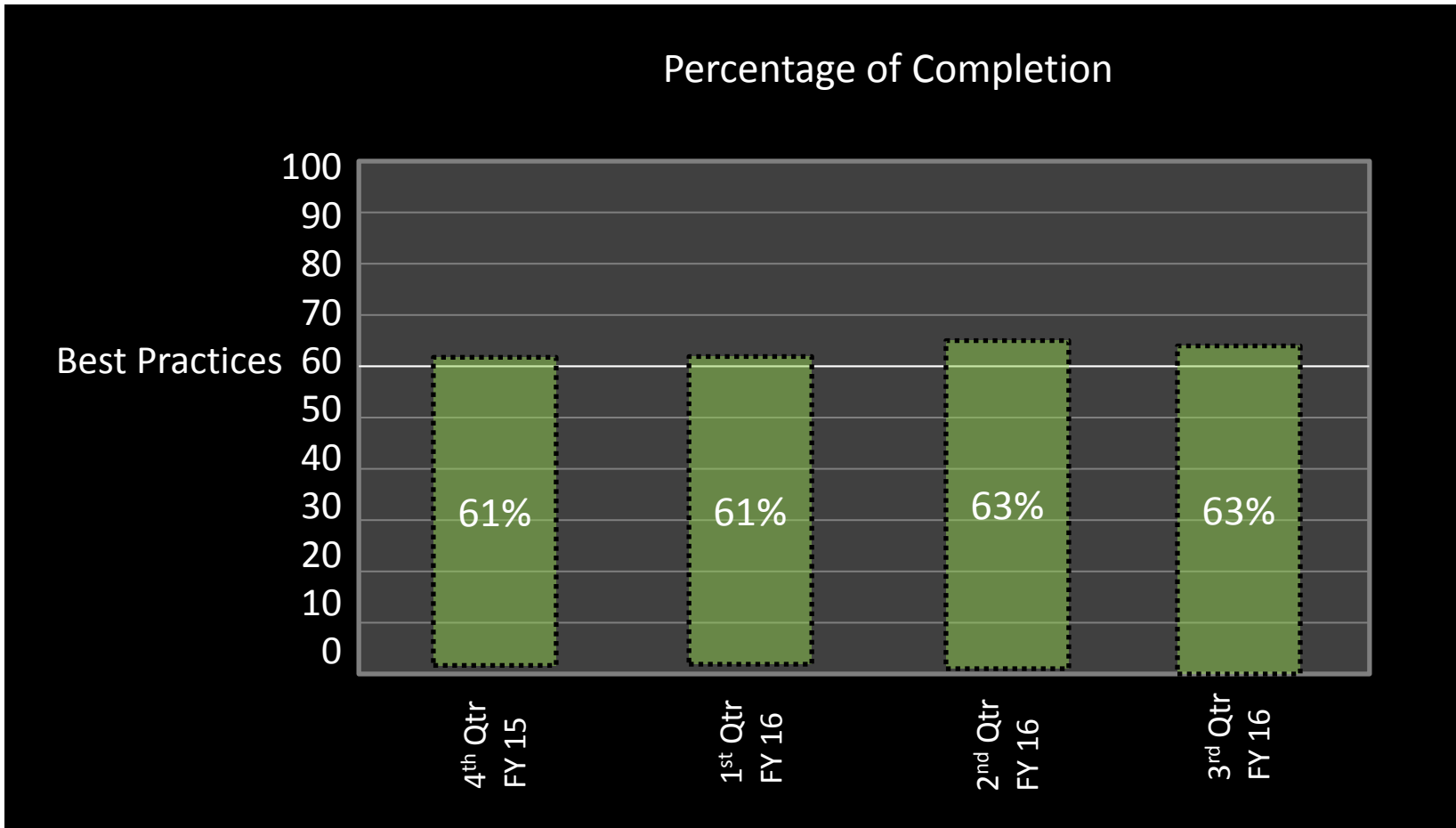
**Objective: 5.2: Develop a Sustainable Campus**

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

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

**Lead:** Facilities Planning

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



**GOAL #5 – Promote Good Stewardship**

<b>Objective</b>	<b>5.3</b>	Conserve Natural Resources
<b>Tactics</b>	<b>5.3.1</b>	Decrease Energy Usage 40% by FY2025

**ACTIONS TO REDUCE CAMPUS  
ENERGY USAGE**

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

# Facilities Management Strategic Planning Session – Third Quarter FY 2016

Lead  
Capital

## GOAL #5 – Promote Good Stewardship

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

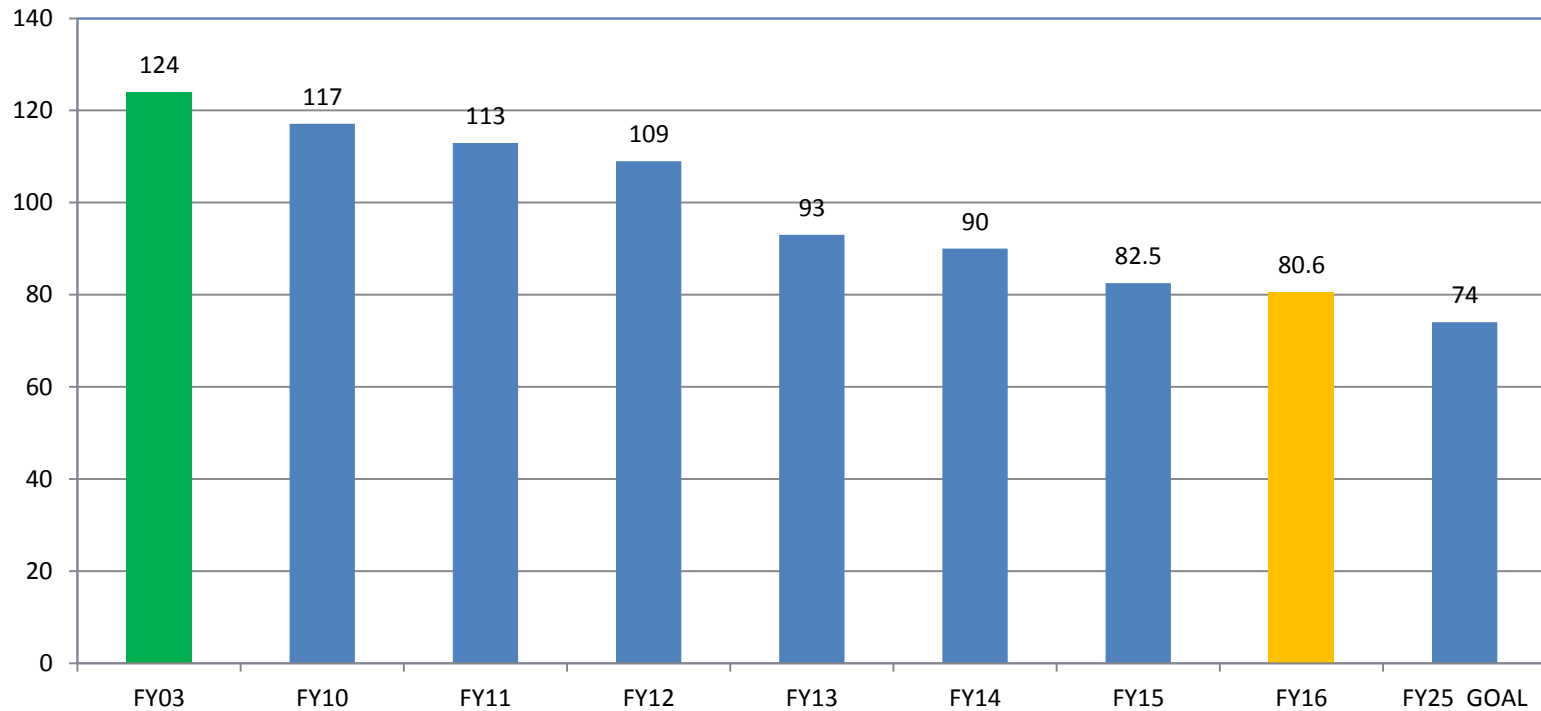
**Measure:** BTUs/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

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

STATUS

### CAMPUS ENERGY USAGE Kbtu/GSF



Lead  
Capital

**GOAL #5 – Promote Good Stewardship**

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

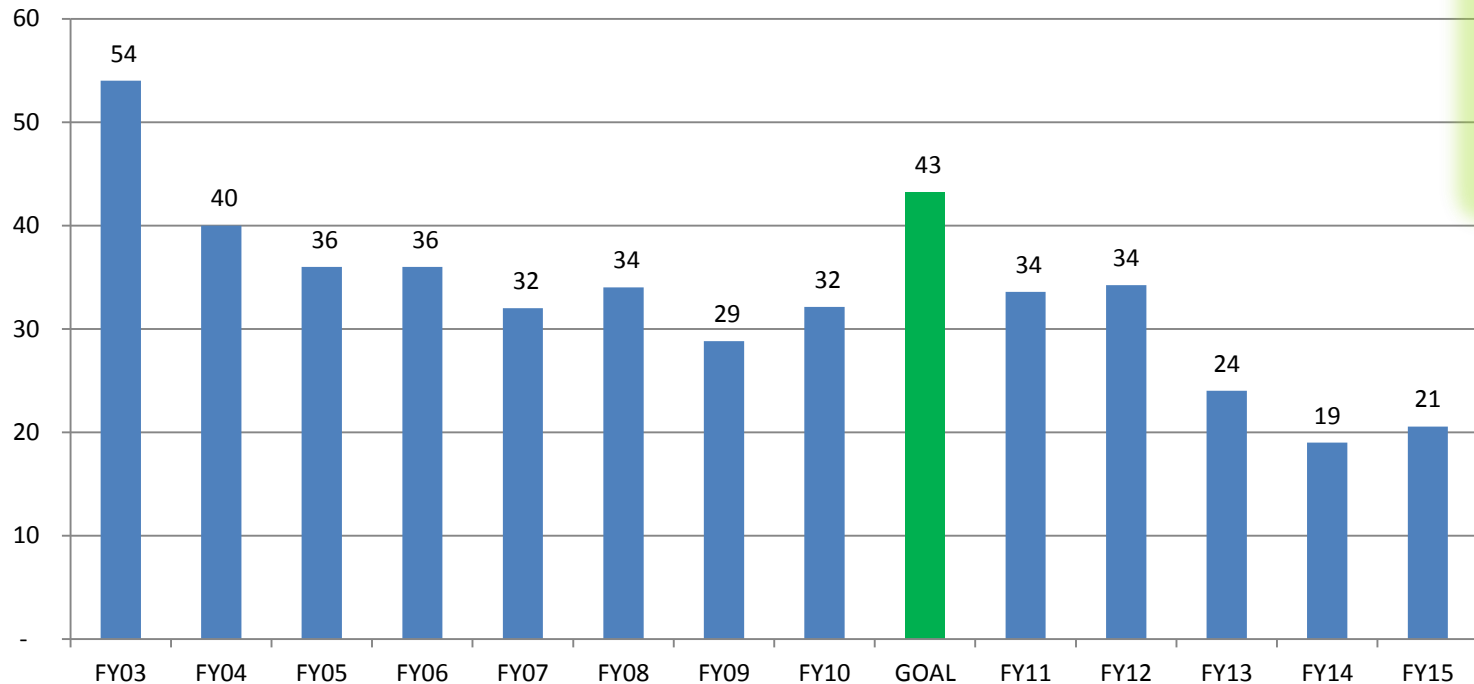
**Measure:** Gallons/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

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

Goal 43 Gal/GSF  
Actual 21 Gal/GSF

STATUS



Exceeded Goal in FY10. No new report

**GOAL #5 – Promote Good Stewardship**

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

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

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

**ACTION PLAN**

- Hosted Construction *Meet & Greet* March 10, 2016
- Establish project specific participation goals for single prime projects
  - 20% goal for RDH; obtained 46%
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *GFE* documentation for compliance before 1<sup>st</sup> tier subcontracts are awarded on CMAR projects
- Work with internal/external groups to identify skilled HUB contractors
- Work with GA/SCO/DOA to ensure HUB information is accurately reflected in InterscopePlus
- Work with SCO to revise new Prequalification Policy

**GOAL #5 – Promote Good Stewardship**

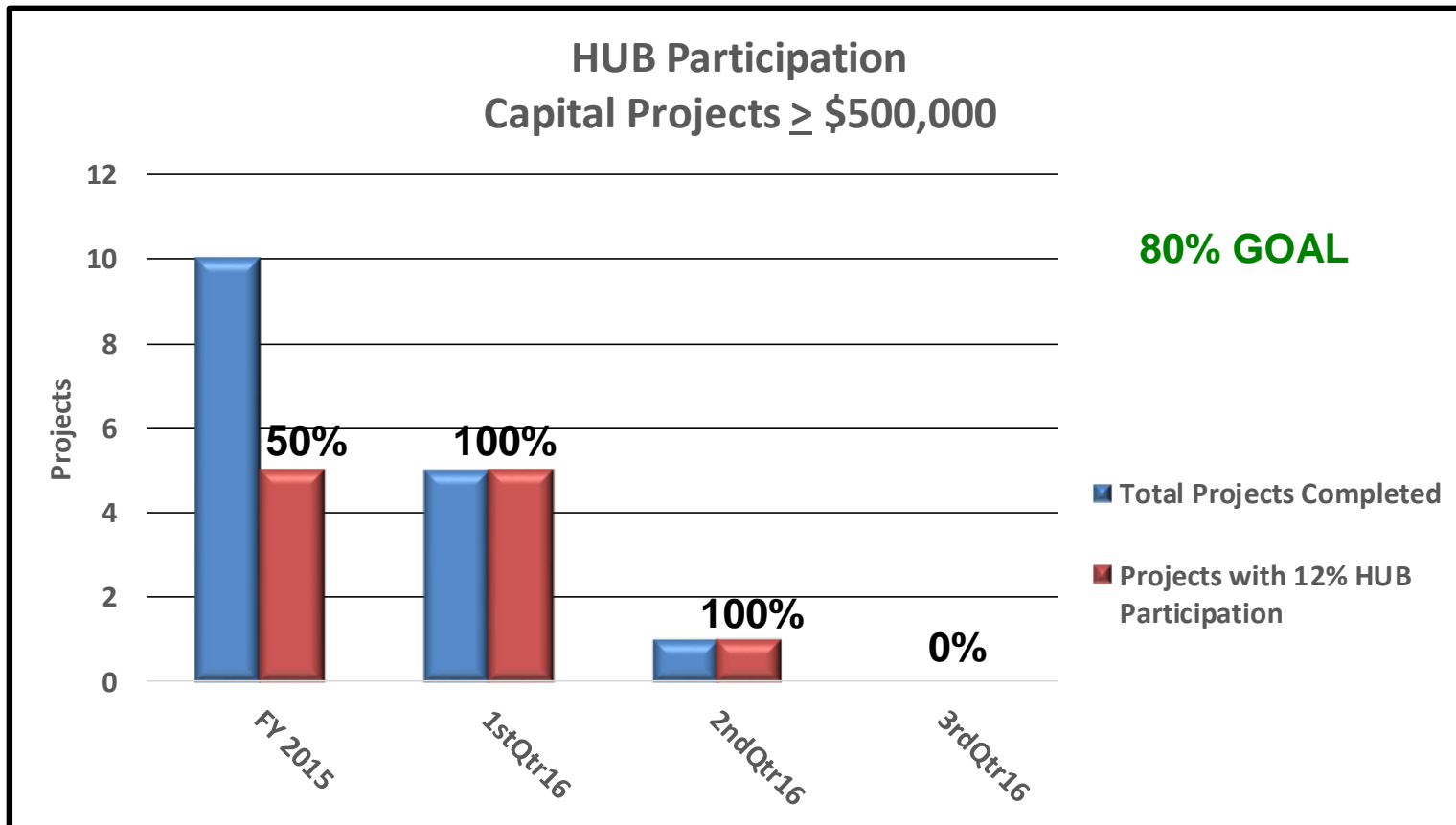
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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





**GOAL #5 – Promote Good Stewardship**

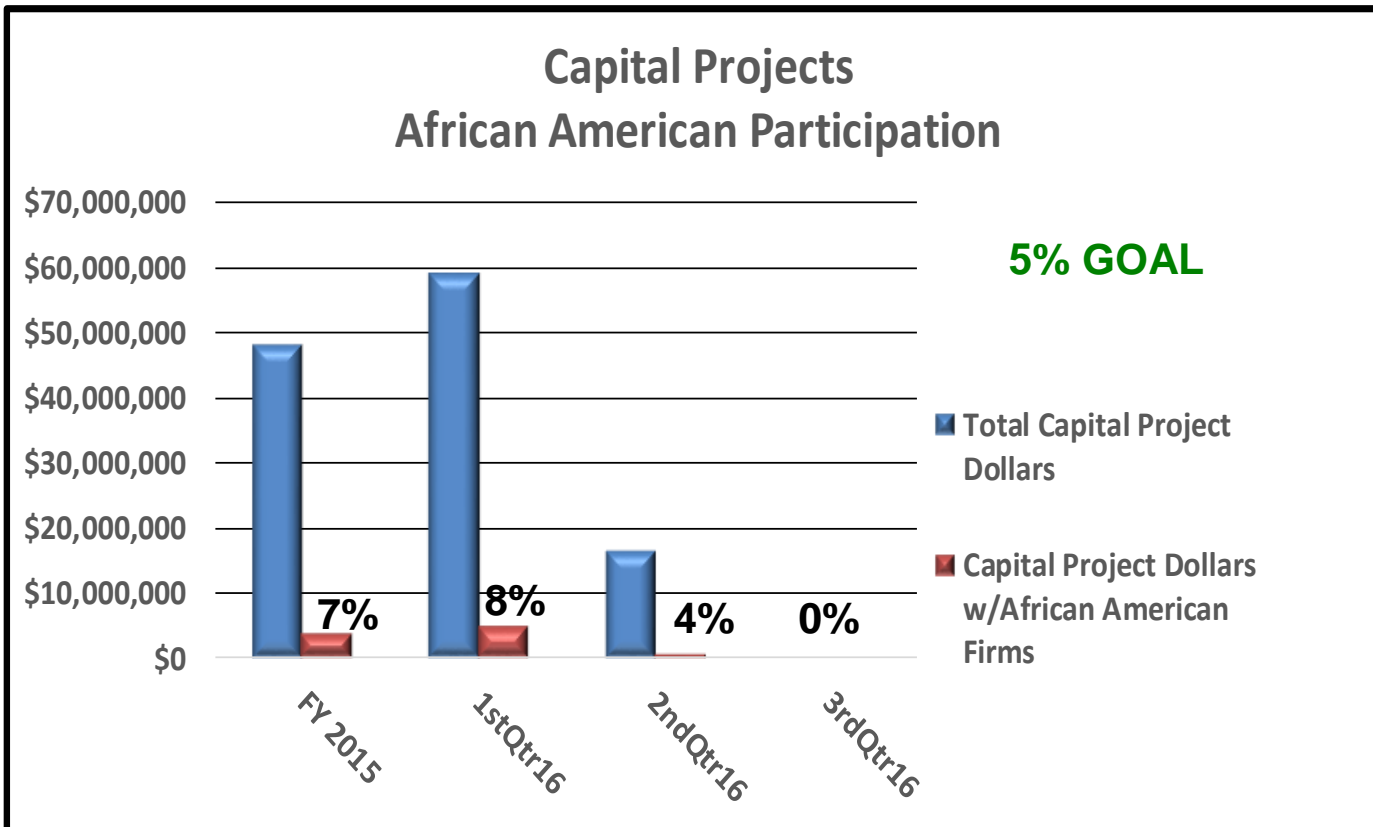
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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



NO  
STATUS

**GOAL #5 – Promote Good Stewardship**

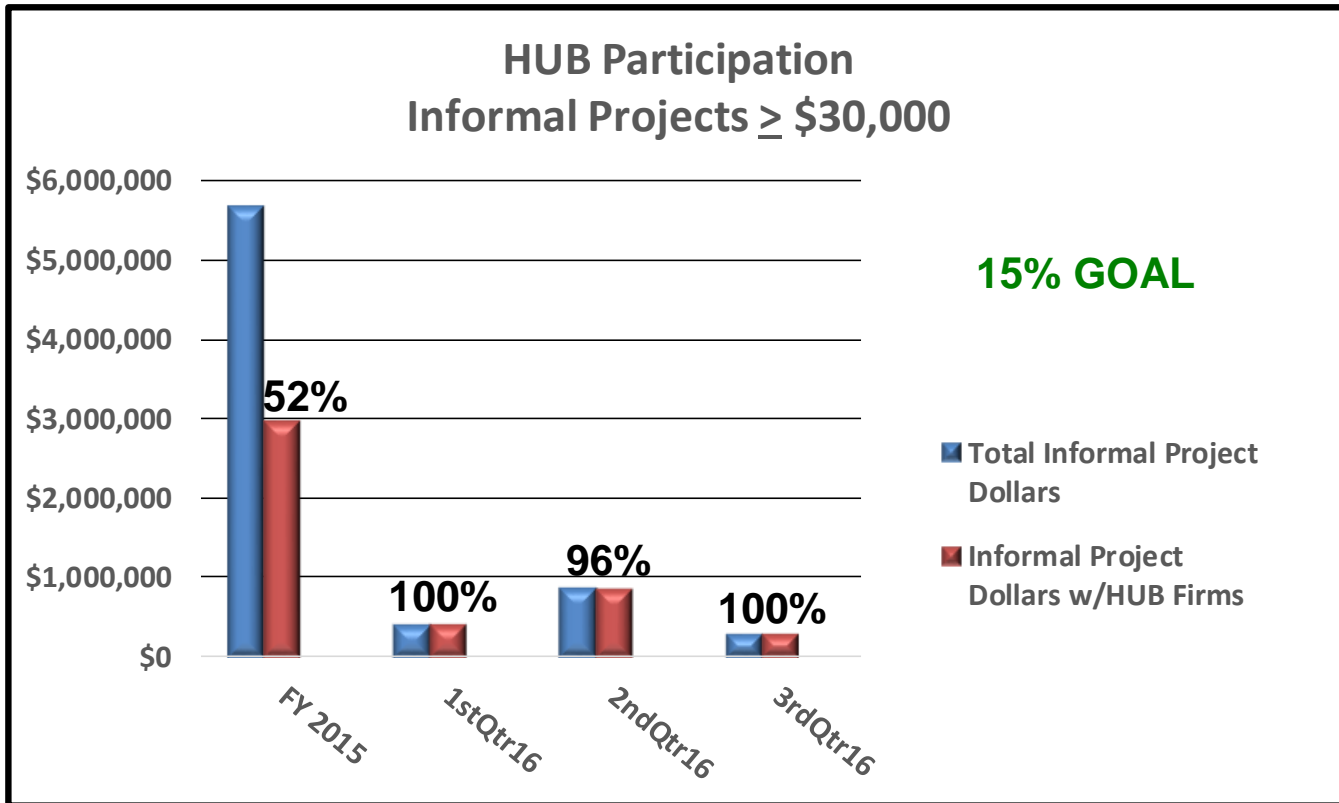
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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:** Financial

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

**ACTION PLANS FOR IMPROVEMENT**

NEW IMPROVEMENTS

- Ben Amanda Caudle schedules initial meetings with African American Contractors

Recent Meetings with African American Contractors:

- ◇ KID Construction Co. – General Contractors – Kevin Burns
- ◇ Benet Electrical – Electrical Contractor – Marvin B. Tyler
- ◇ MORCON QUALITY CONSTRUCTION – Myron Ross

- Benet Electrical has been recently used by David Daignault

ONGOING IMPROVEMENTS

- Design Team continue to review and discuss HUB contractors and vendors at our Design Services weekly meetings.
- All Coordinators are encouraged to reach out to new vendors for work on our Under \$30K projects.

<b>Current Status</b> 47.9%	<b>Annual Goal</b> 13.0%	<b>QTR 3 Status</b> 60.4%	<b>Lead - Design Services</b>
--------------------------------	-----------------------------	------------------------------	-------------------------------

**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

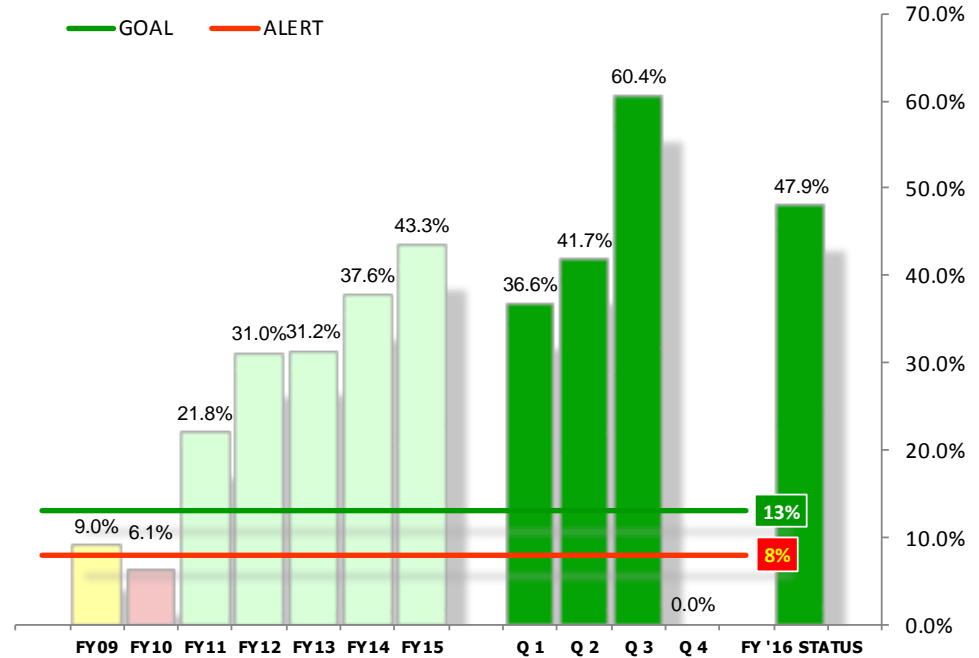
**Balanced Scorecard Category:** Financial

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

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
Q 1	\$ 455,156	\$ 166,732	36.6%
Q 2	\$ 472,858	\$ 197,068	41.7%
Q 3	\$ 643,677	\$ 388,769	60.4%
Q 4	\$ -	\$ -	0.0%
<b>FY '16 STATUS</b>	\$ 1,571,691	\$ 752,569	<b>47.9%</b>



<b>Current Status</b> 3.3%	<b>Annual Goal</b> 3.0%	<b>QTR 3 Status</b> 0.0%	<b>Lead - Design Services</b>
-------------------------------	----------------------------	-----------------------------	-------------------------------

**GOAL #5 – Promote Good Stewardship**

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

Lead: Design Services

**Balanced Scorecard Category: Financial**

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
Q 1	\$ 455,156	\$ 1,250	0.3%
Q 2	\$ 472,858	\$ 29,820	6.3%
Q 3	\$ 0.00	\$ 0.00	0.0%
Q 4	\$ -	\$ -	0.0%
<b>FY16 STATUS</b>	\$ 928,014	\$ 31,070	3.3%

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

