Strategic Planning Session

Fourth Quarter – Fiscal Year 2014
April – June 2014

AGENDA

Fiscal Year 2014 Accomplishments

Employee Satisfaction Survey Action Plans

Strategic Planning Metrics and Actions Plans

Fiscal Year 2015 Challenges

Look Ahead

Strategic Planning Session

Fourth Quarter – Fiscal Year 2014
April – June 2014

Goal 1 - Continuously Improve Operation of Campus Facilities
Goal 2 - Create a Reliable and Sustainable Physical Infrastructure
Goal 3 - Foster a Customer Focused Organization
Goal 4 - Recruit, Develop, and Retain Quality Employees
Goal 5 - Promote Good Stewardship

APPA Award for Excellence

UNC Charlotte Facilities Management

WINNER 2014

UNC CHARLOTTE   "Creating A Campus of Distinction"   APPA

Strategic Planning Session

Fourth Quarter Fiscal Year 2014
Fiscal Year 2014 Fourth Quarter Recognition

GOAL #1

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

-- Harold Geneen, industrialist

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%

<div style="text-align:right;">Lead
F. O.</div>

ACTION PLAN

- Actions Planned

    1 – July 2014; Daily assignment, coordinating and monitoring of work effort

    2 – July 2014; assignment of lead technician in absence of supervisor

    3 – All levels of leadership "Manage by Walking around"

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
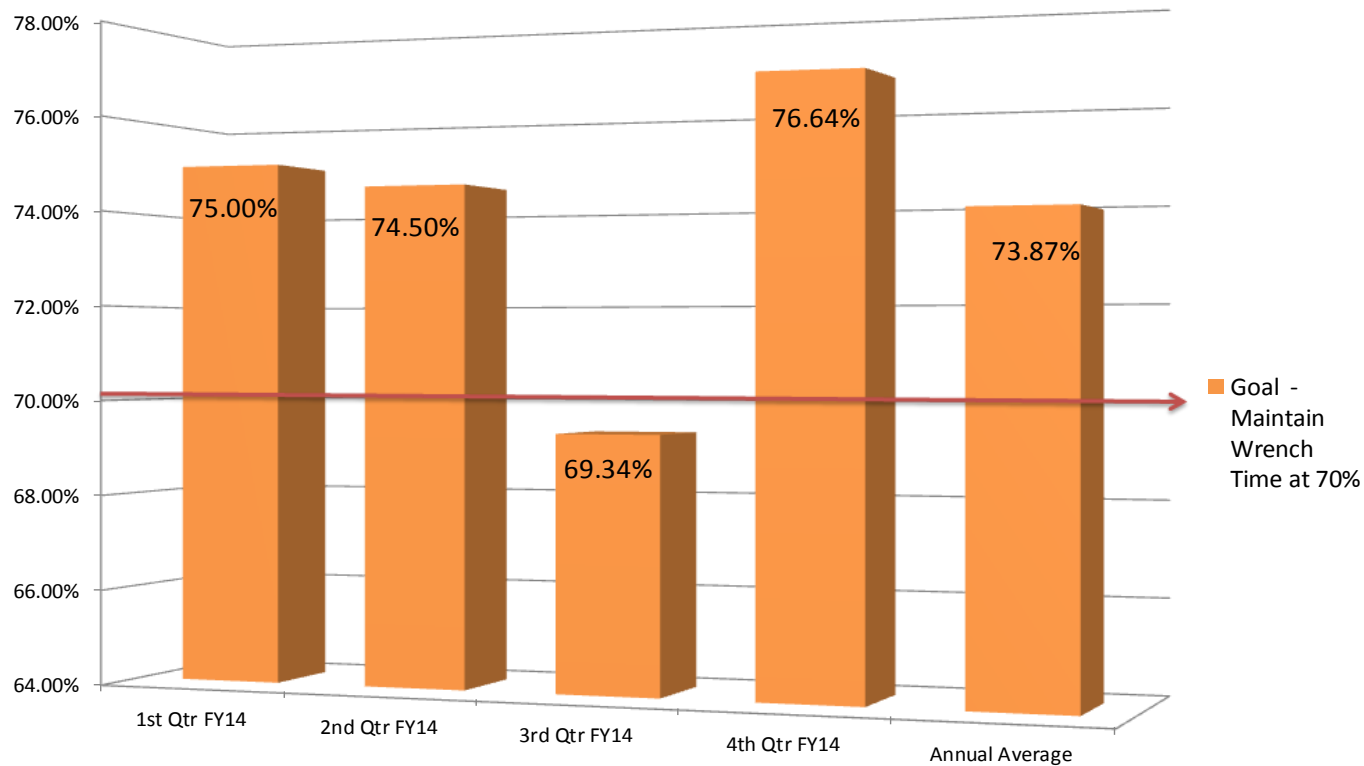**Objective: 1.1: Improve Labor Availability**
Tactic: 1.1.1: Maintain "Wrench" Time at 70%
Measure: Hours (total hours charged to work requests divided by total hours recorded)

Lead: Facilities Operations
Balanced Scorecard Category: Internal Business Process

Lead
F. O.

Wrench Time

Goal -
Maintain
Wrench
Time at 70%

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

Lead
F. O.

ACTION PLAN

- Actions Planned

  1 – Weekly review of items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of "zero" but pre-sourced for faster ordering and delivery).

  2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).

  3 – Send out daily email reminders for approvers (Supervisors, Admins and Managers)

  4 - Monitor the req to PO processing time and discuss weekly.

  5 – Promote the use of SDI Punch-out; conduct lunch and learn July 2014.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
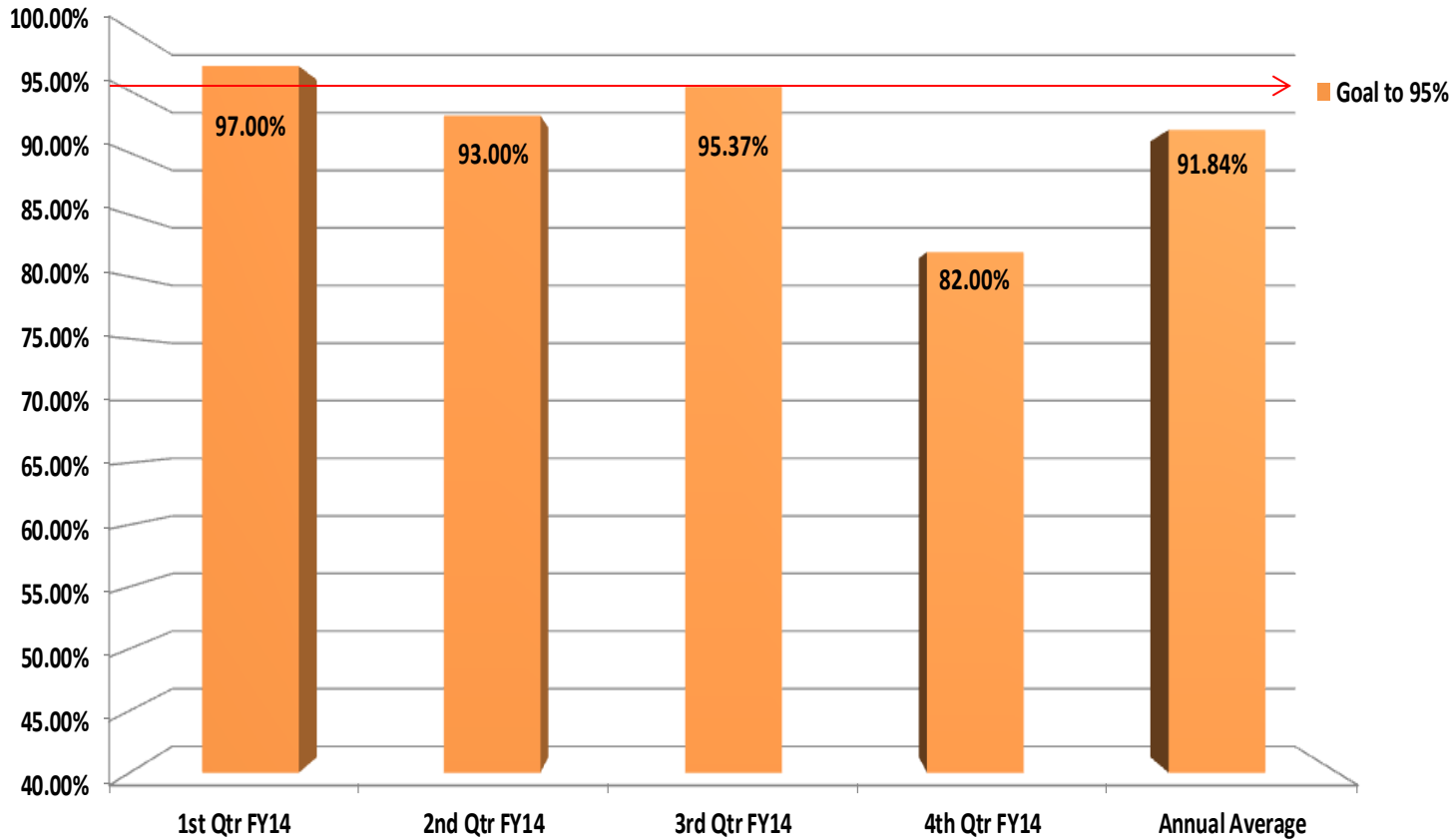**Objective: 1.2: Improve Logistics Efficiency**
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%
Measure: Percent of non-stock orders received on or before delivery due date (SDI Key Performance Indicator (KPI))

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Lead
F. O.

Improve Non-stock On-time Delivery

Goal to 95%

	1st Qtr FY14	2nd Qtr FY14	3rd Qtr FY14	4th Qtr FY14	Annual Average
	97.00%	93.00%	95.37%	82.00%	91.84%

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
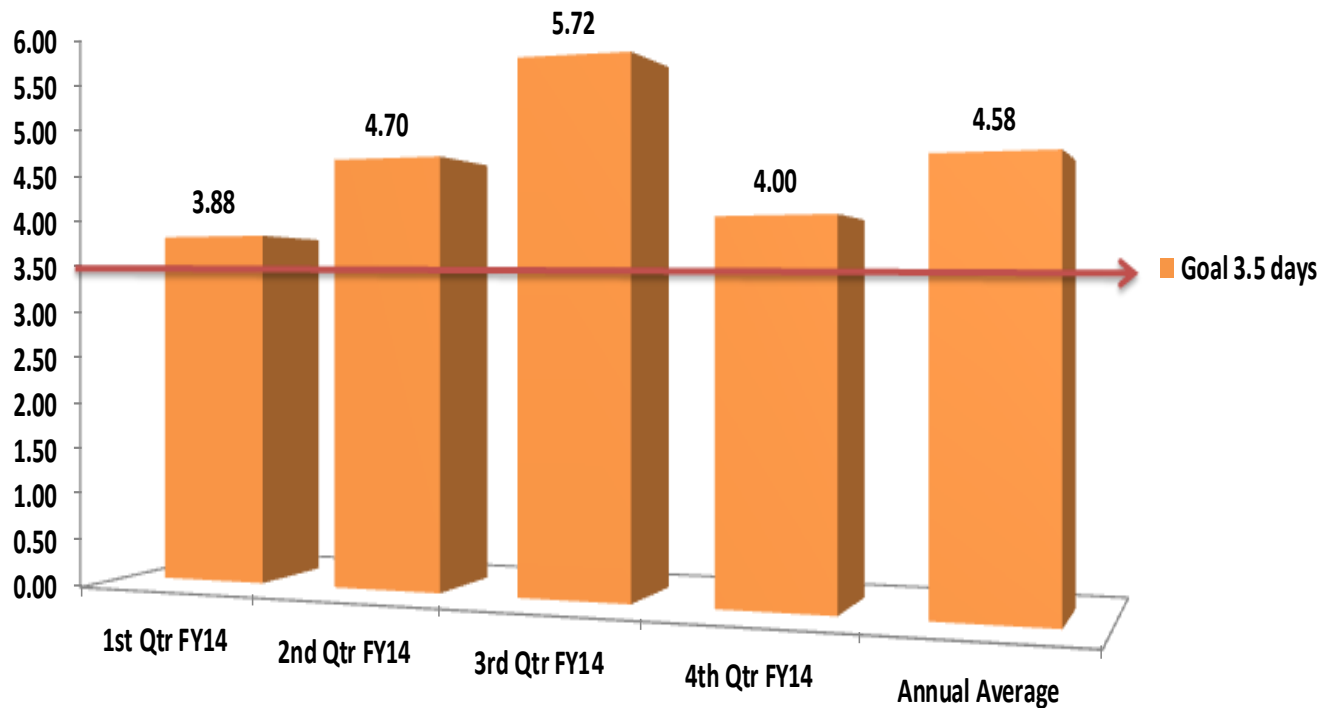**Objective: 1.2: Improve Logistics Efficiency**
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days
Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

| Lead |
| F. O. |

Reduce Average Non-stock Requisition to Receipt Time

Chart values:
- 1st Qtr FY14: 3.88
- 2nd Qtr FY14: 4.70
- 3rd Qtr FY14: 5.72
- 4th Qtr FY14: 4.00
- Annual Average: 4.58
- Goal 3.5 days

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

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)

Lead
F. O.

ACTION PLAN

- Actions Planned

    1 – Review of recurring services and scheduled services currently being completed using PM work request – Aug 2014

    2 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

    3 – Weekly meeting with UPA and Managers to monitor 14 day report.

    4 - Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
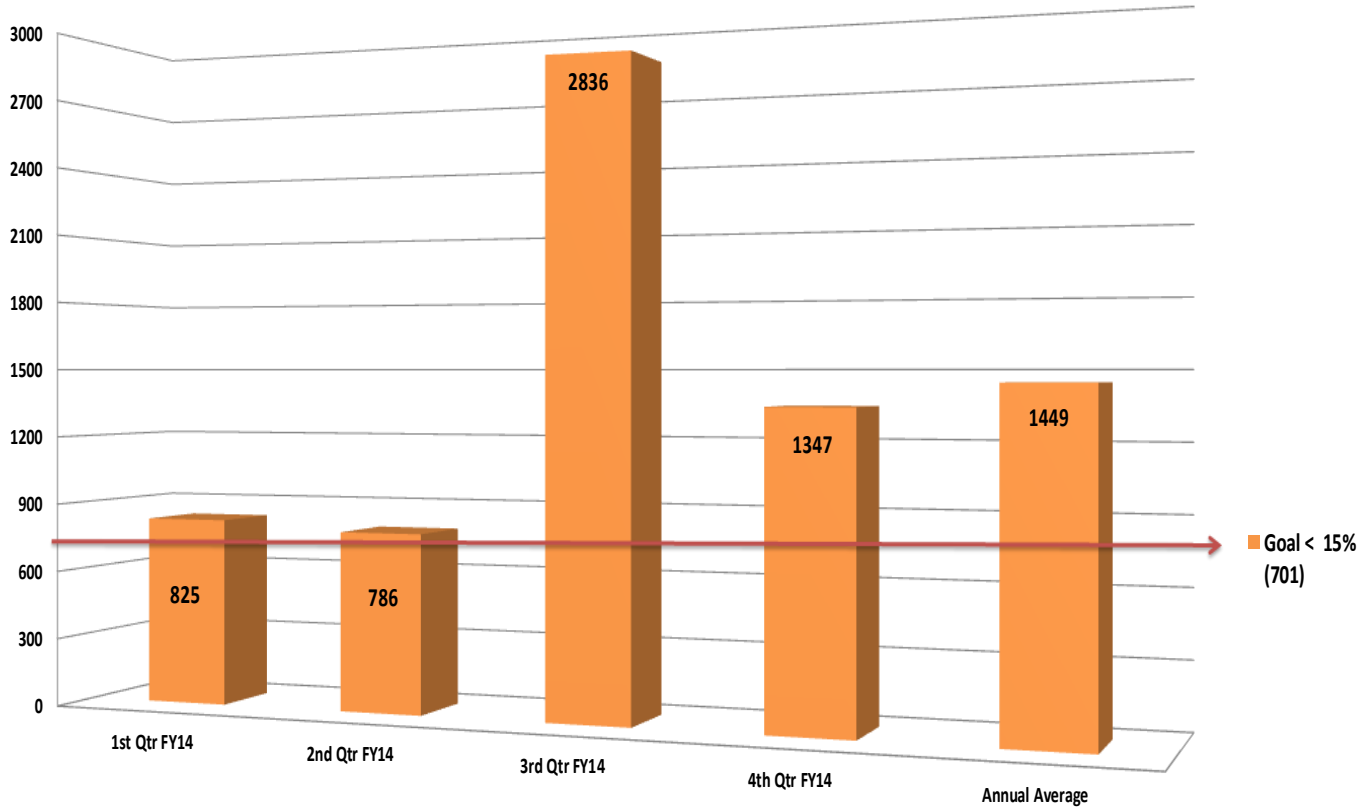**Objective: 1.3: Improve Work Request Process**
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%
Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days

Lead F. O.		

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
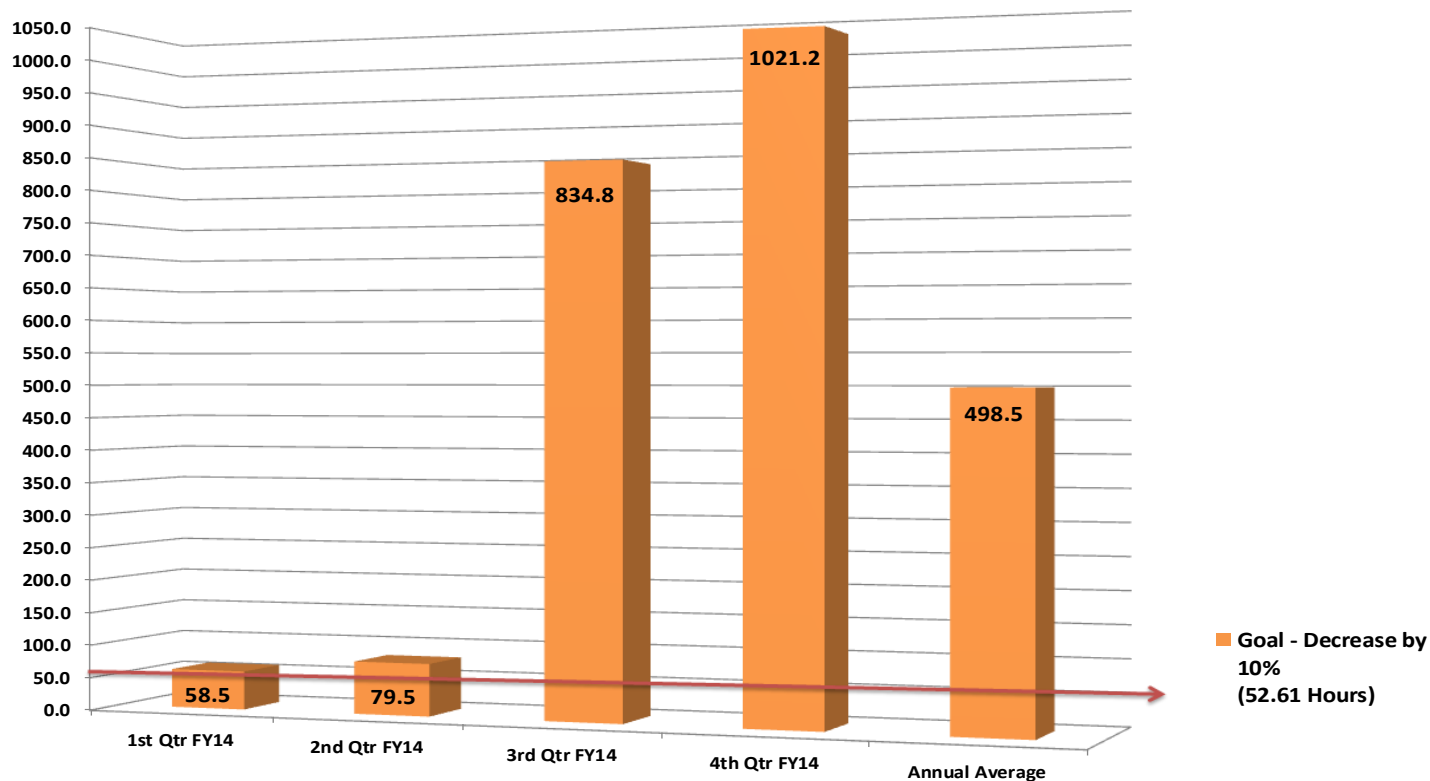**Objective: 1.3: Improve Work Request Process**
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%
Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Lead
F. O.

Decrease Work Request Cycle Time

Quarter	Value
1st Qtr FY14	58.5
2nd Qtr FY14	79.5
3rd Qtr FY14	834.8
4th Qtr FY14	1021.2
Annual Average	498.5

Goal - Decrease by 10% (52.61 Hours)

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
    - Attended Simon Institute Symposium (7/13/14 – 7/15/14)
        - attended by: Althea Cook, Solomon Franklin, Katherine Humphries, and Joe Scollo
    - Completed outside audit of cleaning processes using OS1 and APPA Appearance Levels (4/14/14 – 4/17/14)
    - Obtained Baseline Audit (6/10/14)
        - Reviewed (OS1) and APPA audit reports
    - Identified Friday building for (OS1) Pilot Study (7/1/14)

- Actions Planned
    - Conduct (OS1) Pilot in Friday building (end of FY14-FY15)
    - Training
        - Work Loading Class (TBD)
        - Janitor University (10/6/14 – 10/10/14)
    - Continue Re-engineering implementation planning meetings thru (3/1/15)
    - Review and continue quarterly self audits (11/30/14)

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

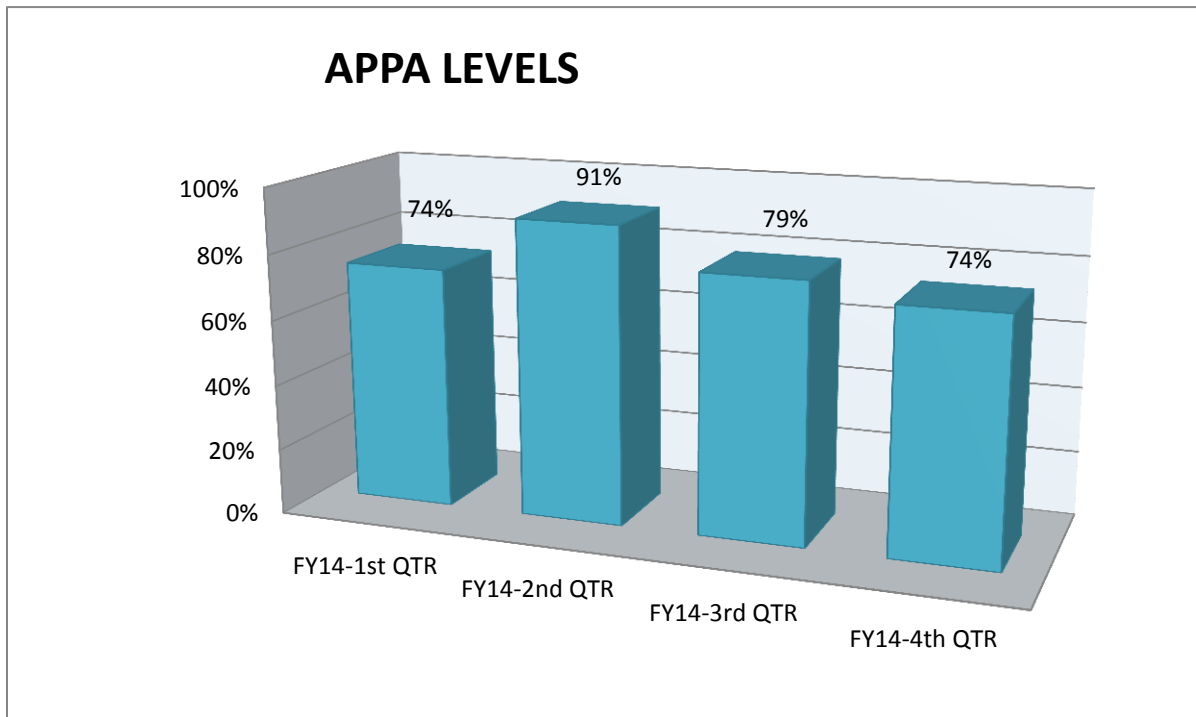**GOAL #1 – Continuously Improve Maintenance and Operations of the Campus**

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)
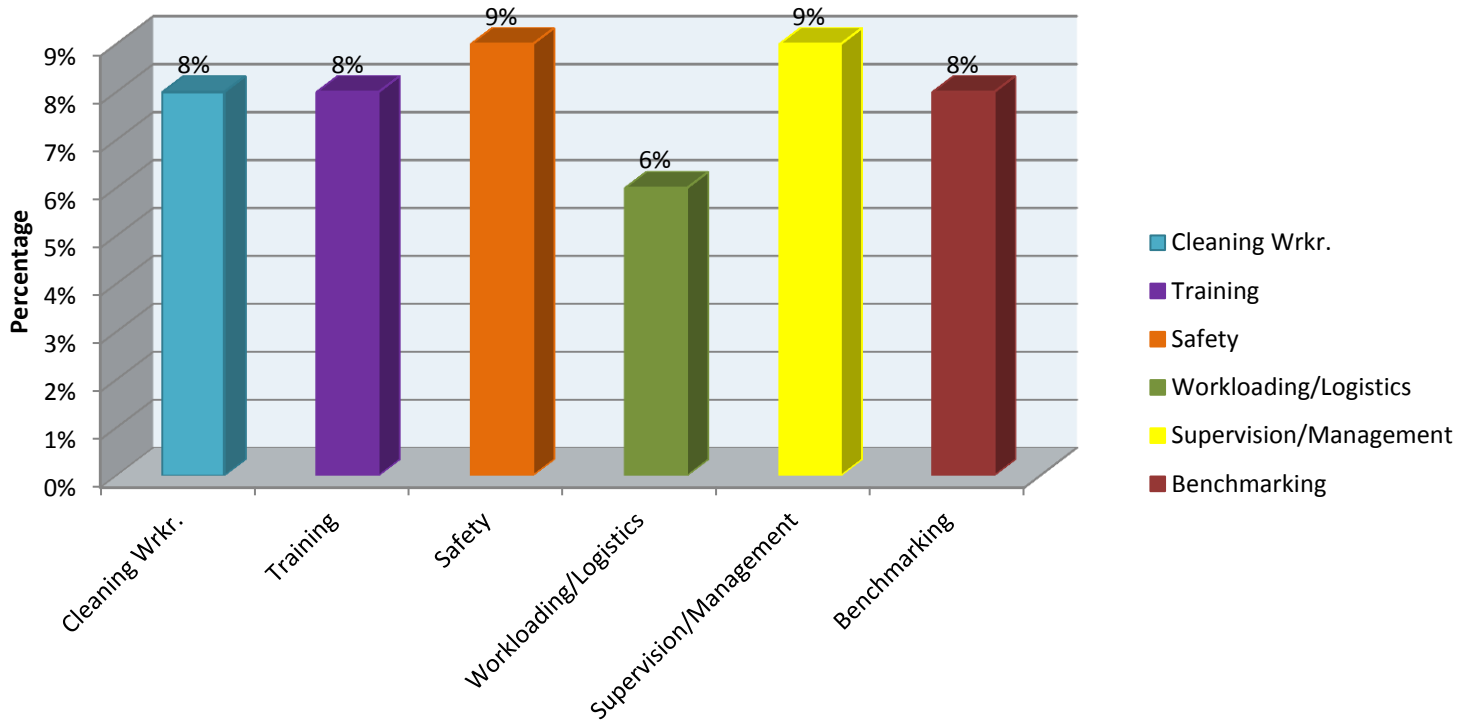
Lead: Building Environmental Services
Balanced Scorecard Category: Customer Perspective

**Lead
BES**

Percentage = 74%

STATUS

14

(OS1) Baseline Audit Scores - Job Category
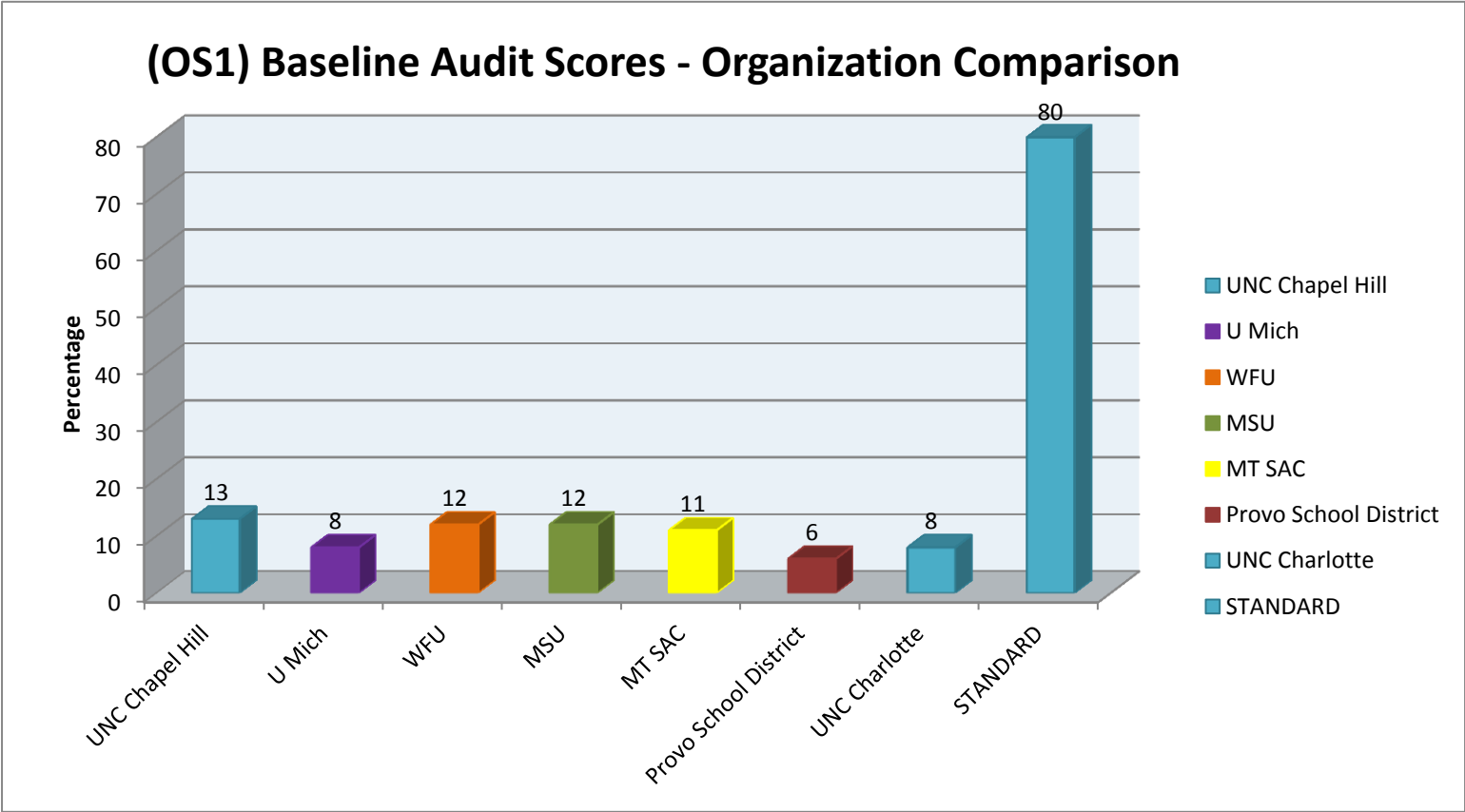
Legend:
- Cleaning Wrkr.
- Training
- Safety
- Workloading/Logistics
- Supervision/Management
- Benchmarking

Values:
- Cleaning Wrkr. — 8%
- Training — 8%
- Safety — 9%
- Workloading/Logistics — 6%
- Supervision/Management — 9%
- Benchmarking — 8%

(OS1) Baseline Audit Scores - Organization Comparison

Bar chart. Y-axis: Percentage (0 to 80). Values:
- UNC Chapel Hill: 13
- U Mich: 8
- WFU: 12
- MSU: 12
- MT SAC: 11
- Provo School District: 6
- UNC Charlotte: 8
- STANDARD: 80

Legend:
- UNC Chapel Hill
- U Mich
- WFU
- MSU
- MT SAC
- Provo School District
- UNC Charlotte
- STANDARD

16

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%

**Lead
F. O.**

ACTION PLAN

- Actions Planned

  1 – Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.

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

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

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

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
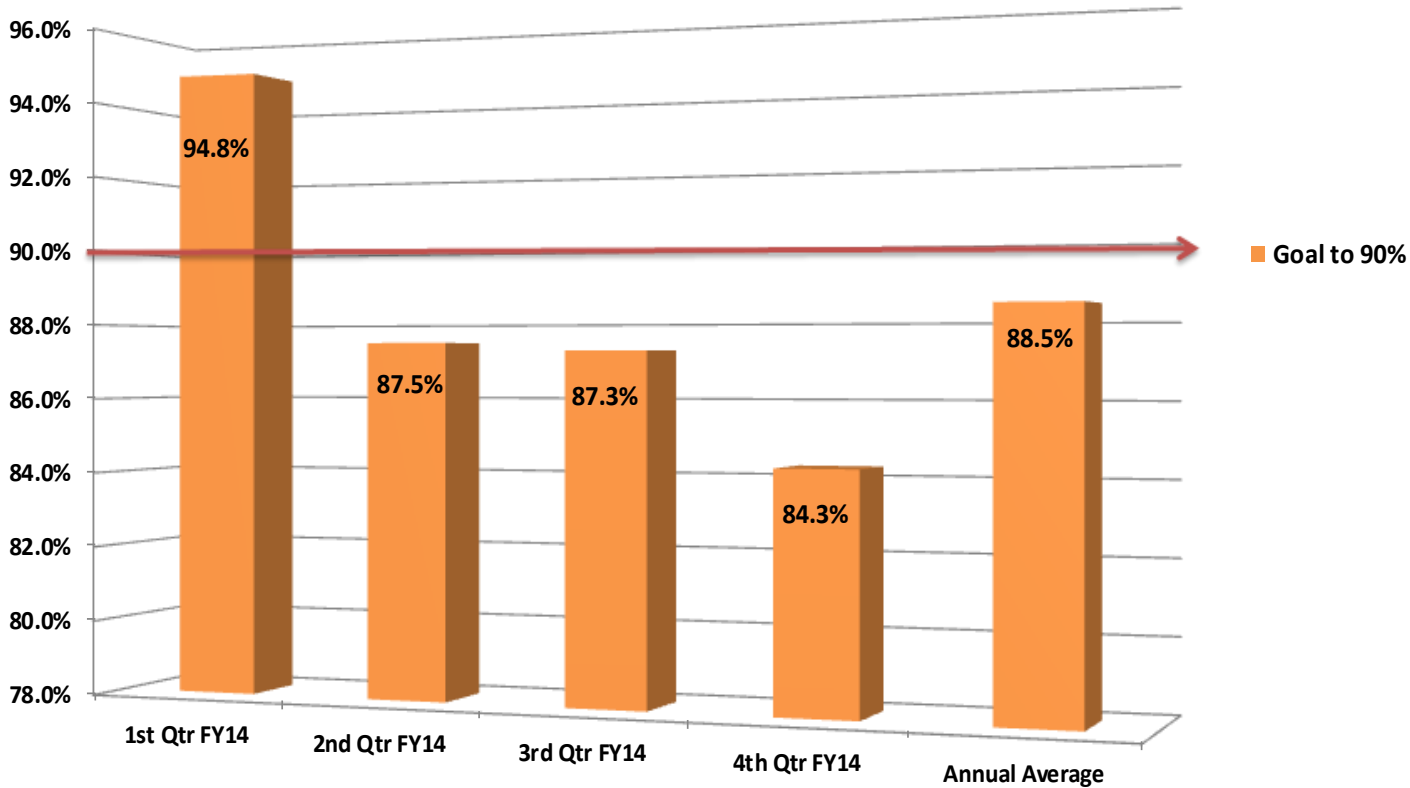**Objective: 1.5: Improve Facility Systems Reliability**
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%
Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Lead
F. O.

Improve Completion of PM Work Orders

Bar chart titled "Improve Completion of PM Work Orders" with y-axis from 78.0% to 96.0% and a red "Goal to 90%" line at 90.0%.

- 1st Qtr FY14: 94.8%
- 2nd Qtr FY14: 87.5%
- 3rd Qtr FY14: 87.3%
- 4th Qtr FY14: 84.3%
- Annual Average: 88.5%

Legend: ■ Goal to 90%

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
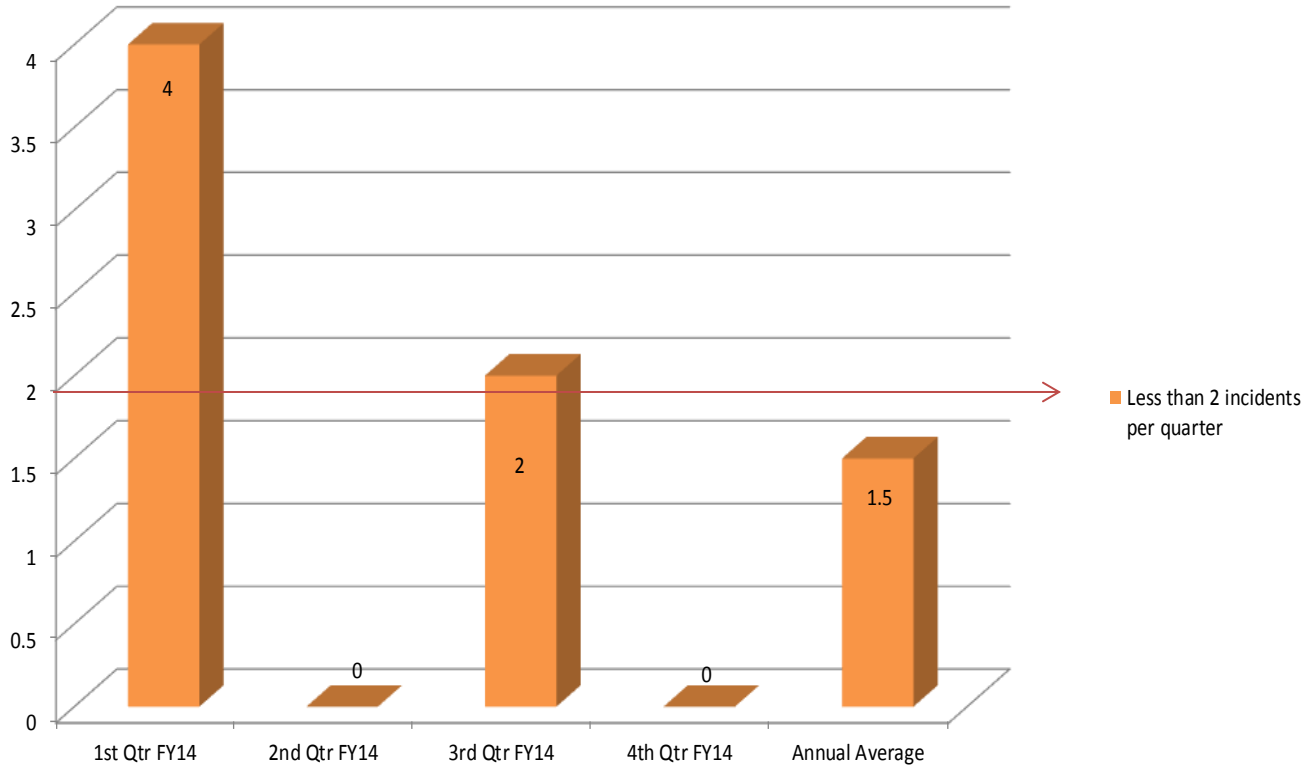**Objective: 1.5: Improve Facility Systems Reliability**
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter
Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

**Lead
F. O.**

STATUS

Unscheduled Equipment Replacement Projects

Chart values:
- 1st Qtr FY14: 4
- 2nd Qtr FY14: 0
- 3rd Qtr FY14: 2
- 4th Qtr FY14: 0
- Annual Average: 1.5

Legend: ■ Less than 2 incidents per quarter

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #1 – Continuously Improve Operations of Campus Facilities
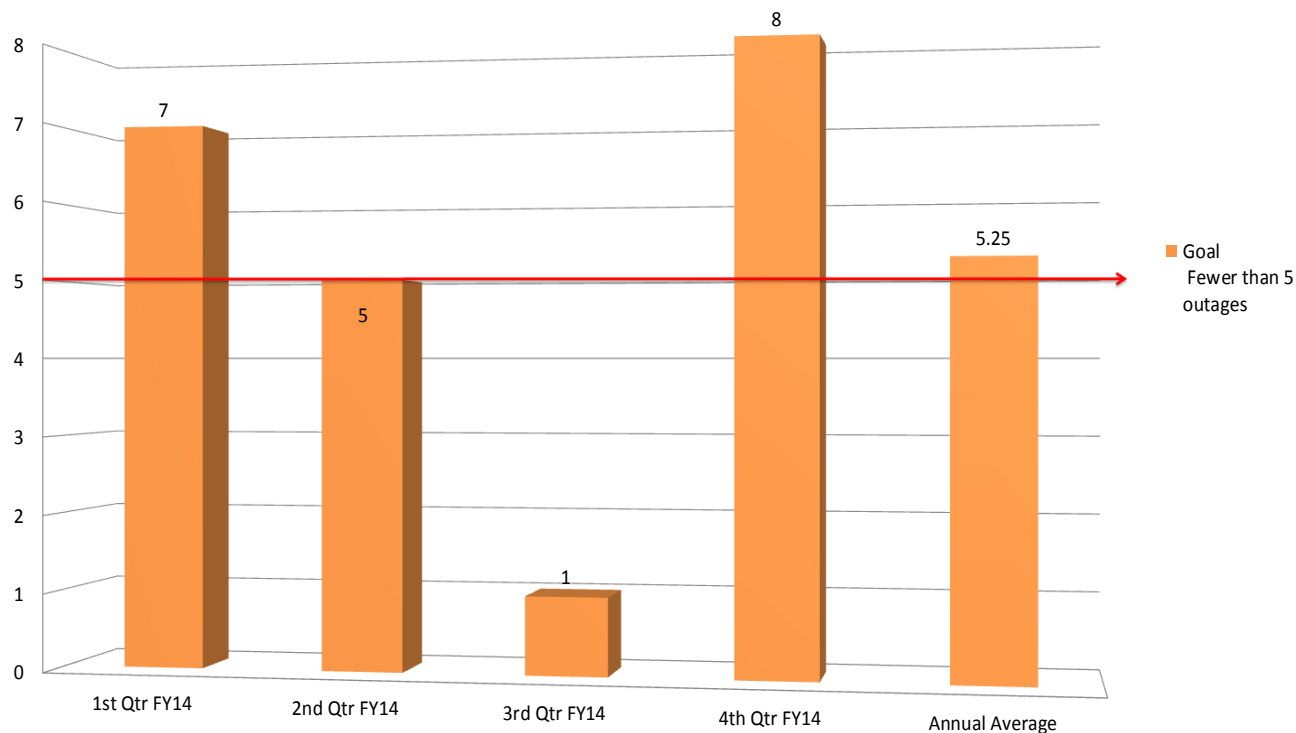**Objective: 1.5: Improve Facility Systems Reliability**
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter
Measure: Number of Occurrences ; Electric, Water, Sewer, HVAC, (Roofs, Lots, Decks, Roads measured separately).

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Lead F. O.

STATUS

Unscheduled Utility Outages

20

GOAL #1 – Continuously Improve Operations of Campus Facilities
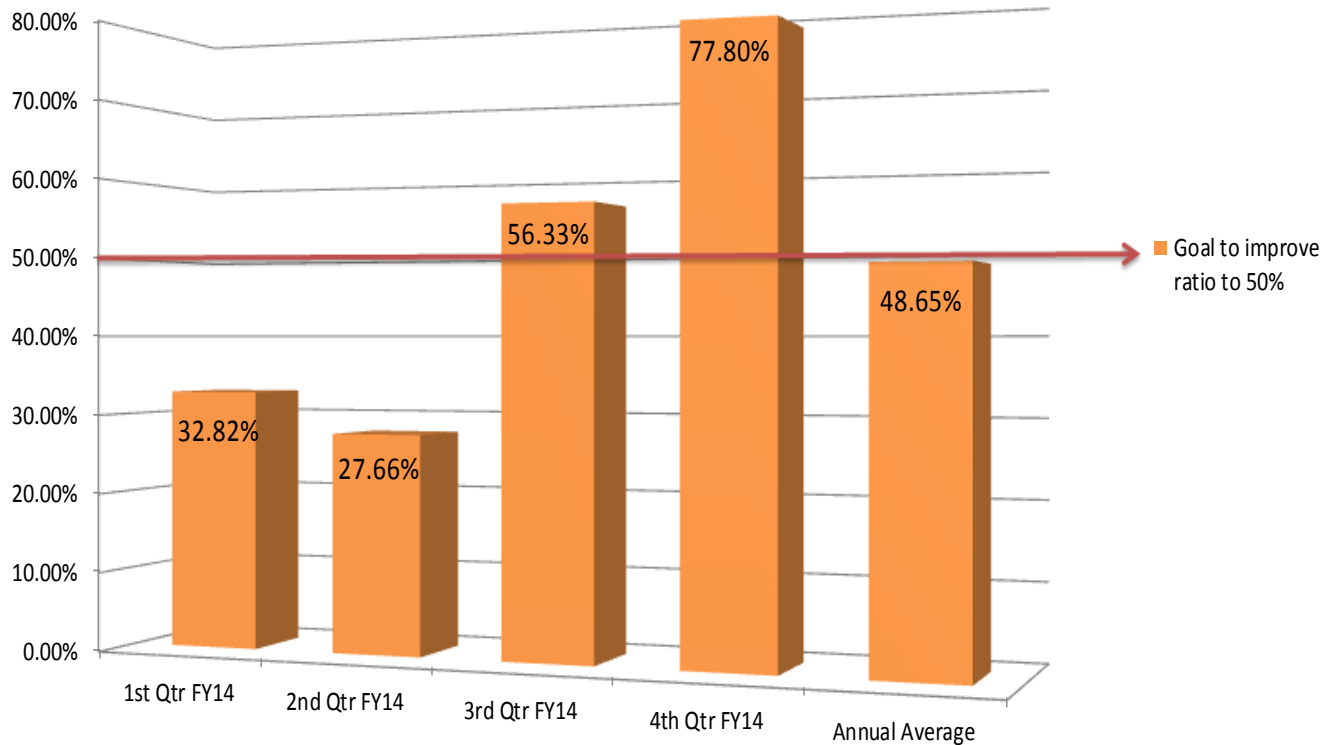**Objective: 1.5: Improve Facility Systems Reliability**
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%
Measure: Percentage (Number of completed reactive work requests divided by total number of completed work requests including PM and Predictive work requests) (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Lead F. O.

Improve Ratio of Preventive/Predictive Work Requests

- 1st Qtr FY14: 32.82%
- 2nd Qtr FY14: 27.66%
- 3rd Qtr FY14: 56.33%
- 4th Qtr FY14: 77.80%
- Annual Average: 48.65%

Goal to improve ratio to 50%

STATUS

GOAL #2

Create a Reliable and Sustainable

Physical Infrastructure

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition
                    Tactic 2.8.1:

Balanced Scorecard Category: Internal Business Process

Lead REAL ESTATE

(Purchase) ACTION PLAN

- Completed
  - Acquired one Medical Office (Foundation)

Actions Planned:

- Complete acquisitions by the State by end of Calendar Year 2014
- Activate Strategic Acquisition Subcommittee within the Property Review Committee (PRC) not started
  - Determine strategic acquisitions
  - Continue to work with Business Affairs and the Cabinet to establish Funds to acquire real estate

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.8: Develop a comprehensive plan for strategic real estate acquisition (by Lease)
Tactic 2.8.1:

Balanced Scorecard Category: Internal Business Process

Lead
REAL
ESTATE

(Lease) ACTION PLAN

Completed

- Request to Modify Millennial Campus Footprint
    - Pending : recommendation to BOG

- Formally requested Delegated Authority
    - Site visit completed
    - Follow-up justification submitted
        - Pending : recommendation to BOG

Actions Planned

- Revise Lease Policy

    - Gathering information

        - Statues & Policies

        - Constituents' samples

- Update Real Estate Procedures Manual to include "disposition"

STATUS

FM Prioritized Projects – FY14

1. ARCHIBUS Upgrade – **Completed Dec 30, 2013**

2. Space GA Reports – **Completed Feb 14, 2014**

3. Space Data Clean Up – **Est. Completion Date: Aug 2014**

4. Design & FBO Enhancements – **Completed Jun 30, 2014**

5. FM Surveys – **Est. Completion Date: Aug 2014**

6. ImageNOW Document Management – **Roll to FY15**

7. Real Estate Module – **Est. Completion Date: Aug 2014**

8. Facilities Condition Assessment Program (FCAP) – **Est. Completion Date: Aug 2014**

9. CRDM Enhancements – **Est. Completion Date: Aug 30, 2014**

10. FBO Accounting Upgrades – **Roll to FY15**

11. LockShop Enterprise Data Assistant (EDA) – **Completed Feb 28, 2014**

12. BES Enterprise Data Assistant (EDA) Asset Mgmt - **Est Completion Date: Aug 30, 2014**

13. BAS LDAP Upgrade & Security Enhancements – **Completed Jun 6, 2014**

14. ARCHIBUS Key Management – **Roll to FY15; Estimated Dec 30, 2014**

15. WO Hot Work Permit Form/Utility – **Est. Completion Date Aug 30, 2014**

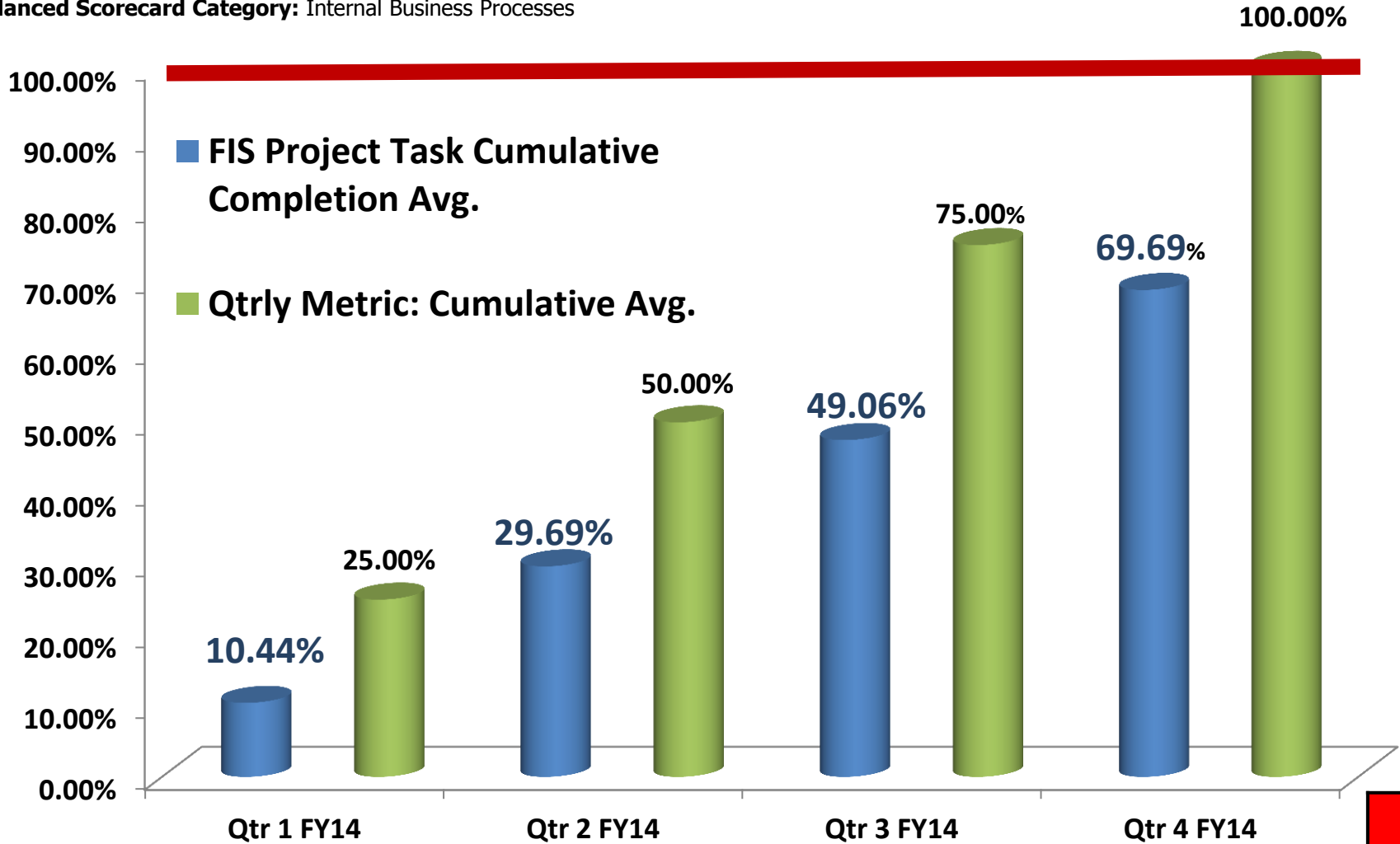16. Campus Map Portal – **Roll to FY15; Estimated Jan 2015**

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes

■ FIS Project Task Cumulative Completion Avg.

■ Qtrly Metric: Cumulative Avg.

Lead FIS

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

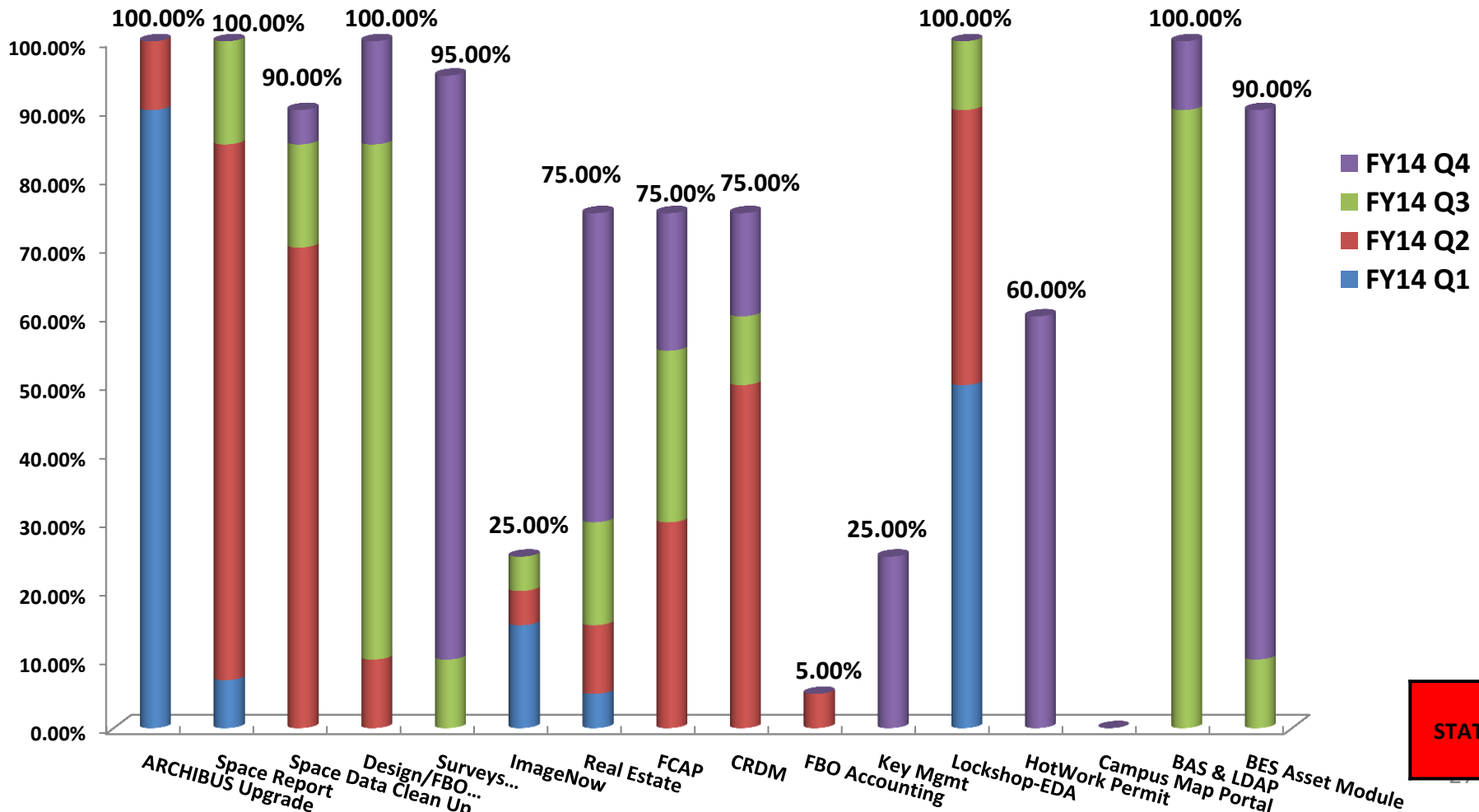**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

Balanced Scorecard Category: Internal Business Processes

Lead FIS

Total Projects at 100% Completion as of June 2014
FY14/ 1st Qtr Status: 0
FY14/ 2nd Qtr Status: 1
FY14/ 3rd Qtr Status: 3
FY14/ 4th Qtr Status: 5

Legend:
- FY14 Q4
- FY14 Q3
- FY14 Q2
- FY14 Q1

Chart values (percent completion by project):
- ARCHIBUS Upgrade: 100.00%
- Space Report: 100.00%
- Space Data Clean Up: 90.00%
- Design/FBO…: 100.00%
- Surveys…: 95.00%
- ImageNow: 25.00%
- Real Estate: 75.00%
- FCAP: 75.00%
- CRDM: 75.00%
- FBO Accounting: 5.00%
- Key Mgmt: 25.00%
- Lockshop-EDA: 100.00%
- HotWork Permit: 60.00%
- Campus Map Portal: (no label)
- BAS & LDAP: 100.00%
- BES Asset Module: 90.00%

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

**Lead
FIS**

ACTION PLAN

Actions Planned:

1. Launch 100% FCAP module and complete integration with CRDM for FO use by Aug 30, 2014.

2. Begin and Complete FM Campus Map by Jan 2015.

3. Complete 100% of testing for Asset Module for BES by Aug 30, 2014.

4. Hire vacant Temp Survey Technician position by Dec 30, 2014.

5. Finalize 100% of FM Surveys Project and Go Live with Survey Reports for Design Services by Aug 2014.

6. Establish ARCHIBUS training initiatives via Moodle (Ongoing).

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. Finalized 100% BAS controls and LDAP upgrade projects by Jun 30, 2014.

2. Completed 100% of Design/FBO ARCHIBUS Enhancements by Jun2014.

3. Completed 95% of FM Surveys Project and launched Design Services Surveys for Project Management module.

4. Completed 90% of Asset Module for BES by Jun 30, 2014.

Final phase: Mobile Asset Testing with BES Supervisors scheduled for Aug 2014.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:
  ➢ Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
      ✓ Timeline: *FY15 QTR 2 - FY15 QTR 3*
  ➢ Convert Excel Purchase Requisition (PR) to Archibus PR.
      ✓ Timeline: *FY15 QTR 2 - FY15 QTR 4*
  ➢ Updates to Estimating Workbook to improve Contingency and Fee calculations.
      ✓ Timeline: *FY15 QTR 2 - FY15 QTR 4*

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: *FY15 QTR 2 - FY15 QTR 4*
  ➢ Project Priority List to include new column designating "true" Project Customer.
      ✓ Timeline: **Success – It works**.

Archibus - Design Services Customer Survey:
  ➢ Started testing viable format for Customer responses via Lime-Survey – Success to date. FIS performing ARCHIBUS testing.

ONGOING IMPROVEMENTS
  ➢ Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

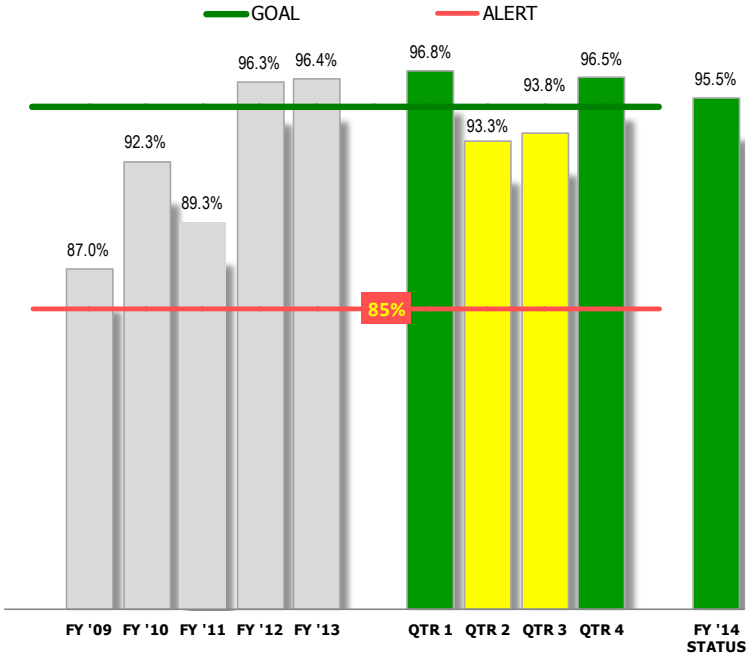**Lead:** Design Services
Balanced Scorecard Category: Internal Business Process

GOAL 95.0%	STATUS 96.5%

Lead
Design Services

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
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
QTR 1	31	30	1	96.8%
QTR 2	45	42	3	93.3%
QTR 3	32	30	2	93.8%
QTR 4	113	109	4	96.5%
FY '14 STATUS	221	211	10	95.5%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

GOAL 100%	STATUS 88.4%	Lead Design Services

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.2:	Increase Project Capacity by 10 projects per year
Measure:	Number of Projects Completed

Increase Project Volume by 5-10 Projects Per Year

FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2014
150	160	170	180	190	200	210	220	230	240	250	250	In Construction
136	161	173	194	205	190	193	278	177	286	218	221	48
$2,060,000	$2,609,000	$3,450,000	$8,480,000	$8,875,000	$8,200,000	$7,745,678	$9,935,384	$17,944,564	$19,393,759	$13,589,752	$13,648,336	$3,886,720
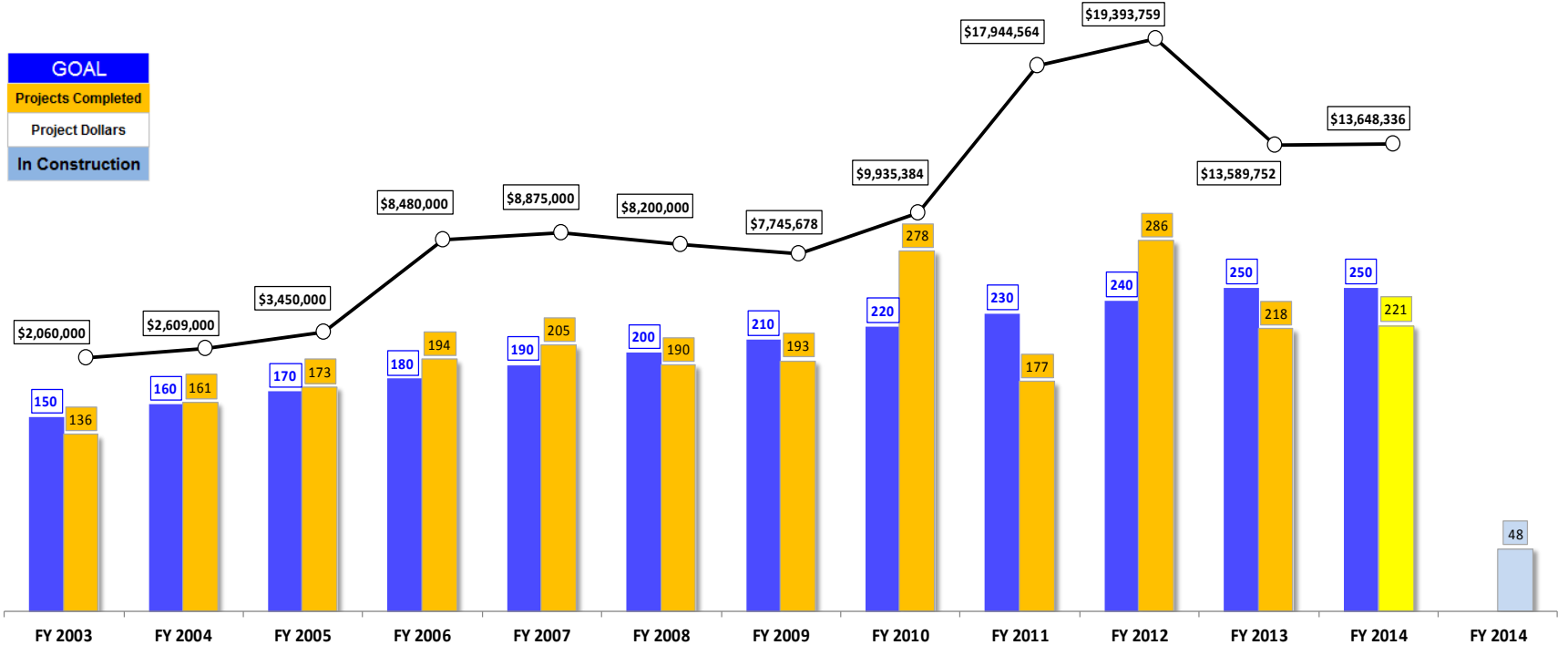
GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program
Tactic 2.3.1:   Improve the Facilities Condition Index (FCI) for buildings on campus by 5% NLT July 2015.
Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

<div align="right">

Lead Facilities Planning

</div>

ACTION PLAN

- **Actions Planned:**

    - **Complete CRDM update including revision of Second Section of SOP by August 2014**

    - **Complete Phase 2, CRDM, for FCI capability (FIS) by August 2014**

    - **Determine O/A FCI of buildings (work begun by FO) July 2015**

    - **Recommend a plan/ prioritize projects to improve FCI by 5% by July 2015.**

<div align="right">

STATUS

</div>

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure
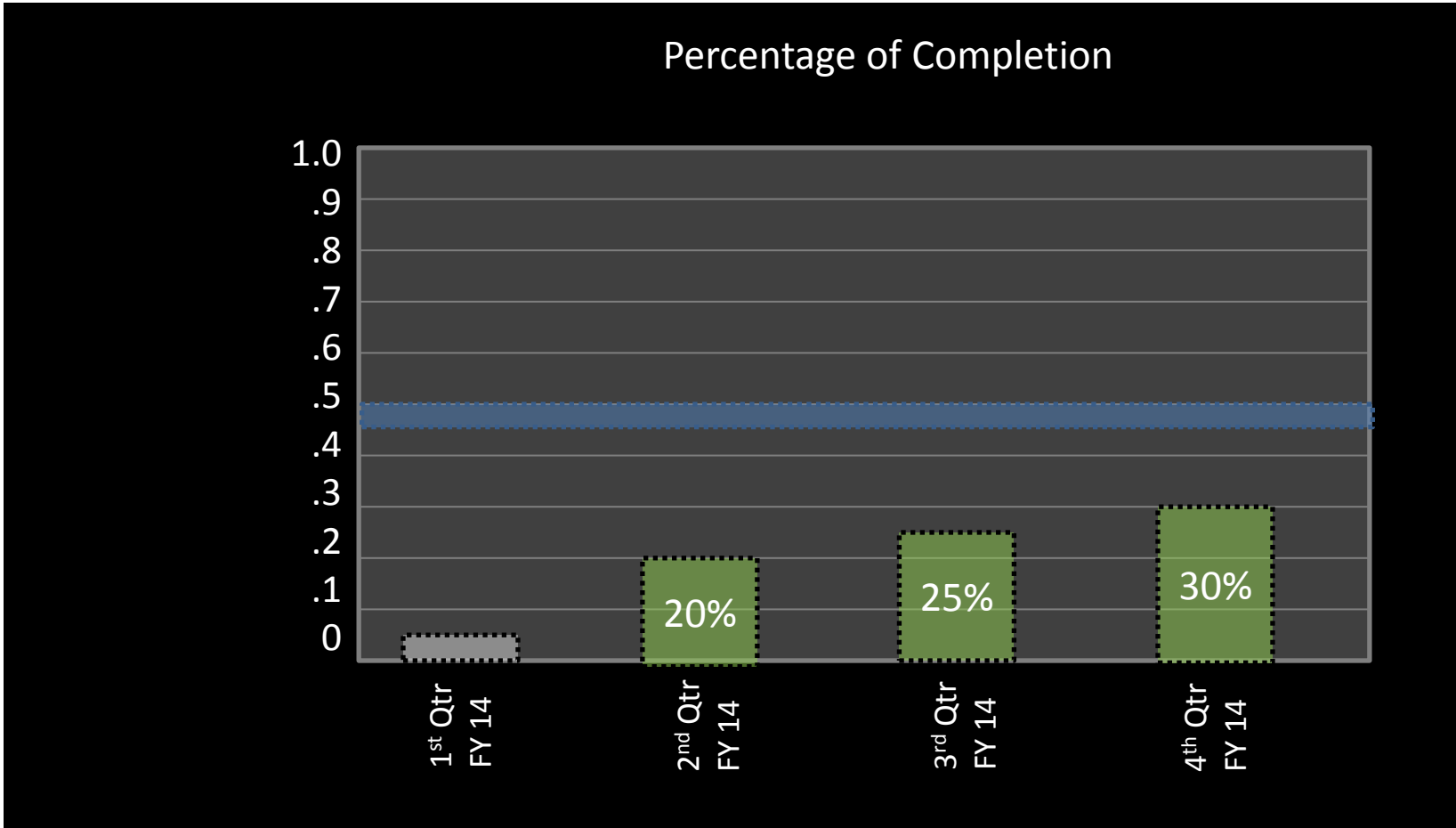
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Tactic 2.3.1:   Improve the Facilities Condition Index (FCI) for buildings on campus by 5% NLT July 2015.
Measure: Average Building FCI for campus

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

Percentage of Completion

Status

34

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards NLT end of July 15.
Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

Lead Facilities Planning

ACTION PLAN

- There is not a "System Wide Standard". Reference UNC Charlotte Approved Standard by January 2015
- Complete space allocations/ inventory by room category in Archibus (Ongoing)
- Compare inventory to standard and report % difference by January 2015
- Work with FIS to generate report by room use (Ongoing)
- Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard by end of July 2015.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

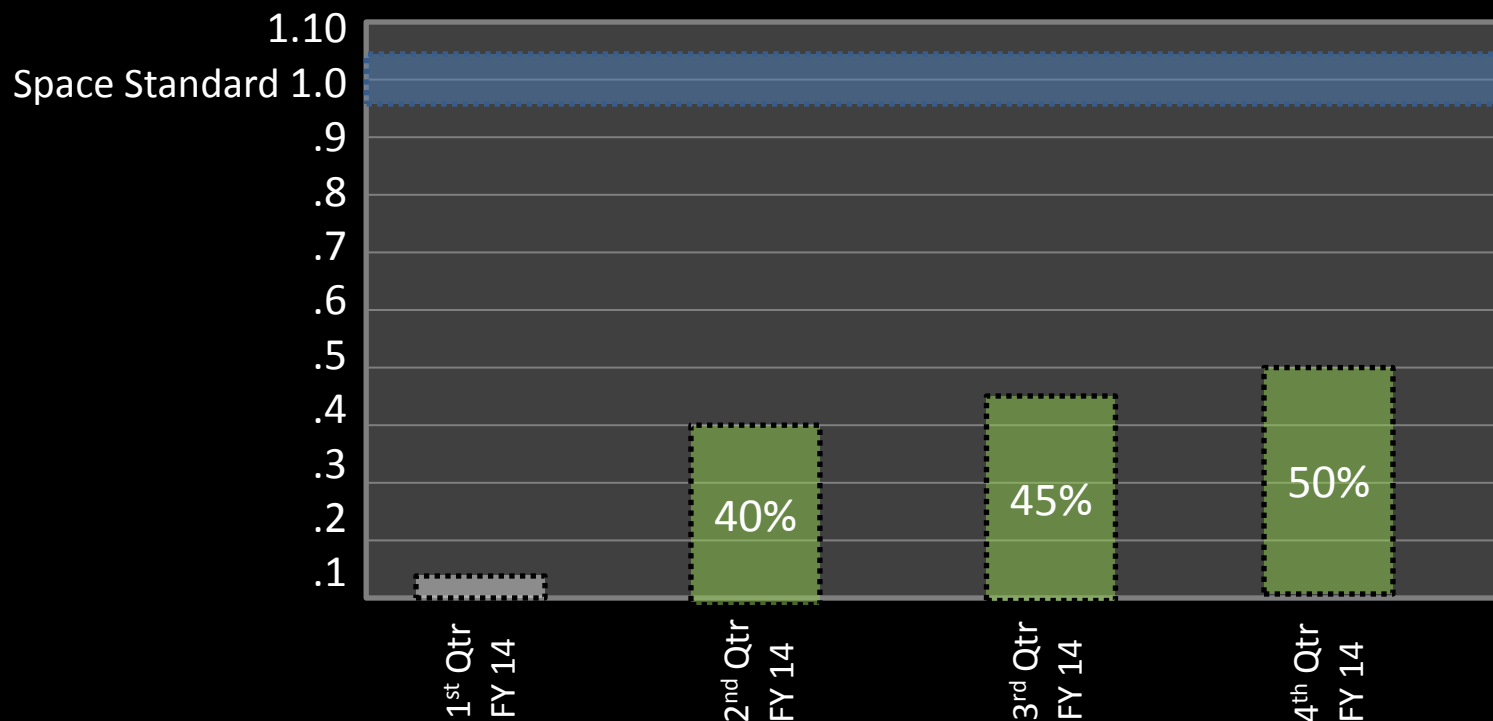**Objective 2.4: Improve Campus Space Planning and Utilization**
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards NLT end of July 15.
Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

Percentage of Completion

Quarter	Value
1st Qtr FY 14	
2nd Qtr FY 14	40%
3rd Qtr FY 14	45%
4th Qtr FY 14	50%

Space Standard 1.0

Status

36

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

<div style="float:right; border:1px solid #999; background:#808080; color:white; text-align:center; padding:8px;">
**Lead
Facilities
Planning**
</div>

ACTION PLAN

- **Actions Planned:**

    o **Sustain current process of completing Operating Budget sheets for new projects (Ongoing)**

    o **Support Capital, when required, with further study related to funding (e.g. HRL, Cone, RDH, Health and Wellness Center, etc. work) (Ongoing)**

<div style="float:right; background:#8CC63F; text-align:center; padding:10px;">
STATUS
</div>

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
	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

- Burson Renovation AP under contract.
- Campus Wide Roofs and CID 1 Roadway designs complete and within budgeted fee.
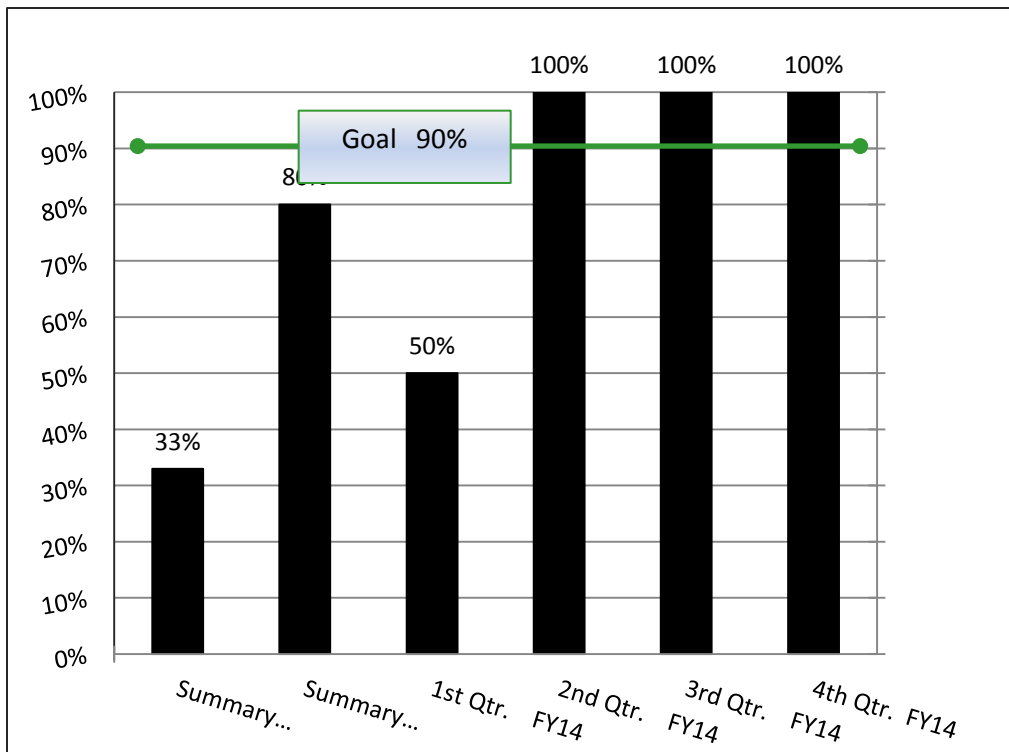
Actions Planned

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

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

Lead Capital

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

Tactic Measurement for 4th Quarter is 100%

Status

39

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

Lead
Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	#not completed by scheduled time	%Designs complete by completion time
Summary FY-13	3	1	75%
Summary FY-14	8	0	100%
1st Qtr. FY-14	1	0	100%
2nd Qtr. FY-14	n/a	n/a	n/a
3rd Qtr. FY-14	5	0	100%
4th Qtr. FY-14	2	0	100%
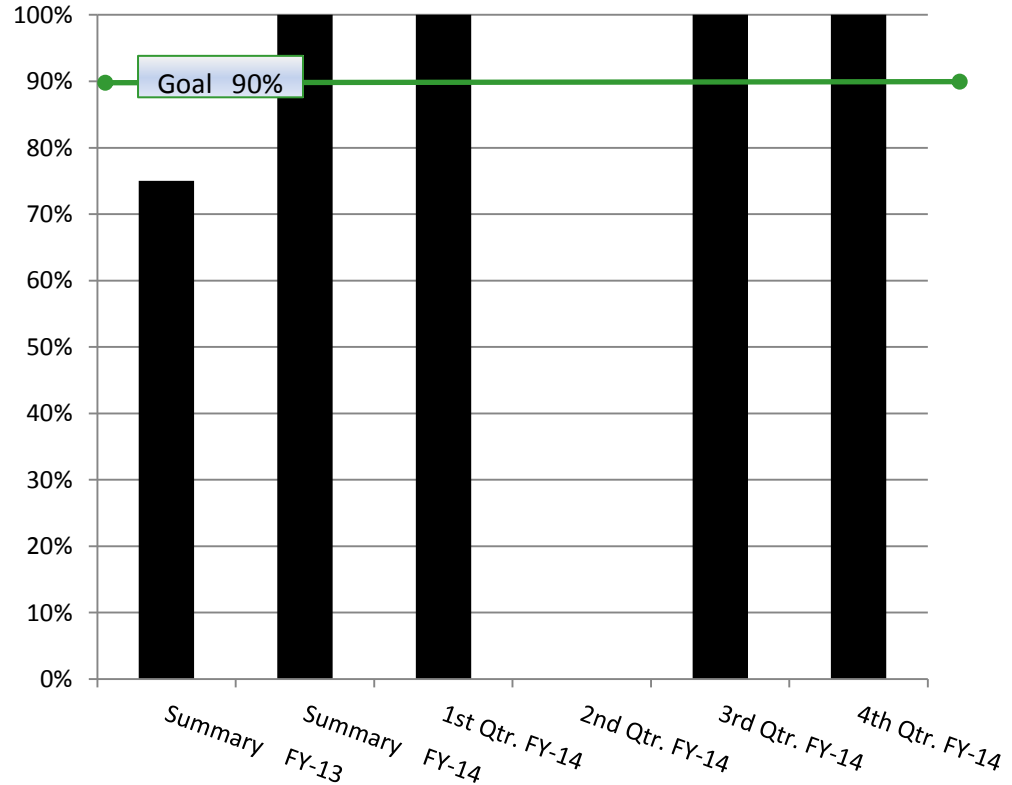
Tactic Measurement for 4th Quarter is 100%

Status

40

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	# of designs not within original budgeted fee	%Designs complete w/in original design budgeted fee
Summary FY-13	3	1	75%
Summary FY-14	6	1	85%
1st Qtr. FY-14	1	0	100%
2nd Qtr. FY-14	n/a	n/a	n/a
3rd Qtr. FY-14	3	1	75%
4th Qtr. FY-14	2	0	100%

Lead Capital

Status

Tactic Measurement is 100%

41

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
	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

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

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

Lead Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
1st Qtr. FY-14	4	3	57%
2nd Qtr. FY-14	0	0	N/A
3rd Qtr. FY-14	1	0	100%
4th Qtr. FY-14	1	0	100%

Tactic Measurement for 100%

Status

43

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

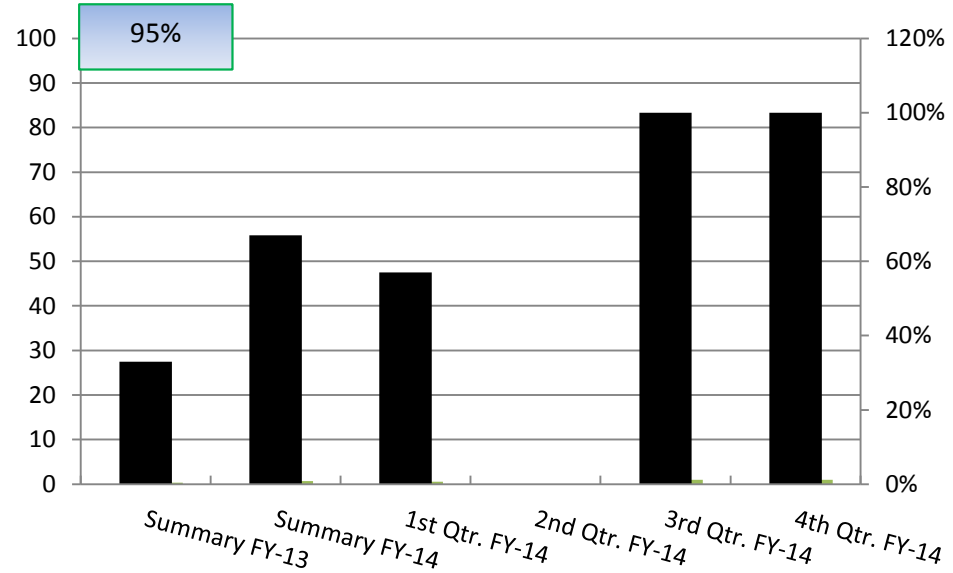**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

Balanced Scorecard Category: Internal Business Process

Goal is 95%

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% of construction completed within budget
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
1st Qtr. FY-14	4	3	57%
2nd Qtr. FY-14	0	0	N/A
3rd Qtr. FY-14	1	0	100%
4th Qtr. FY-14	1	0	100%

Tactic Measurement for 4th Quarter is 100%

Status

GOAL #3

"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

Foster a Customer Focused Organization

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:	**Continuously improve customer service/satisfaction**
Tactic 3.1.1:	Achieve overall customer satisfaction of 90% for FM services.
Measure:	Annual Customer Survey results: Percentage of customers selecting "fair, good or very good" with the statement: "Overall I am satisfied with <the service> I received from Facilities Management"

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Survey

- Urban Institute to present results to Directors – **September 15 2014**
- Urban Institute to present results at All Employees Meetings – **October 2014**
- Directors to develop actionable items to report at Strategic Planning Meeting. – **January 2014**

Communication Initiatives/Updates

- Update and remarket Customer Handbook, digital and print – **Late Fall/Early Winter 2014**
- Website Update (2nd iteration) and QA - **Winter 2014**
    - New hire would help facilitate/improve website management and analytics work
- QA other customer-facing technology **– As needed thru June 30, 2015**
    - Archibus automated customer surveys (may use Survey Share for Facilities Operations)
    - CRDM page
- Forming FM Communication Group. Selecting members now. – **Fall 2014**
- Launch 2nd Customer Environmental Scan – **Winter 2014**

STATUS

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:   Continuously improve customer service/satisfaction
Tactic 3.1.1:   Achieve
Measure:

Lead: FBO
Balanced Scorecard Category: Customer Perspective

**Lead
FBO**

ACTION PLAN

External Marketing Campaign: "Creating A Campus of Distinction"

- Solicit feedback/input from Directors and Employees – **Fall 2014**

- Execute campaign tactics (testimonials, LCD signage, website, etc.) – **Winter 2014**

Branding   **As opportunities arise through June 30, 2015**

- All external customer-facing materials

Internal Communication   **As opportunities arise through June 30, 2015**

- Communications workshop added to FM Leadership Academy. Operations Writing Workshops completed June 2014.

- Expand FM audience and subject materials – **Fall/Winter2014**

STATUS

Facilities Management Strategic Planning Session - Fourth Quarter FY 2014

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:   Continuously improve customer service/satisfaction
Tactic 3.1.1:   Achieve
Measure:

Lead: FBO
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Communications Plan

- Solicit input/feedback from customers, Directors and other key players - **Fall 2014**
- Execute tactics (SOPs - dependent on situations, forms, etc.) - **Fall/Winter 2014**

Publicity/Public Relations - **As opportunities arise through June 30, 2015**

- For FY 2014, 82 documented mass-view FM news items in varying media channels:
  UNC Charlotte Magazine
  University homepage website
  University FB and Twitter
  Inside UNC Charlotte
  Local news, magazines, interviews
  Trade publications
- Campus Construction Reports, Campus-Wide notifications, etc.

STATUS

Communications - Special Projects

**Lead
FBO**

ACTION PLAN

- APPA Award for Excellence Publicity - **Summer 2014**

- Sustainability Magazine Launch– **Early Fall 2014**
    - Writing 100% completed; editing 85% completed
    - Everything turned over to U Marketing/Graphic Designer -**< 5 business days**
    - Final editing & proofing – **Late Summer/Early Fall 2014**

- Editing FM award submissions, announcements, etc. – **As needed through June 30, 2015**

- Intranet – **Spring 2015**

STATUS

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

Lead F. O.

ACTION PLAN

1 – Stay engaged with performance of ESCO contract; keep customers informed; walk the buildings and work with the Energy Manager to keep customers informed; communicate daily.

2 – 1 July 2014; Implemented daily monitoring of temperatures using BAS and field verification. Continue to develop controls section and cross train with Zones.

3 – Support Capital to get buildings commissioned and retro commissioned.

4 – Work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.

5 – Work with other FM team members to establish a communication plan for temperature related building issues; communicate this plan no later than 1 August 2014 and update as needed.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #3 – Foster a Customer Focused Organization
Objective: 3.1: Continuously improve customer service/satisfaction
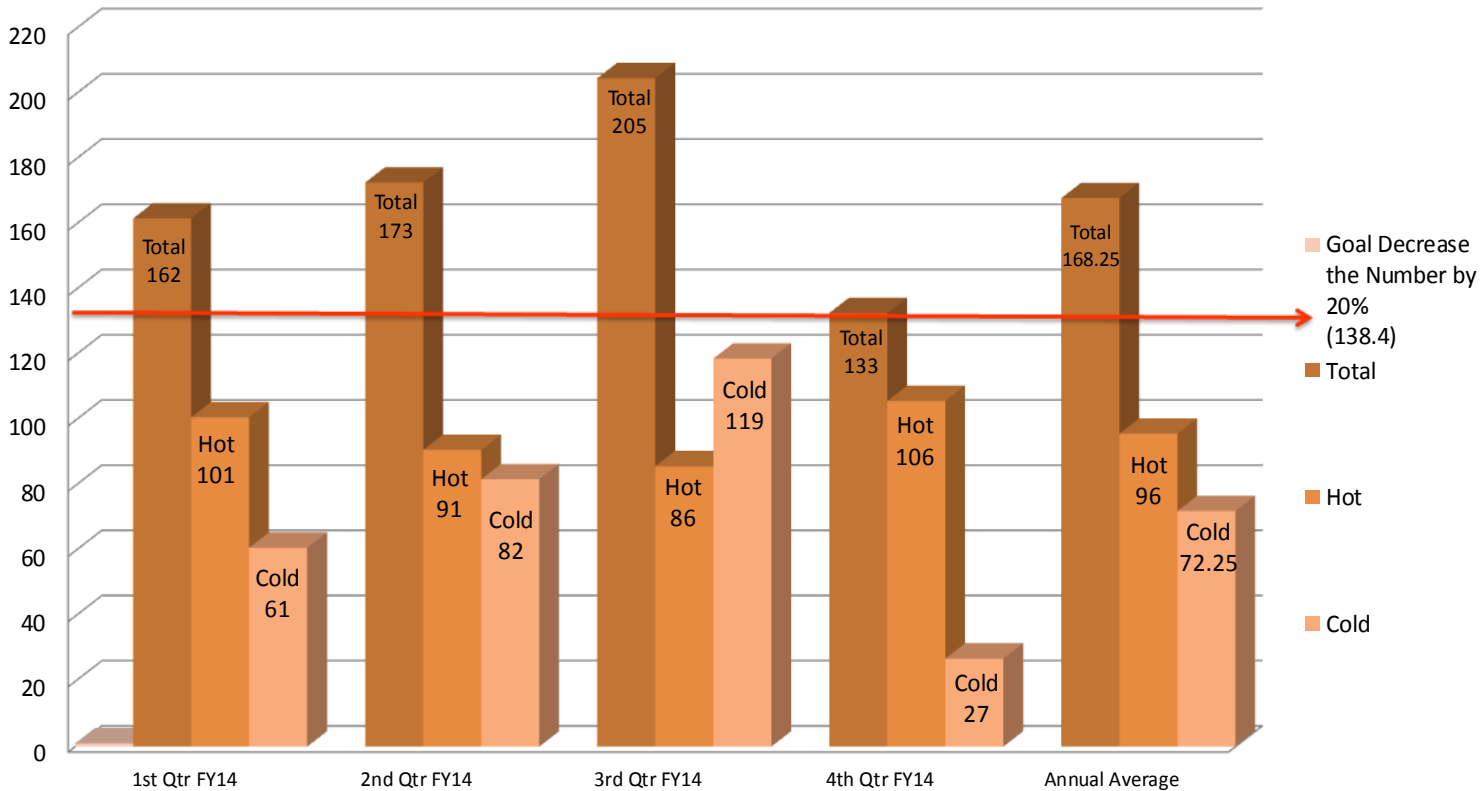**Tactic: 3.1.2:** Decrease the Number of Hot/Cold Calls by 20%
Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Lead
F. O.

Decrease the Number of Hot/Cold Calls

	1st Qtr FY14	2nd Qtr FY14	3rd Qtr FY14	4th Qtr FY14	Annual Average
Total	162	173	205	133	168.25
Hot	101	91	86	106	96
Cold	61	82	119	27	72.25

Goal Decrease the Number by 20% (138.4)

STATUS

51

"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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

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

- Monitor position vacancies and hiring processes to ensure 6- month abolishment threshold is not reached - **As appropriate through June 30, 2015**

- Ensure all position descriptions/postings contains verbiage that request necessary communication skills, computer skills, English language comprehension skills and skills that demonstrate an employee's ability to work/interact with others to increase qualified applicant pools - **As appropriate through June 30, 2015**

- Monitor timeframe of applicant referral to interview to hire. Maintain communications with hiring supervisors requesting status updates. Provide assistance as needed and/or request to keep the process moving - **As appropriate through June 30, 2015**

- Develop resources that result in increased applicant pools, resulting in a more diverse and qualified pool of applicants for referral and selection - **As appropriate through June 30, 2015**

- With the new 24-Month Probationary Period, monitor separation data that allows accurate reporting of employee turnover during the probationary period – **August 22, 2015**

- Provide assistance to hiring supervisors on appropriate verbiage when establishing selection criteria and non-selection rationale in postings and hiring proposals to ensure an efficient turnaround on approvals of both - **As appropriate through June 30, 2015**
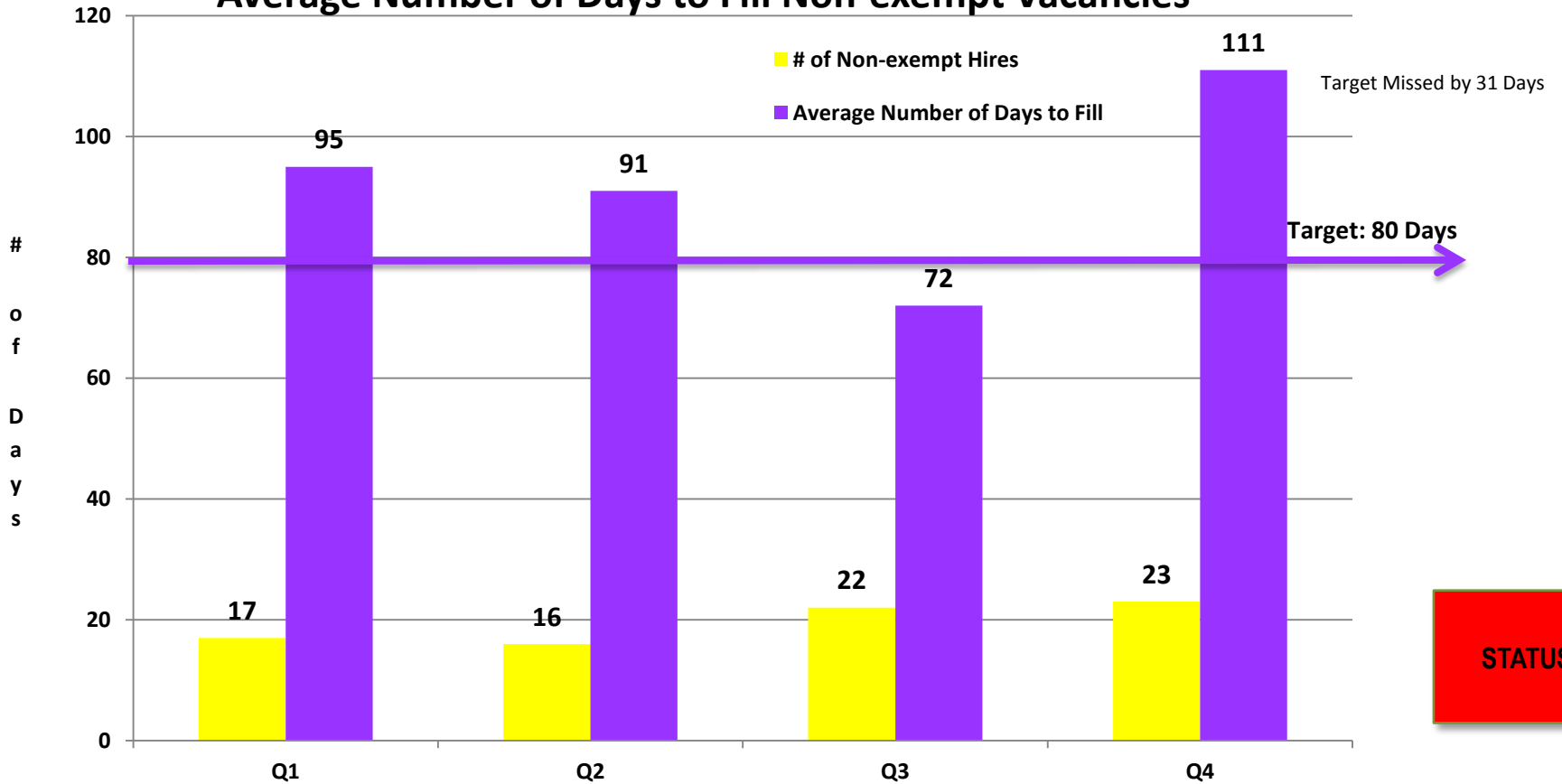
Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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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

**Lead
FBO**

Average Number of Days to Fill Non-exempt Vacancies

■ # of Non-exempt Hires

■ Average Number of Days to Fill

Target Missed by 31 Days

Target: 80 Days

Quarter	# of Non-exempt Hires	Average Number of Days to Fill
Q1	17	95
Q2	16	91
Q3	22	72
Q4	23	111

STATUS

54

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014
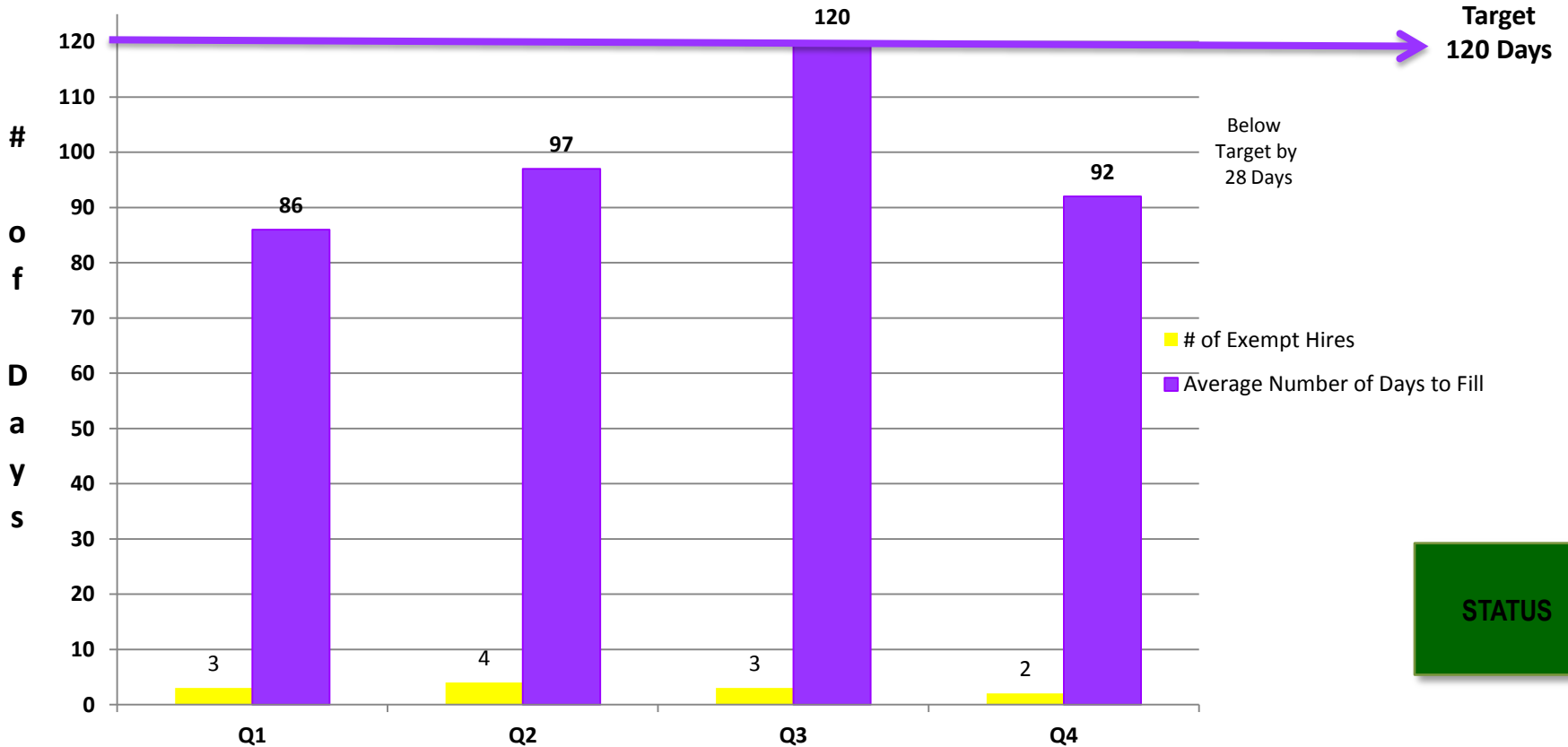
GOAL #4 Recruit, Develop and Retain Quality Employees

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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

Lead
FBO

STATUS

Average Number of Days to Fill Exempt (Salaried) Vacancies

Target
120 Days

Below Target by 28 Days

# of Exempt Hires
Average Number of Days to Fill

Q1: 86, 3
Q2: 97, 4
Q3: 120, 3
Q4: 92, 2

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1:   **Recruit a Qualified Workforce in a Timely Fashion**
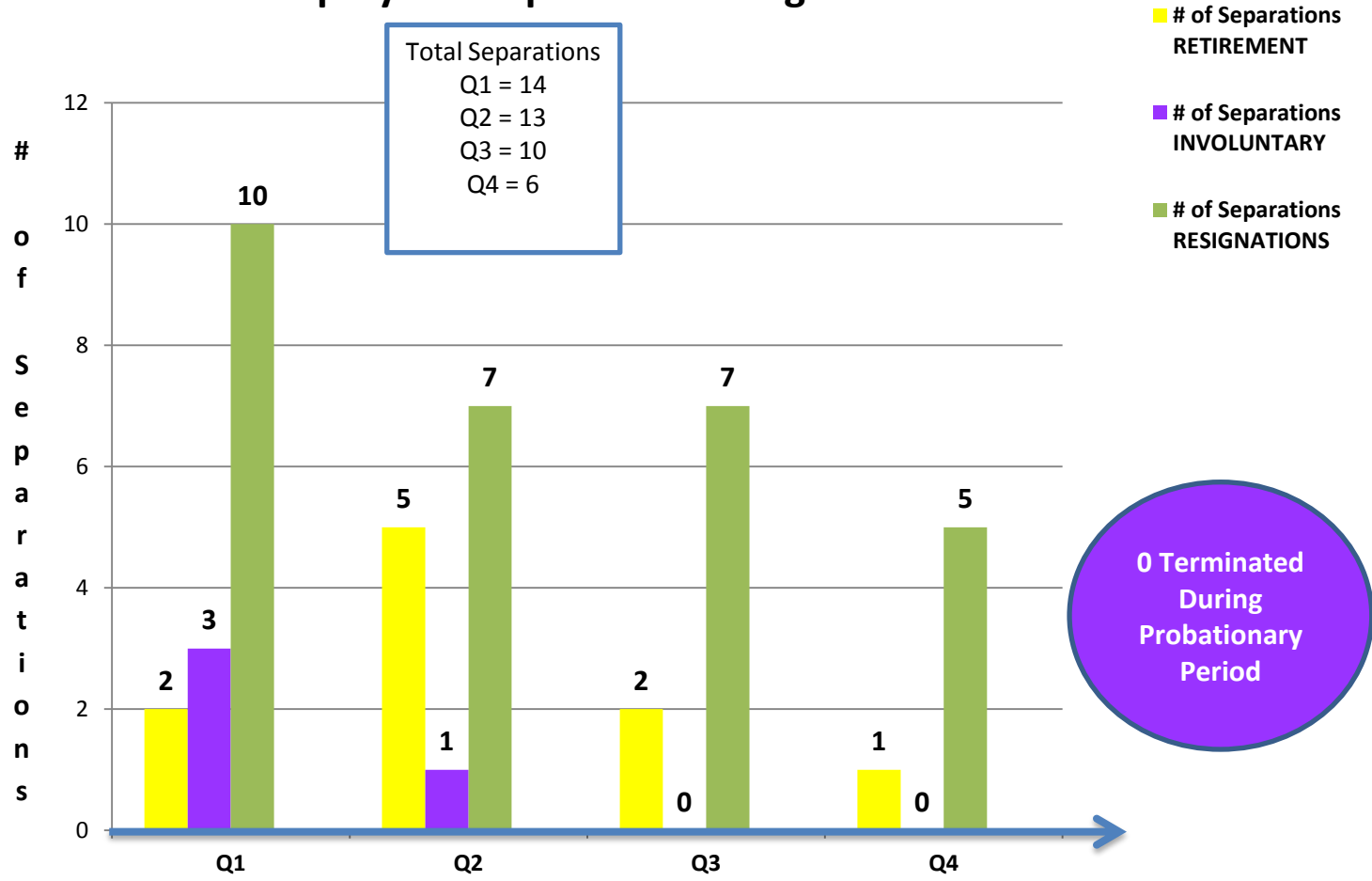**Tactic 4.1.2:**   Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

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

Lead
FBO

Employee's Separated During FY 14

Total Separations
Q1 = 14
Q2 = 13
Q3 = 10
Q4 = 6

■ # of Separations
RETIREMENT

■ # of Separations
INVOLUNTARY

■ # of Separations
RESIGNATIONS

# of Separations

Q1: 2, 3, 10
Q2: 5, 1, 7
Q3: 2, 0, 7
Q4: 1, 0, 5

0 Terminated During Probationary Period

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1:   **Recruit a Qualified Workforce in a Timely Fashion**
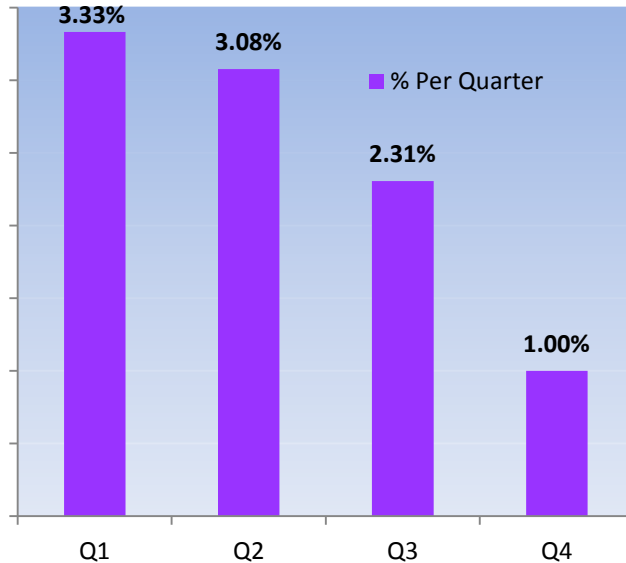**Tactic 4.1.2:**   Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Turnover Percentage

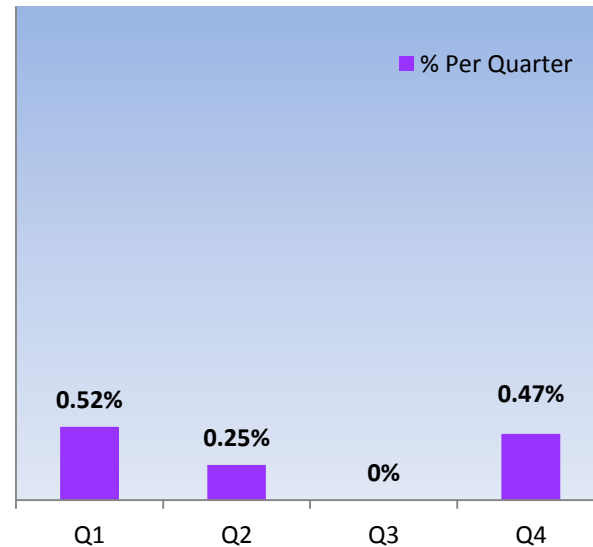**Lead:** Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

Turnover Rate for Nonexempt Positions FY 13/14

- Q1: 3.33%
- Q2: 3.08%
- Q3: 2.31%
- Q4: 1.00%

■ % Per Quarter

Turnover Rate for Exempt (Salaried) Positions FY 13/14

- Q1: 0.52%
- Q2: 0.25%
- Q3: 0%
- Q4: 0.47%

■ % Per Quarter

Lead FBO

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

❑Meet with FM Departments and identify training needs in the area of Employee Relations – December, 2014

   ❑SPA Employee Grievance Policy - effective 5/1/2014
   ❑The 3 causes for disciplinary action
   ❑Steps in the progressive discipline process
   ❑Required/Appropriate documentation in the disciplinary process

❑Complete individual training sessions specific to departmental needs – June 30, 2015

We need to think of **documentation** as a roadmap showing how you got to a certain stage in the discipline process**. Why document…** because memory is selective and unreliable … because in the event of a grievance or lawsuit you will be required to provide a written record supporting your actions… **because if you didn't document it, then it didn't happen!**

❑Increase employee awareness regarding (their) access to our HRMS (PeopleAdmin) – Started July, 2014 and ongoing
   ❑Position Description
   ❑Work Plan
   ❑Performance Evaluation

Discipline is not an independent event. It is part of a larger process.
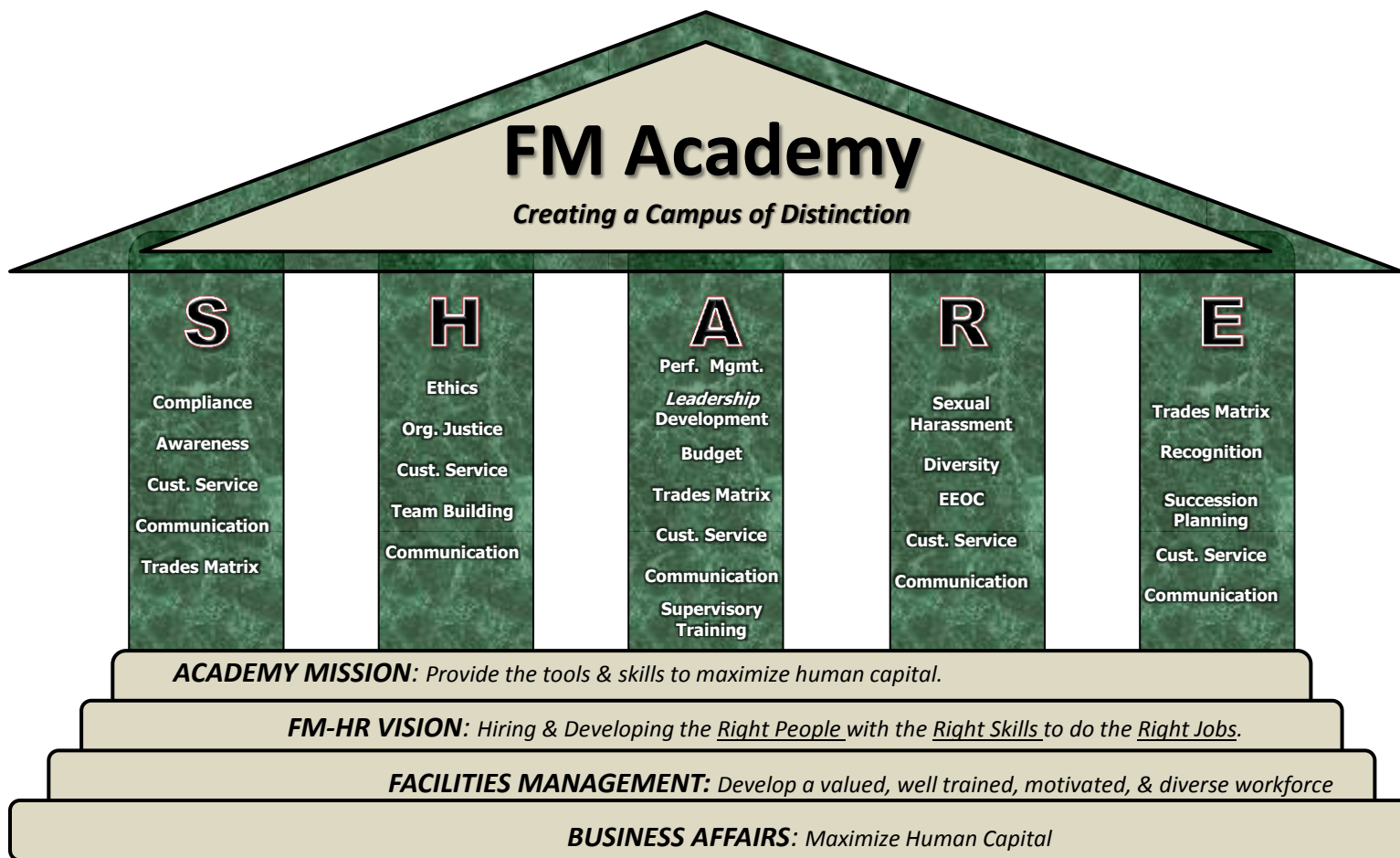
Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

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

Lead
FBO

FM Academy
Creating a Campus of Distinction

S
Compliance

Awareness

Cust. Service

Communication

Trades Matrix

H
Ethics

Org. Justice

Cust. Service

Team Building

Communication

A
Perf. Mgmt.

Leadership Development

Budget

Trades Matrix

Cust. Service

Communication

Supervisory Training

R
Sexual Harassment

Diversity

EEOC

Cust. Service

Communication

E
Trades Matrix

Recognition

Succession Planning

Cust. Service

Communication

ACADEMY MISSION: Provide the tools & skills to maximize human capital.

FM-HR VISION: Hiring & Developing the Right People with the Right Skills to do the Right Jobs.

FACILITIES MANAGEMENT: Develop a valued, well trained, motivated, & diverse workforce

BUSINESS AFFAIRS: Maximize Human Capital

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

FM ACADEMY   **ACTION PLAN**

Action Item	Completed
Technical	
– VFD Training	*Completed* - July 2013
– Pump Repair & Maintenance	*Completed* - December 2013
– PLCs for Non-programmers	*Completed* - February 2014
– EPA 608 Technician Certification Exam	*Completed* - May 2014
– HVAC Matrix development	August 2014
– "Preparing for the NC SP-FA/LV Electrical Examination"	*Completed* - June 2014
"Mini-Series" training sessions (*partnering with Grainger*)	
– LED lighting	*Completed* - September 2013
– FIRE STOP	*Completed* - October 2013
Safety Awareness	
– Supervisor Safety Talks	Monthly
– OSHA 30-hour certification/training	*Completed* - June 2014
Leadership	
– APPA *Supervisor Toolkit* workshop (*UNCC hosted*)	*Completed* - March 2014
– "Supervisory Communication & the Art of Eating Pizza"	*Completed* - June 2014
– Documentation & Disciplinary Process	Fall 2014
– Cultural Awareness/Inclusion Program	June 2015
– Administrative Developmental Matrix	*Completed* - February 2014
– NEO redesign	June 2015

STATUS

60

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

Lead
FBO

Learning & Development With Examples	Hours Completed

Technical

• Pump Repair & Maintenance	480 hours
• VFDs (Variable Frequency Drives)	384 hours
• PLC's for Non-Programmers	480 hours

Leadership

• APPA Supervisors Toolkit Workshop	640 hours
• Supervisory Communication & the Art of Eating Pizza	30 hours

Professional Development

• Women's Summit	115 hours
• APPA Institute, State Construction Conf.	125 hours

Safety Awareness

• OSHA 30 Hour training/certification	1,200 hours
• Fire Stop Training	58 hours

Administrative

• Microsoft Office training	40 hours

NOTE: meetings are being scheduled with department heads to discuss learning & development needs for FY 15. FM-HR will develop the FM Academy **"*Lending Library*"** to provide a variety of learning resources for FM employees.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

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
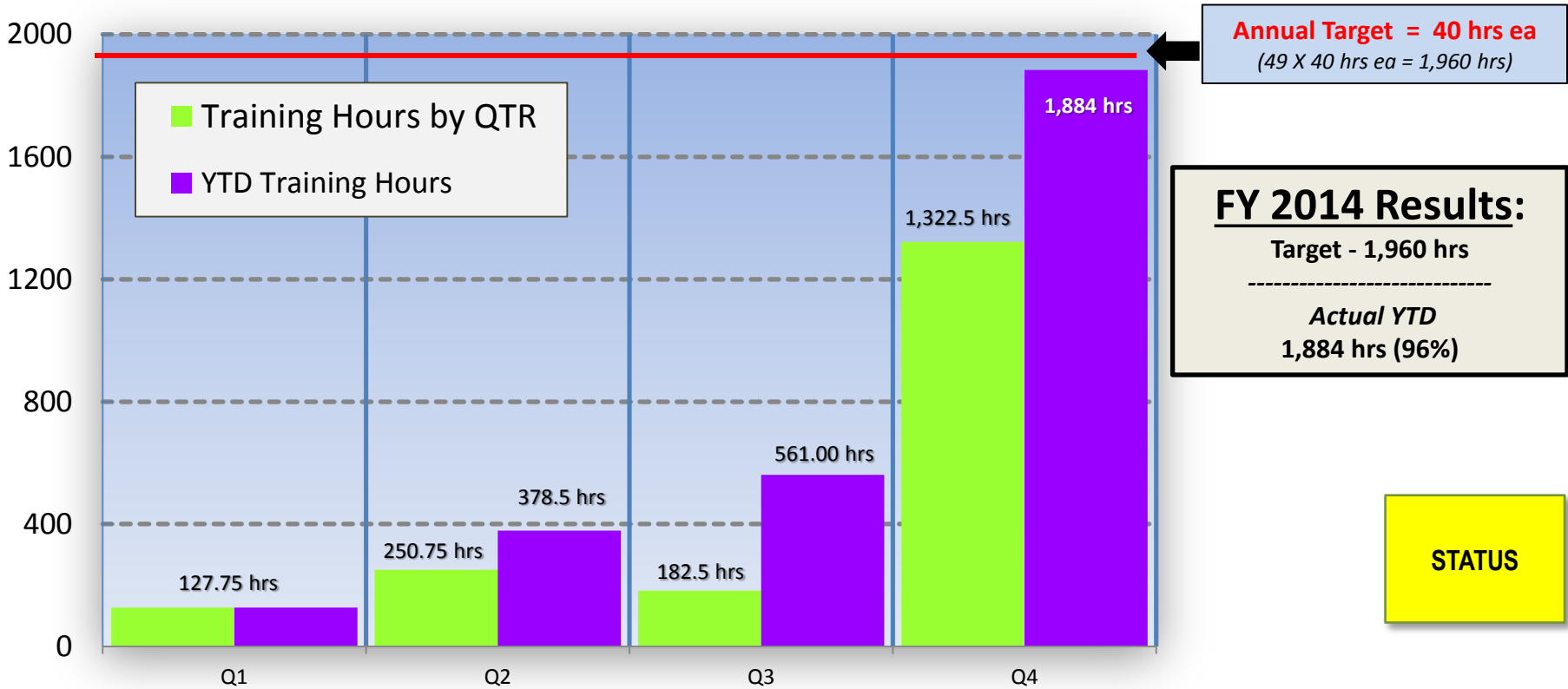**Measure**:   Average Hours of Training completed by Supervisors and Managers

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

Lead
FBO

Training
Hours

FY 14

*Training Hours for **Supervisors & Managers** by Quarter*

Annual Target = 40 hrs ea
(49 X 40 hrs ea = 1,960 hrs)

FY 2014 Results:

Target - 1,960 hrs

Actual YTD
1,884 hrs (96%)

STATUS

Legend:
■ Training Hours by QTR
■ YTD Training Hours

Quarter	Training Hours by QTR	YTD Training Hours
Q1	127.75 hrs	
Q2	250.75 hrs	378.5 hrs
Q3	182.5 hrs	561.00 hrs
Q4	1,322.5 hrs	1,884 hrs

62

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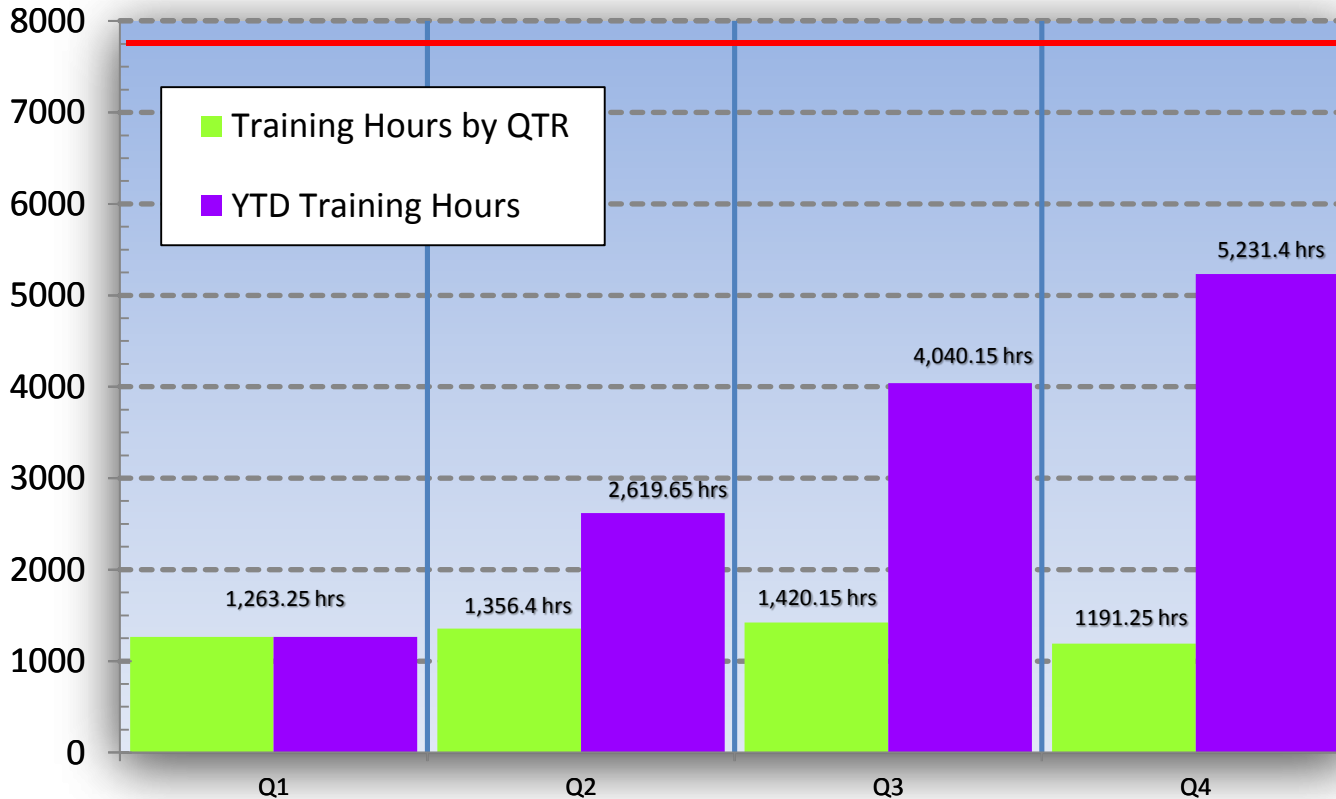
Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process. Learning and Growth

Lead
FBO

Training
Hours

FY 14

Training Hours for front line employees by Quarter

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

Fiscal 2014 Results:

Annual Target- 7,760 hrs

Actual YTD
5,231 hrs (67 %)

STATUS

Chart legend:
- Training Hours by QTR
- YTD Training Hours

Quarter	Training Hours by QTR	YTD Training Hours
Q1	1,263.25 hrs	1,263.25 hrs
Q2	1,356.4 hrs	2,619.65 hrs
Q3	1,420.15 hrs	4,040.15 hrs
Q4	1191.25 hrs	5,231.4 hrs

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

Lead
FBO

ACTION PLAN

Survey Results and Data Review:

- Preliminary results were presented to the Directors on January 15th and to FM at the January 2014 AEM meeting.

- Survey report distributed to all Directors (February/March 2014).

- Directors to develop actionable items based on survey feedback for report out during April SP Meeting.

Survey Logistics:

- Continue to improve practice of working with BES and FO leadership to schedule use of computer lab for employees in their respective areas for FY 15 survey - October 2014.

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – October 2014

- Next survey should be administered in November 2014.
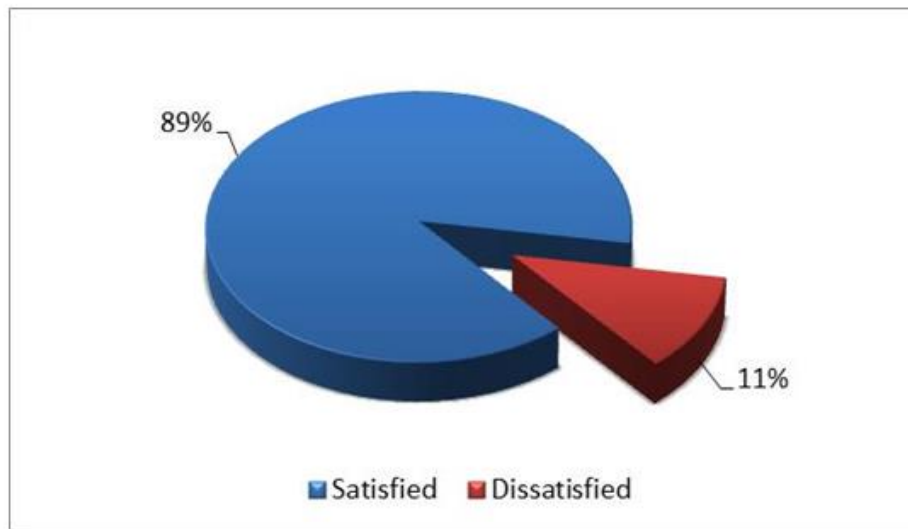
GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

Lead
FBO

Overall how satisfied are you working in the Facilities Management Department? (2013)
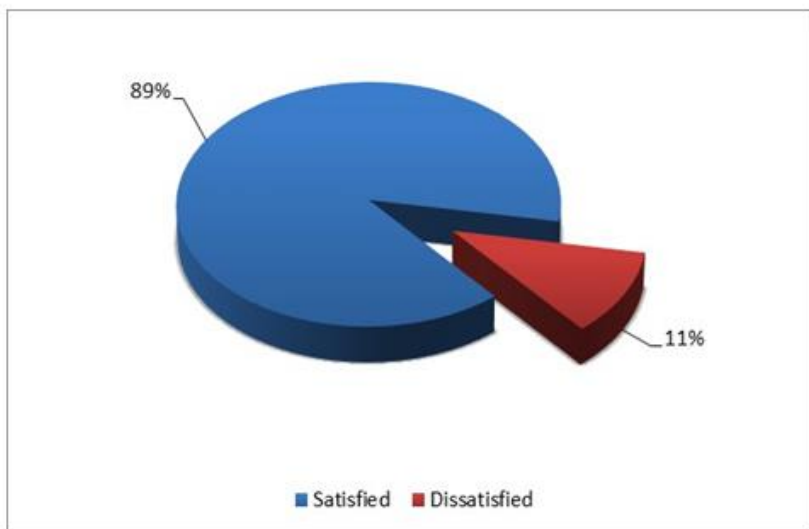
89%
11%
■ Satisfied   ■ Dissatisfied

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

89%
11%
■ Satisfied   ■ Dissatisfied

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

<div align="center">

**Lead
FM
Operational
Units**

</div>

ON HOLD

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

**Lead
FM Wide**

FM ACADEMY

ACTION PLAN

Action Item	Target Date
• Ongoing safety related activities to foster continuous awareness	
• Supervisor Safety Talks	Ongoing monthly
• FM Safety Fair	April 2014
• Safety Slogan Contest (*New Slogan – "Start Safe, Work Safe, Finish Safe"*	July 2014
• Accident/Incident YTD	
• Accidents - 7	2014 year end
• Minor incidents - 1	2014 year end
• Compliance training (OSHA)	
• FM-HR, Risk Mgmt. and EHS to meet to discuss requirements	March 2014
• ***OSHA 30 Hour*** *training for F/O & BES&R leadership*	June 2014 (*completed*)
• Process Review Project	TBD
1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc.	
2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD	
3. Continuing current process of reporting training activities to FM Learning & Development Specialist.	
• All training records sent to FM-HR Staff Dev. Specialist	Ongoing

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
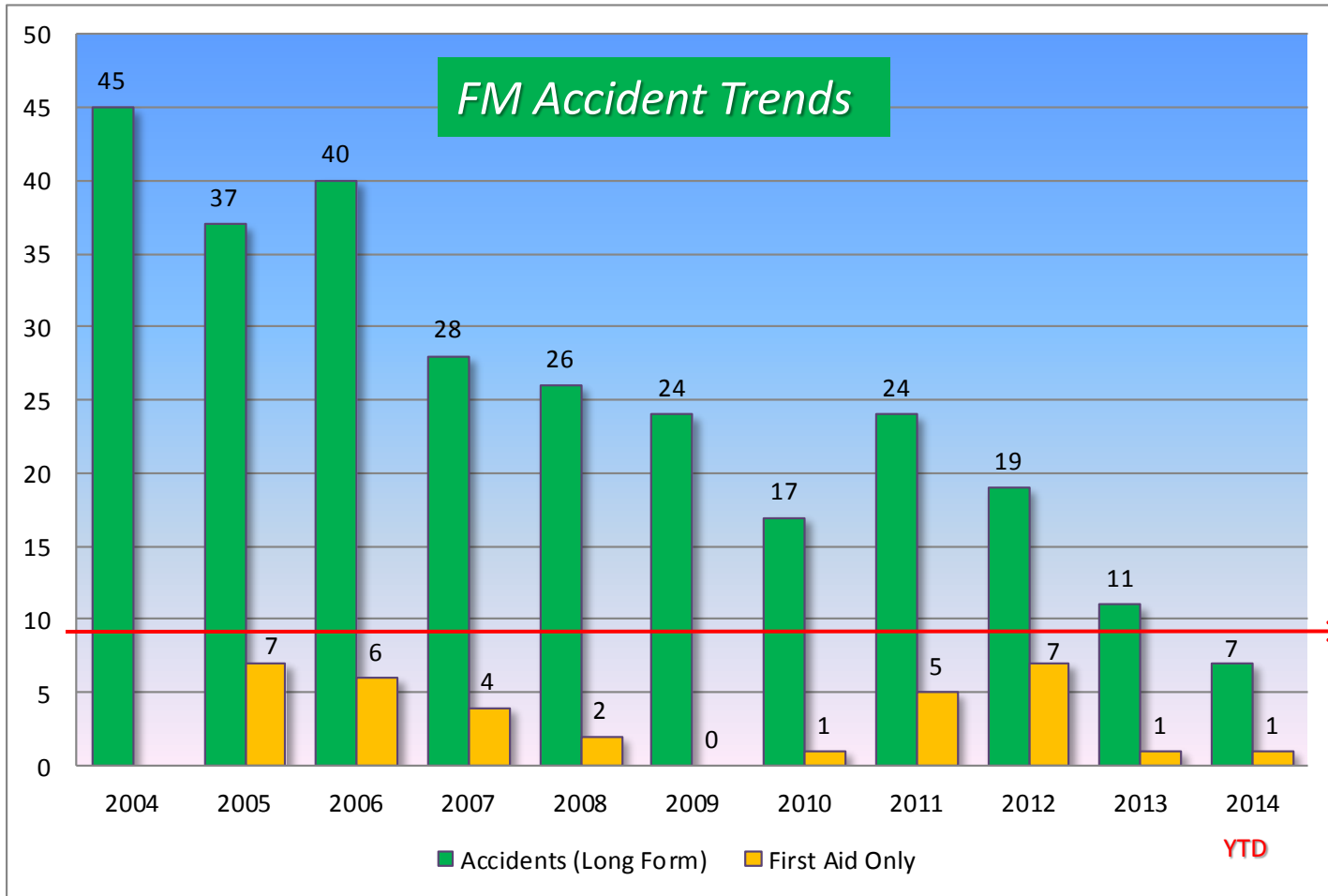
Lead
FM Wide

STATUS

Target ≤ 9

68

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation and Learning Perspective

Mandatory compliance training (OSHA)

20%

- Periodic meetings with EH&S to review needs, processes, etc.

- OSHA 30 Hour training delivered in June 2014

- Identified need to perform process mapping on current OSHA training with FO Leaders; Date to begin current state mapping TBD. First meeting to be tentatively held in mid-May.

- Research training providers/vendors to help fill training gaps, as needed.

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Action Item	Target Date

- Further development of FM Academy
  - Marketing Strategy & Website Development — July 2014
  - Content Development — Ongoing
  - Vendor Selection and Delivery — As Needed/As Funded

- HVAC Matrix Development – meetings ongoing — August 2014

![UNC Charlotte logo]

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 ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

<div style="background-color:purple;color:white">

Lead
FBO

</div>

ACTION PLAN

Finance/Budget:

- Hired Procurement/Grants Specialist Position (M. Davis - April 19, 2014**)**.

- Monitored general fund spending within operational units of FM: July 1st, 2013 – June 30th, 2014; Spending %s at year-end were as follows: Emergency Funds – 98.5%; One-Time – 98.1%; Base Operations – 93.8% ;

- All receipts-supported fund balances ended in the black as of June 30, 2014. NOTE: Labor Services analysis is underway to determine and address areas of concern:
    – FBO reviewed all existing commitments on the books and cleaned up the fund – completed June 1 – June 30th, 2014;
    – Review of Archibus work orders (NR vs R) to begin July 1st;
    – Meeting with FO Leadership and FBO Finance to be tentatively scheduled in mid to late August 2014;

Supplemental Grant/Award Funding:

- *Announcement*: FM won A NC State Energy Office Grant for Electric Stations; Total won = $65,000; PI = M. Lizotte; Budget Manager – M. Davis; Still awaiting contract document from donor.

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 ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
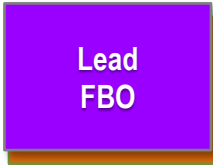**Balanced Scorecard Category:** Financial Perspective

**Lead
FBO**

ACTION PLAN

Supplemental Grant/Award Funding con't:

- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring "matching funds", ensure buy-in from AVC prior to submitting proposals – **thru June 2015;**

- Submit Award application for APPA Effective and Innovative Practices; **Due November 2014**;

- Submit Campus Tree USA application – **Due December 31, 2014**.

Cost Accounting:

- Devise strategy to improve cost accounting measures within all areas of Facilities Management (org code usage, account code usage, budget revisions, etc.) – **July – September 2014**;

- Request an entry-level accountant position for FY 15 to assist in this area – **May 2014**.

- Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no <u>upfront</u> oversight by FBO (i.e., Archibus NR work orders); increase monitoring efforts **July 1, 2014 thru June 30, 2015** close out.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

Lead
FBO

Fund Name	YEAR END - % Expended
Base Operations	93.8%
Emergency Fund	98.1%
BA-OT adj for CF Projects	98.5%

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014
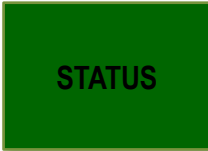
GOAL #5 Promote Good Stewardship
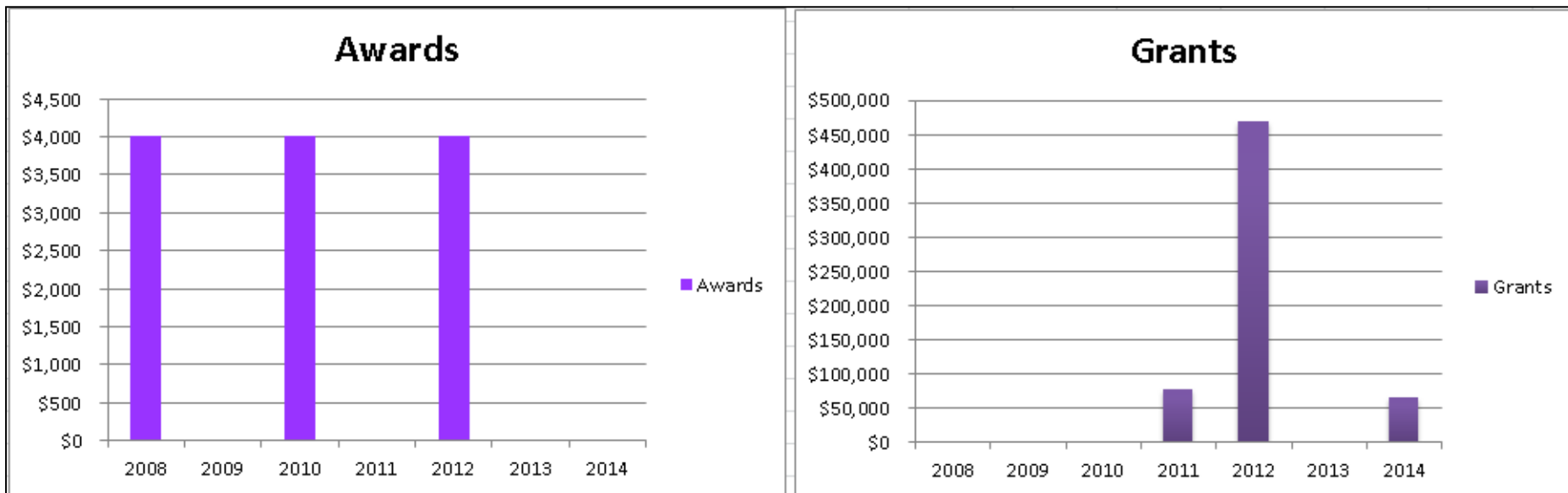
Objective 5.1:	**Promote Fiscal Responsibility**
Tactic 5.1.2:	Increase Supplemental Funding to the Department by 10% annually
Measure:	Percent increase in supplemental funding

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

Lead
FBO

STATUS

75

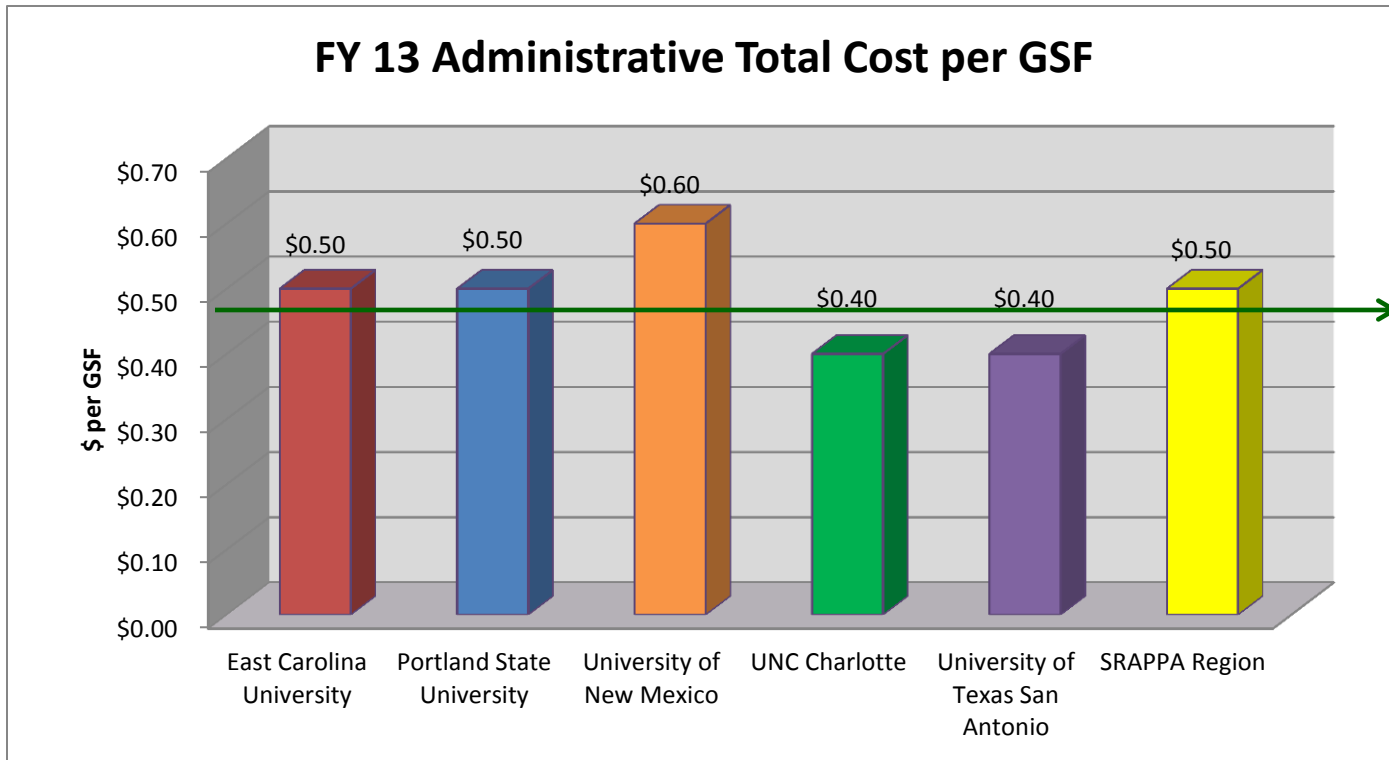**GOAL #5 Promote Good Stewardship**

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

**Lead
FBO**

FY 13 Administrative Total Cost per GSF

Overall APPA Avg. = $0.48
Target = $0.456
UNC Charlotte = $0.40

STATUS

GOAL #5 – Promote Good Stewardship

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

ACTION PLAN

- Actions Completed
    – Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
    – Received one-time funds for supply chain management project (project underway)
    – Completed hand dryer pilot study paper count in Fretwell
    – Completed hand dryer pilot study survey (of building occupants) in Fretwell

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

GOAL #5 –Promote Good Stewardship

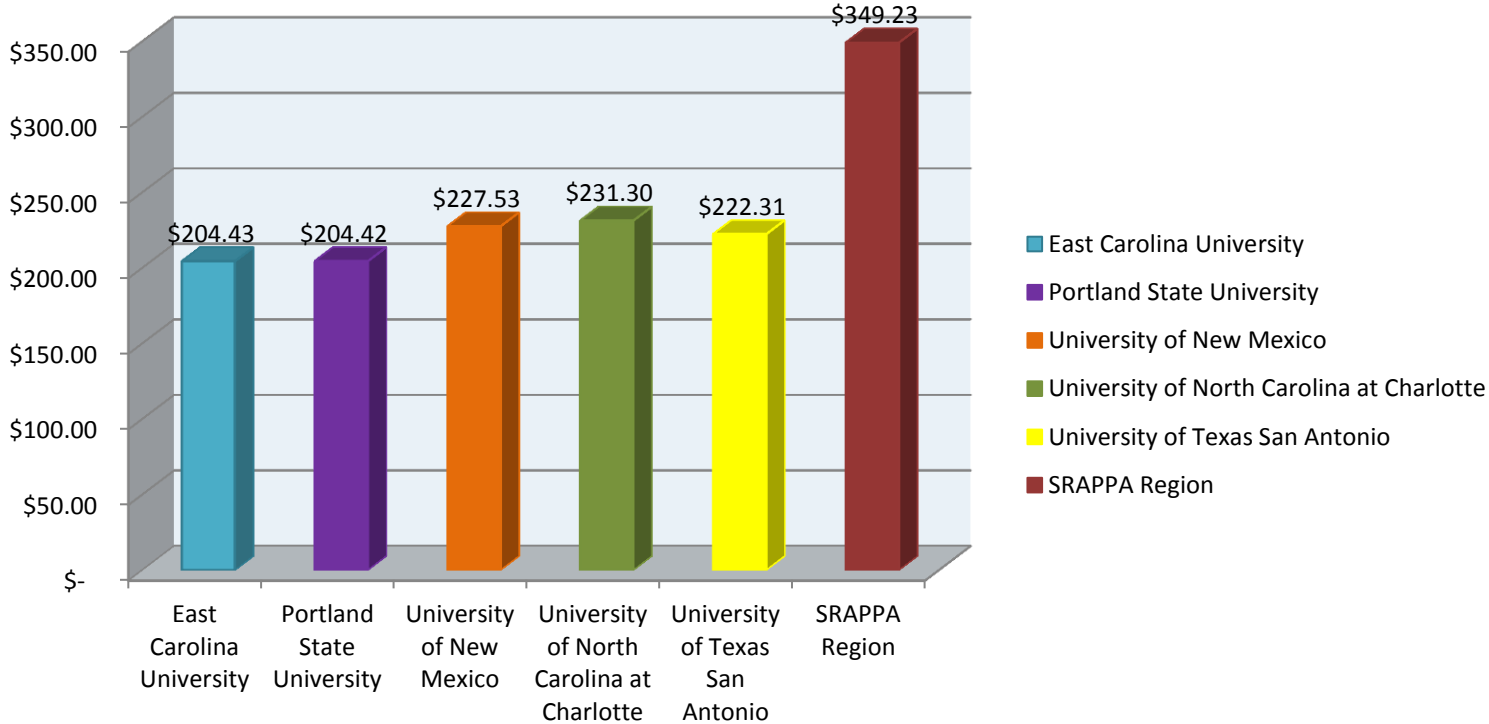|	
Objective: 5.1:	Promote Fiscal Responsibility
Tactic 5.1.4:	Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina) (National Peers – Portland State University, University of New Mexico, University of Texas at San Antonio)
Measure:	Custodial Costs/Student from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/Student FTE

Balanced Scorecard Category: Financial Perspective

Lead
BES

Custodial-Total Cost/Student FTE

Avg. cost/student = $217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

Value	Institution
$204.43	East Carolina University
$204.42	Portland State University
$227.53	University of New Mexico
$231.30	University of North Carolina at Charlotte
$222.31	University of Texas San Antonio
$349.23	SRAPPA Region

STATUS

78

GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Lead
F. O.

ACTION PLAN

1 – Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not To Charge) by 30 September 2014.

2 – Identify opportunities to expand reimbursable work in an effort to support labor services funds 25 November 2014

3 – Realign the labor services positions to ensure maximum utilization of resources by 28 October 2014.

4 – Weekly review of Facilities Operations Labor pool before going outside for additional staff support.

5 – Monthly review of Labor Services accounts with FBO to identify gaps and improve processes.

GOAL #5 – Promote Good Stewardship
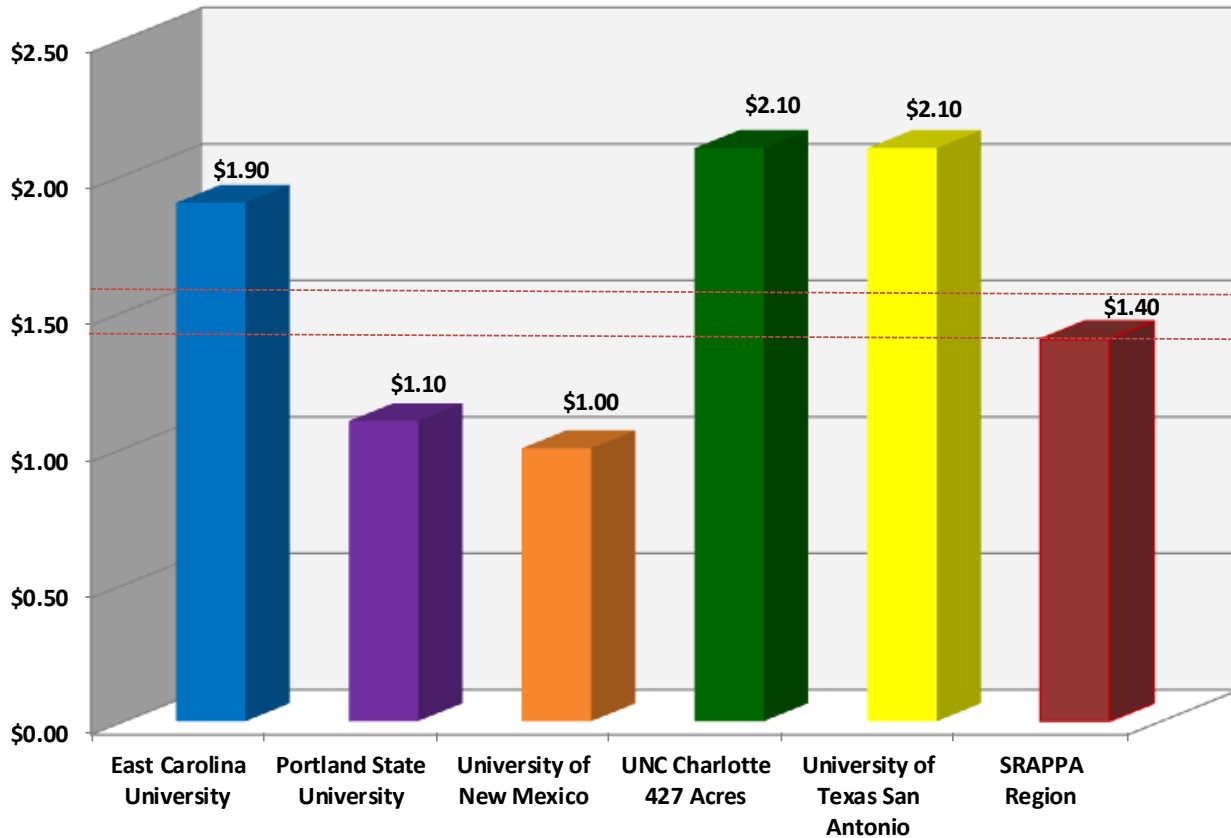**Objective: 5.1: Promote Fiscal Responsibility**
Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions
Measure: Maintenance cost/GSF from annual APPA Facilities Performance Indicators Report **(APPA Benchmark)**

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Lead
F. O.

Maintenance Total per GSF

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

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

STATUS

80

GOAL #5 – Promote Good Stewardship
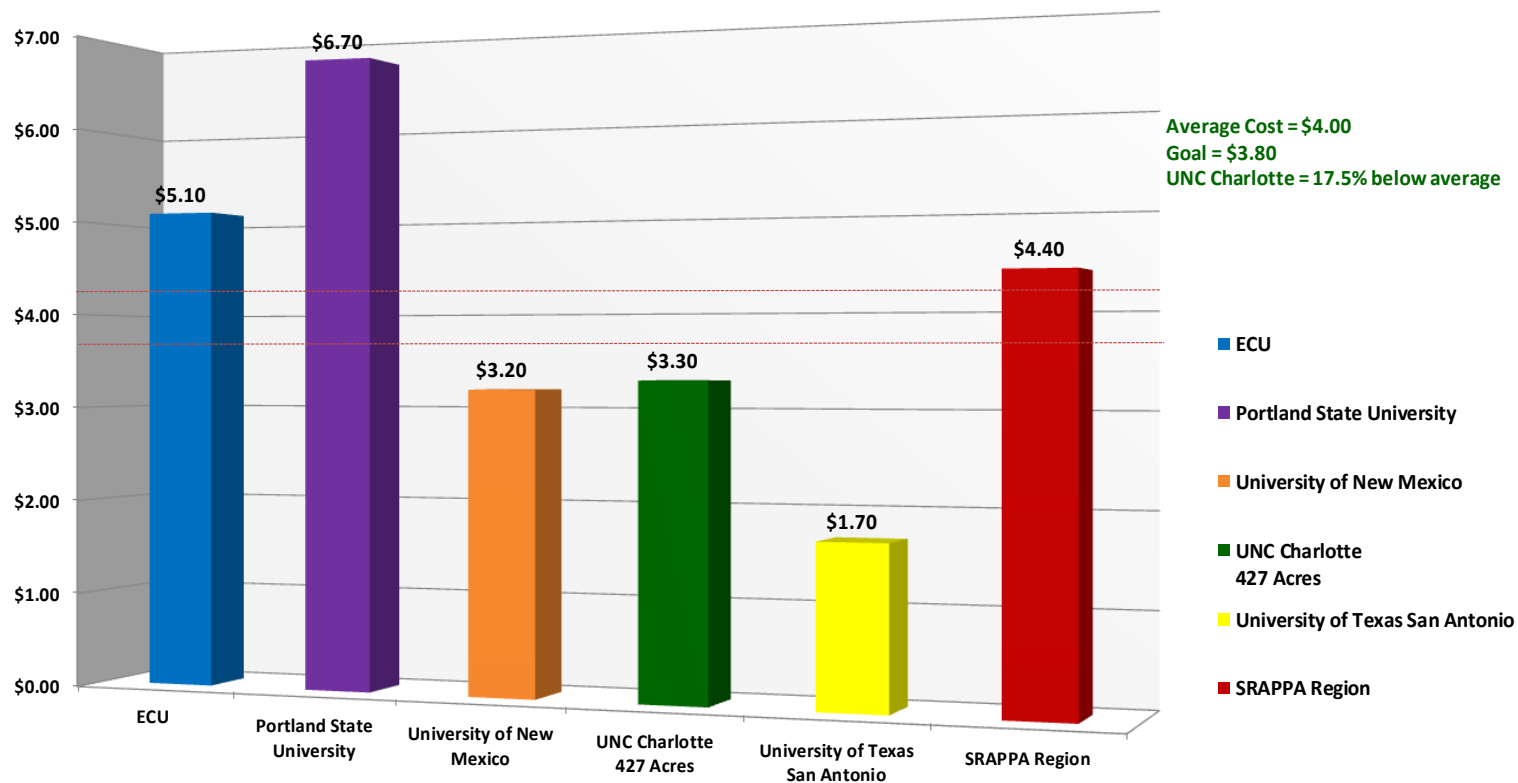**Objective: 5.1:** Promote Fiscal Responsibility
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions
Measure: Landscape cost/acre from annual APPA Facilities Performance Indicators Report **(APPA Benchmark)**

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Lead
F. O.

Grounds - Total Cost per Acre

Average Cost = $4.00
Goal = $3.80
UNC Charlotte = 17.5% below average

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

Values on chart:
ECU: $5.10
Portland State University: $6.70
University of New Mexico: $3.20
UNC Charlotte 427 Acres: $3.30
University of Texas San Antonio: $1.70
SRAPPA Region: $4.40

STATUS

81

GOAL #5 – Promote Good Stewardship
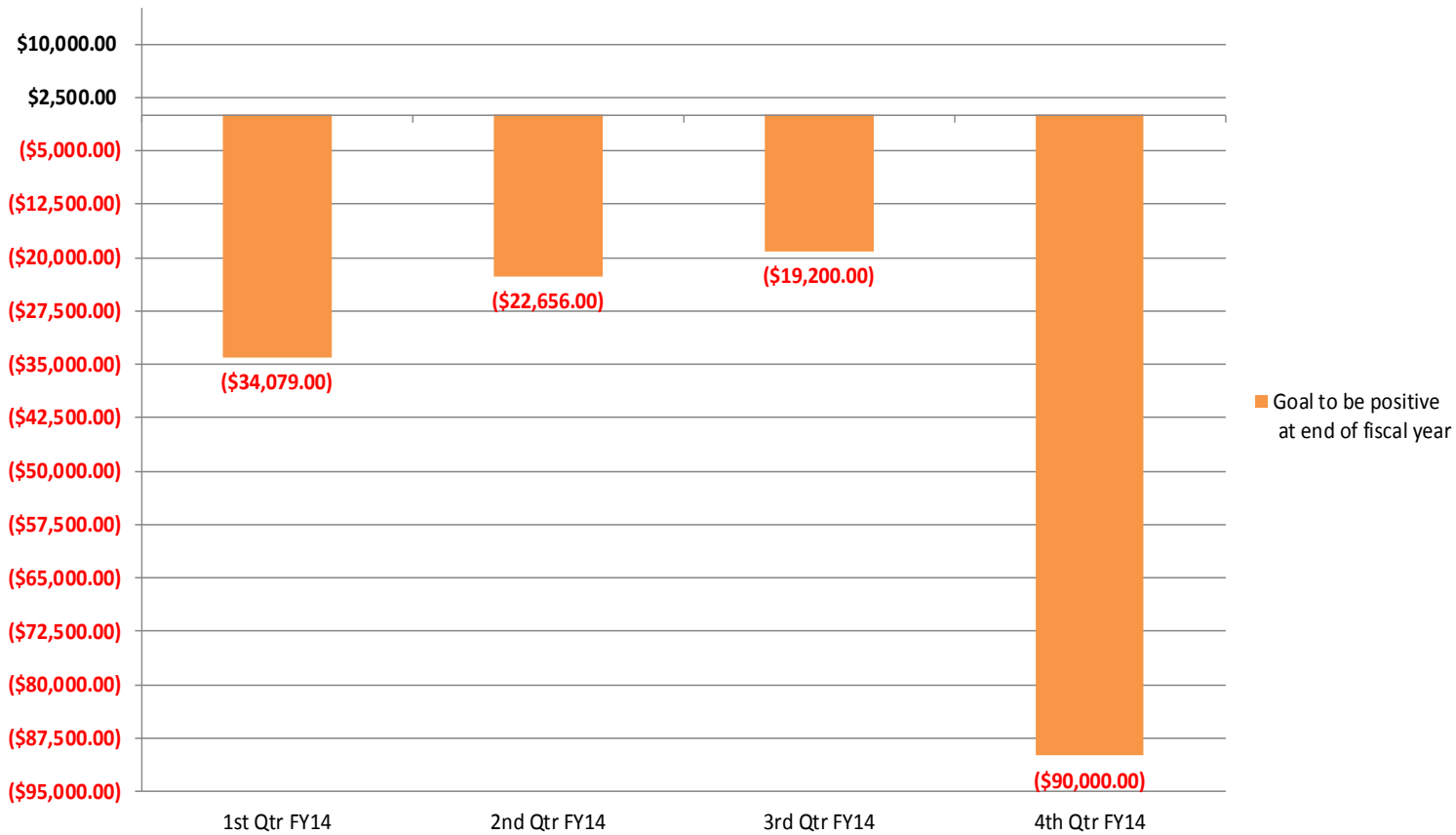**Objective: 5.1: Promote Fiscal Responsibility**
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year
Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Lead
F. O.

Dollars In Account at end of Fiscal Year

$10,000.00	
$2,500.00	
($5,000.00)	
($12,500.00)	
($20,000.00)	($19,200.00)
($27,500.00)	($22,656.00)
($35,000.00)	($34,079.00)
($42,500.00)	
($50,000.00)	
($57,500.00)	
($65,000.00)	
($72,500.00)	
($80,000.00)	
($87,500.00)	
($95,000.00)	($90,000.00)

1st Qtr FY14   2nd Qtr FY14   3rd Qtr FY14   4th Qtr FY14

■ Goal to be positive at end of fiscal year

STATUS

82

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

Lead Recycling

ACTION PLAN

- ## Waste Reduction and Recycling

   ### Actions Complete

   TOTAL recycling for quarter 34% (all totals are not in) , 36% (all totals are not in) **for the year**

   - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
   - Coordinated MOVE OUT – 16,672 pounds collected for charity , tabled at all freshman and transfer SOAR, provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, presented at Collegiate Sports Summit and APPA, Zero Waste Football program won the **NACAS 2014 Innovative Achievement in Auxiliary Services Award** (National Association of College Auxiliary Services

   ### 1st Quarter Actions Planned

   - Planning for MOVE IN – August 15-17
   - Second Zero Waste Football season August - November
   - Start composting program at Center City Building
   - 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
   - Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
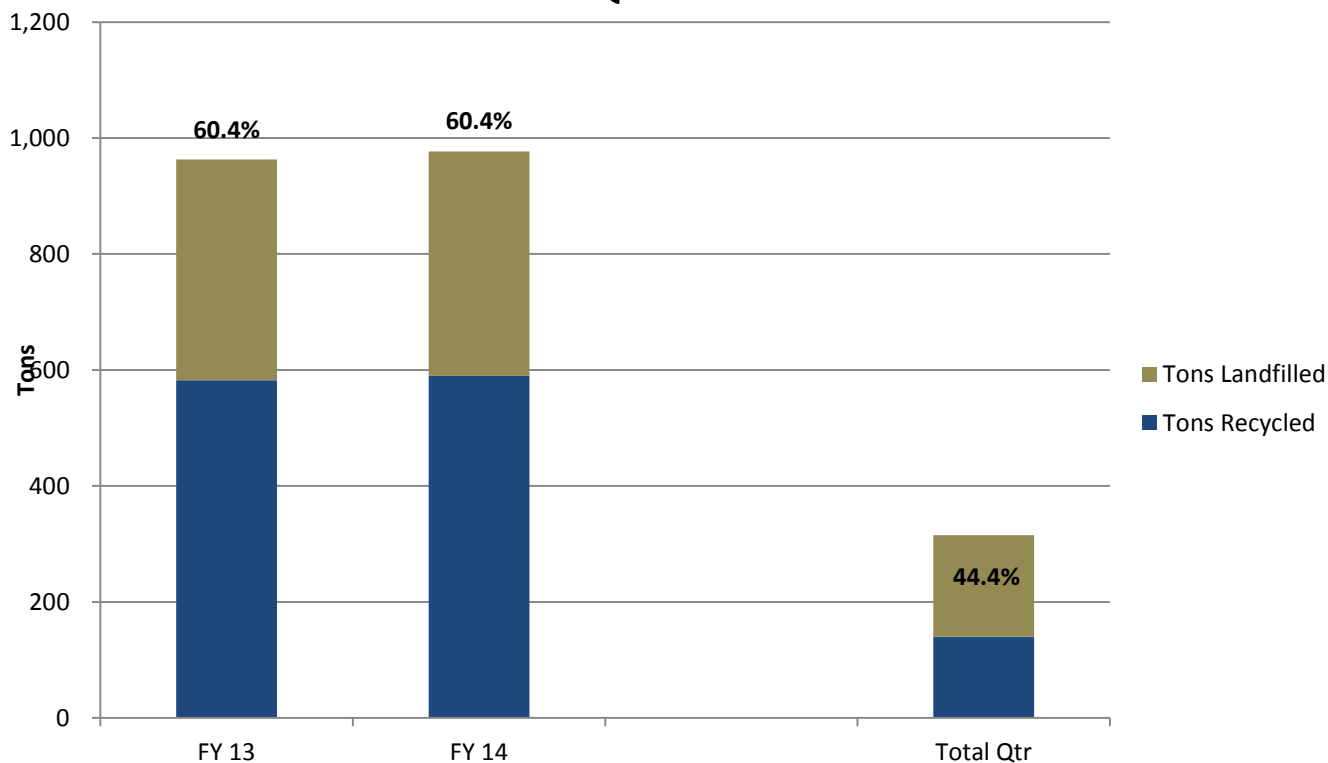
Objective 5.2:   **Develop a Sustainable Campus**

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

Lead
Recycling

Construction & Demolition Debris Diversion
4th Quarter FY14

Chart legend:
- Tons Landfilled
- Tons Recycled

Data labels: FY 13 – 60.4%, FY 14 – 60.4%, Total Qtr – 44.4%
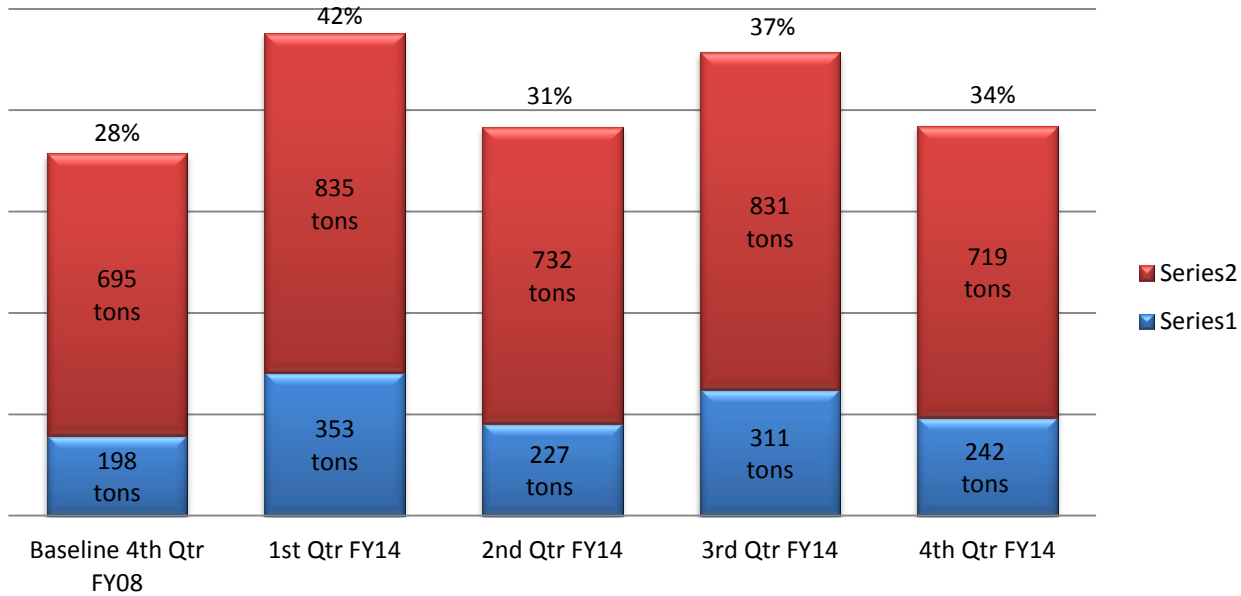
Tactic 5.2.2
Increase Percent of Solid Waste Diversion on Campus to 45%
Measure: Pounds of Solid Waste Recycled, composted and reused
Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Lead
Recycling

Breakdown of Solid Waste

Category	Baseline 4th Qtr FY08	1st Qtr FY14	2nd Qtr FY14	3rd Qtr FY14	4th Qtr FY14
Percent	28%	42%	31%	37%	34%
Series2	695 tons	835 tons	732 tons	831 tons	719 tons
Series1	198 tons	353 tons	227 tons	311 tons	242 tons

GOAL #5 – Promote Good Stewardship

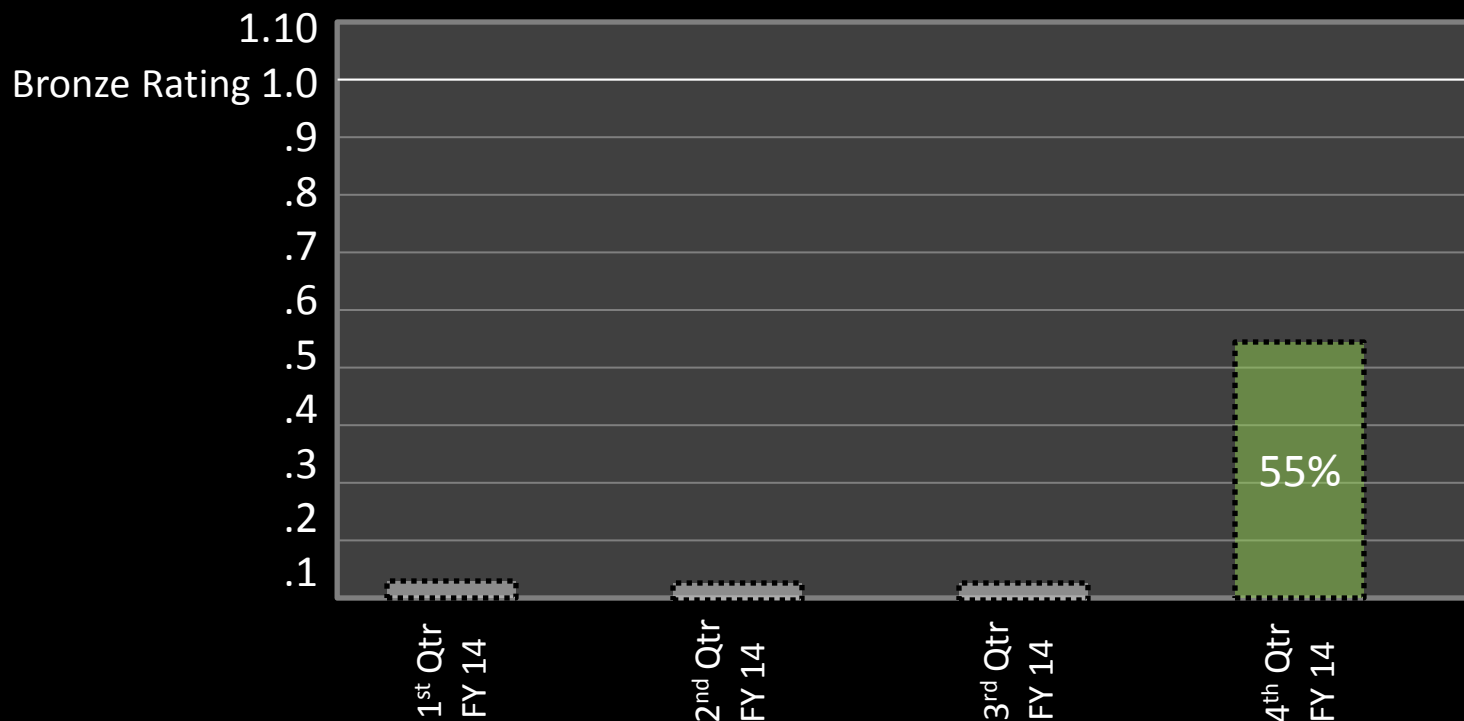**Objective: 5.2: Develop a Sustainable Campus**
Tactic 5.2.3:   Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.
Measure: STARS points to achieve bronze rating

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**

  o **Complete preliminary inventory of STARS points by October 2014.**

  o **Quarterly update of implementation plan for earning further credits based on feasibility: 7/14, 10/14, 1/15, 4/15.**

  o **Achieve bronze rating by end of FY 15.**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3:   Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.
Measure: STARS points to achieve bronze rating

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

Lead Facilities Planning

Percentage of Completion

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.4:   Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.
Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**

  - **Assess use of identified best practices (from Sustainability and Climate Action Plans, completed in May), including timeline and probable costs for additional implementation, by October 2014.**

  - **Draft annual plan and budget by January 2015 to achieve implementation of 60% of identified best practices.**

  - **Demonstrate 60% of best practices implemented by October 2015.**
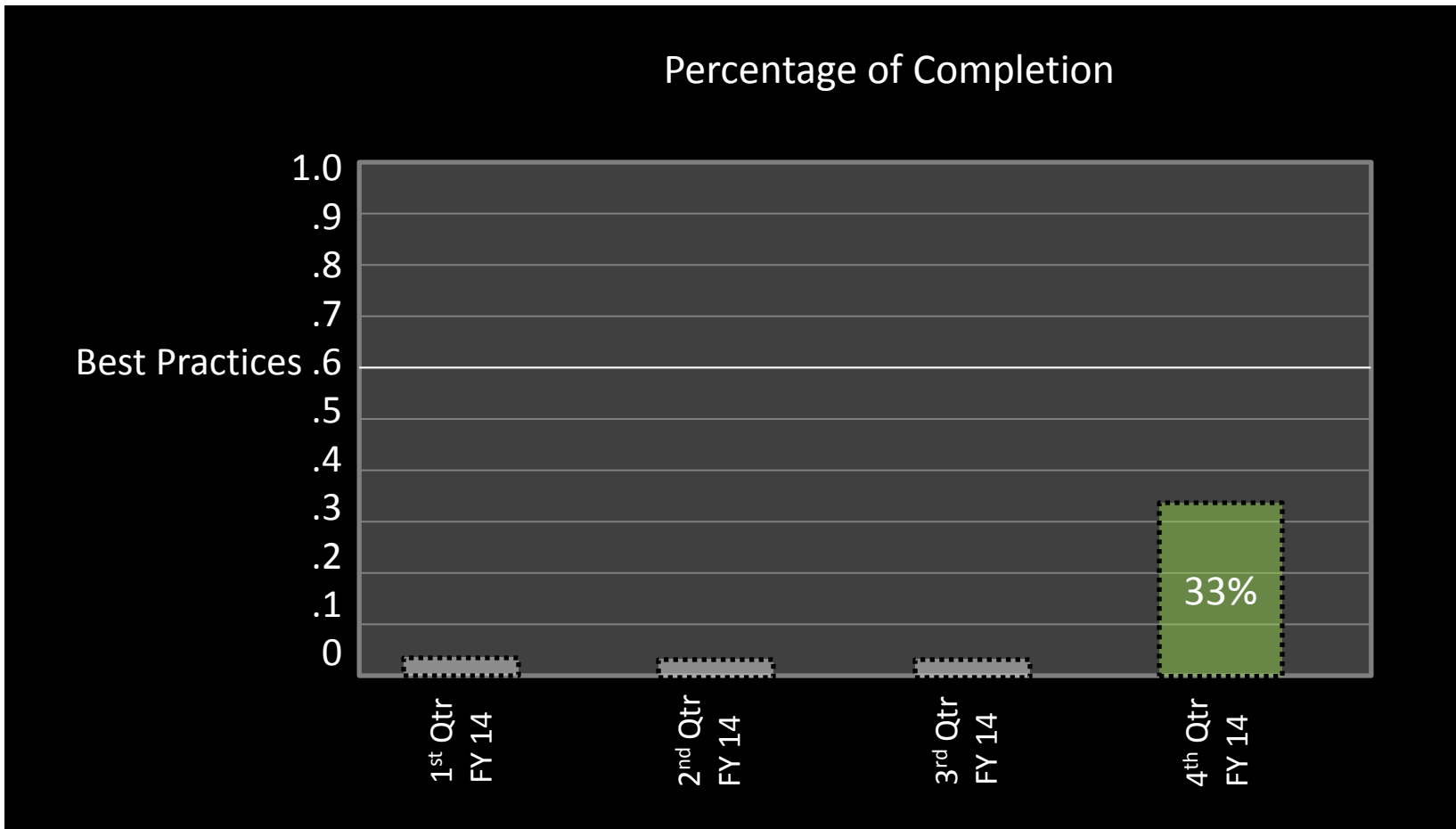
STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.4:   Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.
Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

Lead
Facilities
Planning

STATUS

GOAL #5 – Promote Good Stewardship

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

Lead Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Performance Contract wrapping up

  - Will reduce campus consumption by another 4%

- System Wide Lighting Performance Contract - scheduled to go into construction Nov 2014

- Continue retro-commissioning program

- Exterior Lighting upgrades to LED

  - Street light replacements fixtures to be finalized by end of August – lights to be replaced by end of year.

  - Pedestrian Lights to be replaced as funds become available – start with campus core.

Facilities Management Strategic Planning Session – 4th QTR FY 2014

GOAL #5 – Promote Good Stewardship

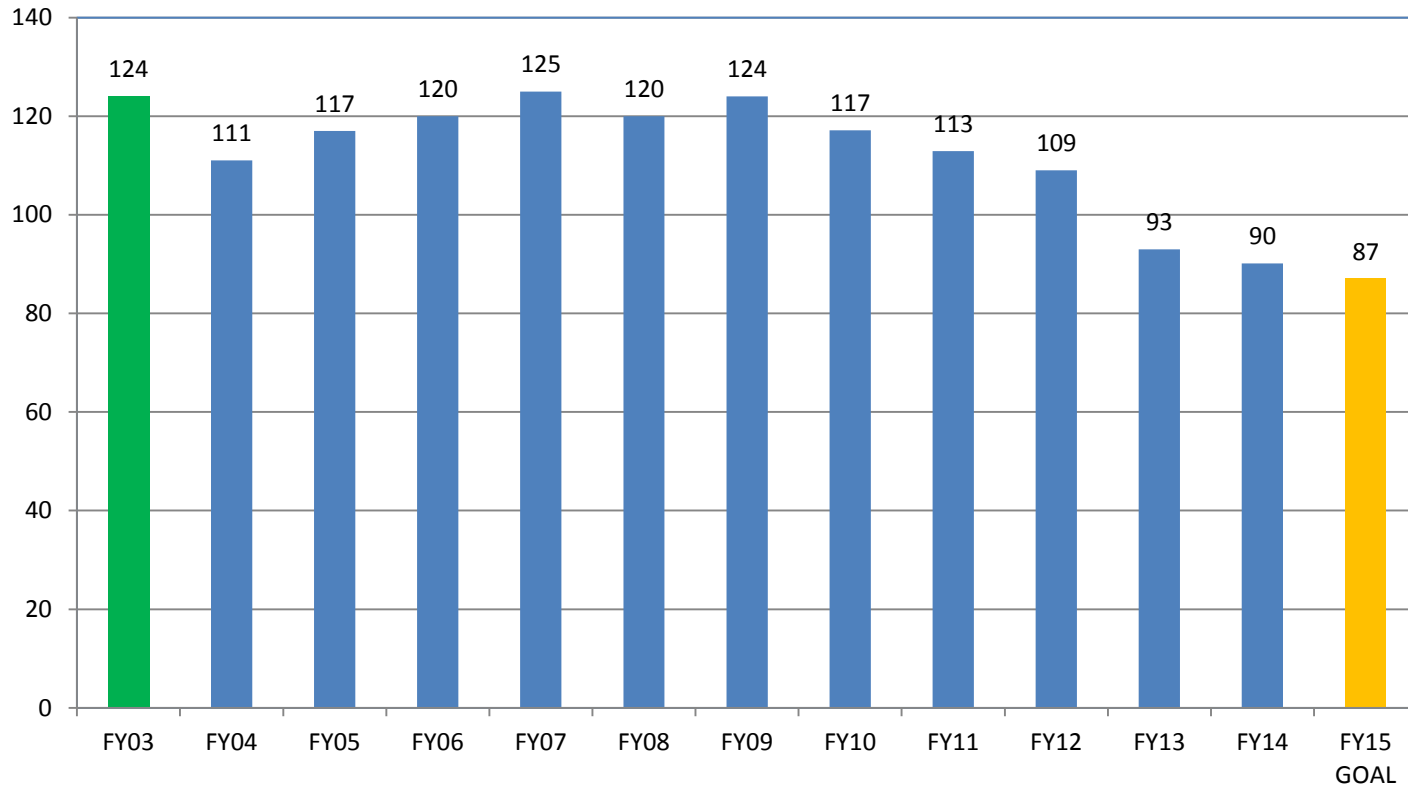|		
Objective	**5.3**	Conserve Natural Resources
Tactics	**5.3.1**	Decrease Energy Usage by 30% by FY2015

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Lead Capital

Base Year FY 2003
Current Reduction 28%
Mandated Reduction 30% BY FY 15

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF

Bar chart of Campus Energy Usage (Kbtu/GSF):
- FY03: 124
- FY04: 111
- FY05: 117
- FY06: 120
- FY07: 125
- FY08: 120
- FY09: 124
- FY10: 117
- FY11: 113
- FY12: 109
- FY13: 93
- FY14: 90
- FY15 GOAL: 87

GOAL #5 – Promote Good Stewardship

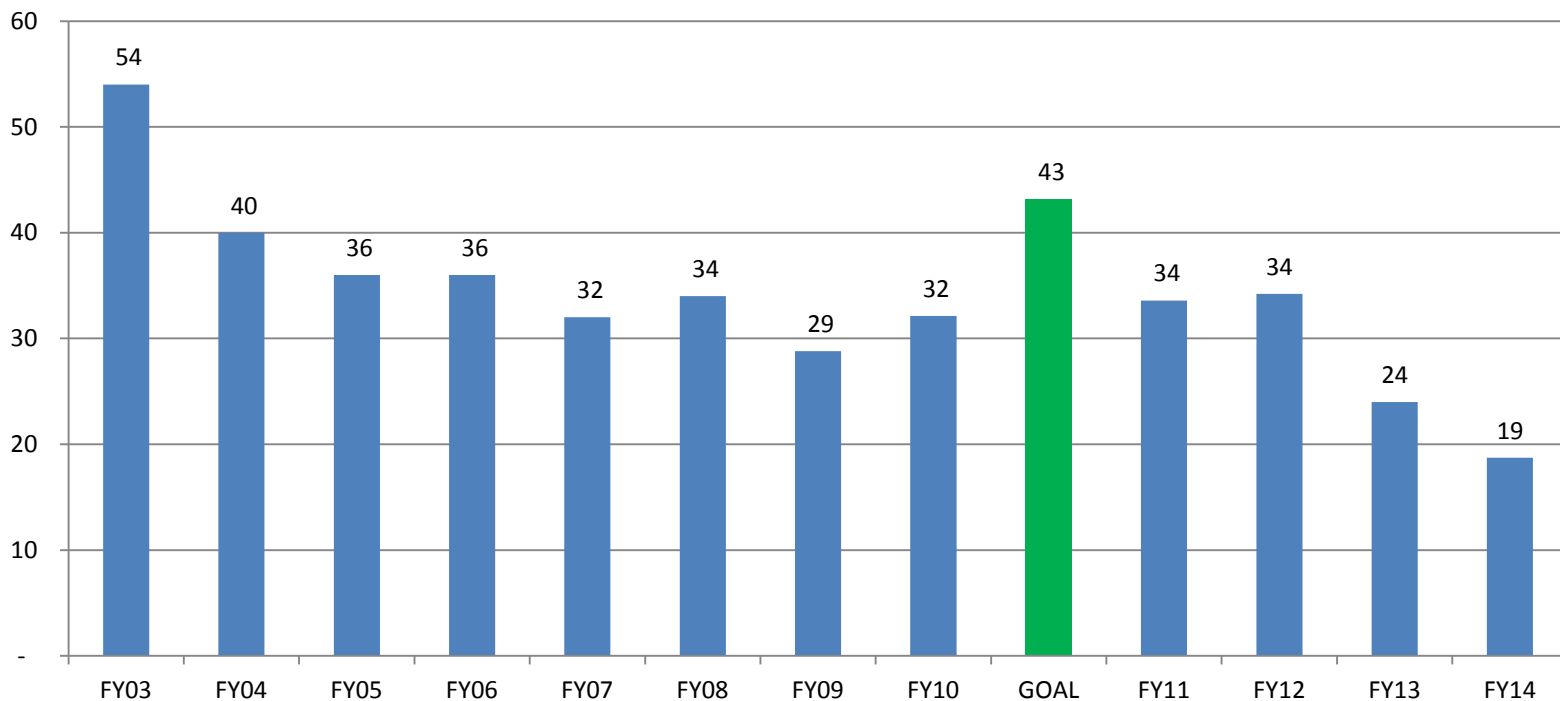|		
Objective	**5.3**	Conserve Natural Resources
Tactics	**5.3.2**	Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Lead Capital

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 19 Gal/GSF

STATUS

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

- Conduct/participate in events promoting utilization of HUB firms
  - Construction "Meet & Greet" – October 7, 2014
  - Charlotte MED Week – TBD
- Establish/emphasize project specific HUB participation goals for single prime projects
  - Campus-wide Roof Replacements
  - CID Roadway Improvements – 15% goal / 11.4% achieved
- Review *GFE* documentation for compliance before 1st tier subcontracts are awarded
- Work with internal/external groups to identify qualified contractors
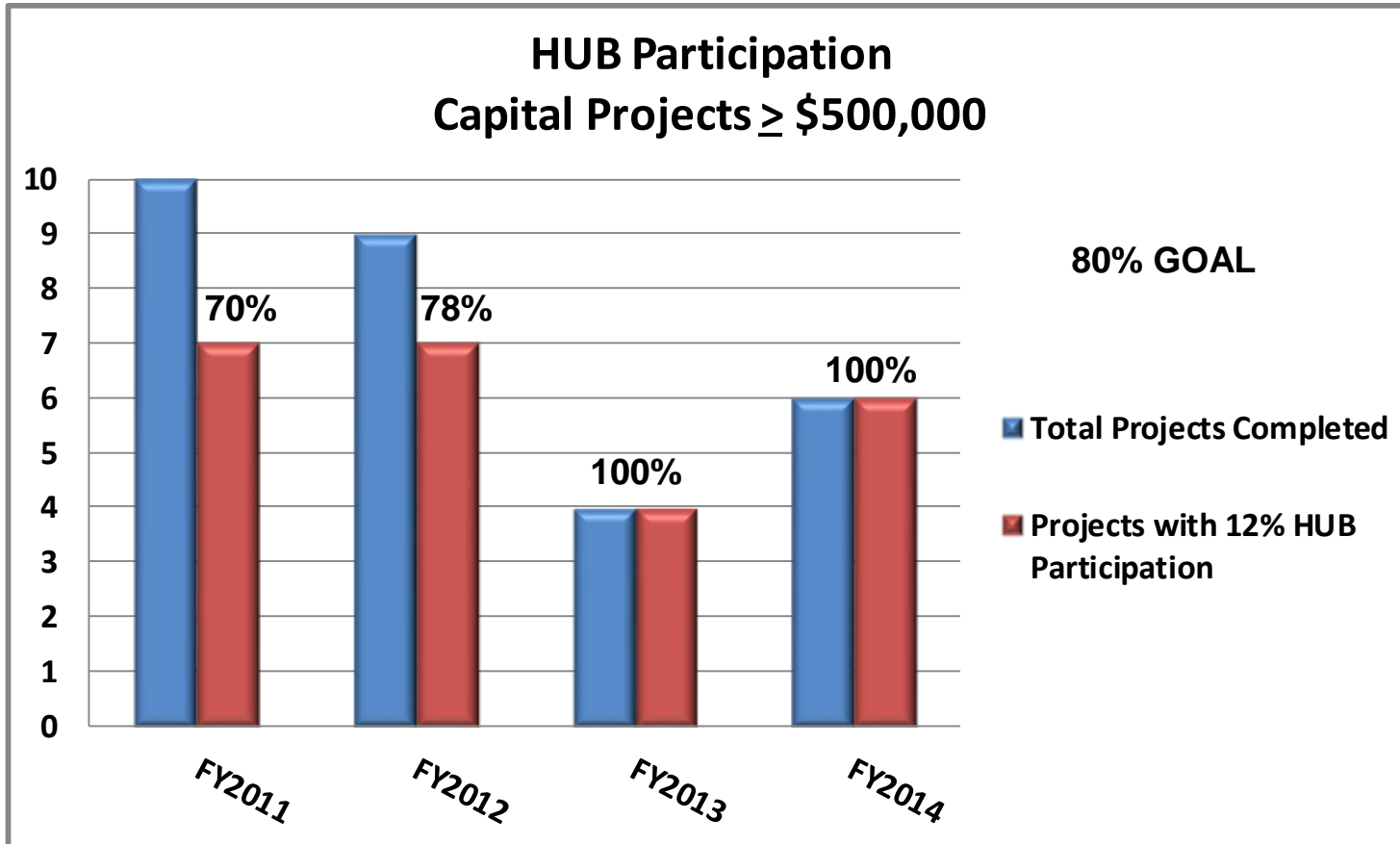
GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation
Tactic 5.4.1:   12% HUB participation on 80% of Capital Projects
Measure: Number of Individual Capital Projects achieving 12% HUB participation divided into Total Projects Completed
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective

Lead
Capital

HUB Participation
Capital Projects $\geq$ $500,000

80% GOAL

70%   78%   100%   100%

Total Projects Completed

Projects with 12% HUB Participation

FY2011   FY2012   FY2013   FY2014

STATUS

GOAL #5 – Promote Good Stewardship

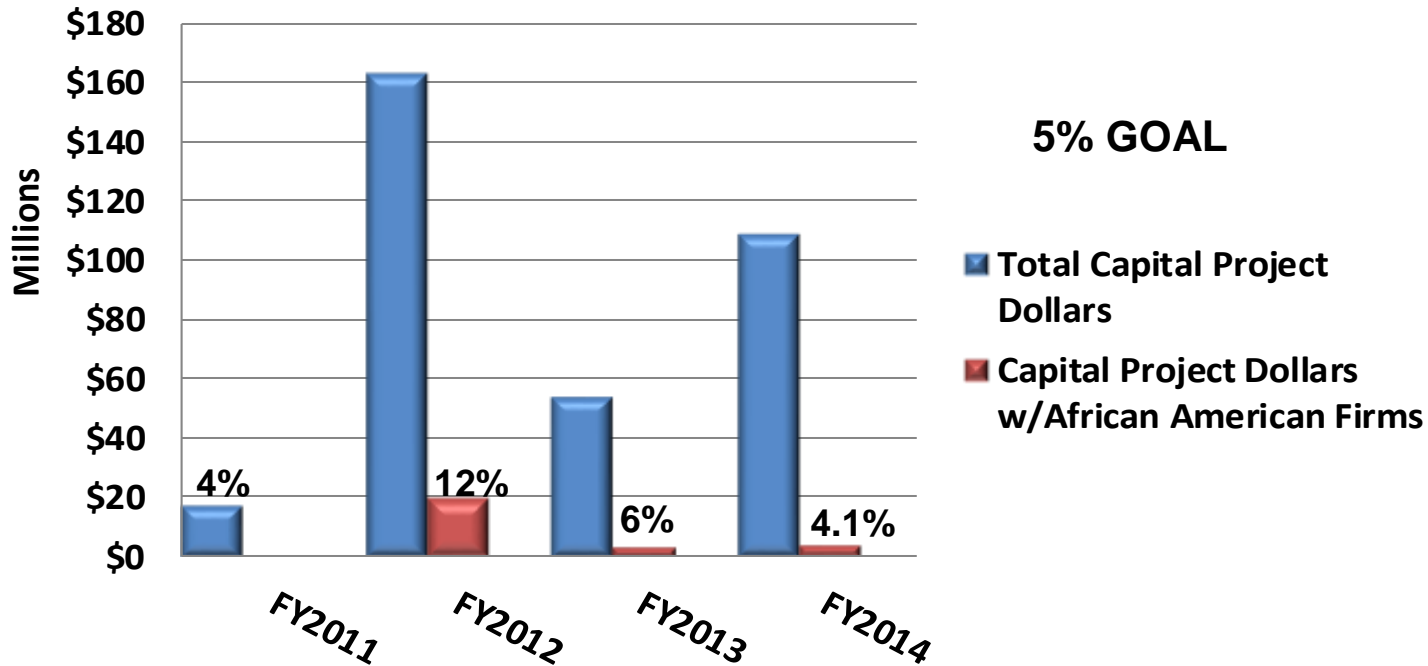**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**
Tactic 5.4.2: 5% African American Participation on Capital Projects
Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective

Lead
Capital

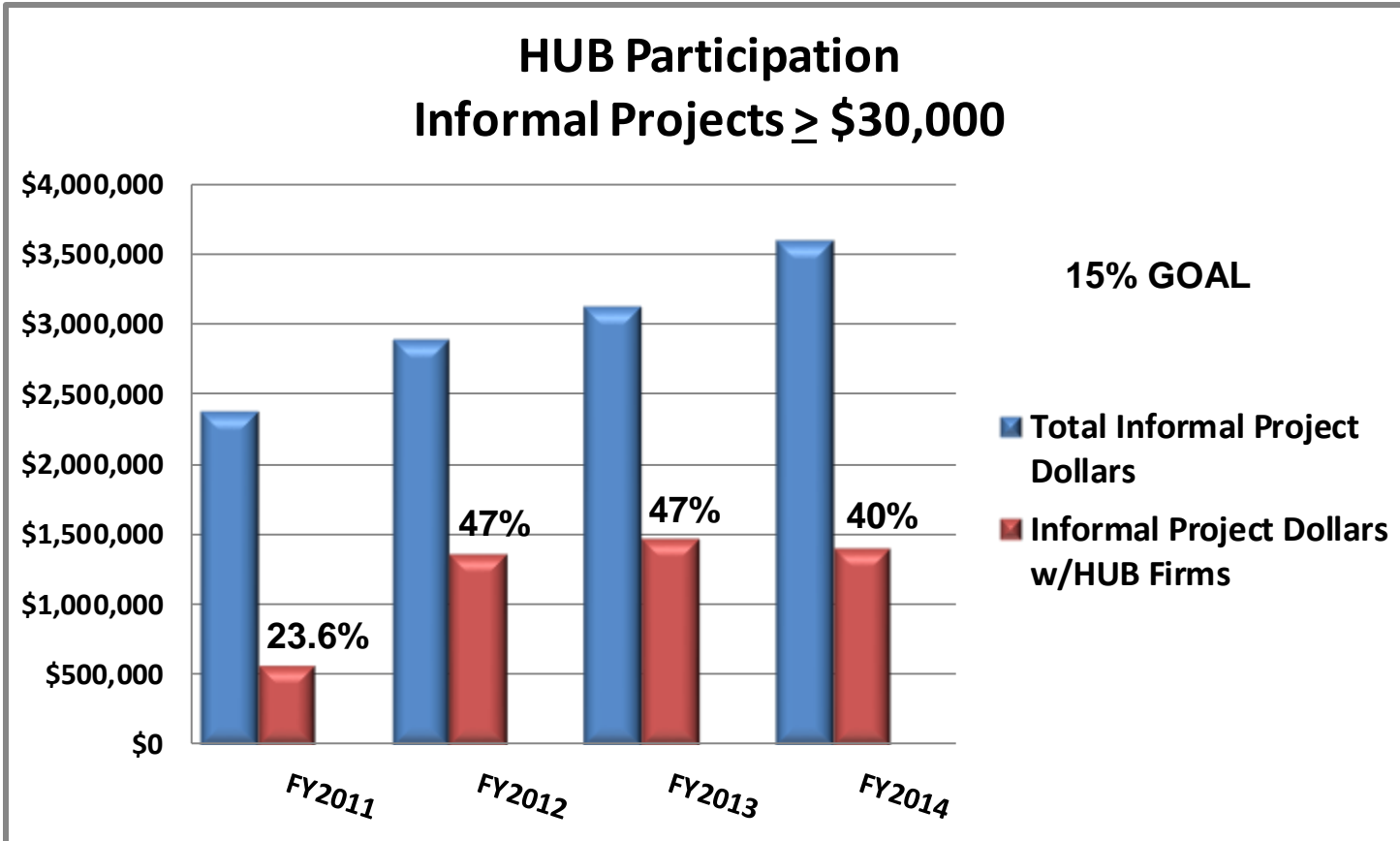
STATUS

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

Lead Capital

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

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

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

➢ Added new HUB Electric Supply Company : Mayer Electric Supply Company, Inc. – Woman owned.

ONGOING IMPROVEMENTS

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

➢ Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
➢ Amanda Caudle acts as advisor for other Coordinators.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

GOAL 13.0%	STATUS 32.4%

Lead Design Services
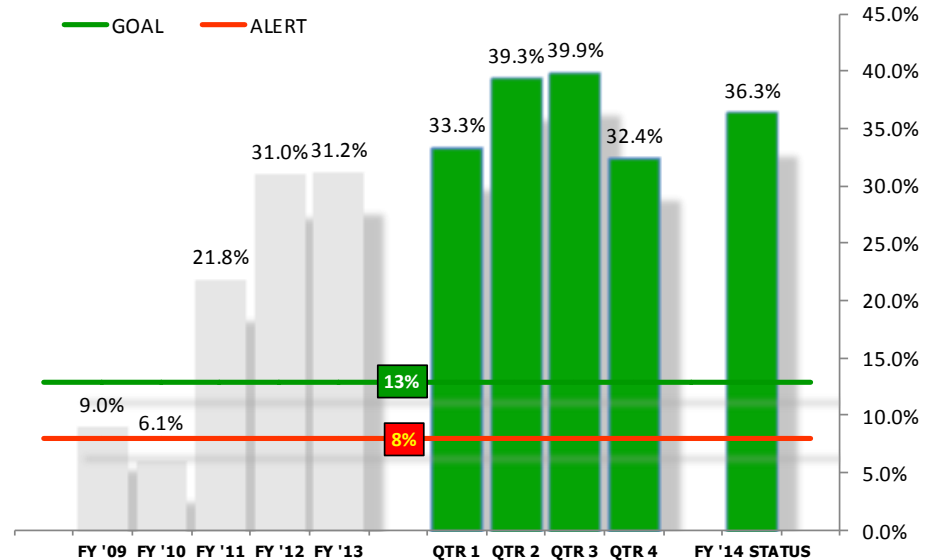
Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	$ 996,756	$ 89,479	9.0%
FY '10	$ 1,452,202	$ 88,703	6.1%
FY '11	$ 3,924,102	$ 857,125	21.8%
FY '12	$ 2,878,027	$ 891,793	31.0%
FY '13	$ 2,891,003	$ 902,065	31.2%
QTR 1	$ 611,428	$ 203,778	**33.3%**
QTR 2	$ 411,281	$ 161,687	**39.3%**
QTR 3	$ 840,824	$ 335,138	**39.9%**
QTR 4	$ 610,875	$ 198,015	**32.4%**
FY '14 STATUS	$ 2,474,408	$ 898,618	**36.3%**

13% Overall HUB Participation – Summary Graph

Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

GOAL #5 – Promote Good Stewardship

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

GOAL 3.0%	STATUS 4.9%

Lead
Design Services

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	$ 996,756	$ 40,894	4.1%
FY '10	$ 1,452,202	$ 73,987	5.1%
FY '11	$ 3,924,102	$ 77,377	2.0%
FY '12	$ 2,878,027	$ 46,475	1.6%
FY '13	$ 2,891,003	$ 115,219	4.0%
QTR 1	$ 611,428	$ 42,900	**7.0%**
QTR 2	$ 411,281	$ 25,172	**6.1%**
QTR 3	$ 840,824	$ 35,441	**4.2%**
QTR 4	$ 610,875	$ 29,914	**4.9%**
FY '14 STATUS	$ 2,474,408	$ 133,427	**5.4%**

3% African American Participation – Summary Graph