



Strategic Planning Session

**Third Quarter – Fiscal Year 2018
January – March 2018**



...Creating a Campus of Distinction



Strategic Planning Session

Facilities Management's Goals

Goal 1 - Continuously Improve Operation of Campus Facilities

Goal 2 - Create a Reliable and Sustainable Physical Infrastructure

Goal 3 - Foster a Customer Focused Organization

Goal 4 - Recruit, Develop, and Retain Quality Employees

Goal 5 - Promote Good Stewardship

...Creating a Campus of Distinction



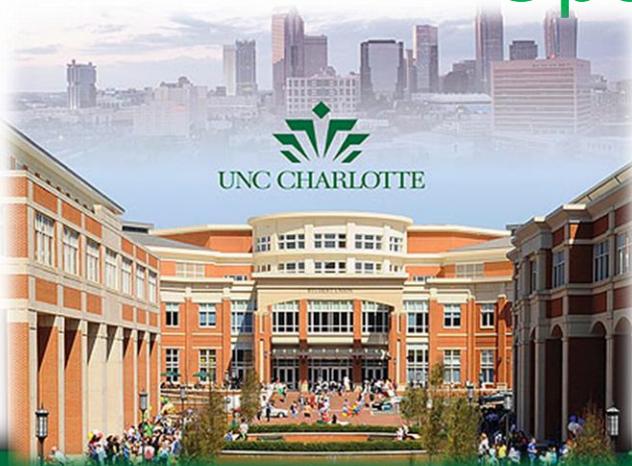
UNC CHARLOTTE

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

-- Harold Geneen, industrialist

GOAL #1

Continuously Improve
Operations of Campus



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

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

ACTION PLAN

Actions Planned

1. Daily assignment; coordinating and monitoring of work effort (on-going)
2. Working with FIS on the “work order reinvention project”
3. Working w consultant to discuss WO process and materials acquisition strategies

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

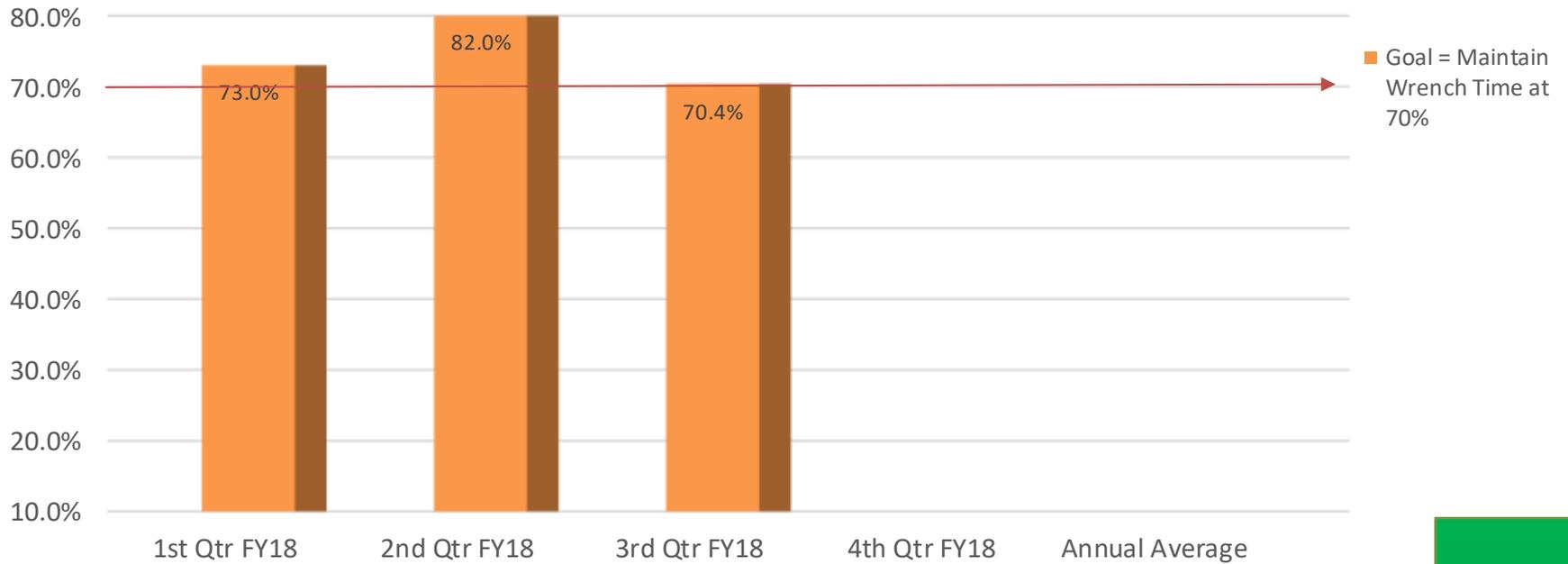
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process

Wrench Time



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

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

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

ACTION PLAN

Actions Planned

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

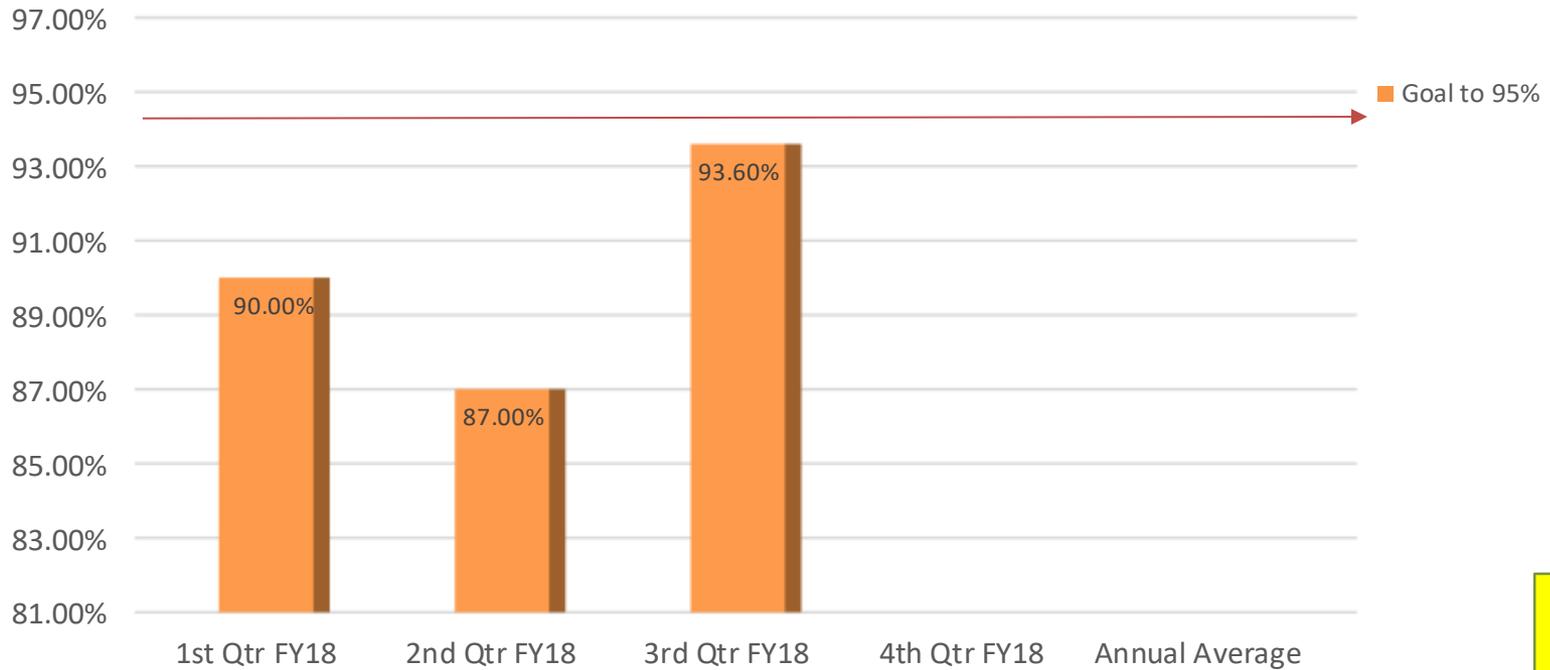
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Non-stock on-time Delivery



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

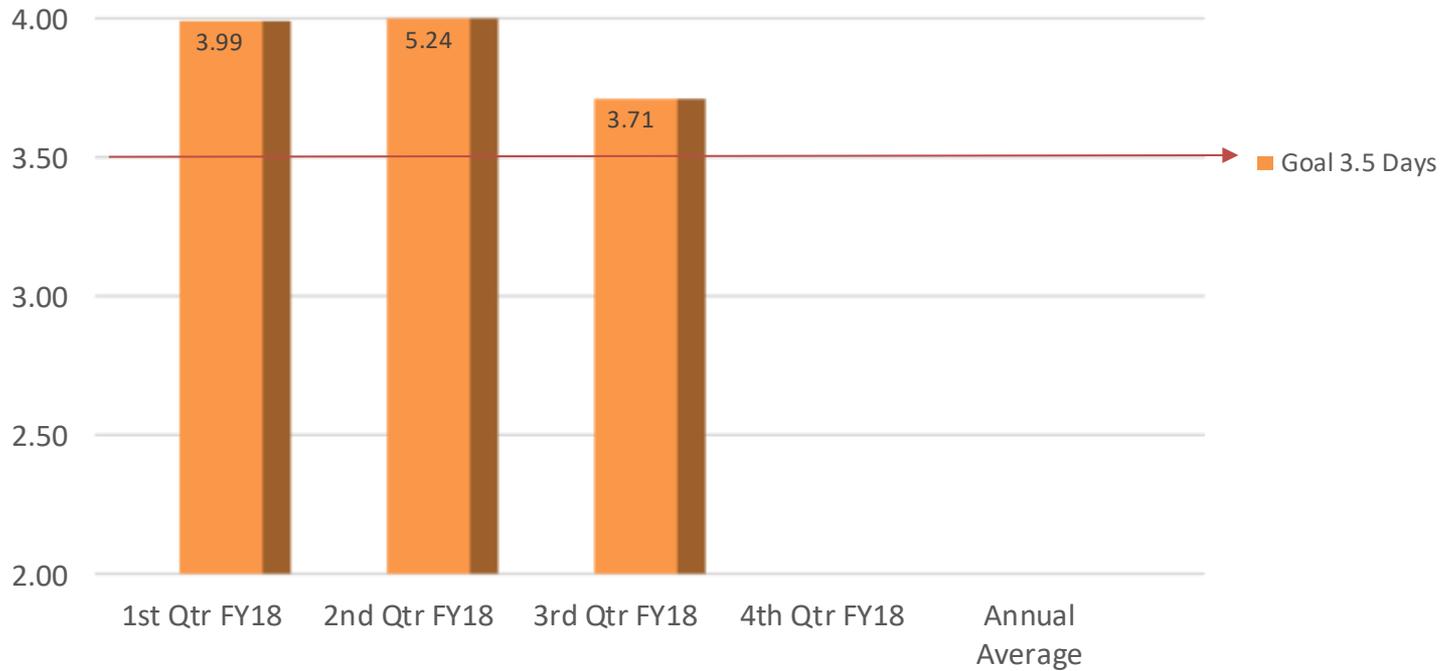
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

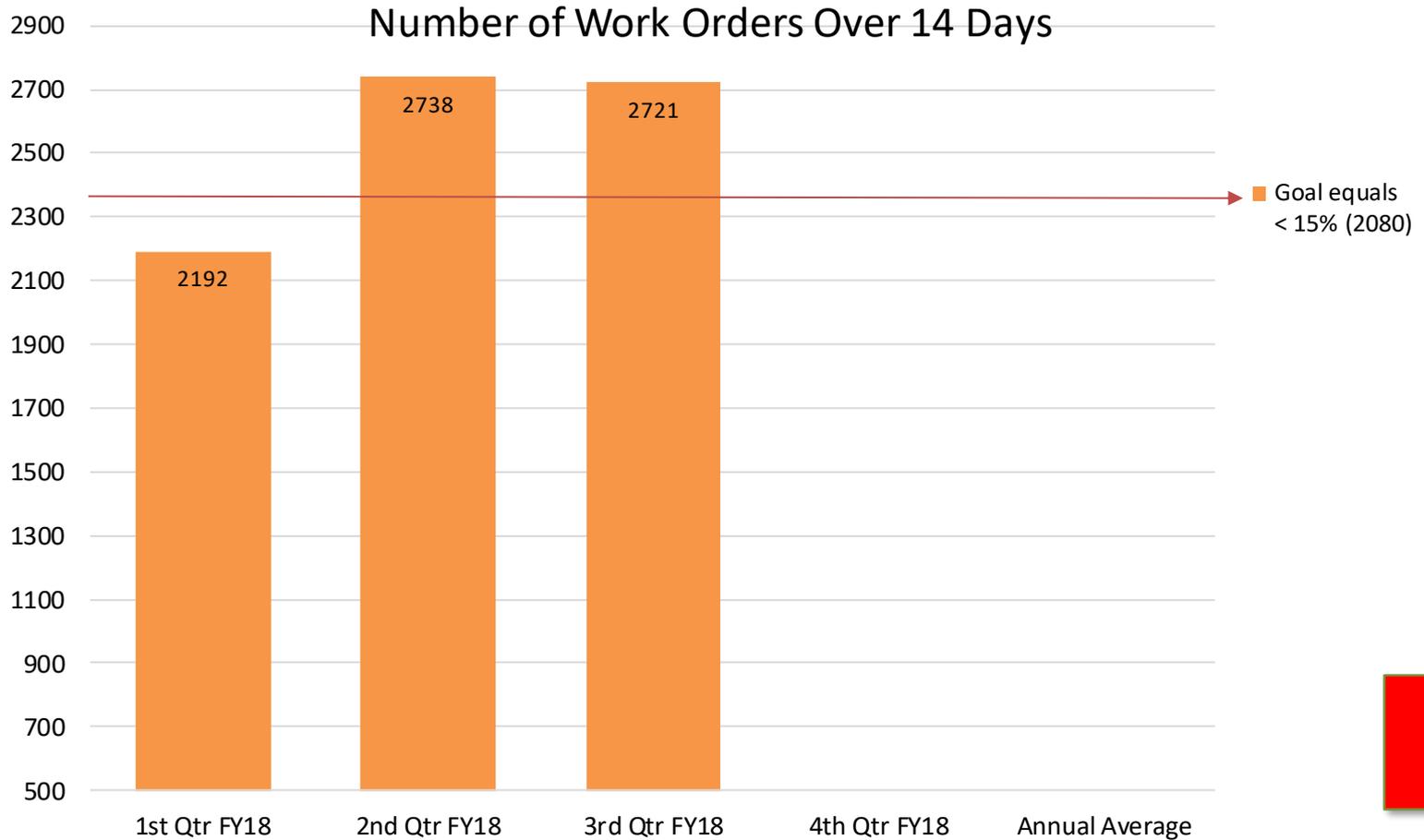
Objective: 1.3: Improve Work Request Process

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

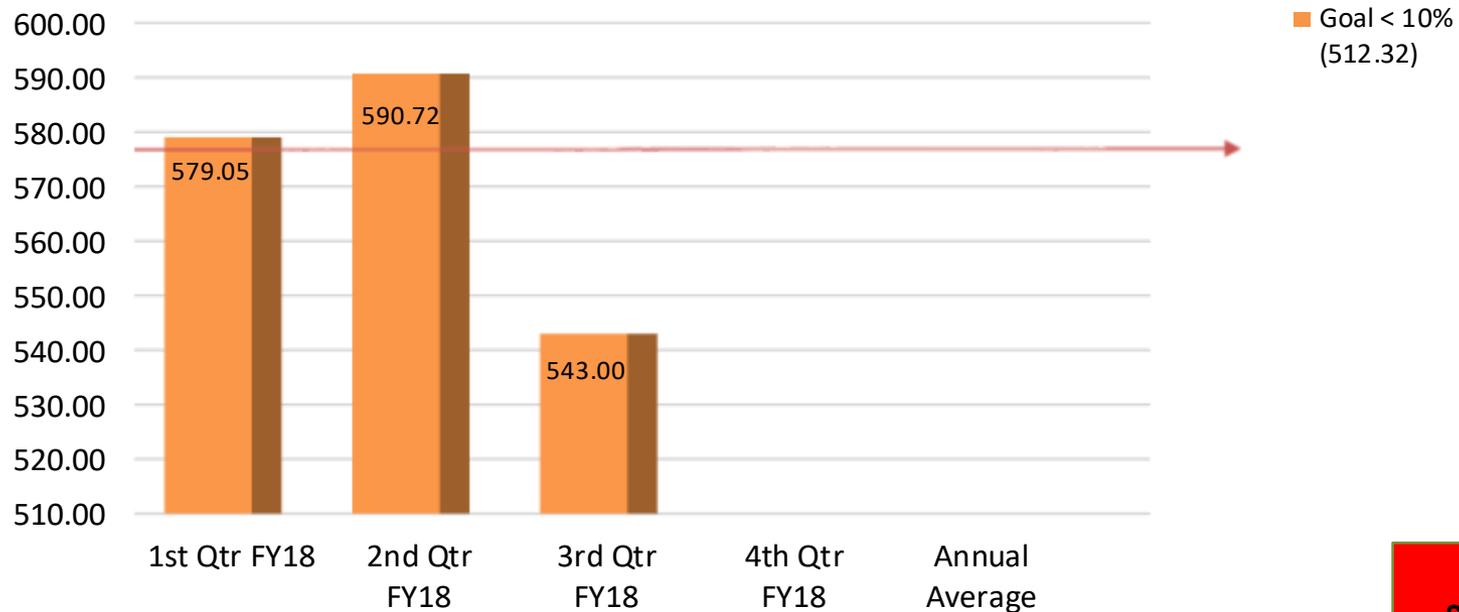
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

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**
 - Completed 3 Contributing Technician Hiring Pool Cycles
 - Placed Lead Technician Keys into Key Boxes with Current Key Slot Openings
 - Completed 2nd cycle of “Expect What You Inspect” Inspections
- **Actions Planned**
 - Implement new HPTC Digital Training Platform (5/2018)
 - Develop new APPA Appearance forms into quarterly audits (6/2018)
 - Implement High Performance Team Cleaning in all Academic and Administrative buildings (3/2022)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (Ongoing)

Facilities Management Strategic Planning Session – Third Quarter FY 2018

Lead
BES

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

Objective: 1.4: Improve BES Processes

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

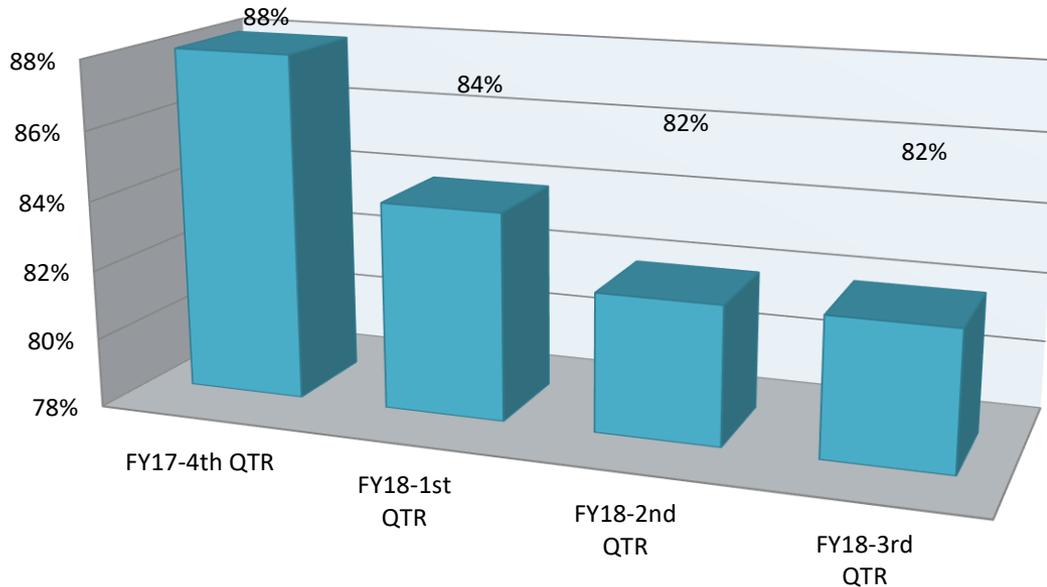
Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Lead: Building Environmental Services

Balanced Scorecard Category: Customer Perspective

APPA LEVELS

Percentage = 82%



STATUS

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

ACTION PLAN

Actions Planned

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

Actions Completed

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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

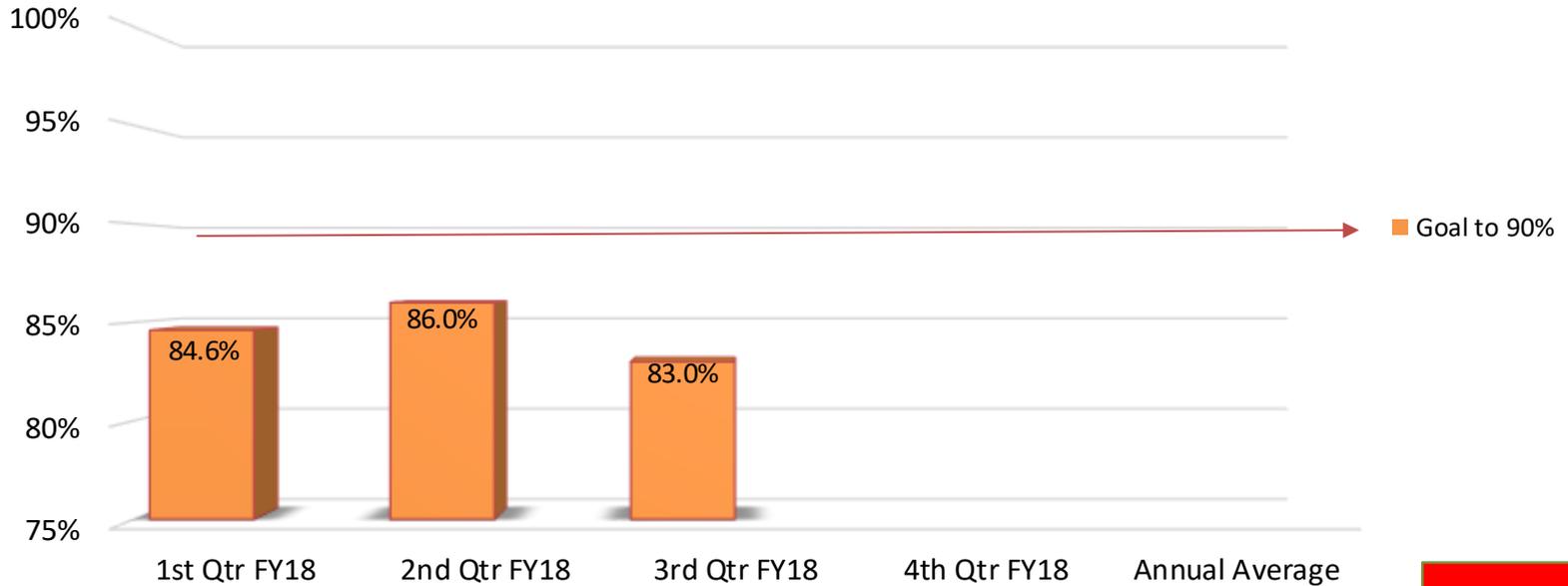
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

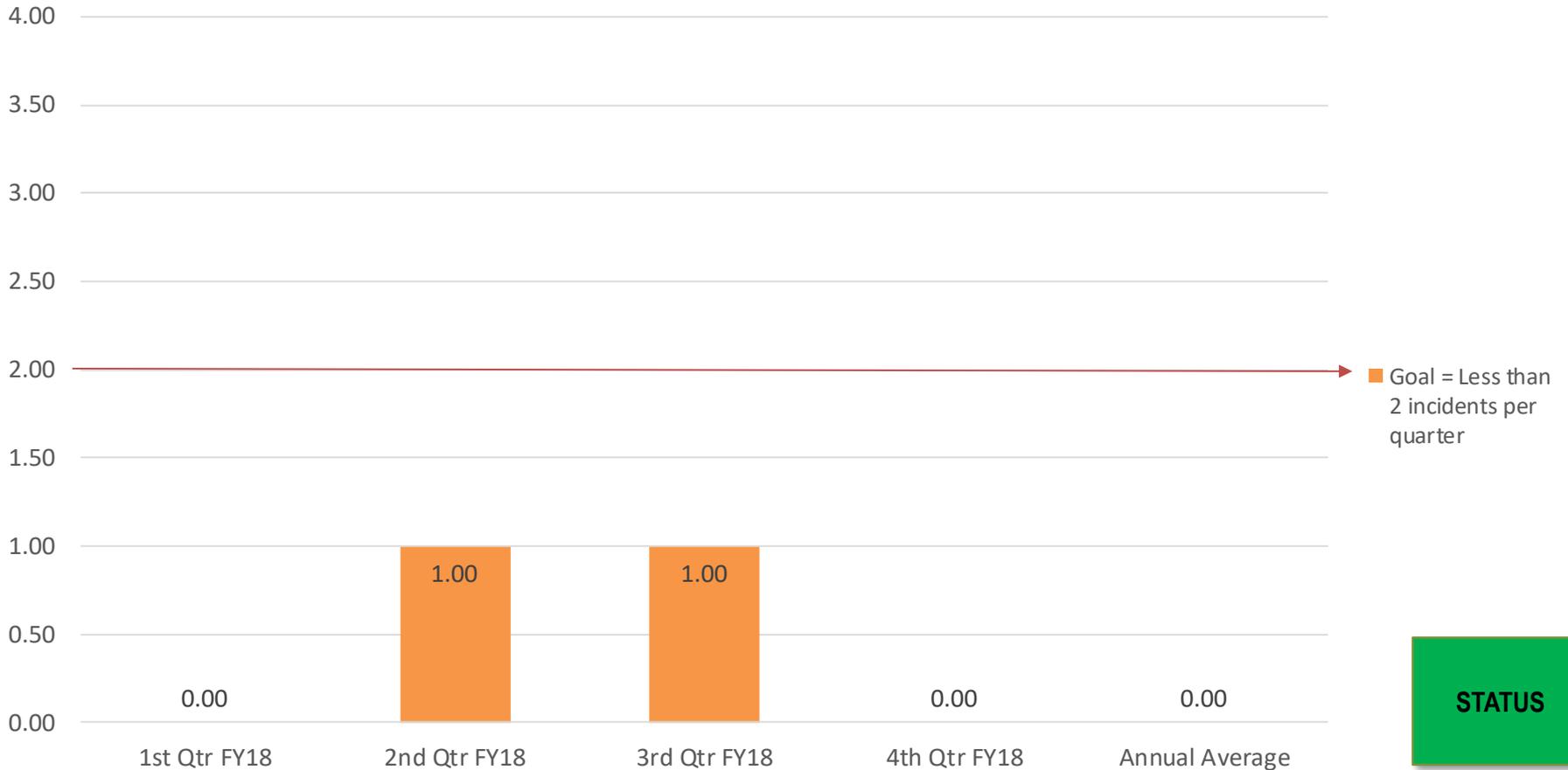
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

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

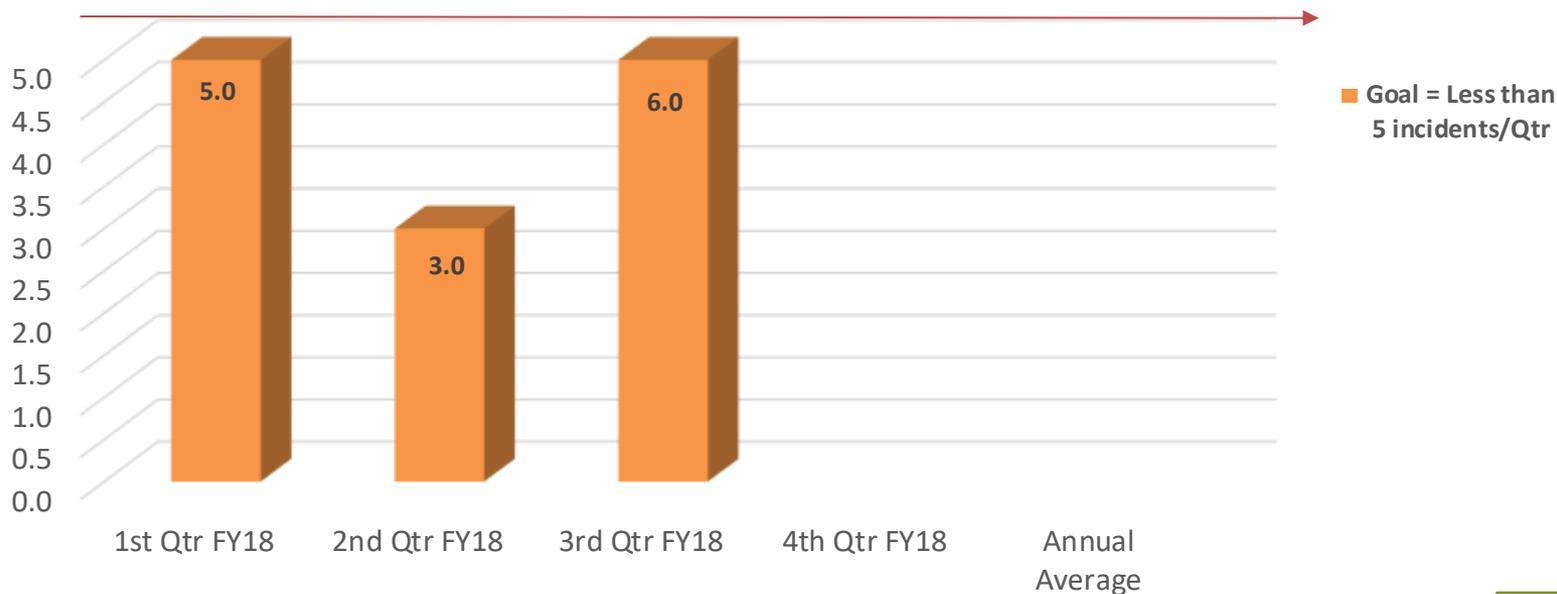
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

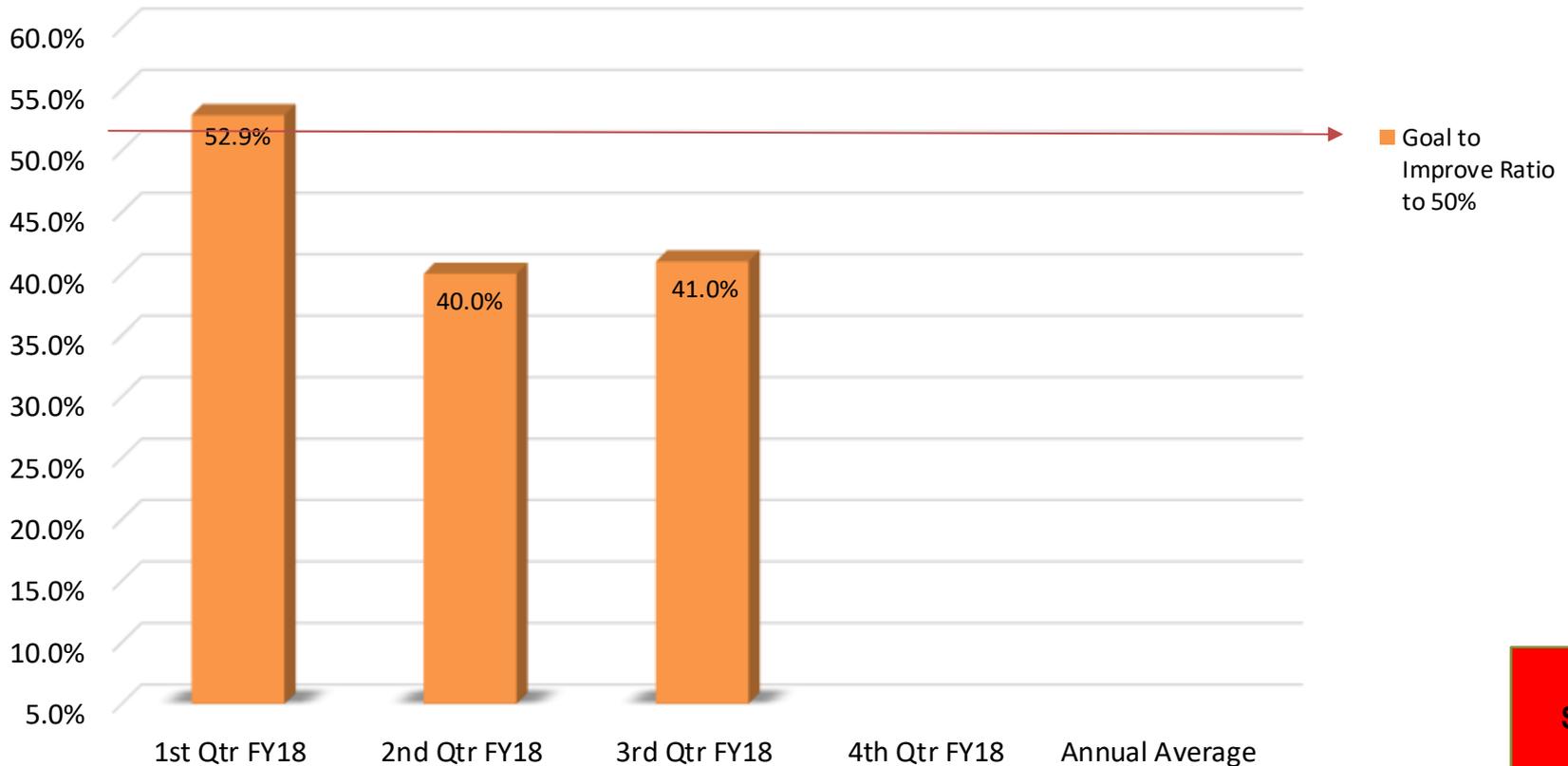
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

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



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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



FM Prioritized Projects – FY18

COMPLETED PROJECTS:

1. Primary Investigators (SPACE)
2. Design Services Report Updates
3. KRONOS ARCHIBUS Training Import
4. Google Sheets Integration
5. AD PC Inventory Clean Up
6. Active Directory Migration
7. FY18 Computer Replacement Project
8. Asbestos Updates
9. Classroom Support Asset Tracking
10. Space Committee Changes (SMAC)
11. Refrigeration Compliance Phase 2
12. BES Recycling Bin Revamp
13. Avigilon Upgrade
14. Open Options Data Purge
15. MISC Map Updates
16. ARCHIBUS Security Remediation
17. Light Rail Cameras (Genetec)
18. RUP2 JACE Integration

FM Prioritized Projects – FY18

PROJECTS IN PROGRESS:

1. **ARCHIBUS WO Reinvention** – Est. Jun 30, 2018
2. **Real Estate Phase 3** – Jun 30, 2018
3. **ARCHIBUS Canvas Training** – Est. June 30, 2018
4. **Open Options Integration (HRL)** – Jun 1, 2018
5. **Open Options Conversion Project Phase 1** – Est. Jun 30, 2018
6. **BAS FIN Tagging** – Est. Apr 30, 2018
7. **FIN STACK Energy Report** – Est. Jun 30, 2018
8. **FCAP: PM & Equipment** – Est. Jun 30, 2018
9. **Evacuation Maps (EHS)** – Jun 30, 2018
10. **GIS Parking Counts** – Jun 30, 2018
11. **State Construction Property Analysis** – Jun 30, 2018
12. **Card Office EQ Management** – Est. Jun 30, 2018
13. **Department Drop boxes** - Est. Jun 30, 2018
14. **FIN STACK Graphics VAVs** – Est. for Jun 30, 2018
15. **FIN STACK Graphics AHUs** – Est. for Jun 30, 2018
16. **FIN STACK Graphics Meter History Import** – Est. for Jun 30, 2018
17. **Space Public Private Revenue Tracking and Reporting** – Est. Apr 30, 2018

FM Prioritized Projects – FY18

PROJECTS NOT YET STARTED:

1. **ASP Printing Revisions** – Est. Jun 30, 2018
2. **Project Management Tools/Updates** – Est. Jun 30, 2018
3. **Radio CANVAS Training** – Est. Jun 30, 2018
4. **Radio Inventory** – Est. Jun 2018
5. **Remote Key Admins** – Est. Jun 30, 2018
6. **ARCHIBUS Testing Framework** - Est. Apr 30, 2018
7. **GIS Department Map** - Est. Apr 15, 2018
8. **Mobile Intent Reinvention** – Est. Jun 30, 2018
9. **Mobile Floor Plans** – Est. Jun 30, 2018
10. **Critical Alarms (Periscope & FIN)** - Est. Jun 30, 2018

*OTHER PROJECTS – Moved to Next Year:

1. **Risk Management Integration** – *(Awaiting Safety)*
2. **ARCHIBUS Fleet Module** – *(Awaiting Funding)*
3. **49er Mart Integration (Jaggaer)** – *(Awaiting Funding)*
4. **GIS Wayfinding Signage** – *(Moved to Next Year)*
5. **ARCHIBUS Lockout/Tag Out (LOTO)** – *(Moved to Next Year)*
6. **Equipment Maps** – *(Moved to Next Year)*
7. **FIN STACK Hot Water Chill Water Graphics** – *(Next Year)*

**Projects awaiting funding/approval or moved to next year are not calculated in project tasks*

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Planned:

1. Complete Refrigeration Phase 1 CANVAS training by May 15, 2018.
2. Complete FIN Stack Energy Report by June 30, 2018.
3. Complete updates to PM/EQ views by June 30, 2018.
4. Complete 50% of Evacuation Maps (for EHS) by June 30, 2018.
5. Complete remainder of AHU FIN Graphics updates by June 30, 2018.
6. Complete GIS Parking Counts project by June 15, 2018.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Completed:

1. Hired GIS Survey Technician and Access Controls Technician position.
2. Hired Student Worker to assist with EHS map project.
3. Completed new view roll out for Real Estate including new Office Manager role.
4. Completed Work Order Reinvention development and began testing.
5. Completed Map Updates.
6. Completed Avigilon Upgrade and Open Options data clean up.
7. Completed ARCHIBUS Security Remediation.

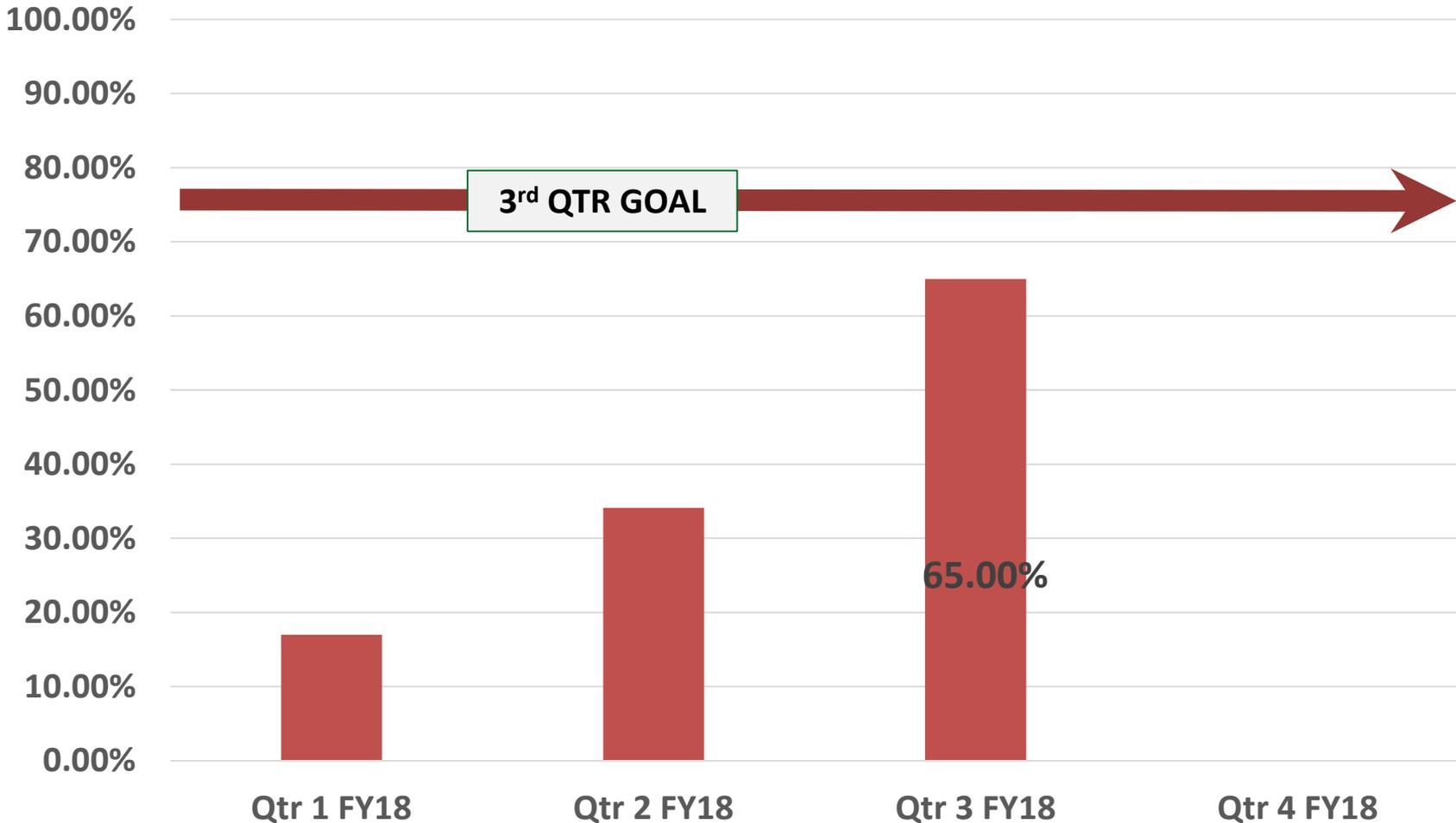
Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes

Cumulative Project Task Completion Percentage



STATUS

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

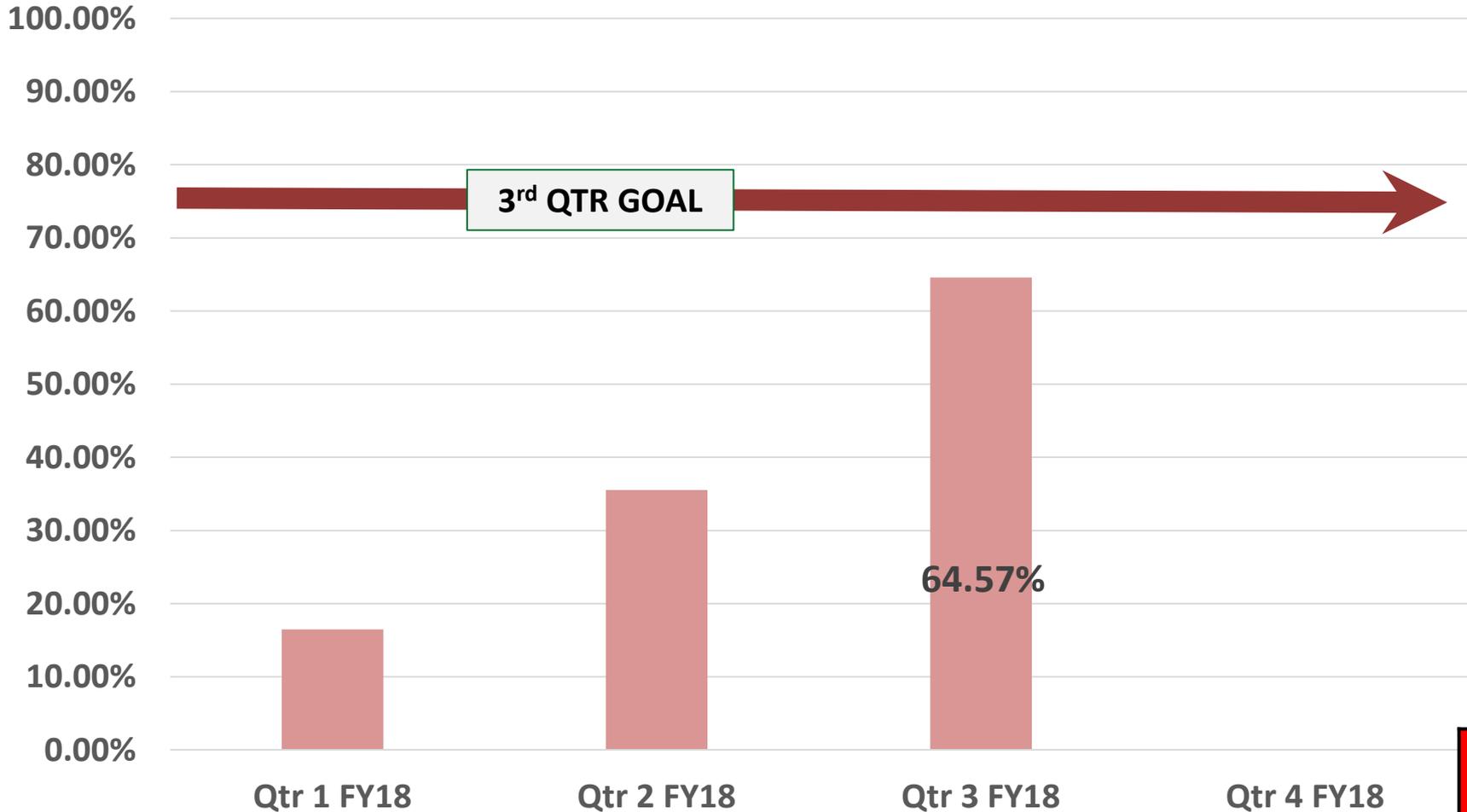
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

Weighted Project Average Completion



STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2018

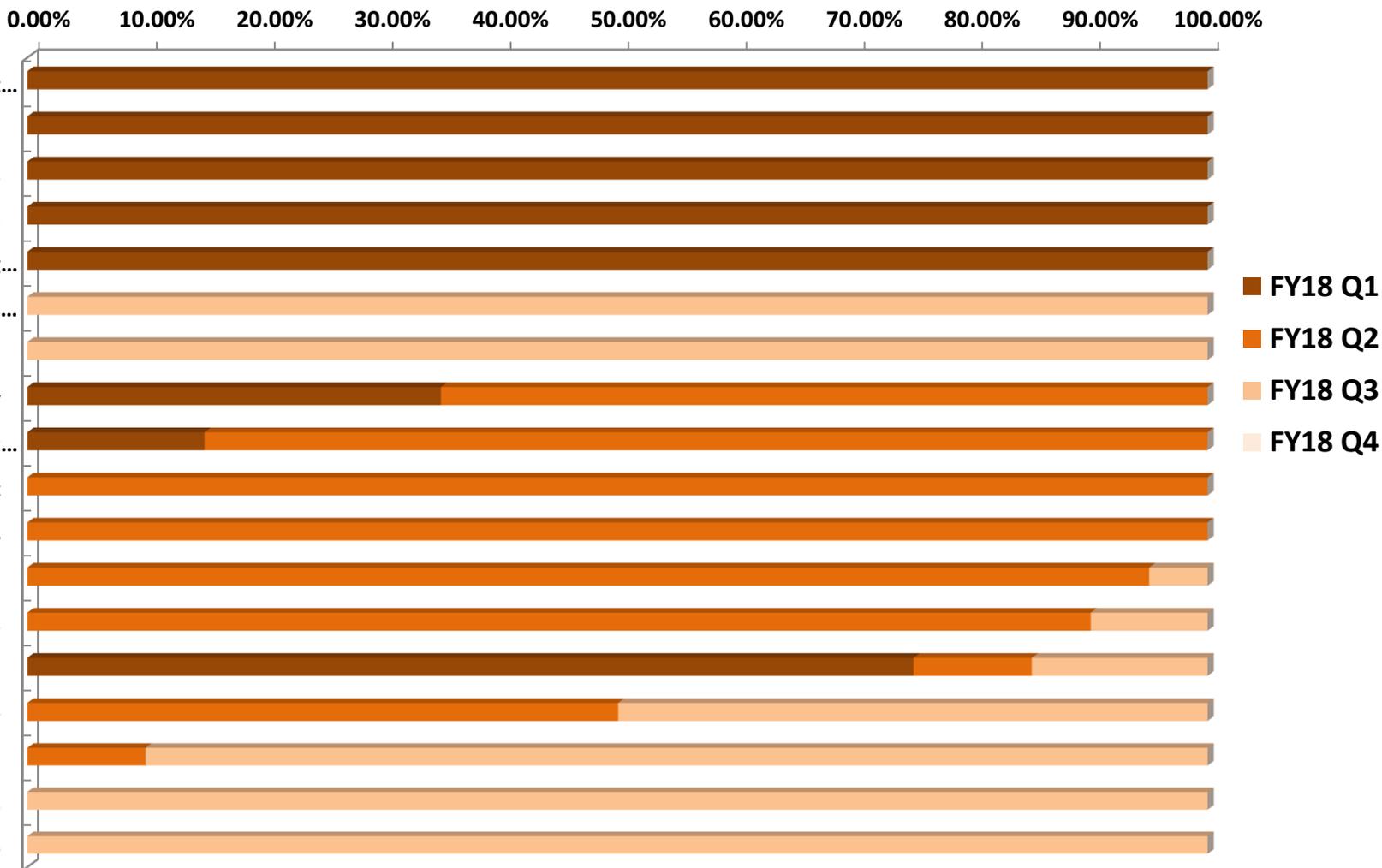
Lead FIS

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

COMPLETED PROJECTS TO DATE



Facilities Management Strategic Planning Session – Third Quarter FY 2018

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

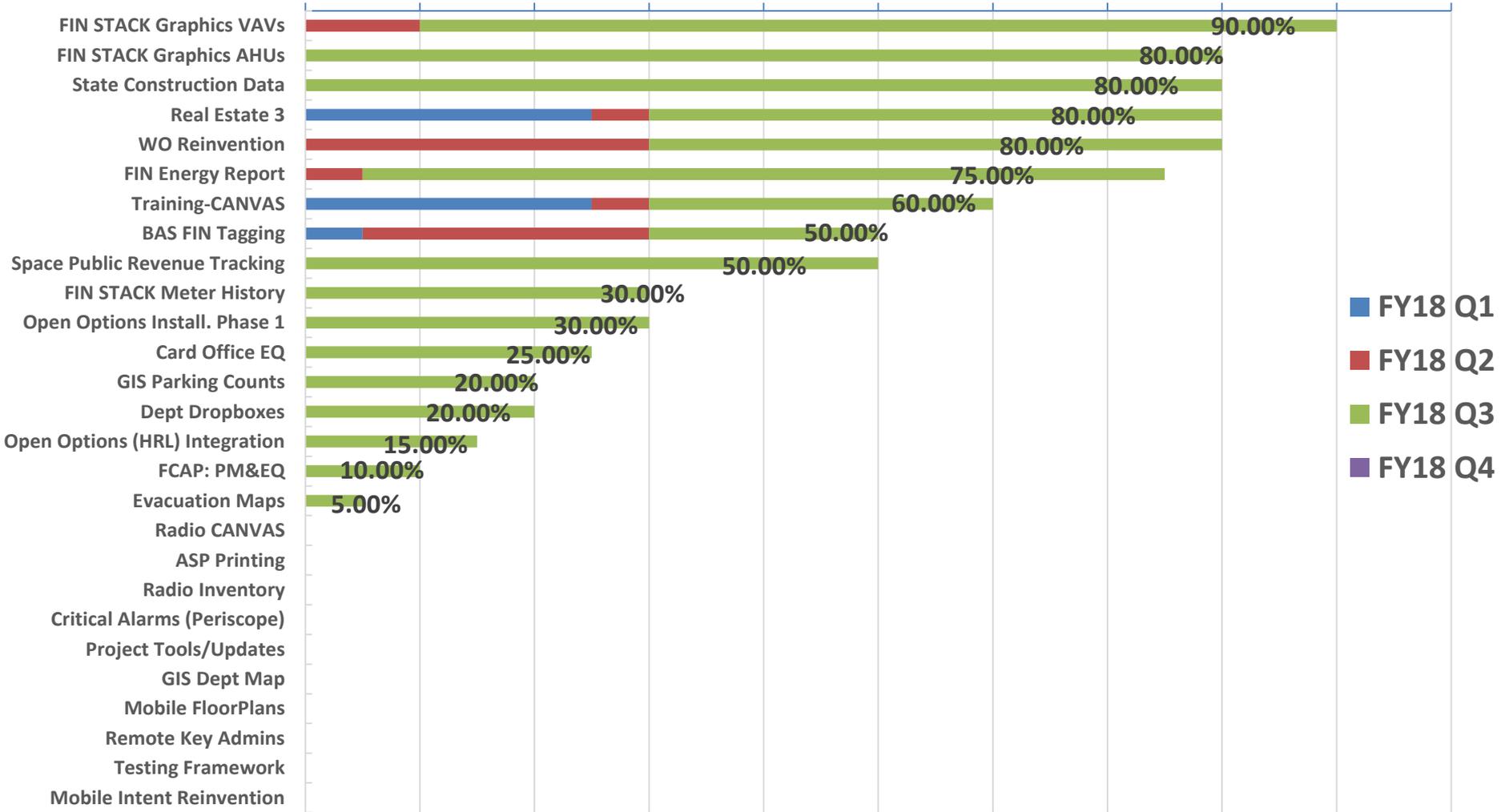
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

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

Balanced Scorecard Category: Internal Business Processes

PROJECTS IN PROGRESS

0.00% 10.00% 20.00% 30.00% 40.00% 50.00% 60.00% 70.00% 80.00% 90.00% 100.00%



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 220 projects per year
Measure:	Number of Projects Completed (Annual Goal)

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

New Job Order Contracting (JOC) Renewal Process: Deep into the planning stages with The Gordian Group.
Reviewing Possibility for bringing on Electrical JOC and Civil JOC.

✓ *Timeline: **FY18 QTR 3 - FY19 QTR 2 – Work In Progress***

Seeking better understanding of Mechanical Standards for Lab Renovations – Don Janus (lead).

✓ *Timeline: **FY18 QTR 3 - FY19 QTR 1– Work In Progress***

ONGOING IMPROVEMENTS

- Invoice – Purchase Order Management – ARCHIBUS: Eliminates excel spreadsheet with potential for errors.
- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
- Meet with Customers to help them understand our full set of processes. This may occur over the phone.

Facilities Management Strategic Planning Session – Third Quarter FY 2018

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

Annual Goal
95%

QTR 3
Status
96.0%

Lead
Design Services

Year to Date
95.1%

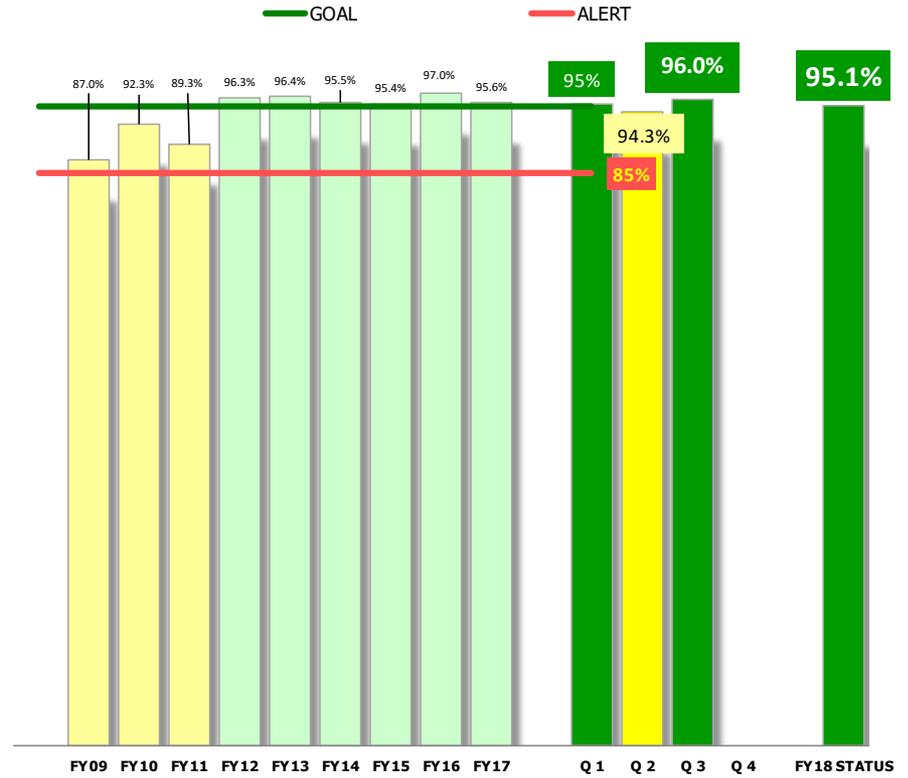
Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects Completed on or before Delivery Date Divided by Total Number of Project Completed)

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

FY 18

QUARTERLY
REVIEW

	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY09	115	100	15	87.0%
FY10	182	168	14	92.3%
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
FY16	233	226	7	97.0%
FY17	205	196	9	95.6%
Q 1	21	20	1	95.2%
Q 2	35	33	2	94.3%
Q 3	25	24	1	96.0%
Q 4	0	0	0	0.0%
FY18 STATUS	81	77	4	95.1%



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.1: Assignable square footage of space allocation for specific room uses for new and renovation projects will be within +/- 10% of recommended range.

Measure: Measure Assignable Square Feet of allocated space compared to recommended guideline and metric.

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Conduct annual physical audit of all campus space**
ON-GOING
 - **Send space data to colleges for review**
ON-GOING
 - **Develop Space Guidelines – incorporate in Space Management Policy**
COMPLETE March 2017
 - **Develop Metrics for Room Use Categories based on national standards**
COMPLETE March 2017
 - **Assess proposed space use for new construction and renovation projects to evaluate alignment with accepted metrics**
ON-GOING

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**
ON-GOING
 - **Collaborate with university divisions and departments to identify capital project needs**
COMPLETE
 - **Collaborate with Financial Services on the funding of the FY 20 – FY 25 Capital Plan.**
 - **Refine project budgets**
ON-GOING
 - **Develop a prioritized list of projects for review by the Chancellor and Cabinet**
ON-GOING

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

- Campus Infrastructure 3
- Parking Lot 8 Expansion
- Residence Hall Phase XVI – Advanced Planning
- Science Building Early Site Package 1

Actions Planned

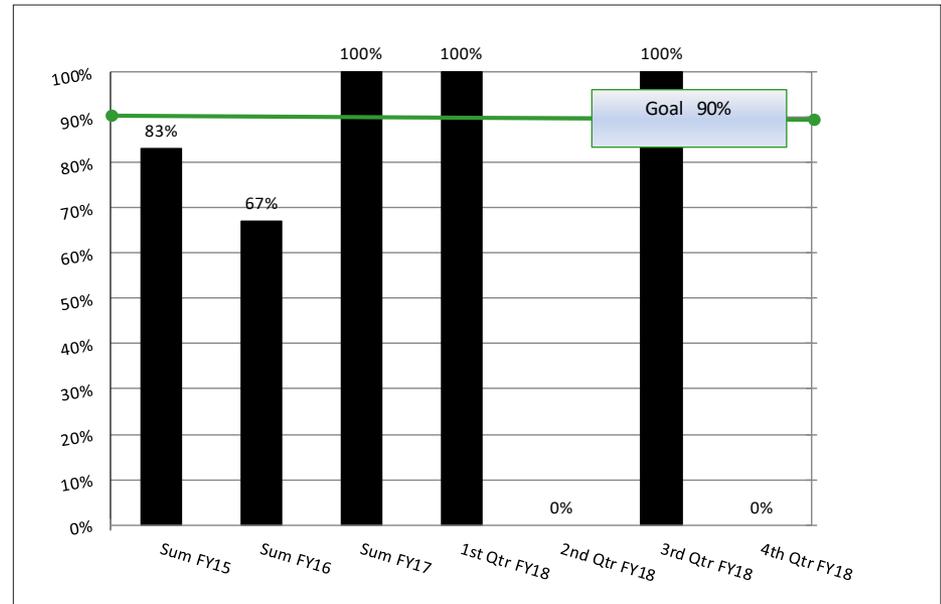
- Atkins Air Handler
- Bioinformatics 4th Floor Upfit
- Intercollegiate Swimming Upfit (Belk Gym)

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

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



Tactic Measurement for 3rd Quarter is 100%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

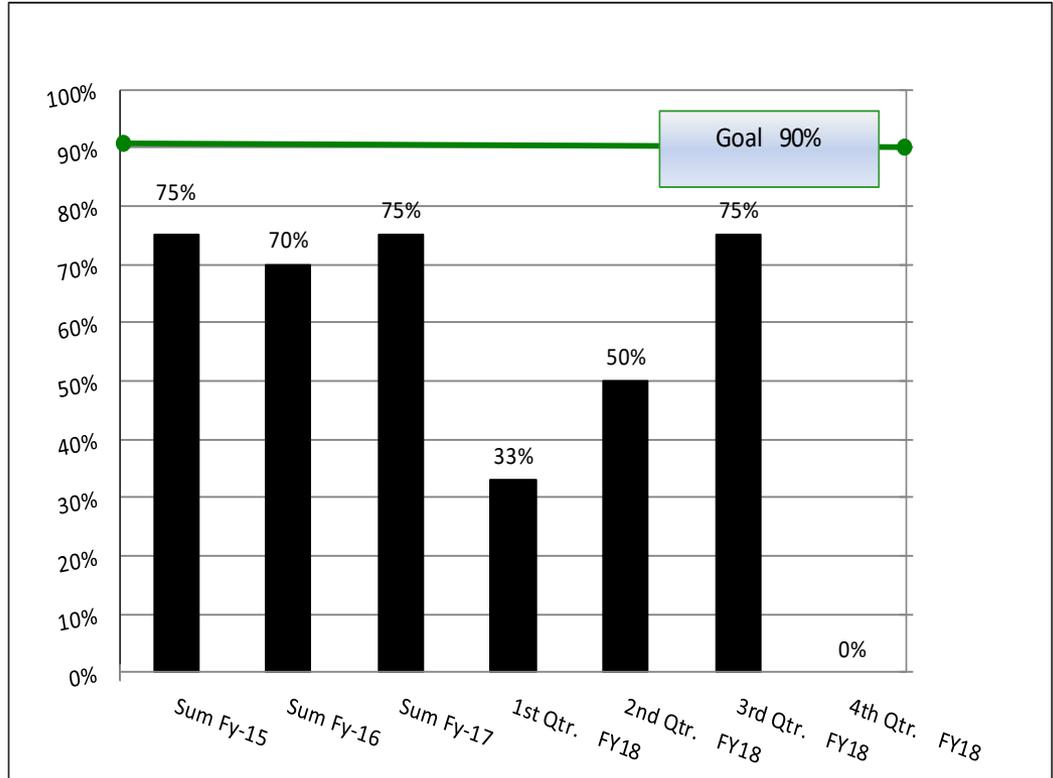
Measure: Percentage of designs completed on or before the original completion time

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled	#not completed by scheduled time	% Designs complete by completion time
Summary FY-15	3	1	75%
Summary FY-16	7	3	70%
Summary FY-17	6	2	75%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	2	1	50%
3rd Qtr. FY-18	3	1	75%
4th Qtr. FY-18			%

↑

**CRI Entrance,
 Parking Lot 8
 Expansion,
 Residence Hall
 Phase XVI
 ESUP**



Status

Tactic Measurement for 3rd Quarter is 75%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

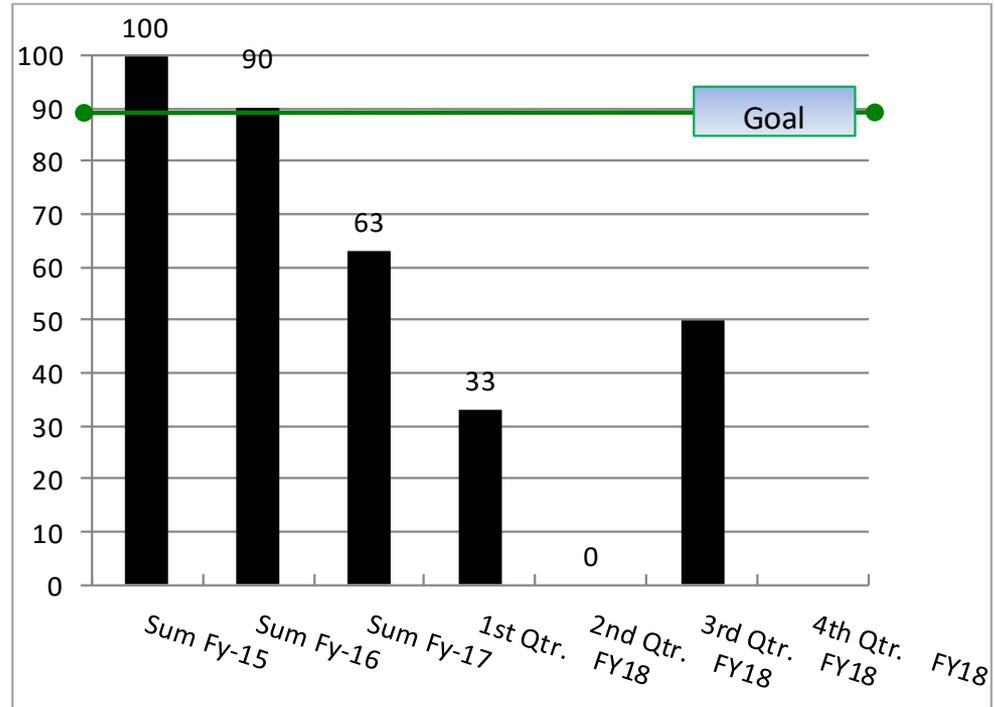
Measure: Percentage of designs completed within the original design contract amount

Balanced Scorecard Category: Internal Processes

STRATEGIC REVIEW by Fiscal Year (July-June)	# of designs with original budgeted fee	# designs complete not within budget	% Designs not complete w/in budgeted fee
Summary FY-15	3	0	100%
Summary FY-16	9	1	90%
Summary FY-17	5	3	63%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	0	2	0%
3rd Qtr. FY-18	2	1	50%
4th Qtr. FY-18			%



Parking Lot 8 Expansion, Sycamore Hall Renovation



Tactic Measurement for 3rd Quarter is 50%

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

Tactic 2.5.5: Maintain Design and Construction Manual

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Develop process for reviewing proposed updates to the Design and Construction Manual and incorporating approved updates.**
ON-GOING
 - **Compile a list of stakeholders to be notified of proposed and approved revisions**
COMPETE
 - **Coordinate review comments and update the manual quarterly**
ON-GOING

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

- Burson Hall, Campus Circulation - Phase 1, Campus WiFi (Smith & Colvard), Davis Lake, Maple Hall.

Actions Planned

- CMs keep schedules current & refer to them regularly.
- CMs discuss schedule (baseline & current) with end users, designers & contractors.
- Inform designers and contractors of each other's contractual schedule dates
- CMs maintain project budgets & account reports monthly.
- CMs share budgets with AVC and end users.
- Maintain control over use of owner contingency.
- Oversee proper use of CM contingency.
- Manage construction scope creep
- Use Earned Value Management

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

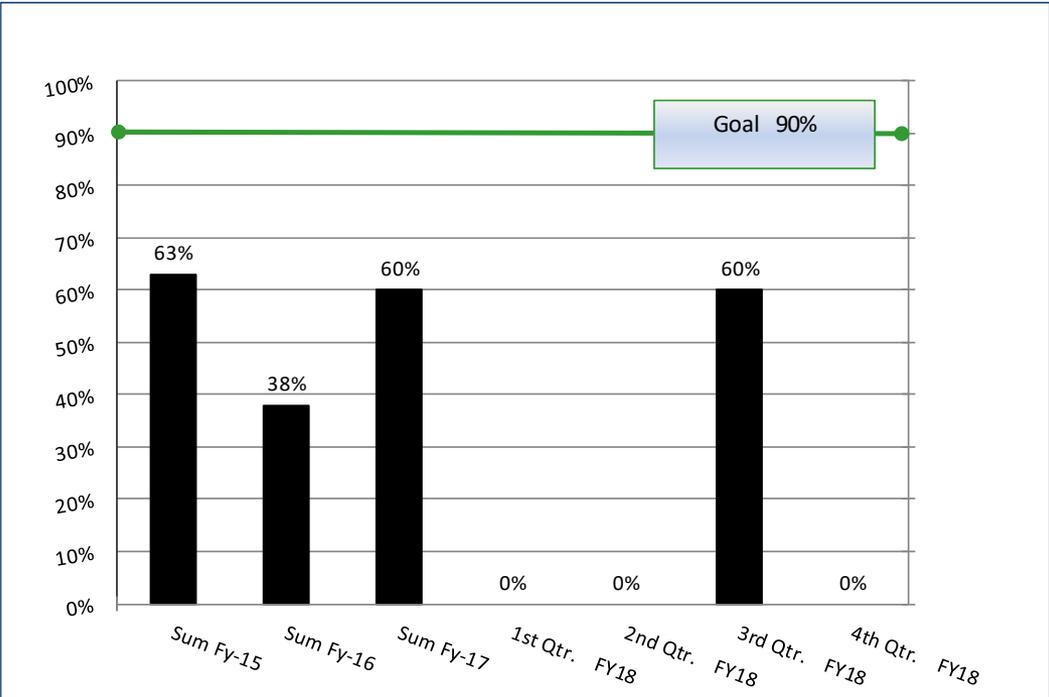
Measure: Percentage of construction projects completed on or before the contract completion date (CCD)

Balanced Scorecard Category: Customer Perspective

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

↑

**Burson Hall Renovation,
Campus Circulation,
Campus WiFi**



Tactic Measurement for 3rd Quarter is 60%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

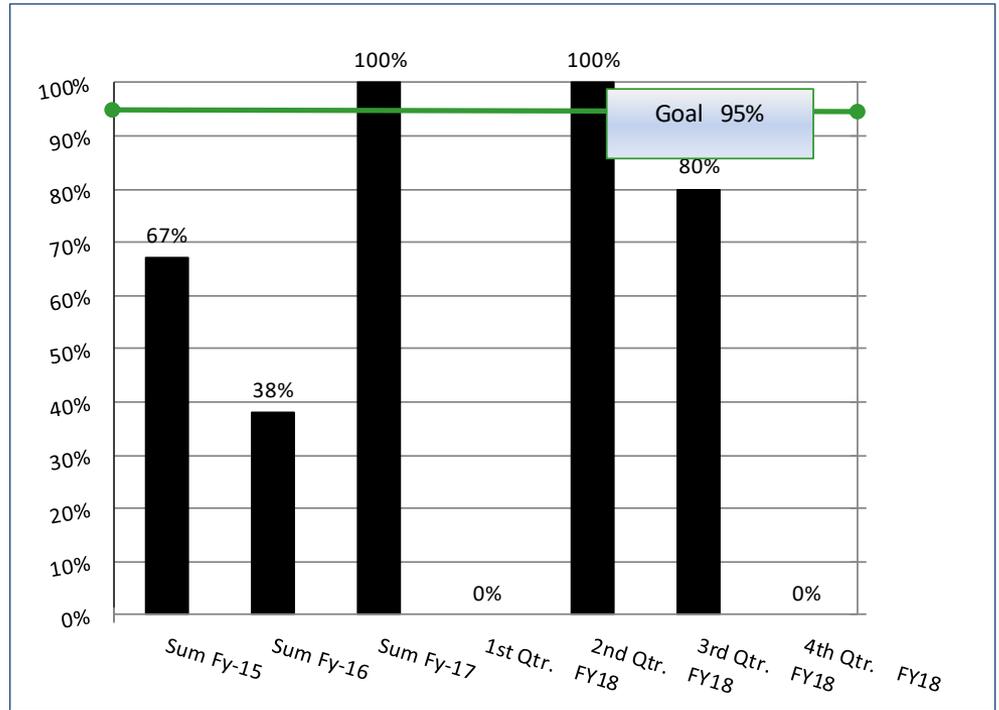
Measure: Percentage of projects completed within the original contract amount or GMP plus 3% (contingency).

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-15	4	2	67%
Summary FY-16	3	5	38%
Summary FY-17	5	0	100%
1st Qtr. FY-18	0	0	0%
2nd Qtr. FY-18	3	0	100%
3rd Qtr. FY-18	4	1	80%
4th Qtr. FY-18			%

↑

**Burson Hall Renovation,
Campus Circulation,
Campus WiFi, Davis Lake**



Tactic Measurement for 3rd Quarter is 80%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

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

Actions Completed

1. Hired a Critical Facilities Manager (August 2017)



UNC CHARLOTTE

“People don’t want to communicate with an organization or a computer.

They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction.”

- Theo Michelson, State Farm Insurance

GOAL #3

Foster a Customer Focused Organization



GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Online updates every four weeks. **Jan. 11, Feb. 15, and Mar. 15**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - **Inside UNC Charlotte** – Horne appointed Director of Facilities Planning, Motor Fleet wins efficiency awards, University’s zero waste initiative expands to Halton Arena, University to compete in RecycleMania, and RecycleMania event to collect e-waste and medications for disposal
 - **SYC Newsletter** – Construction Report (*published in Issue 40, March 2018*)
- **Publicity documentation and analytics*:** Will continue to work with UComm and ITS on analytics; goal is to increase external media (in particular, trade publications) coverage.

Customer Communication Initiatives (interrelated):

- **Customer Facing technology Ongoing**
 - “Five-year Plan” List of Projects and Schedules tab and home page rotating header (*updated March*)

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

ACTION PLAN

Actions Planned

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

Actions Completed

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

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

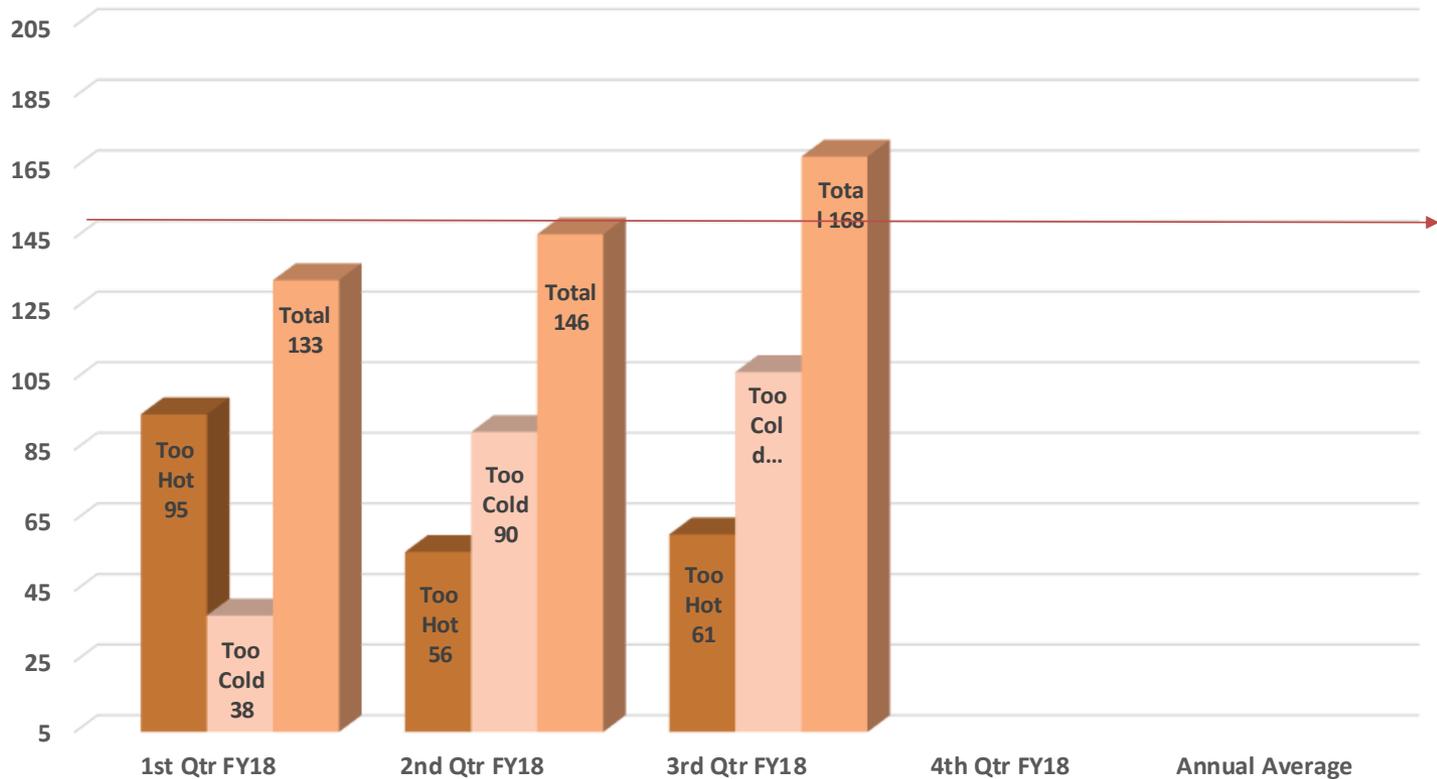
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls



Goal =
Decrease
Number by
20% (145
Total)

STATUS

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from ARCHIBUS – Design Services Projects Customer Survey

ACTION PLANS FOR IMPROVEMENT

ARCHIBUS - Design Services Customer Survey:

Actions taken by Members of the Design Services Team:

- Climate Survey Review Discussions and Improvements are improving Customer Communication.
- Over communicate – Document, document, document.
- Construction field reports for “hands on” Customers.
- Punch List reviews that include the Customer.
- Design Services Team Meetings include discussing effective Customer Service.

Facilities Management Strategic Planning Session – Third Quarter FY 2018

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Project Related Customer Surveys

Annual Goal
95%

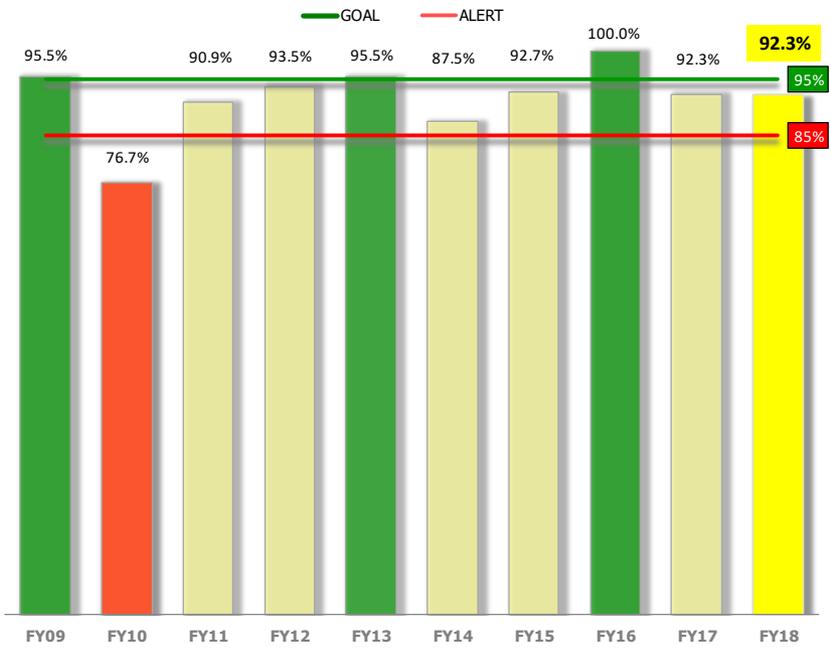
QTR 3
Status
100%

Lead
Design Services

Year to Date
92.3%

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

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY09	22	22	18	3	0	95.5%
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
FY16	115	32	28	4	0	100.0%
FY17	38	13	6	6	1	92.3%
FY18	53	13	9	3	1	92.3%
Q 1	20	3	2	1	0	100%
Q 2	15	5	4	0	1	80%
Q 3	18	5	3	2	0	100%
Q 4						
YEAR TO DATE	53	13	RESPONSE RATE - TOTAL			25%



Customer Comment:

Example of One “More than Satisfied” Customer Comment:

We are all very pleased with the scope and execution of the project. Extra finishing details were great. Project Coordinator was superb!

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Ongoing:

- **FM Apprenticeship Program Communication/Marketing Plan**
- **Light Rail Coordination Committee** (member of the communications working group)
- **Digital Signage Steering Committee** (campus-wide initiative)
- **Campus Congestion, Construction, and Parking Communication Plan** (joint initiative with Christy Jackson and Lou Ann Lamb)
- **(University) Crisis Communication Committee** (member of stakeholders group)
- **Academic Complex Communication Plan** (implementation underway)
- **“Five-year Plan” External Communication Plan** (implementation underway)
- **“Five-year Plan” website** (continual updates to projects listing, other areas as needed)
- **Traffic communications committee** (joint initiative with University Communications):
 - Continue to seek guidance from AVC
 - Initiative evolved with Notification updates posted to Inside UNC Charlotte

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Completed:

- FBO Unit Spotlight video
- Zero Waste Basketball communication initiatives
- “RecycleMania” communication plan
- Assisted with Frank B. Turner award nomination packet

Upcoming:

- Earth Month communication plan
- FOPS/Lock and Key Shop Moves communication plan
- FM Screens assessment and strategy plan
- FM Business Affairs Annual Report
- Reinstate Web Advisory Group
- Establish FM Communications Task Force and Working Group
- Develop department social media strategy
- FM Communication Guidebook
- Update Professional Communications Policy #10



UNC CHARLOTTE

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

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

GOAL #4

Recruit, Develop, and Retain
Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1:	Vacancy time of no longer than 80 calendar days – Nonexempt Vacancy time of no longer than 120 calendar days - Exempt
Tactic 4.1.2:	Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2018

Recruitment Strategies:

- Managing creation of new positions and career progressions for FY18
Update:
 - a. New Positions
 - b. Other Budget Requests
- New approach to Budget Cycle Process
 - a. Complete Information
 - b. Detail Justification
- New Interview Preparation Strategy
- Completed Facilities Management standard onboarding checklist to be found on the Shared Drive Public Folder for New Employee Orientation

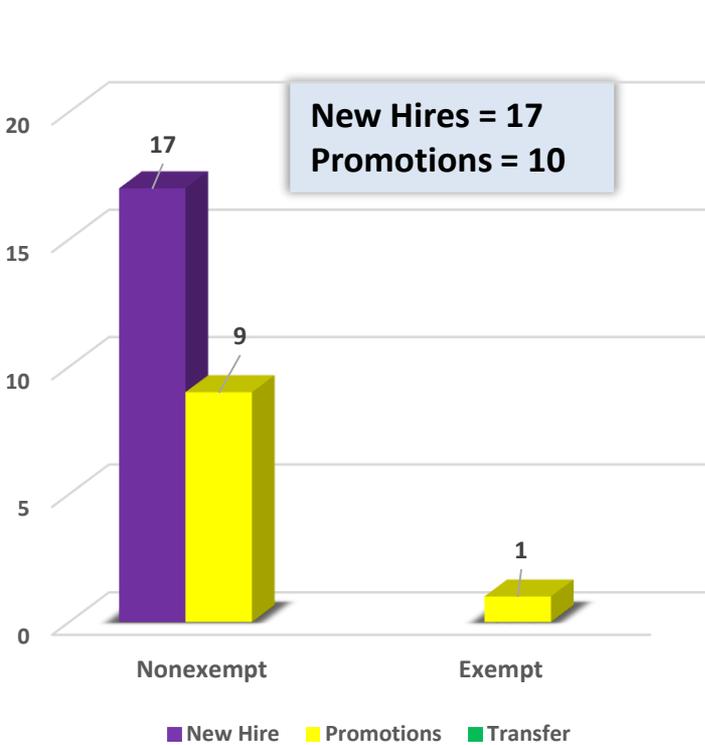
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

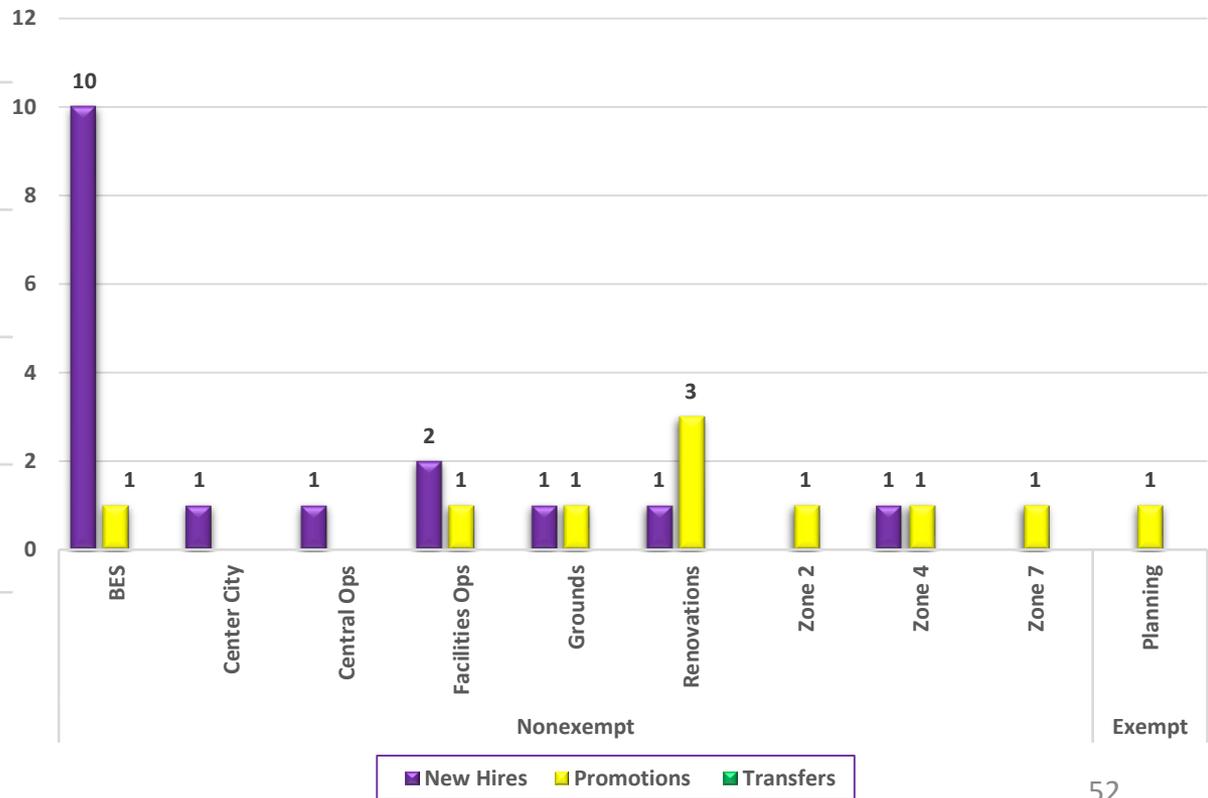
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotion 3rd Quarter FY 2017



FM New Hires / Promotions per Department 3rd Quarter FY 2018



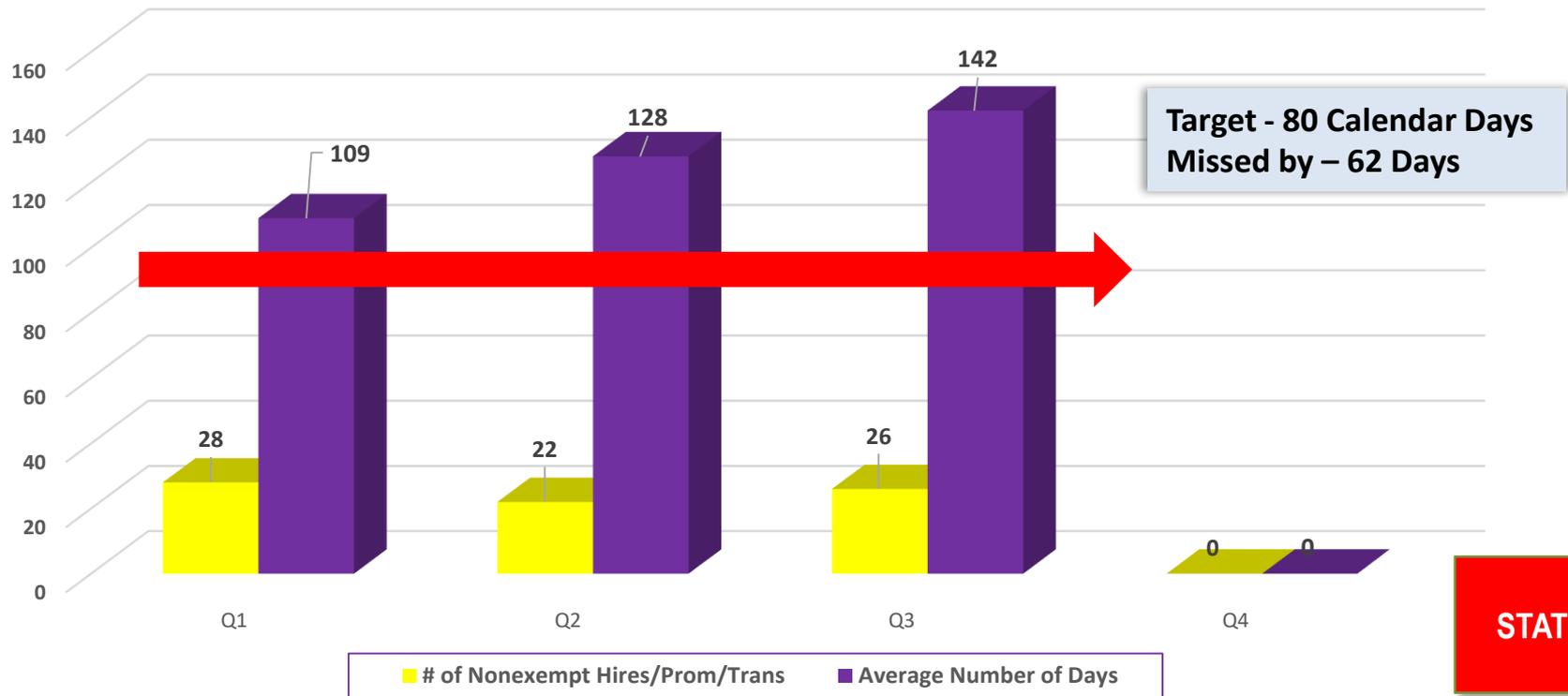
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

Average Number of Days to Fill Nonexempt Vacancies - FY 2018



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

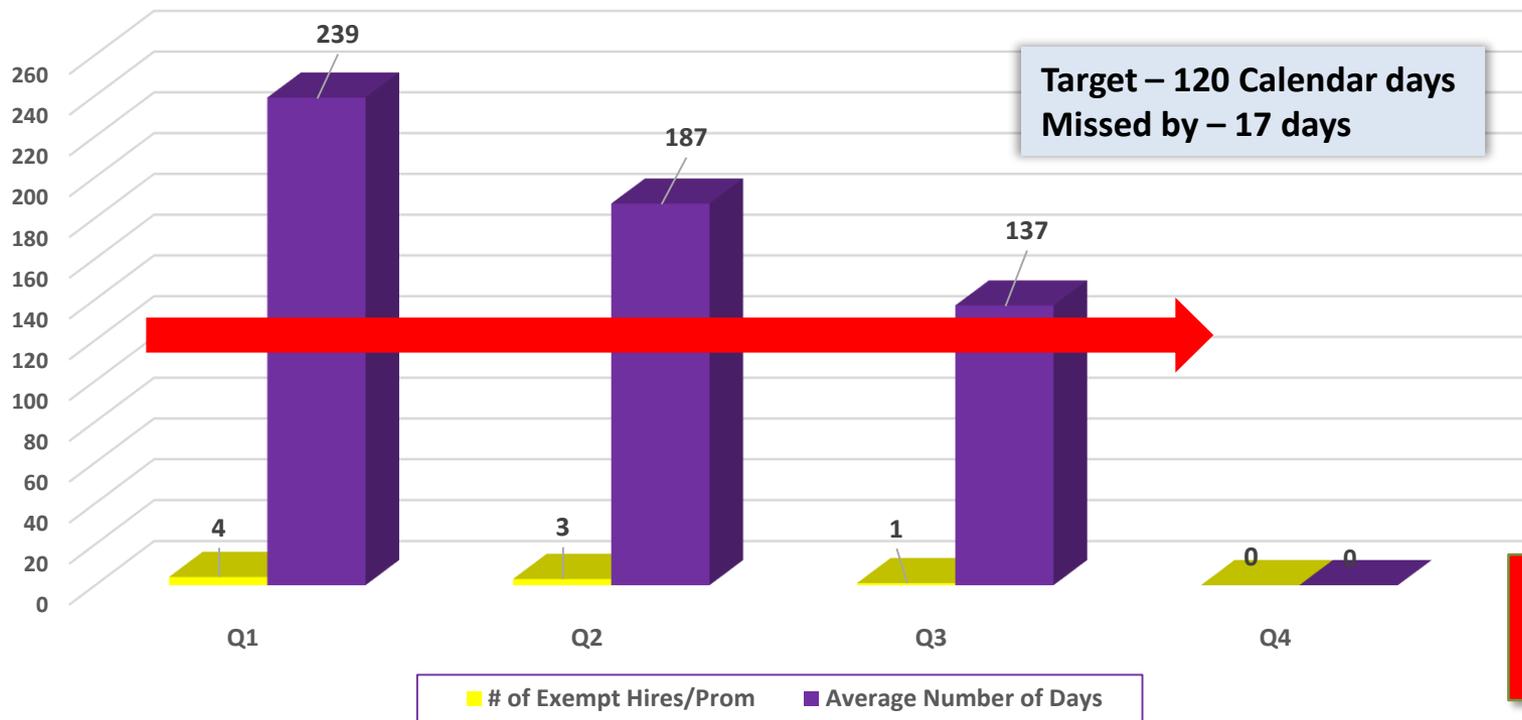
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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 2018



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2018

- 2017/2018 Performance Appraisal Process

FM Workflow Schedule for 2017-2018 Cycle		
Task/ Step	Due Date	Task Description
Employee completes Self-Appraisal	4/1/2018	Employee answers questions in appraisal and will make any relevant and/or required comments on their performance
Supervisor completes Appraisal	4/15/2018	Add comments, individual overall rating, and performance improvement plan if needed
Next Level Supervisor/ Manager Approves Appraisal	4/30/2018	Review/ edit supervisor comments, ratings, and performance improvement plan if included
Appraisal Review Meeting with Employee	5/15/2018	Schedule/ conduct meeting to discuss annual appraisal with employee
Employee completes Self-Appraisal	5/30/2018	Employee will receive notification to acknowledge the appraisal. Appraisal process complete.

- FM HR partnering with main HR to address system issues in NinerTalent STAKES
- Performance Work Plans for 2018/2019 need to be completed by **May 30, 2018**

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through March 2018

- Reorganizing FM HR Team duties to better meet the demands and requests in recruitment and employee relations.
- Collaborate with and provide guidance to leadership to better strategize future personnel needs.

GOAL #4 Recruit, Develop and Retain Quality Employees

Lead
FBO

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

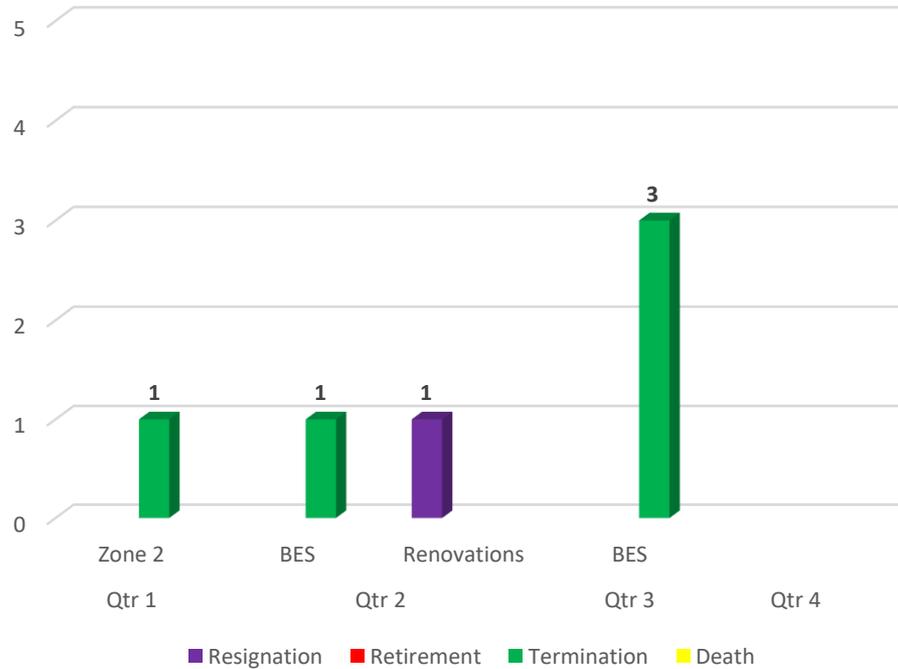
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

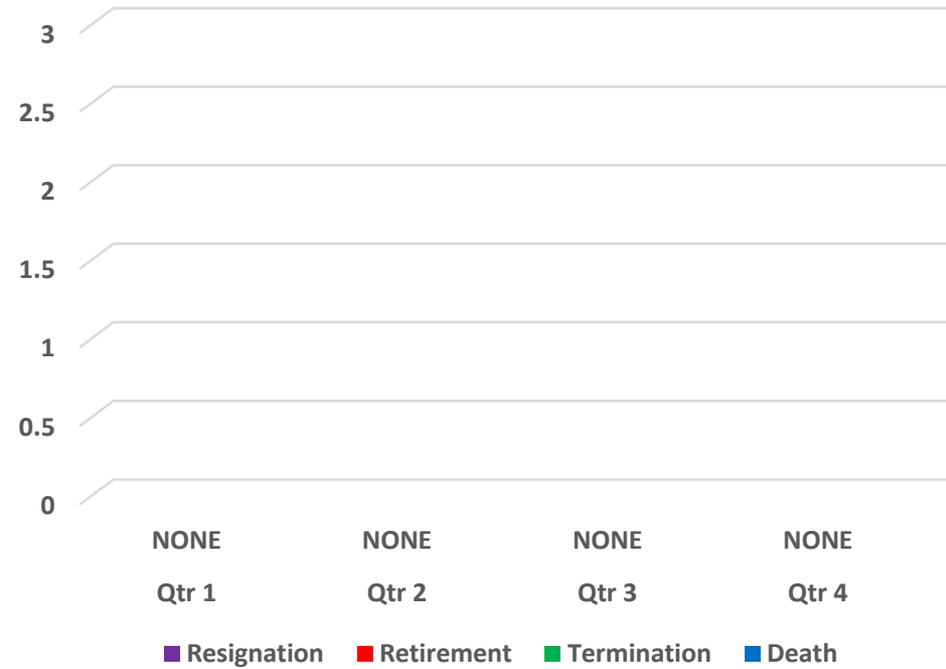
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations by Department During Probation Nonexempt FY 2018



Separations by Department During Probation Exempt (Salaried) FY 2018



Status

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

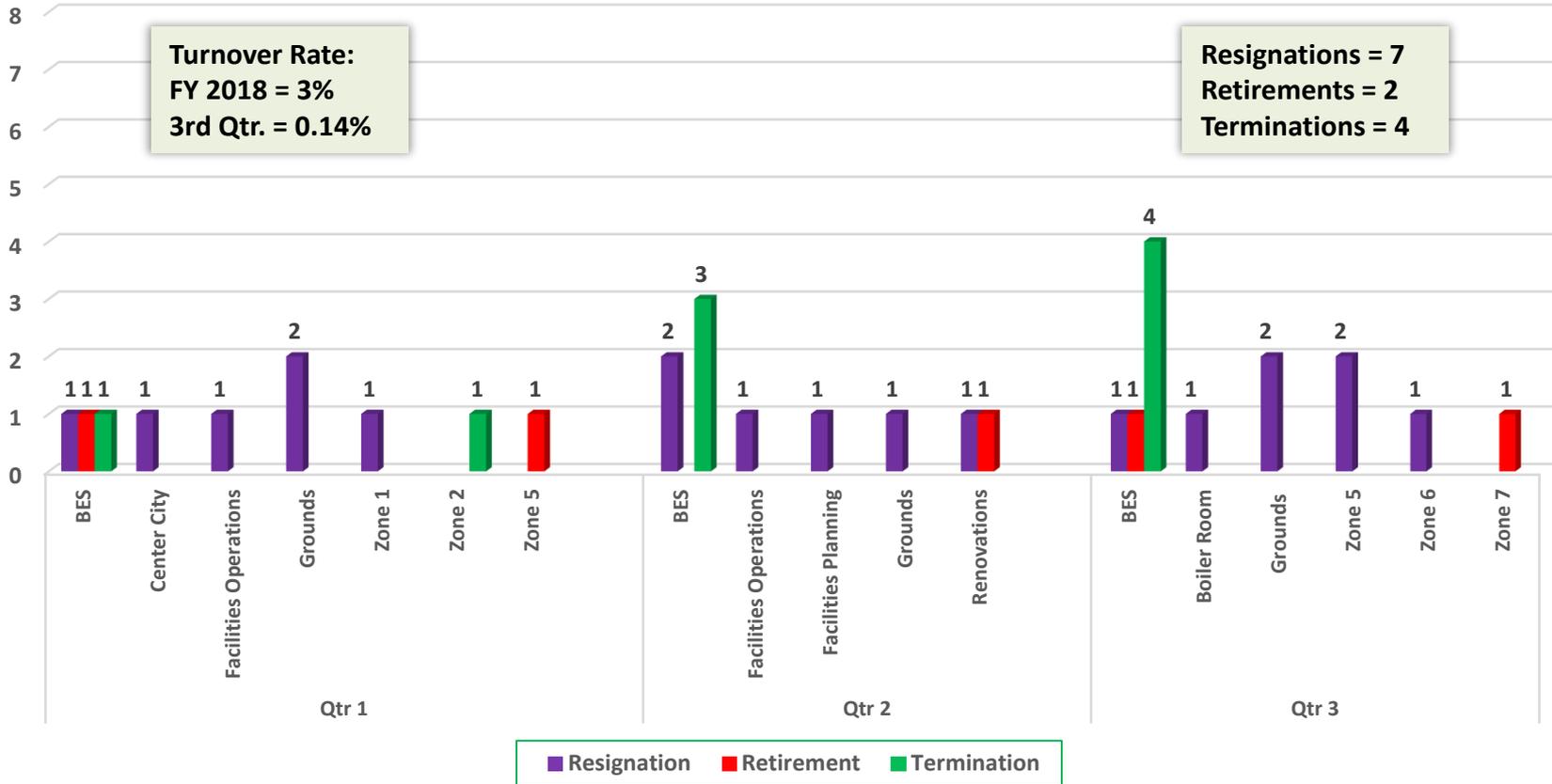
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2018 - Nonexempt



GOAL #4 Recruit, Develop and Retain Quality Employees

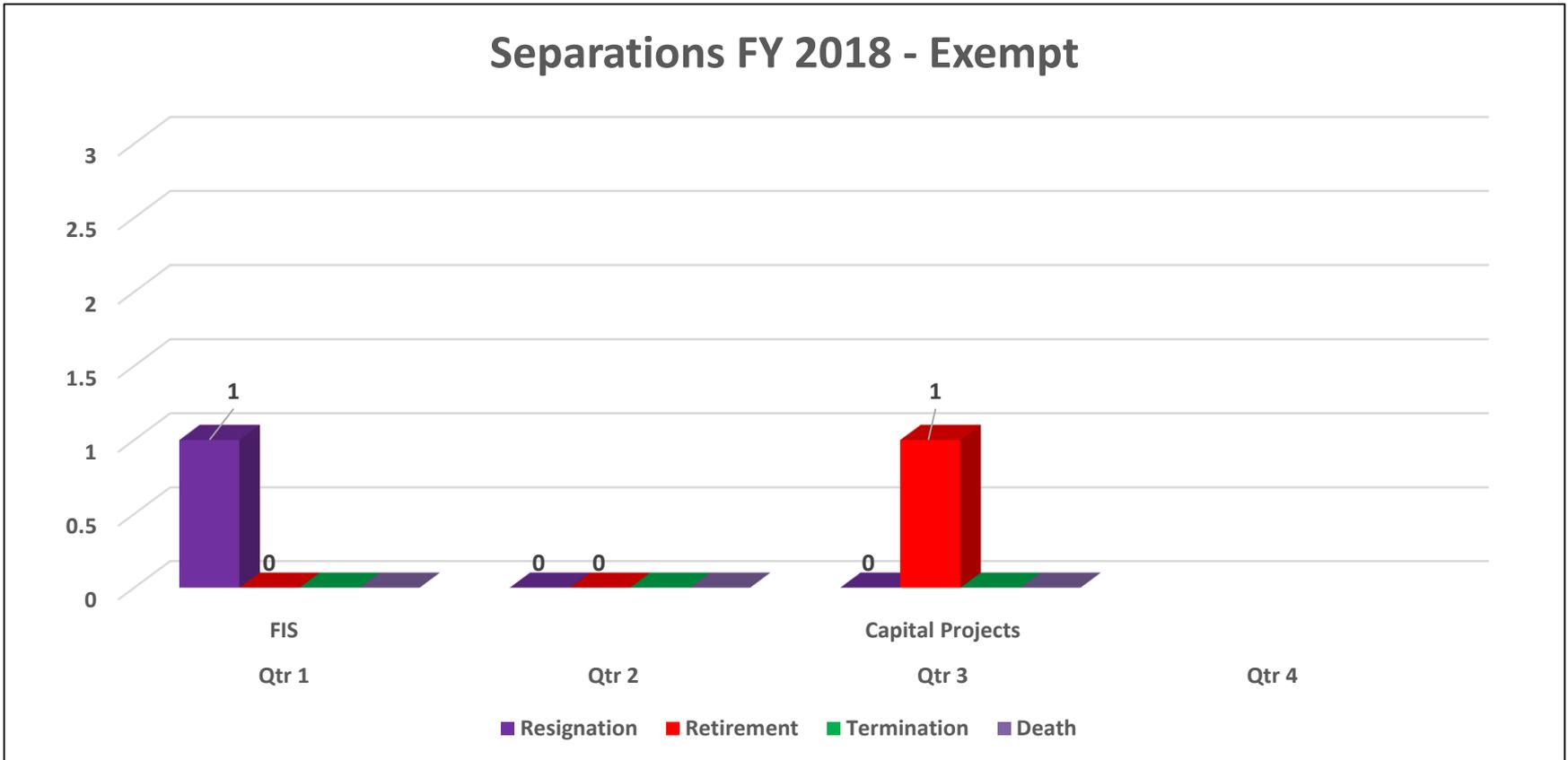
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

FM ACADEMY

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

Technical

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

Safety

- Supervisor Safety Talks Monthly

Leadership

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

Externally Driven Initiatives

- Niner Talent “Workplan” training Annual, as needed

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

Tactic 4.2.2: Increase Employee Training to 20 hours/year

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

Departmental Development

- Identify and source vendors for training delivery;
 - Areas of focus: Leadership, Technical, Administrative, Safety and Professional Development;
- Ongoing initiatives with FO and BES&R Learning and Development coordinators on:
 - Reimagining the former FBO proposed “Gotcha” recognition program with BES&R.
 - Consulting with BES&R team on 5-S implementation for select area(s)
- **FM Apprenticeship Program** developments to date:
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and classroom instruction.
 - DOL Journeyman Credential received upon successful completion of program.
 - Committee in place working with program standards and operational guidelines
 - Steering Committee and Workgroups identified (HR, L&D, FO, Marketing)
 - Program Standards completed
 - Engaging with community colleges (CPCC & RCCC) to create educational partnerships
 - Apprentice Position Description submitted to campus HR.
 - Program updates given at April All Employee Meeting Recruitment to begin in late Spring 2018
 - Electrician apprentice positions approved for recruitment (HVAC positions to be added later)
 - FBO-Communications has created marketing materials and a webpage with FAQs.

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

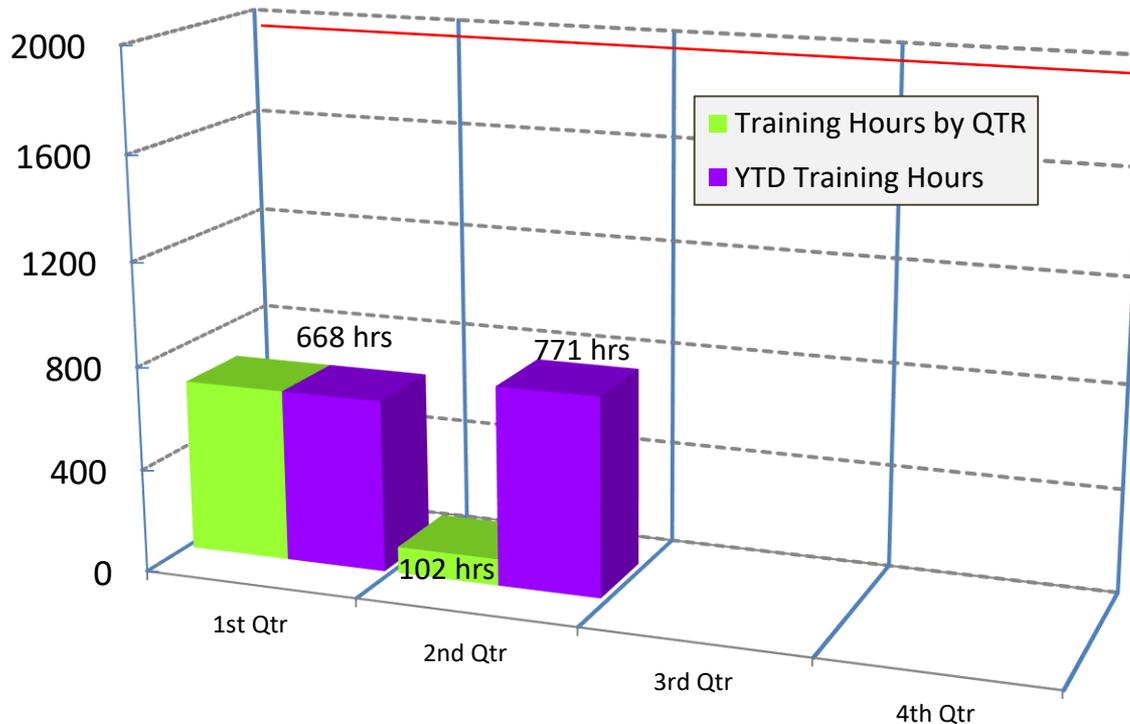
Balanced Scorecard Category: Internal Business Process, Learning and Growth

Pending: Obtaining information from ARCHIBUS

Training
Hours

FY 18

Training Hours for Supervisors & Managers by Quarter



Annual Target

FY 2018
Target - 1,960 hrs

Actual YTD
771 hrs (40%)

Annual

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

Lead: Facilities Business Office

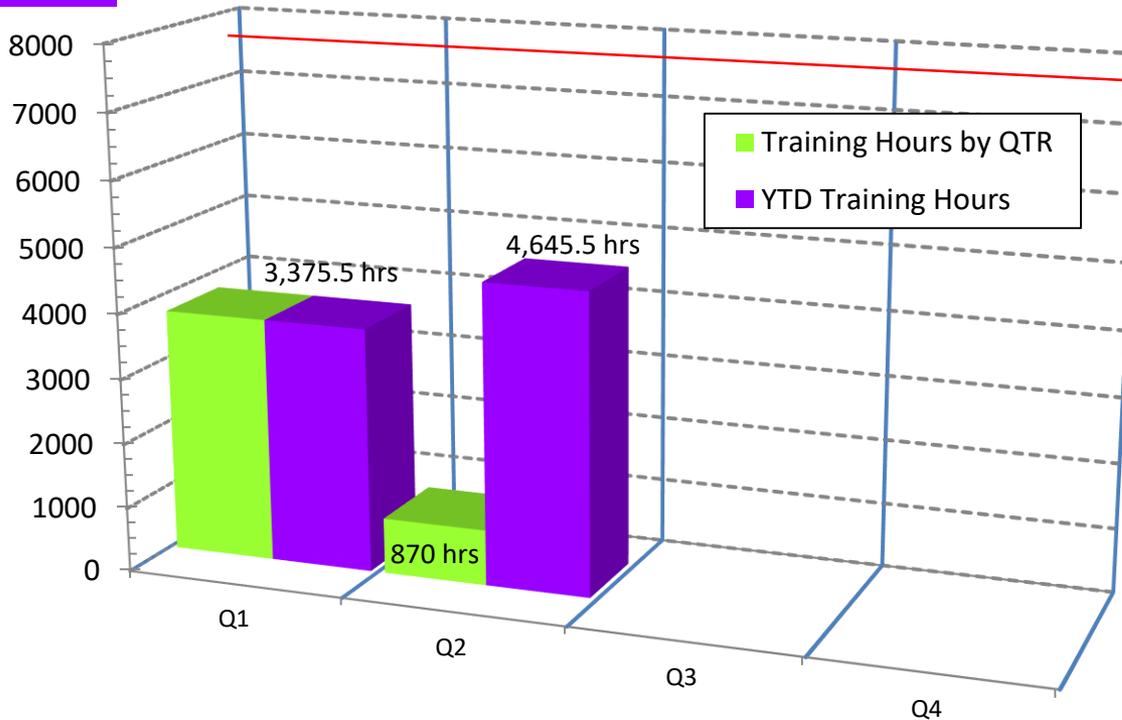
Balanced Scorecard Category: Internal Business Process. Learning and Growth

Pending: Obtaining information from ARCHIBUS

FY 18

Training Hours for front line employees by Quarter

Training
Hours



Annual Target

FY 2018
Annual Target - 7,760 hrs

Actual YTD
4,646 hrs (60 %)

Annual

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

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

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

Efforts to reduce accidents:

- Safety Training Taskforce (Collaborative initiative with EHS):
 - FM Training Calendar established listing safety training topics delivered by EHS
 - Discussions held on best way to report training;
 - Digital training records system developed by FM team – Launched March 2018
 - System enhancements utilizing ARCHIBUS platform in process – ready late April 2018
- Safety related activities:
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks training – Monthly
 - 8th Annual FM Safety Fair – May 2nd at Hauser Pavilion
 - 10th annual FM Safety Slogan Contest – kicked off at April AEM
- Current Accident/Incident Stats (**CY18**)
 - Accidents - 9
 - Minor incidents – 0
 - Near Miss - 0

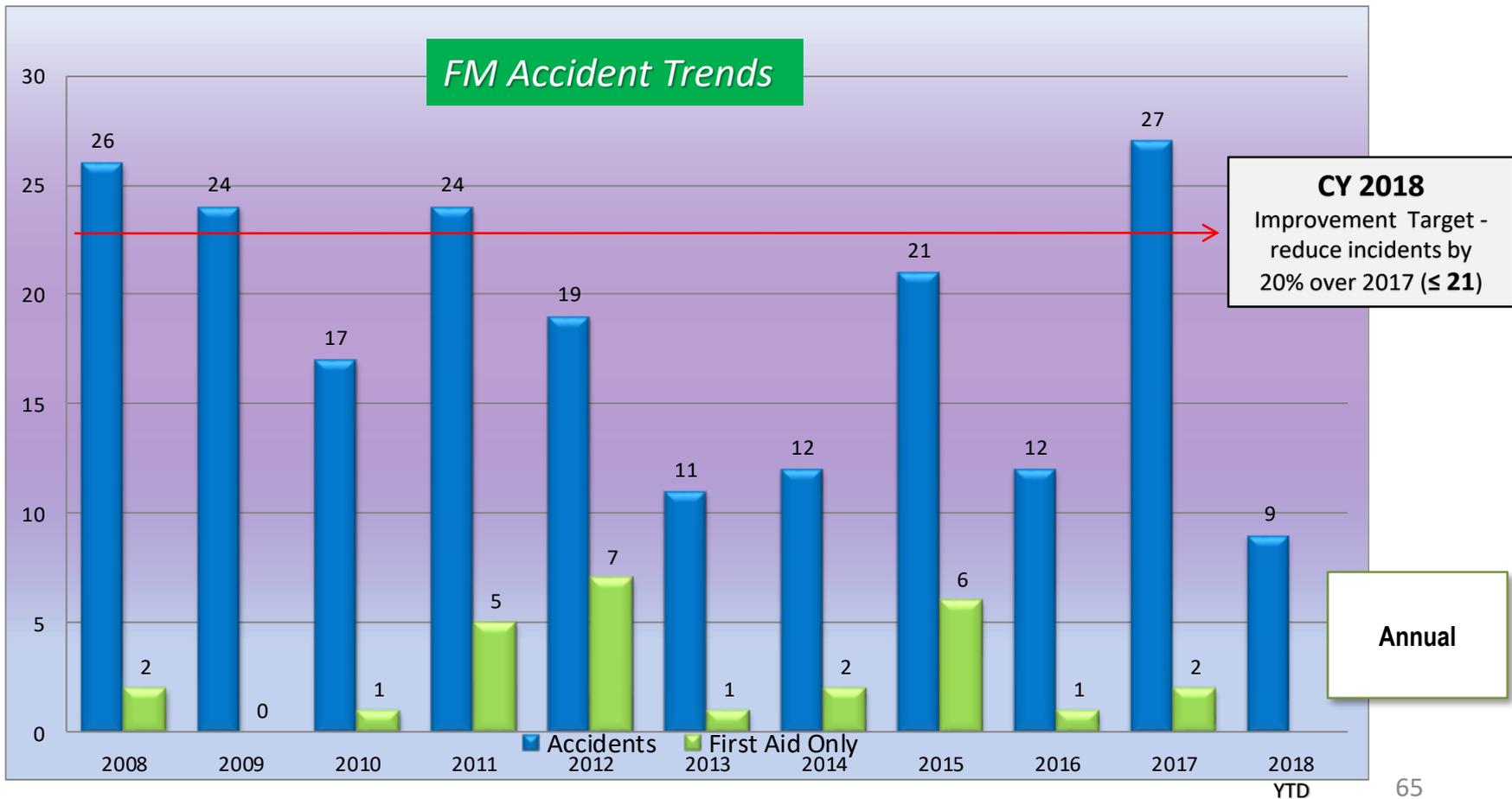
Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

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

- FM Apprenticeship Program
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and designated classroom instruction. DOL Journeyman Certification received upon successful completion of program.
 - Committee in place working with program standards and operational guidelines
 - Steering Committee and Workgroups identified
 - Program Standards completed
 - Engaging with community colleges (CPCC & RCCC) to create educational partnerships
 - Apprentice Position Description submitted to campus HR.
 - Program updates given at April All Employee Meeting Recruitment to begin in late Spring 2018
 - Electrician apprentice positions approved for recruitment (HVAC positions to be added later)
 - FBO-Communications has created marketing materials and a webpage with FAQs.

(Continued on next slide)

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

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

- **Leadership – APPA leadership workshops**
 - APPA Leadership Academy (Level 1 – proposed dependent on funding availability) TBD
 - APPA Leadership Academy (Levels 2-4, proposed dependent on funding availability) TBD
- **Digital Training Records System**
 - Records system launched March
 - Version 2.0 enhancements to include reports capability April
 - FM Training Calendar created (shared with EHS)

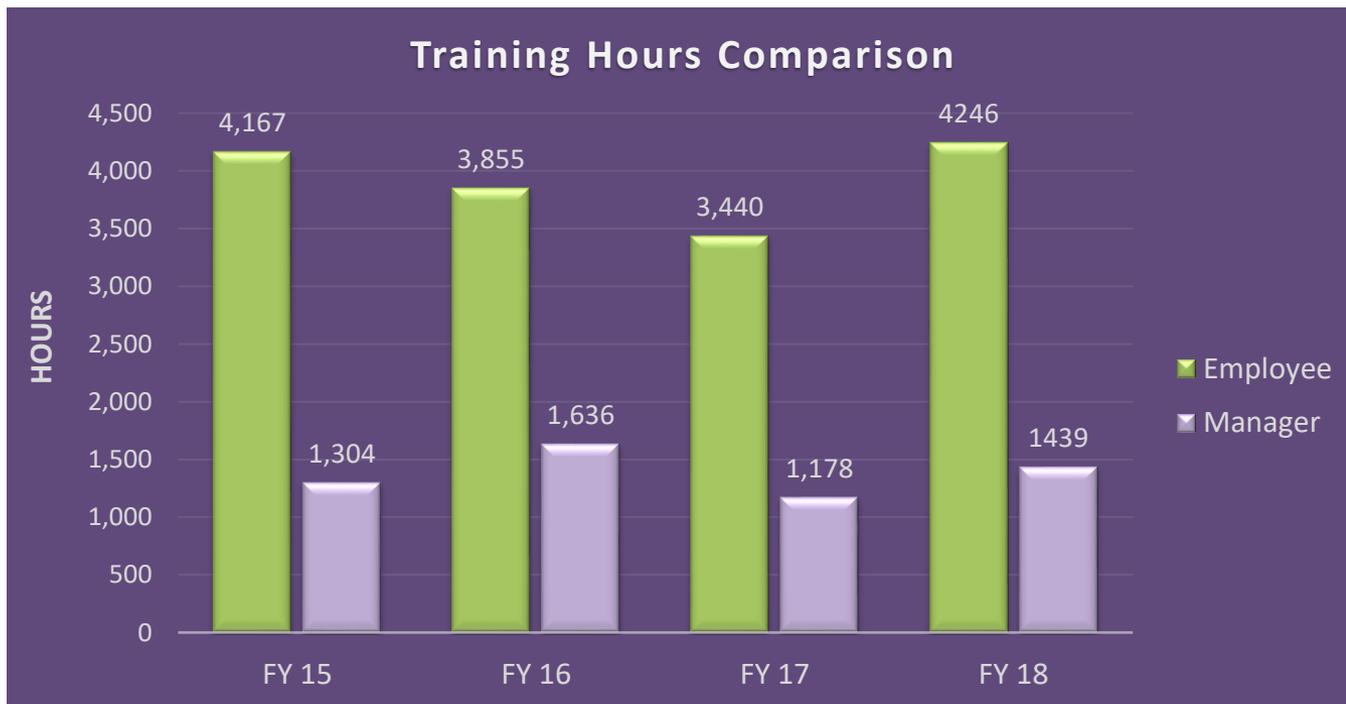
Facilities Management Strategic Planning Session – Third Quarter FY 2018

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective





UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Finance/Budget:

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

Budget Memo and Instructions

- For FY 18, budget spreadsheet was updated – thank to Sherry Ceallaigh and Steve Terry!
- Based on results from submittals, the FBO will continue to make improvements to the documents for FY 19

Supplemental Grant/Award Funding:

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

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting

Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management;
- Analysis of receipts supported funds underway.
 - Completed: Result: \$160,000 in code errors corrected and applied to Informal Project balance;
 - Next analysis will be Labor Services which will begin after year-end close out
- Conducting spending trend analysis to assist with better budget projections for maintenance and service agreements is also underway. Anticipated completion: July 2018
- Financial Reports Budget Spreadsheet currently being reviewed for reporting improvements; New spreadsheet will roll out in FY 19 (July);

Administrative Cost/GSF Analysis:

- Cost per GSF for administration – analysis for past 5 years completed.

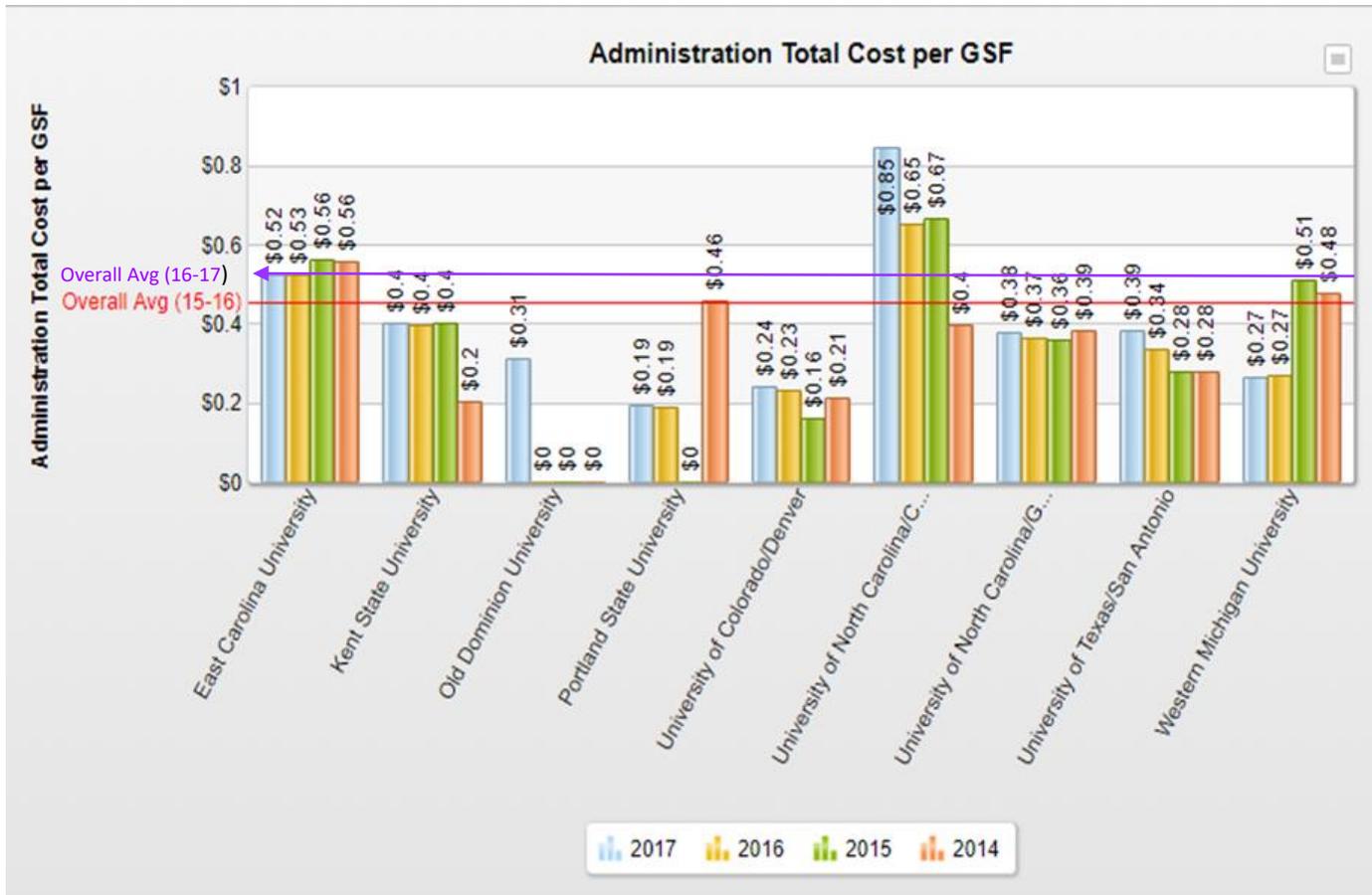
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



Overall APPA Avg. = \$0.54
 SRAPPA Avg = \$0.45
 Target = \$0.4275 (-5%)
 UNC Charlotte = \$0.85

ANNUAL

GOAL #6 –Promote Good Stewardship

Lead
BES

Objective: 5.1: Promote Fiscal Responsibility

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

ACTION PLAN

- Actions Planned
 - Implement team cleaning model throughout all BES zones (3/2022)
 - Development of BES&R 5-year plan with budget projections (6/2018)
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (Ongoing)
 - Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (Ongoing)
 - Developed Production Tracking tool based on attendance and staffing (Ongoing tracking)

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

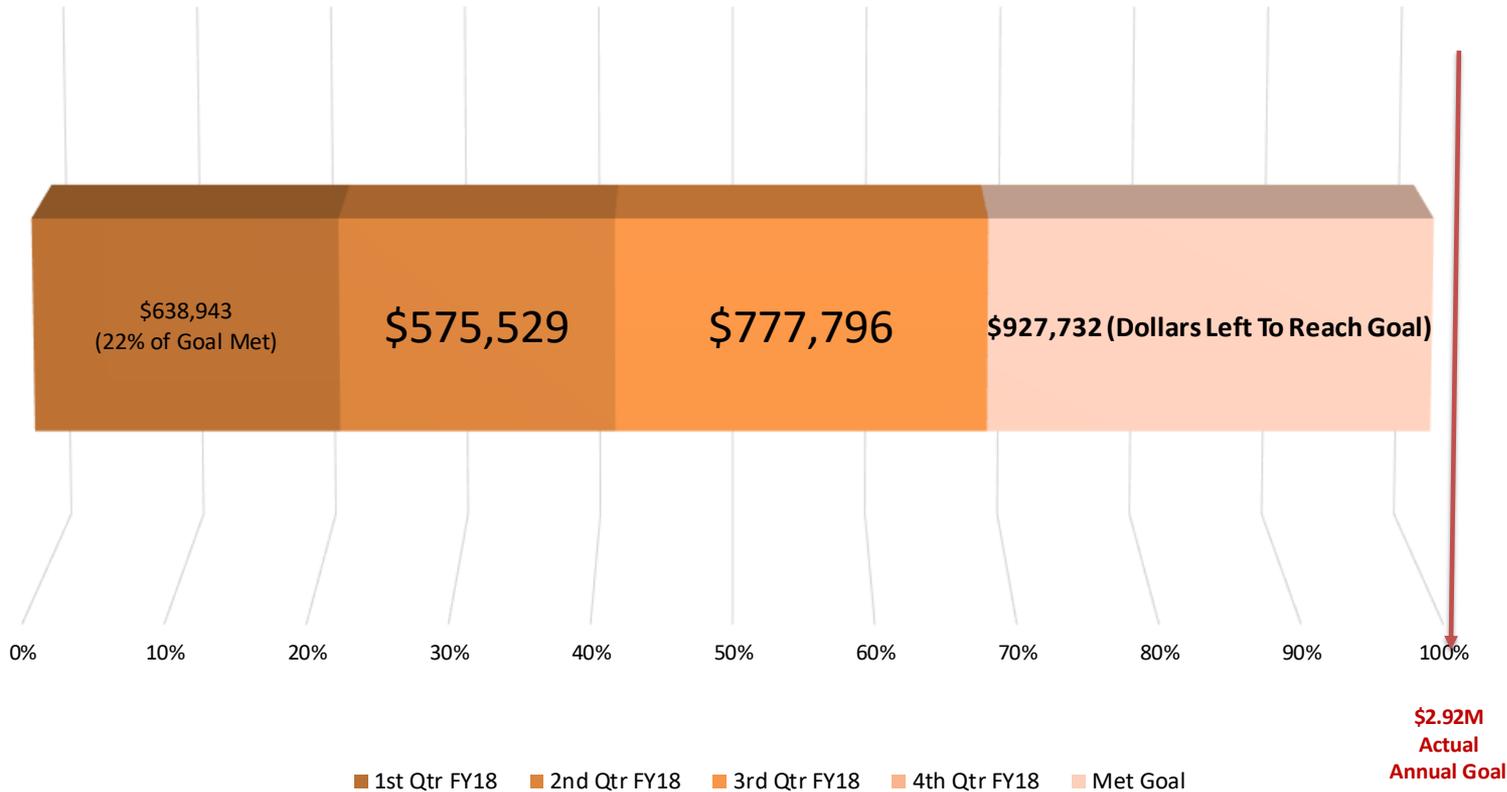
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



STATUS

Objective
Tactics

5.3
5.3.1

Conserve Natural Resources
Decrease Energy Usage 40% by FY2025

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Retro-commissioning program
 - Begin Bioinformatics in FY19 / Still working on King internally – continue to Retro-Cx at least one building each FY
 - Strong emphasis to reduce energy usage in Woodward (new LED lighting, reduced boilers short cycling & ER wheel repair
 - Re-activate Load Shedding program on BAS
- Exterior Lighting upgrades to LED
 - Replacing building HID's and Pedestrian Lights as funds become available – start with campus core. (Design Services projects)
 - Only 7% Pedestrian Lights are now LED
- Repair Campus energy metering in BAS, JACE or the meters themselves
- **WARNING!** – Going the wrong way toward reduction !!!!

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

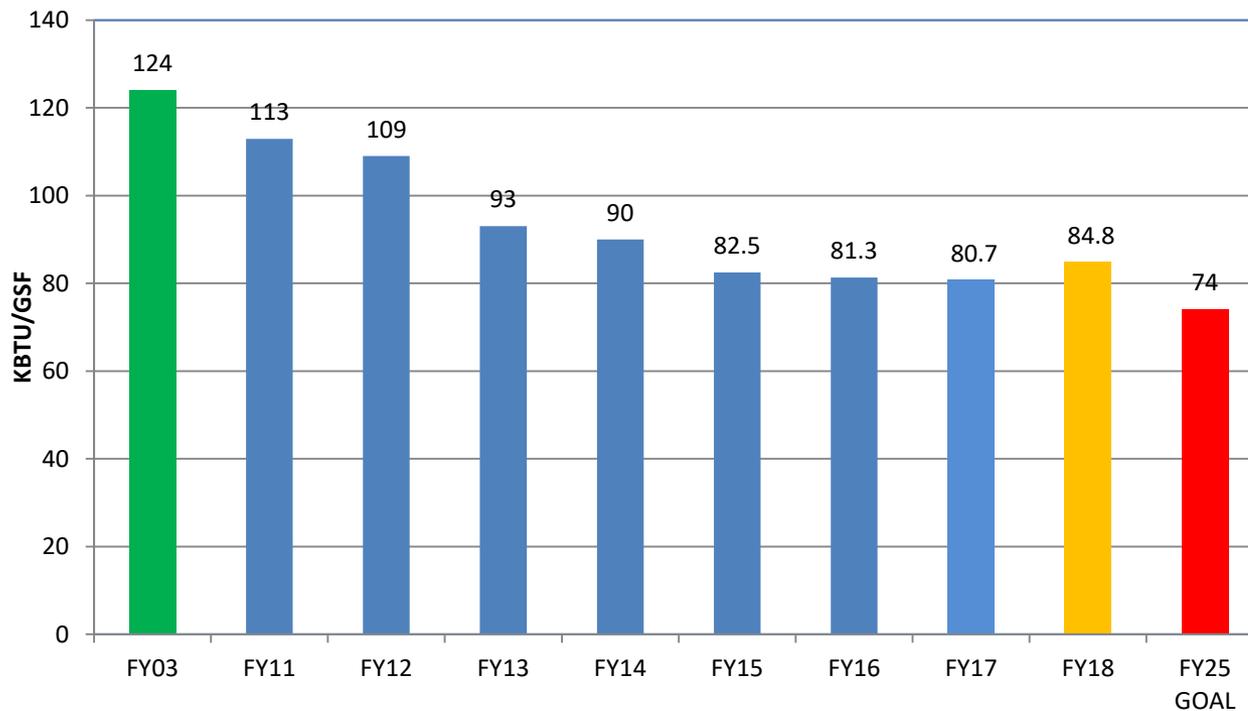
Measure: KBTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 32%
Goal of 40% by 2025

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



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

Continue . . .

- Establish project specific participation goals for single prime projects;
 - ✓ Softball Indoor Training Facility – 10% goal / 20% achieved
 - ✓ Parking Lot 8 Expansion – 10% goal / 20% achieved
 - ✓ Campus Infrastructure Renewal Phase 3 Boilers – 10% goal / 13% achieved
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *Good Faith Effort* documentation for compliance
- Work with internal/external groups to identify skilled subcontractors – minority & non-minority firms
- Encourage firms to bid our work

GOAL #5 – Promote Good Stewardship

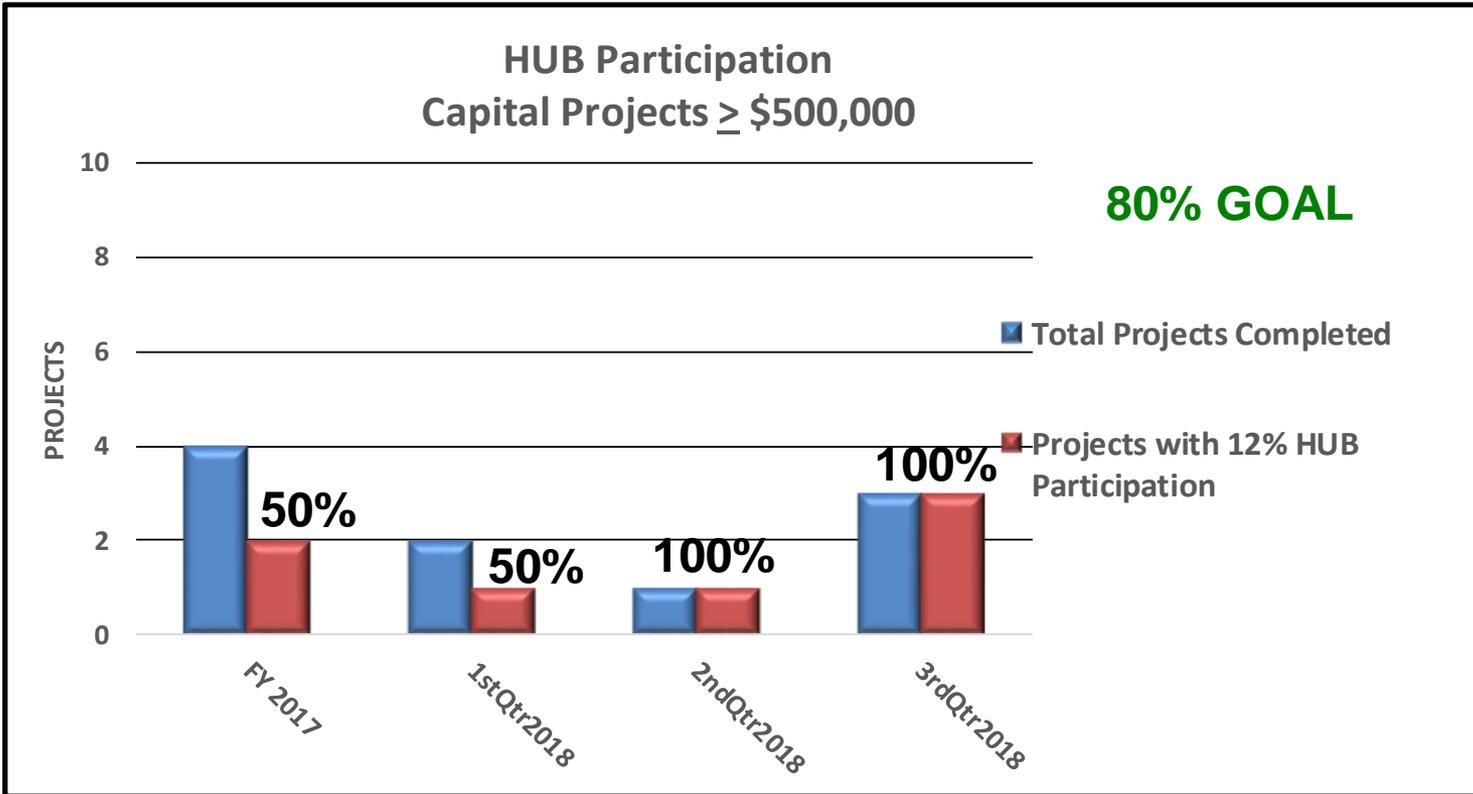
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



Elm, Maple, Pine
Reno – **22%**

Burson Building
Reno – **15%**

CID II Wi-Fi – **71%**

CID II East Village
Utilities – **15%**

STATUS

GOAL #5 – Promote Good Stewardship

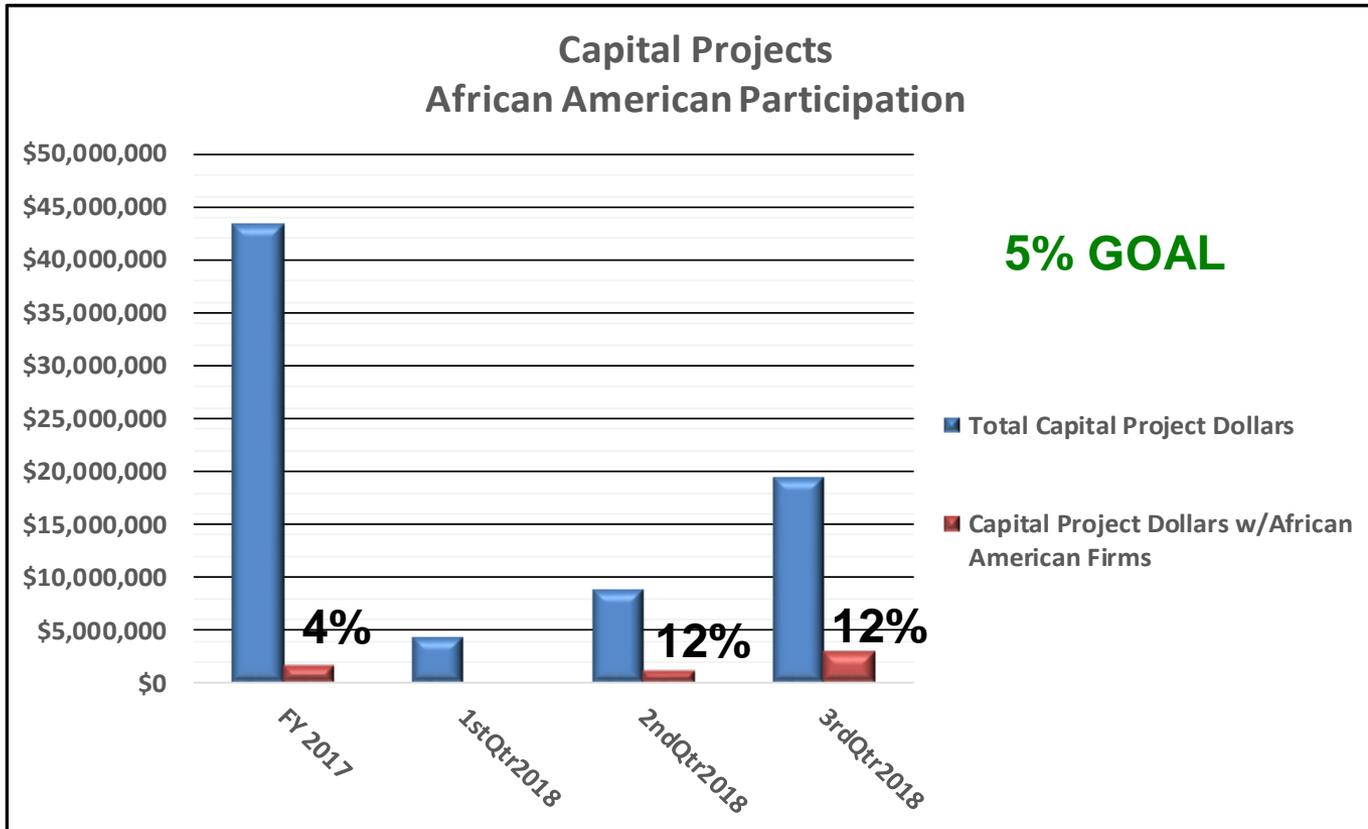
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



Elm, Maple, Pine
Reno – **14%** African
American

Burson Building
Reno – **8%**

CID II Wi-Fi – **71%**

STATUS

GOAL #5 – Promote Good Stewardship

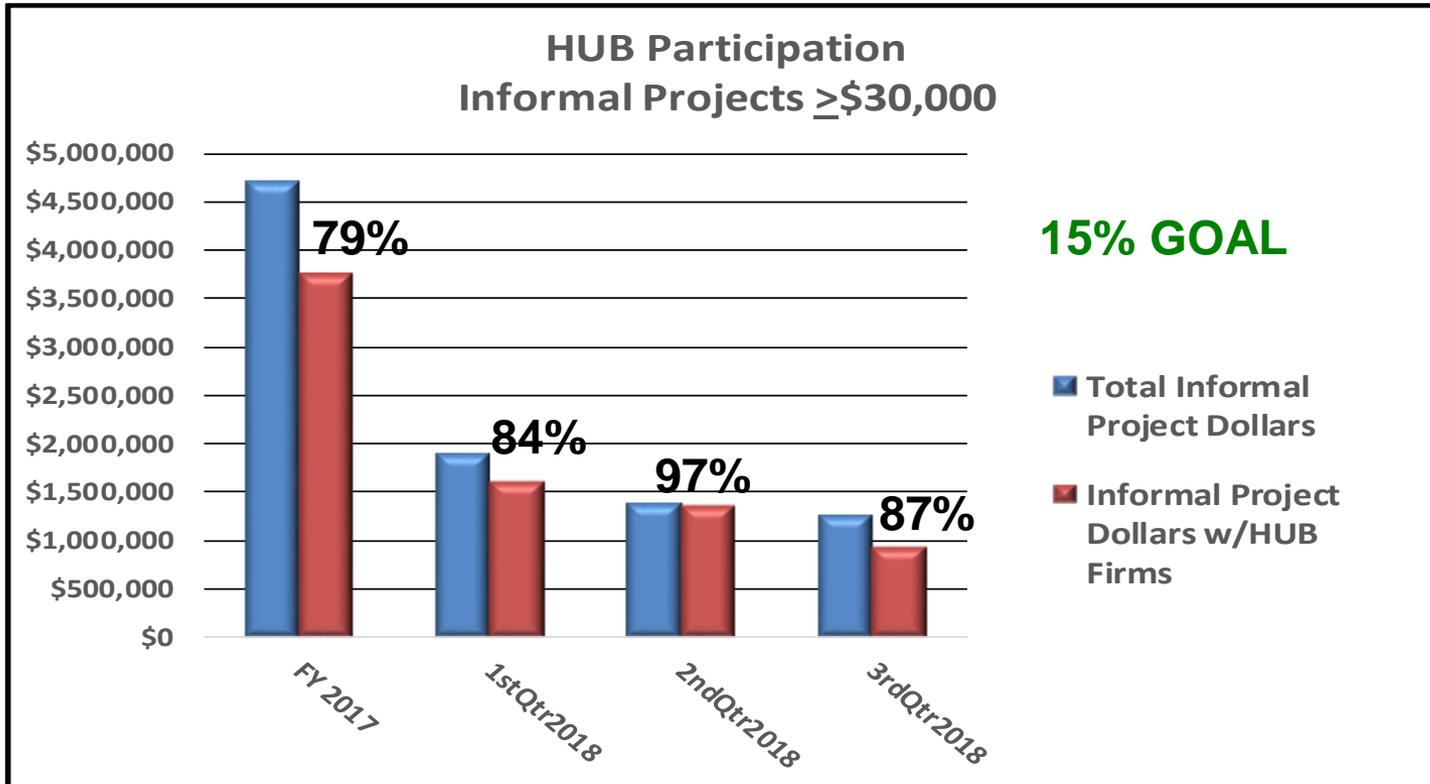
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

Congratulations

Heartland Contracting, LLC



Recipient of the
2018 HUB Award for Excellence

Facilities Management Strategic Planning Session – Third Quarter FY 2018

Annual Goal
13%

QTR 3
Status
62.7%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Year to Date
47.8%

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

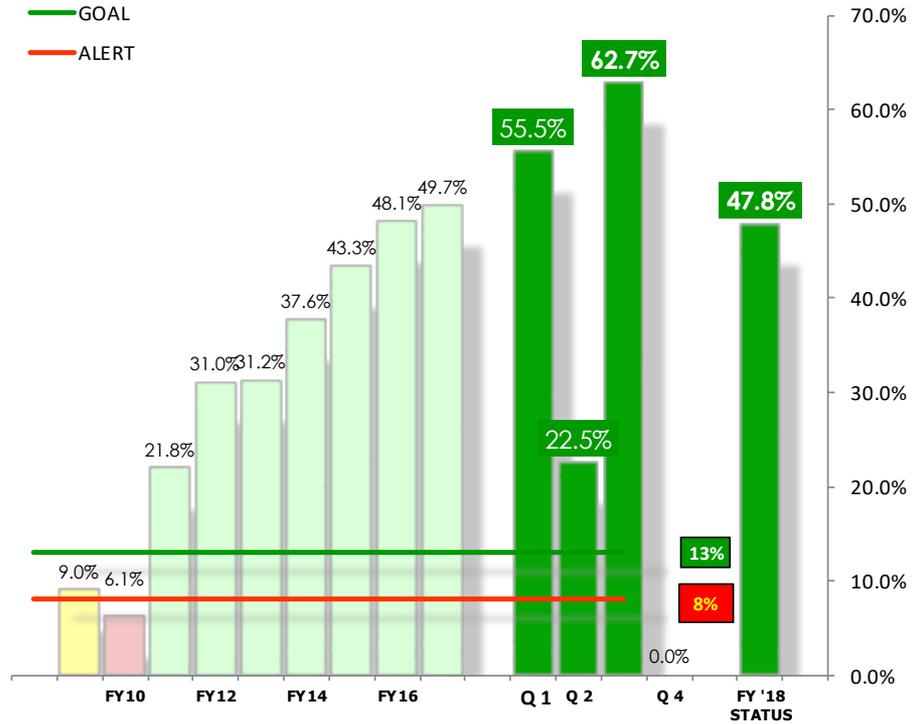
13% Overall HUB Participation Informal Projects Below \$30,000

FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
FY16	\$ 2,605,540	\$ 1,252,152	48.1%
FY17	\$ 2,122,583	\$ 1,055,439	49.7%
Q 1	\$ 414,160	\$ 229,963	55.5%
Q 2	\$ 354,275	\$ 79,808	22.5%
Q 3	\$ 386,332	\$ 242,403	62.7%
Q 4	\$ -	\$ -	0.0%
FY '18 STATUS	\$ 1,154,767	\$ 552,174	47.8%

HUB OVERALL GOAL: **13.0%**

13% Overall HUB Participation – Summary Graph



GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Continue outreach for more African American vendors: Amanda Caudle as lead with Ashley Sisco, and Evamarie Spataro assisting.

Evamarie started a new procedure welcoming any HUB company to present to Design Services team prior to our bi-weekly meetings

ONGOING IMPROVEMENTS

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

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

Design Services team continues to review and discuss HUB contractors and vendors at Design Services bi-weekly meetings.

Facilities Management Strategic Planning Session – Third Quarter FY 2018

Annual Goal
3%

QTR 3 Status
9.58 %

Lead
Design Services

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Year to Date
5.23%

Tactic 5.4.5: 3% African American Participation on Informal Projects Below \$30,000
Measure: Total African American Contract Dollars for Informal Projects Below \$30,000 (**Construction only**) Divided by Total Contract Dollars

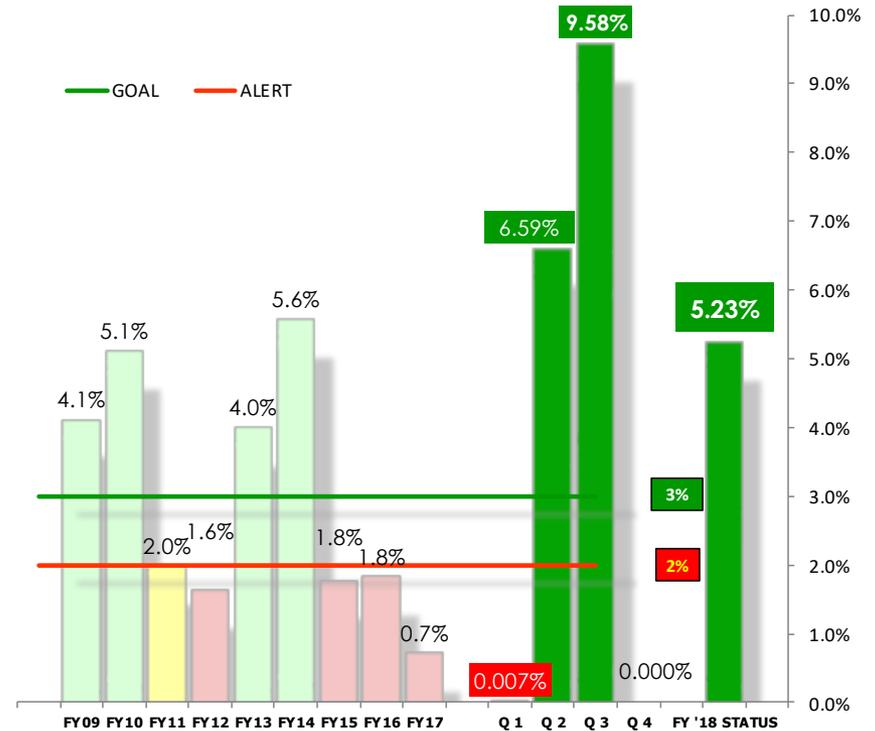
3% African American Participation Informal Projects Below \$30,000

FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
FY16	\$ 2,605,540	\$ 47,345	1.8%
FY17	\$ 2,122,583	\$ 14,905	0.7%
Q 1	\$ 414,160	\$ 30	0.007%
Q 2	\$ 354,275	\$ 23,361	6.59%
Q 3	\$ 386,332	\$ 37,000	9.58%
Q 4	\$ -	\$ -	0.000%
FY '18 STATUS	\$ 1,154,767	\$ 60,391	5.23%

HUB AFRICAN AMERICAN GOAL: 3.0%

3% African American Participation – Summary Graph



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 2020



ACTION PLAN

Waste Reduction and Recycling

Actions Complete

- New Recycling Facility operational!! Pallets
- Began working with Chartwells to conduct waste audits and implement composting and recycling collections back of house. (Orbis Grille, Prospector/Gold Room/Feisty's/Chick-fil-A, Einstein Bagels, Starbucks, Catering Kitchen are complete)
- Barcode project complete for interior bins – just need technology to work now. (540 interior collection sites - does not currently include exterior bins)
- Recycling Education and Outreach Coordinator position completed and posted. (Interviews to be completed in April)
- Supported Sustainability Office with Zero Waste Basketball pilot (2 Men's games, 1 Women's game – Best result was 52% diversion)

4th Quarter Actions Planned

- Earth Month Activities – Tree Planting (57 trees planted); Campus Cleanup (110+ volunteers; 420+ lbs. litter picked up); Earth Day Celebration
- Continue work with Chartwells (SoVi, Mainstreet Market, re-visit the sites already done)
- Finish interviewing and hire Education & Outreach Coordinator position. (May/June)
- Move-out (with Housing and Residence Life) – this year will better incorporate RA's and REC's. (May)
- Update Recycling Policy – 713. (April/May)
- Reworking campus waste hauling contract (RFP needs to go out July/August)

Facilities Management Strategic Planning Session – Third Quarter FY 2018



Objective 5.2: Develop a Sustainable Campus

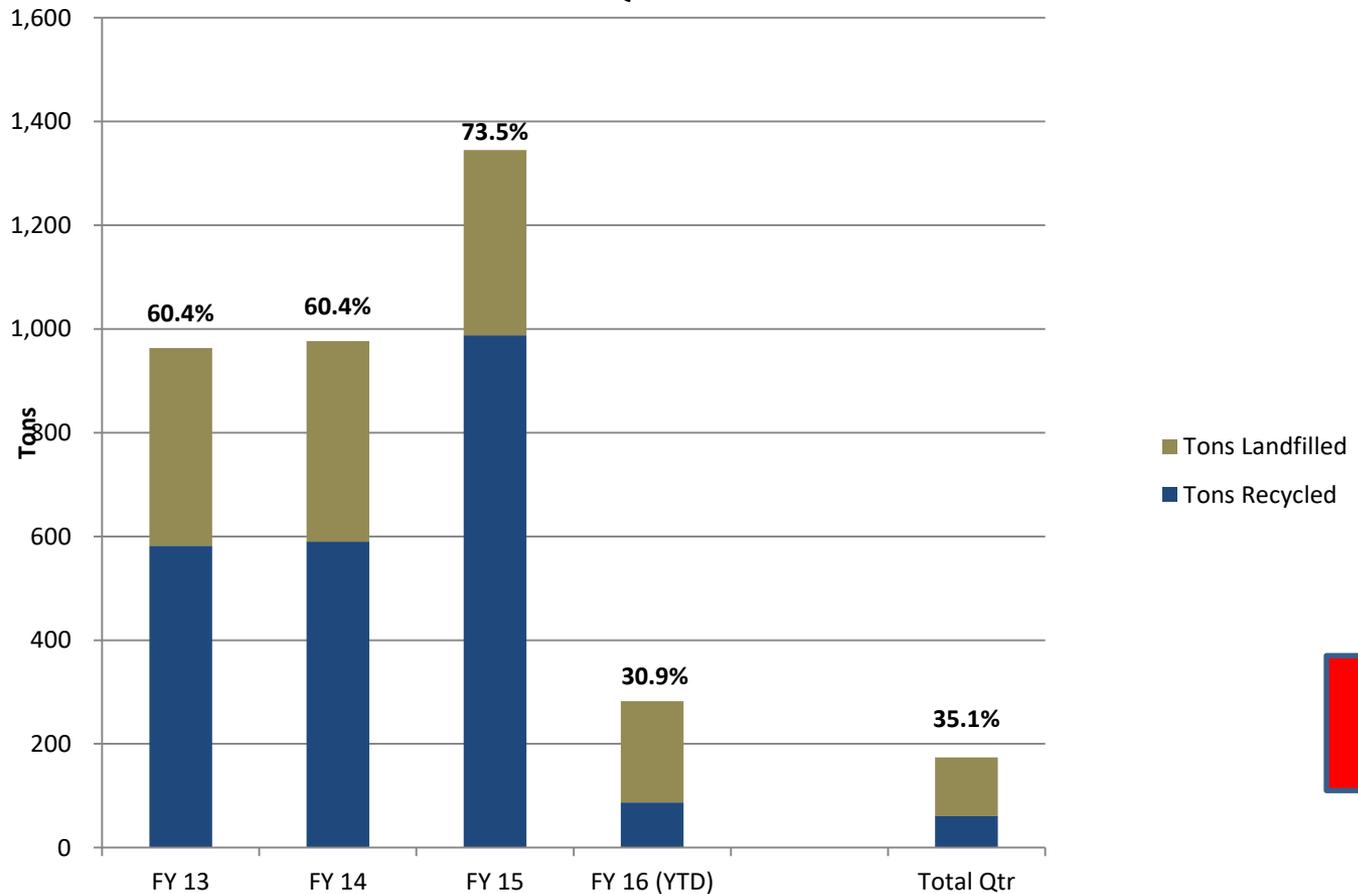
Tactic 5.2.1

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

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

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion 3rd Quarter FY18



STATUS:



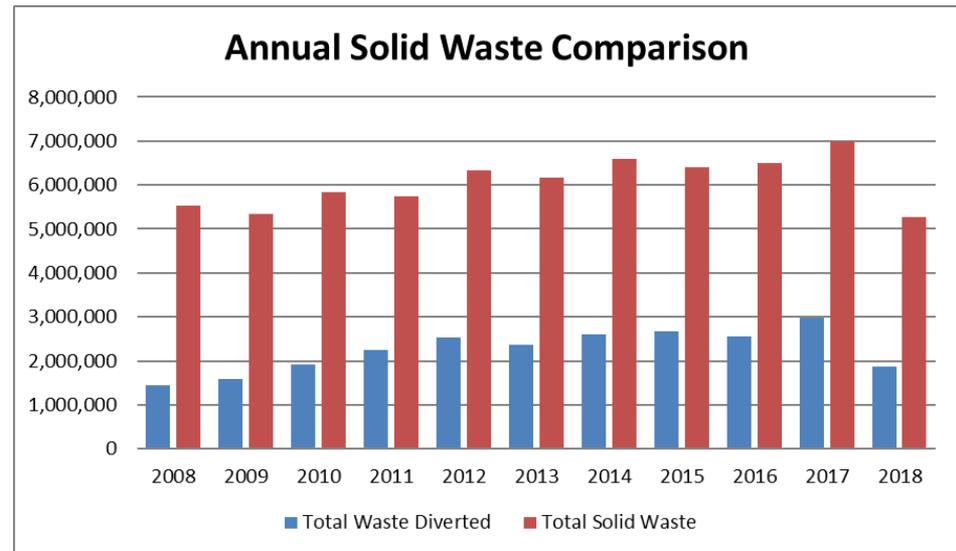
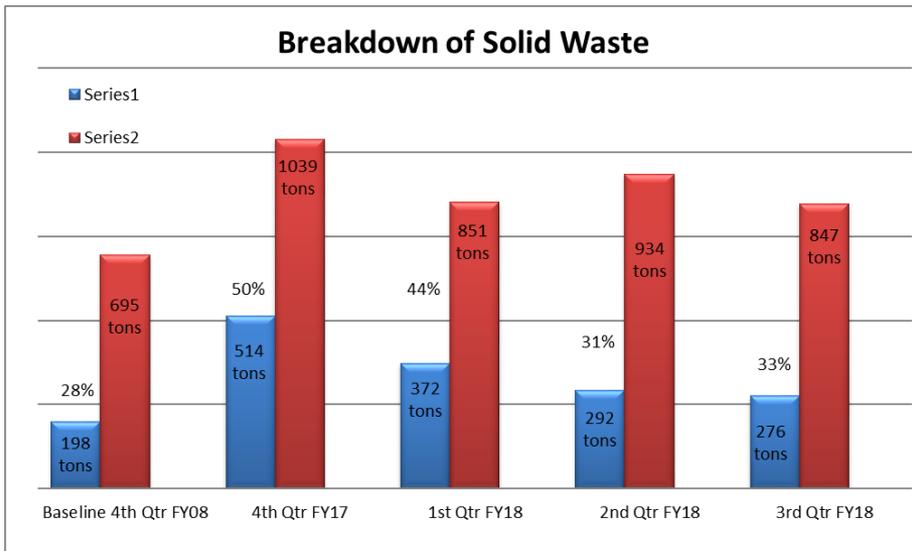
Tactic 5.2.2

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

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points documented to achieve gold rating.

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Achieved STARS 2.0 Rating of Silver in October 2016**
- **Re-set goal: STARS 2.1 Gold by December 2018**
 - **Monthly meetings with Chartwells for Food Credits**
 - **Interns hired to assist – ca. 40% completed**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by October 2018**
 - **Executive Committee: Base on Compliance with UNC Sustainability Policy (*italics*)**
 - **2 Priorities (ongoing)**
 - **Academics:** *Integration of Sustainability Principles*
 - **Operations:** *Operations & Maintenance; Design & Construction; Master Planning*
 - **3 Initiatives (5 years, 2018-2023)**
 - **Zero Waste**
 - **Responsible Purchasing**
 - **Transportation Planning**
 - **1 Commitment (32 years – 2050)**
 - **Carbon Commitment (Chancellor)**

STATUS