



**Facilities Management  
Quarterly Strategic Planning Session**

**Fourth Quarter – Fiscal Year 2015  
April – June 2015**

APPA Award for Excellence  
UNC Charlotte  
WWW.  
**AGENDA**

**Opening – Phil Jones**

**Strategic Planning Metrics and Actions Plans**

**Business Processes Status Report - Directors**

**FY15 Accomplishments**

**FY16 Wildly Important Goals**

**Look Ahead – Phil Jones**

*...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*



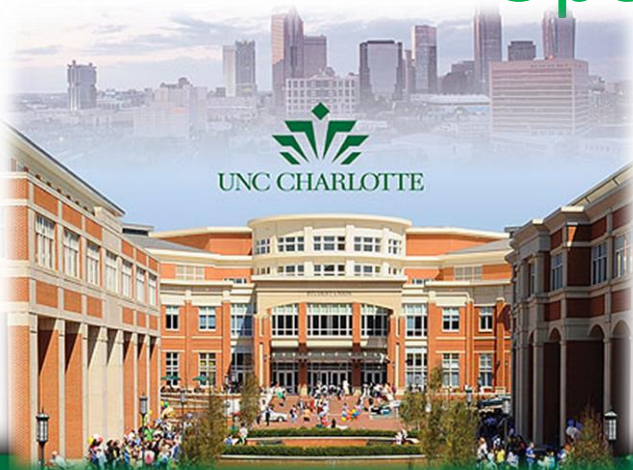
UNC CHARLOTTE

"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%**

Lead  
F. O.

## ACTION PLAN

### Actions Planned

1. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. Supervisors and Managers weekly assignment; “Manage by Walking around.”
4. Continue to work with Zones and Shops to increase efficiencies.

### Actions Completed

1. Weekly review of work assignment completion.
2. Completed initial training in all Zones “Operating like a business.”

**GOAL #1 – Continuously Improve Operations of Campus Facilities****Objective: 1.2: Improve Logistics Efficiency****Tactic: 1.2.1:** Improve Non-stock on-time delivery to 95%**Tactic: 1.2.2:** Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days**ACTION PLAN****Actions Planned**

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

**Actions Completed**

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

Lead  
F. O.

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

**Objective: 1.2: Improve Logistics Efficiency**

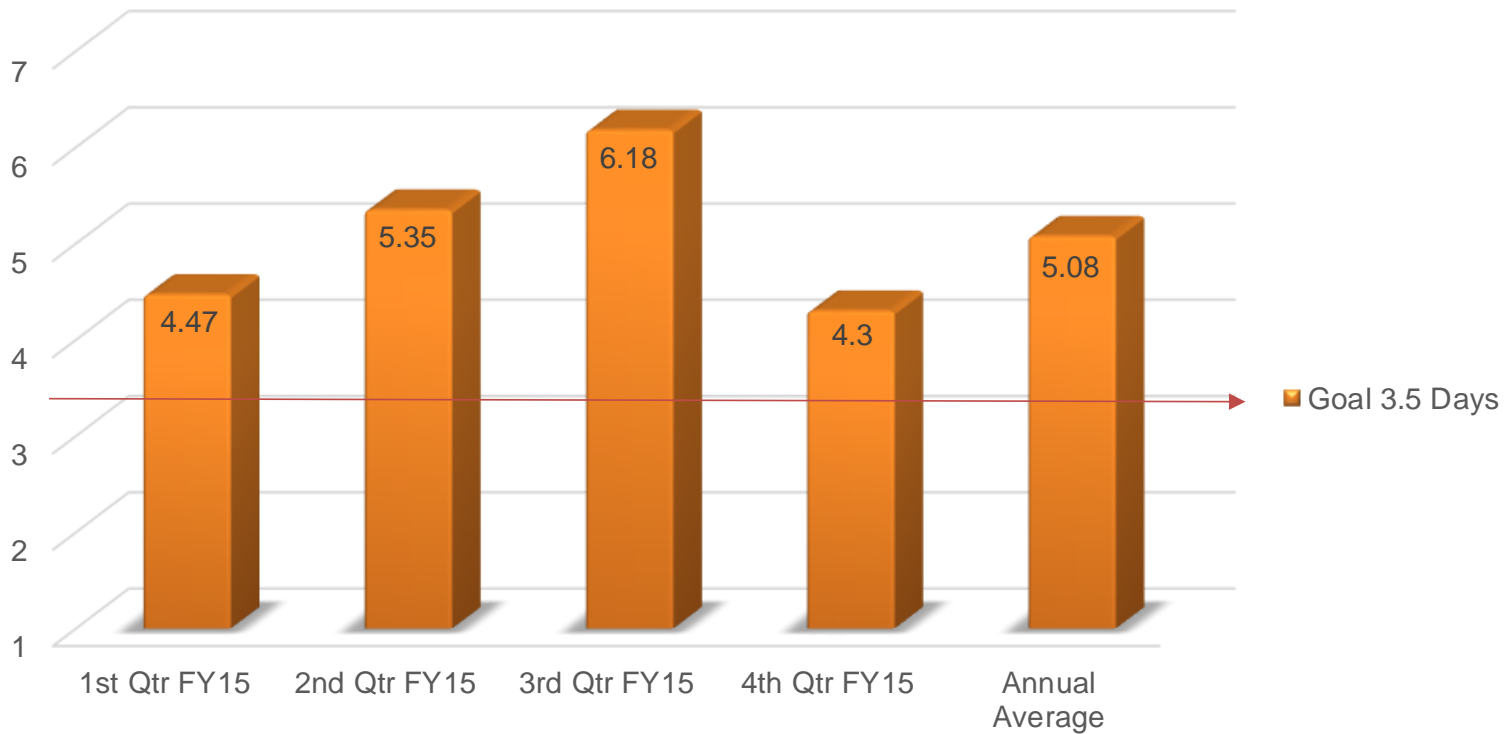
**Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Internal Business Process

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



**STATUS**

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

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

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

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

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

Lead  
F. O.

## ACTION PLAN

### Actions Planned

1. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request..
2. Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
3. Weekly meeting with Zone Supervisors to monitor 30 day report.
4. Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented Sept 2015.
5. Supervisors meeting with technicians on a daily basis.

### Actions Completed

1. Communicated work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014.
2. Reviewed recurring services and scheduled services currently being completed using PM work requests; August 2014.

Lead  
F. O.

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

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

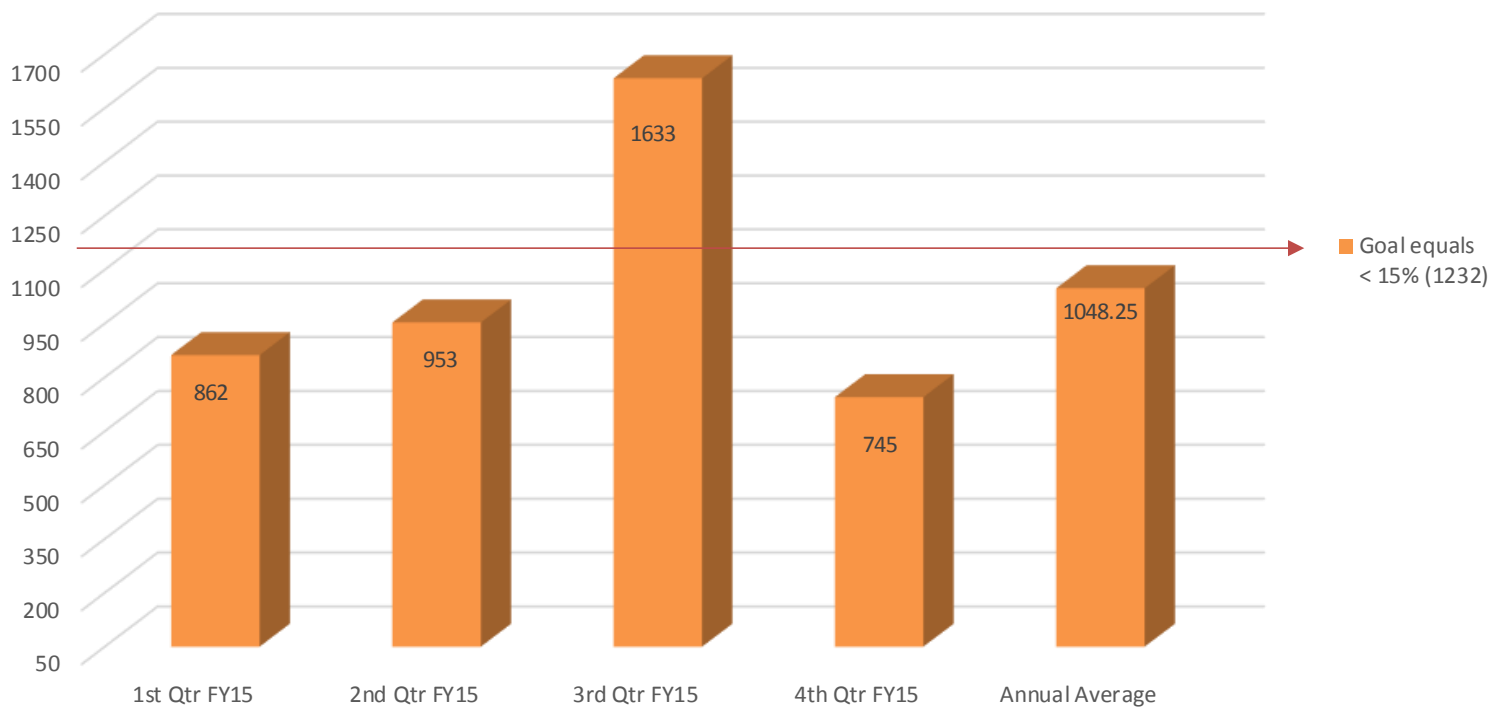
**Tactic: 1.3.1:** Decrease Number of Work Orders Over 14 Days Old by 15%

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

Number of Work Orders Over 14 Days



**STATUS**



Lead  
F. O.

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

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

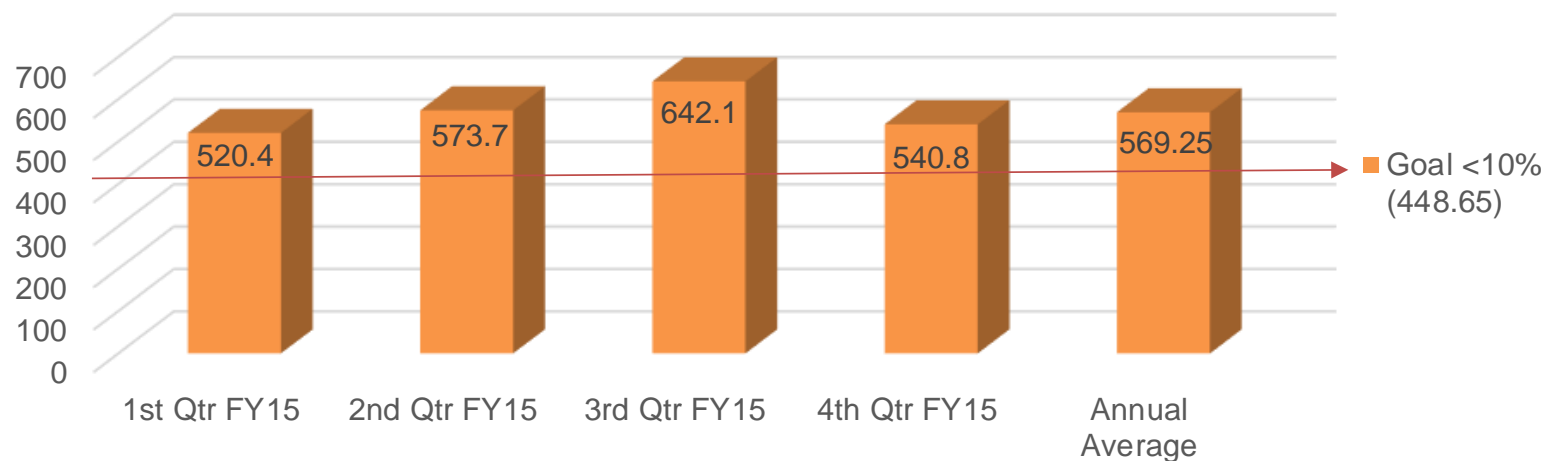
**Tactic: 1.3.2:** Decrease Work Request Cycle Time by 10%

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

## Decrease Work Request Cycle Time



**STATUS**

## GOAL #1 – Continuously Improve Maintenance and Operations

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

Lead  
BES

### ACTION PLAN

- Actions Completed
  - Conducted (OS1) pilot building audit (5/2015)
  - Conducted(OS1) Decision-to-Proceed meeting (5/2015)
  - Reviewed and continued quarterly self audits (6/1/15)
  - Began routine process of EDA Inventory Count (6/2015)
- Actions Planned
  - Develop In-service training curriculum and matrix (8/2015)
  - (OS1) Bootcamp Part II (8/2015)
  - Simon Institute Symposium (8/9/2015 – 8/12/2015)
  - Develop 5-Year BES&R Plan (9/1/2015)
  - Update Hiring Process/Flow Chart (10/2015)
  - Develop Standard Operating Procedures Manual (SOP) for BES&R (12/2015)
  - Implement new Budget process for BES Zone Supervisors (8/2015)

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

Lead  
BES

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

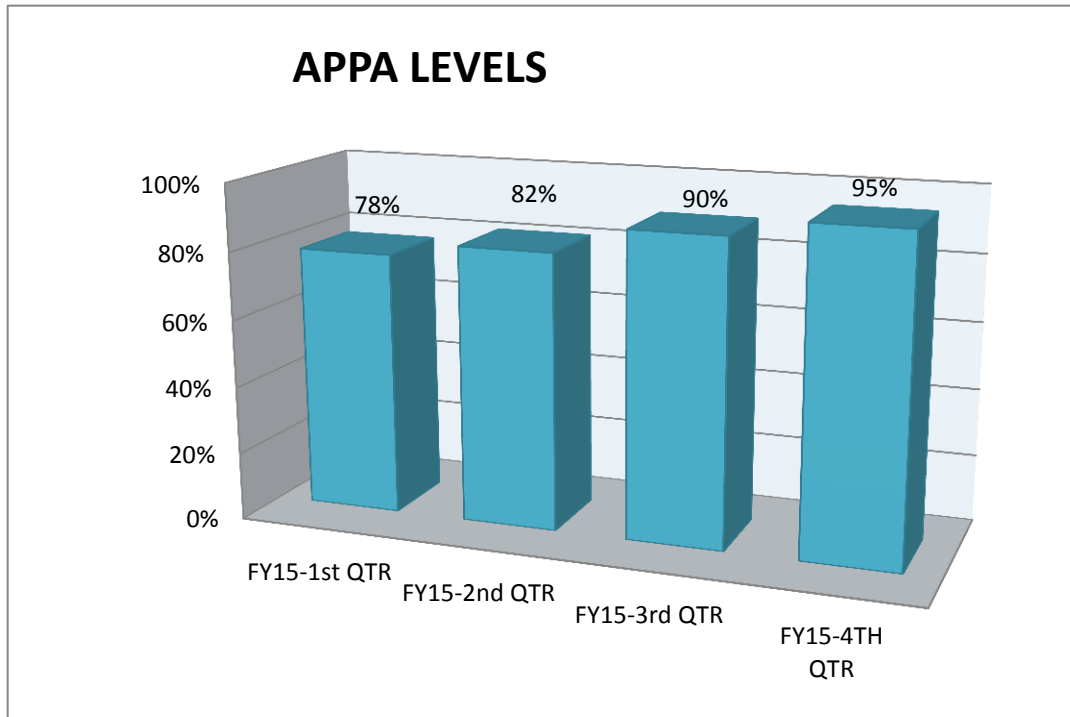
**Objective: 1.4:** Improve BES Processes

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

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

**Lead:** Building Environmental Services

**Balanced Scorecard Category:** Customer Perspective

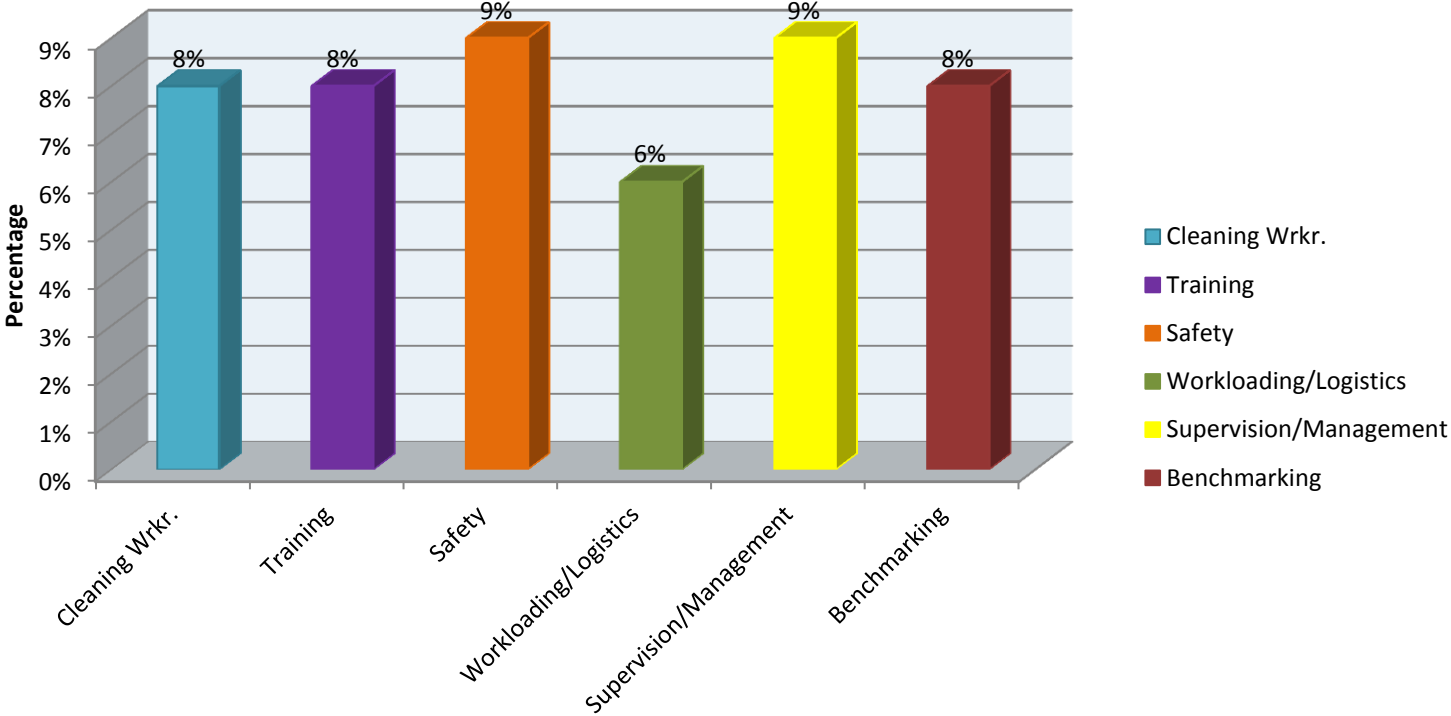


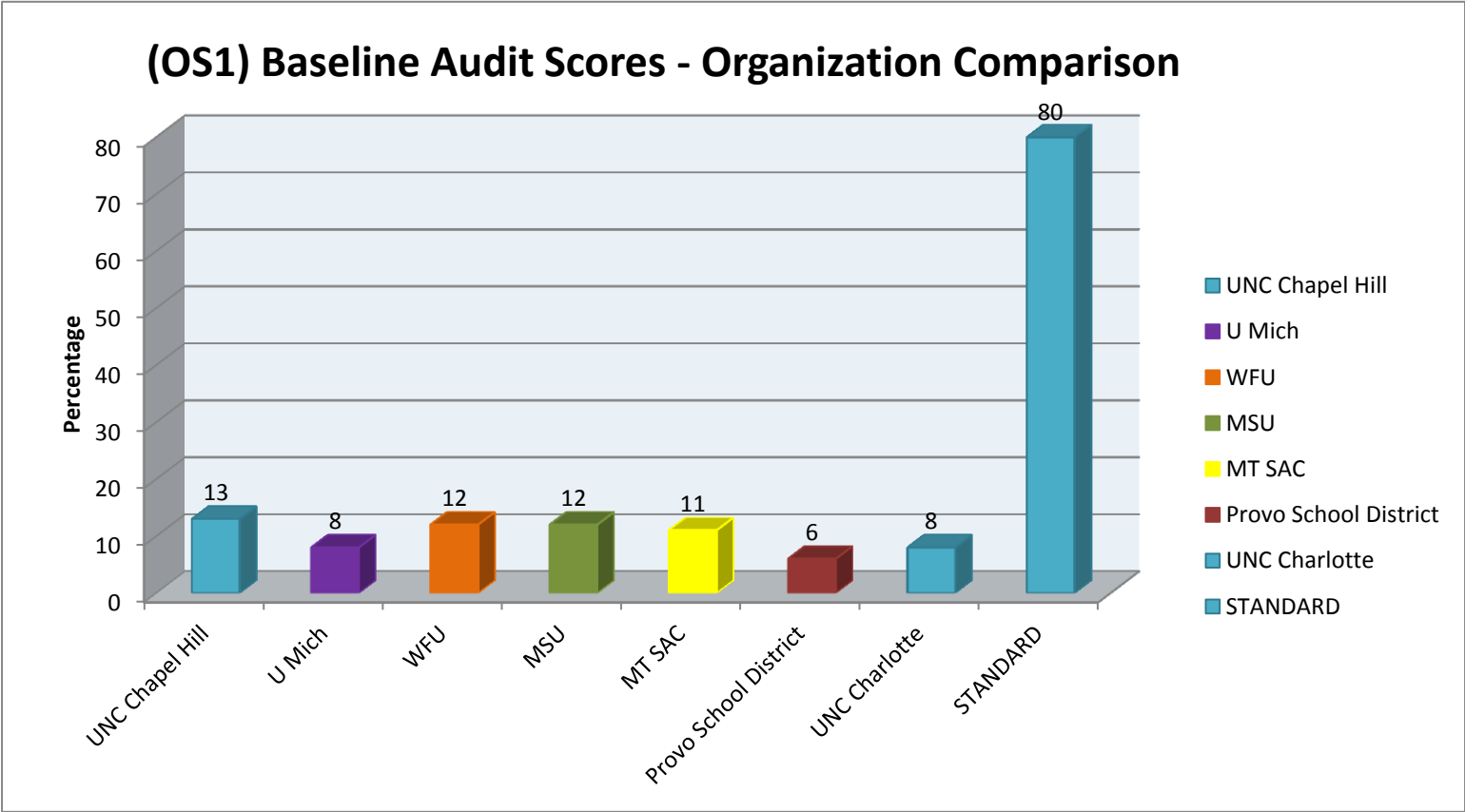
Percentage  
95% (4<sup>th</sup> Quarter)  
86% (Annual Average)

STATUS  
4<sup>th</sup> Quarter

STATUS  
Annual  
Average

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





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

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

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

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

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

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

Lead  
F. O.

## ACTION PLAN

1. Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.
2. Continue expansion of PM Program and predictive maintenance program. Work with key customers.
3. Identify and prioritize equipment conditions and needs for replacement.
4. Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
5. Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.
6. Reorganize PM Program; PM Supervisor report to Area Manager; August 2016.

Lead  
F. O.

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

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

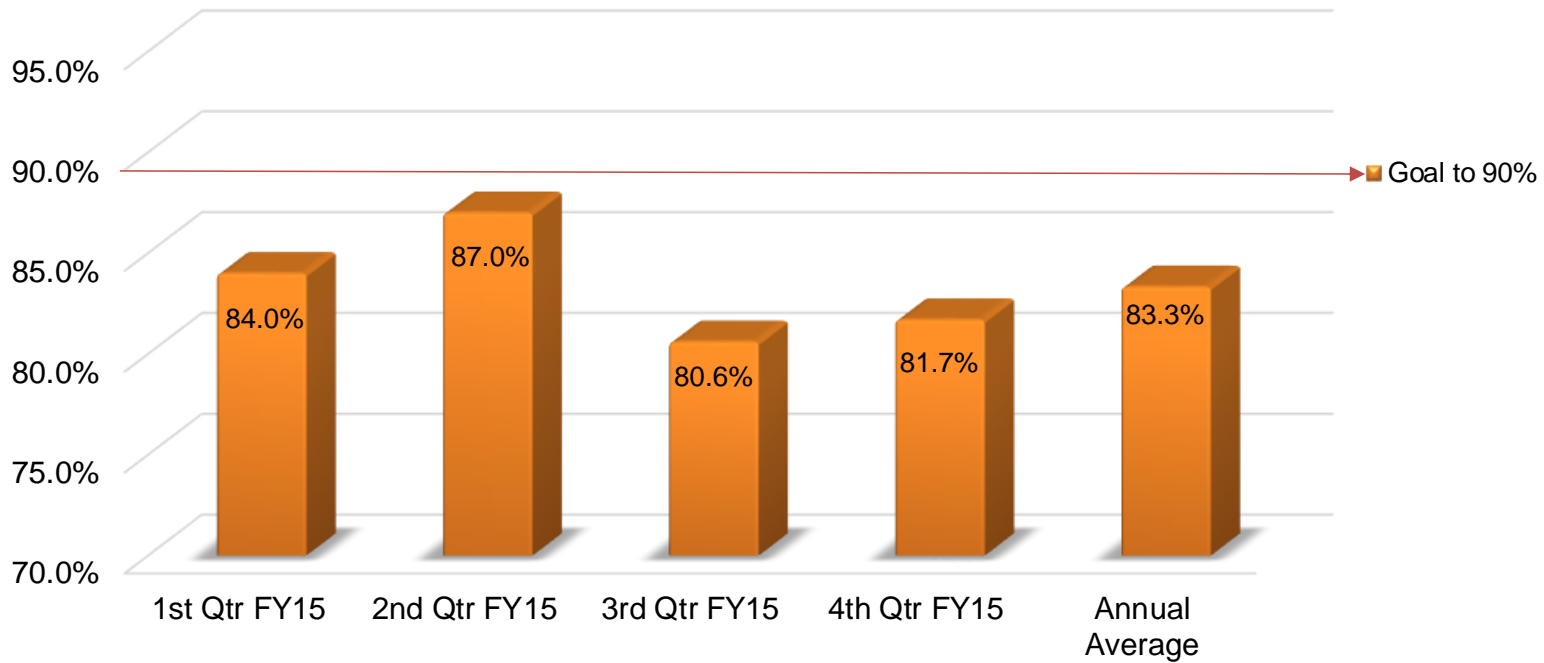
**Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%**

**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**

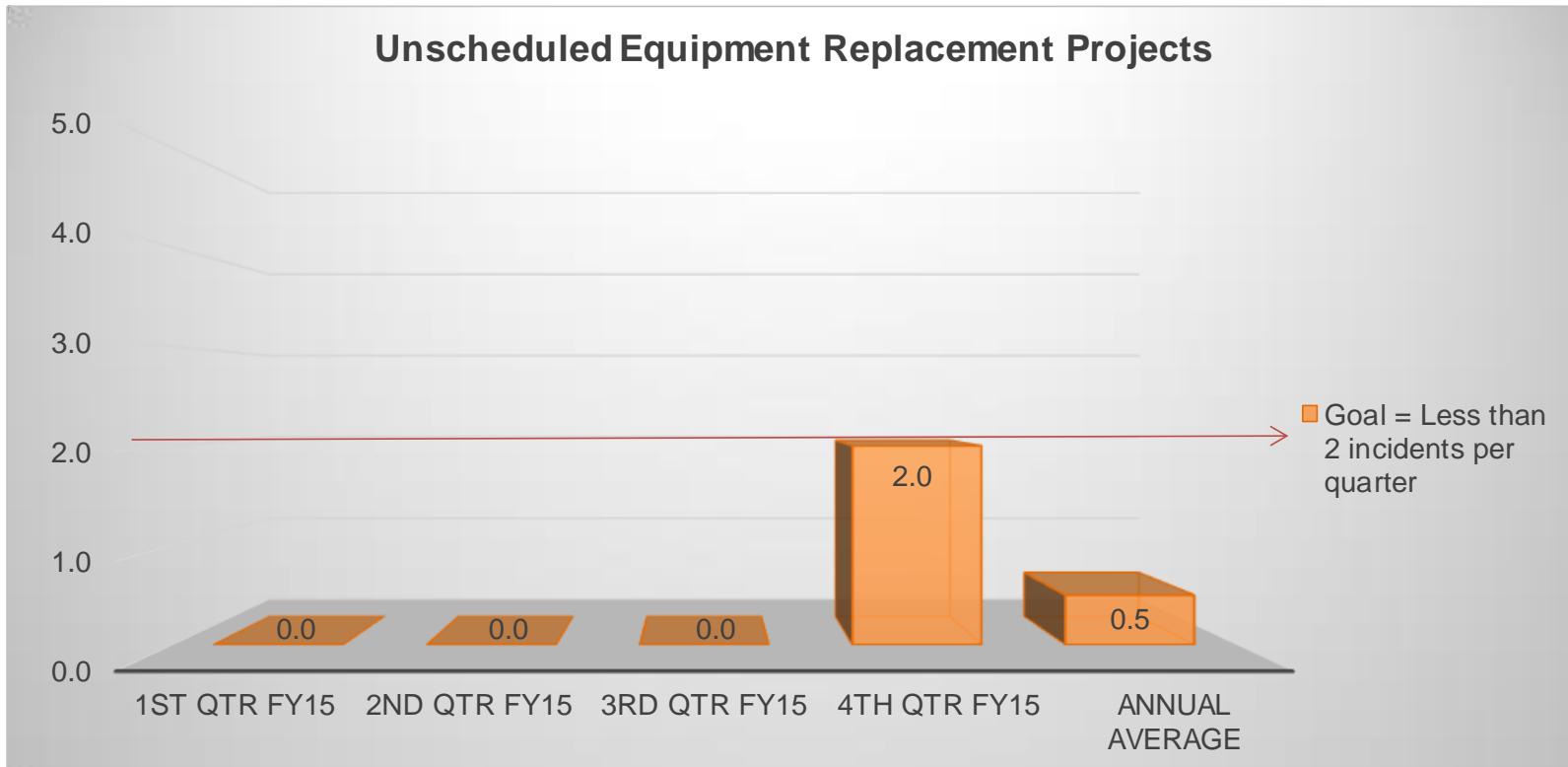
**Objective: 1.5: Improve Facility Systems Reliability**

**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



**STATUS**



Lead  
F. O.

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

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

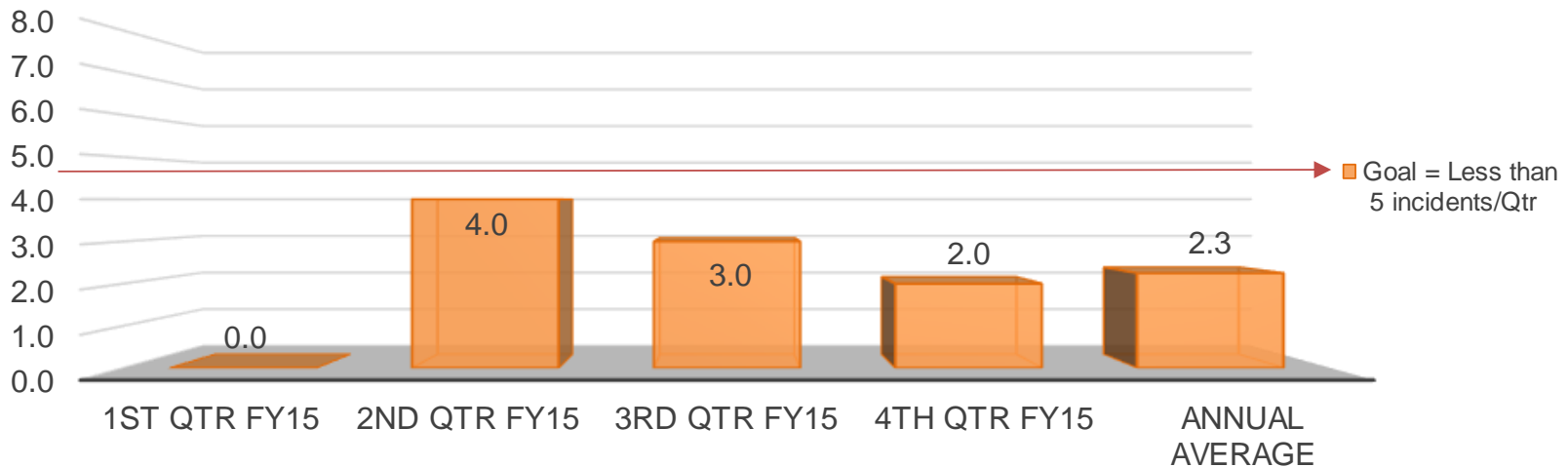
**Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Unscheduled Outages



STATUS

Lead  
F. O.

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

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

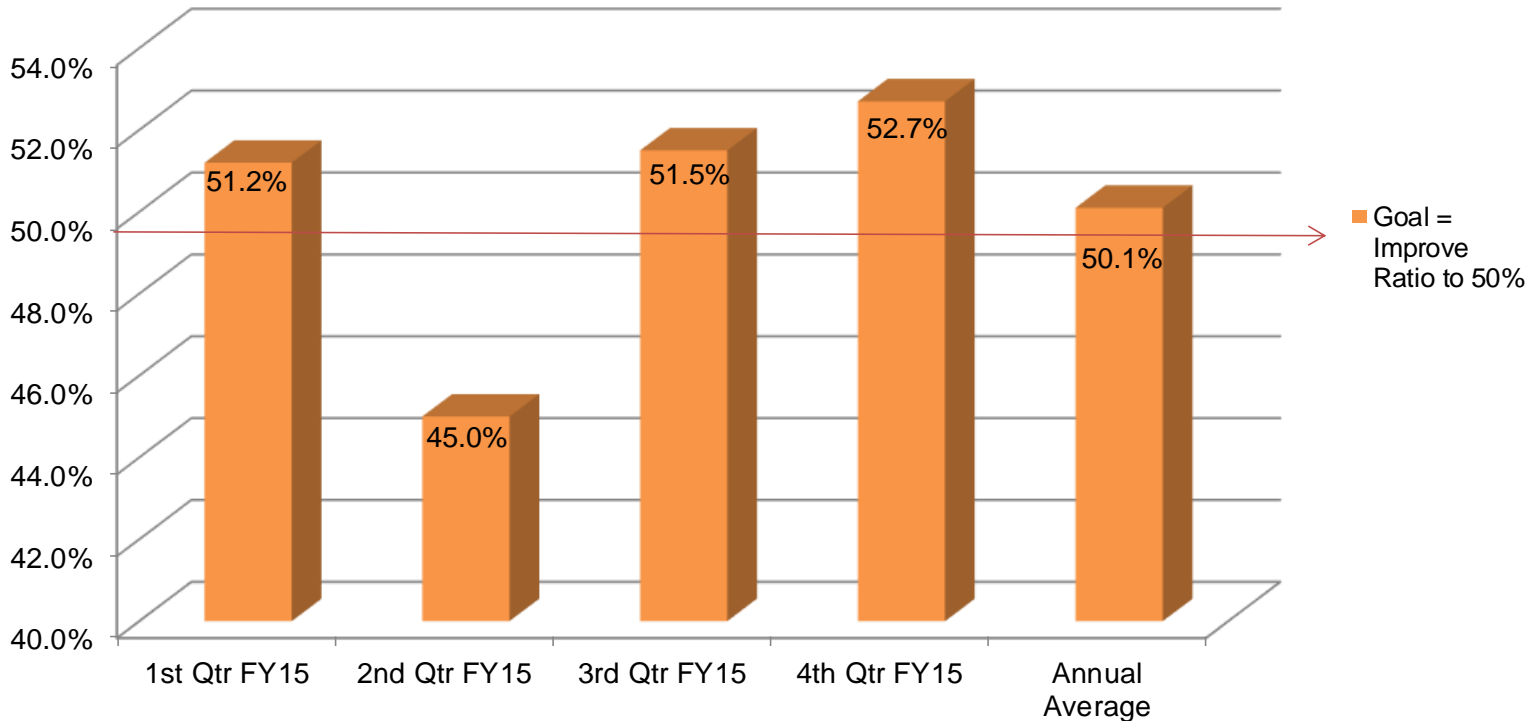
**Tactic: 1.5.4:** Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

**Improve Ratio of Preventive/Predictive Work Requests**



**STATUS**

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

-- Earl Nightingale,  
Motivational Speaker

## GOAL #2

Create a Reliable and Sustainable  
Physical Infrastructure



# FM Prioritized Projects – FY15

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

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

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

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

Lead  
FIS

### ACTION PLAN

1. Complete remaining Design Services Enhancements by Sept 30, 2015
2. Complete Phase 1 of Key Management by Sept 30, 2015.
3. Complete GIS Mobile Utilities Mapping Project by Sept 30, 2015.
4. Continuation of user support for FM department's Google transition through FY16 Qtr 1.
5. Finalize Motor Fleet Customer Moodle2 Training for Aug 1, 2015 Go Live (Currently in Review/Test Phase)
6. Collaborate / Schedule Image NOW training with ITS for Capital and Design personnel by Aug 30, 2015.
7. Begin Space Assessment/Improvements Project with Phase 1 completion by Dec 15, 2015.

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

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

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

Lead  
FIS

### ACTION PLAN

#### Actions Completed:

1. GIS Survey Technician, Sara Clayton, hired and onboard June 4, 2015.
2. Completed Fuel Master Upgrade June 23, 2015.
3. Completed Go Live for Campus Map on July 15, 2015.
4. Completed Capital Upgrades and CRDM Project June 30, 2015.
5. Completed Building Automation 3.8 JACE upgrade May 2015.
6. Completed Campus Radio System Upgrade and NVR Installation Project prior to Jun 30, 2015.
7. Completed invoicing/close out of all FIS FY15 POs on time and on budget by May 2015.
8. Successfully collaborated with FO to resolve SDI/Work Request issues for FY15 close outs deadlines – May/June 2015.

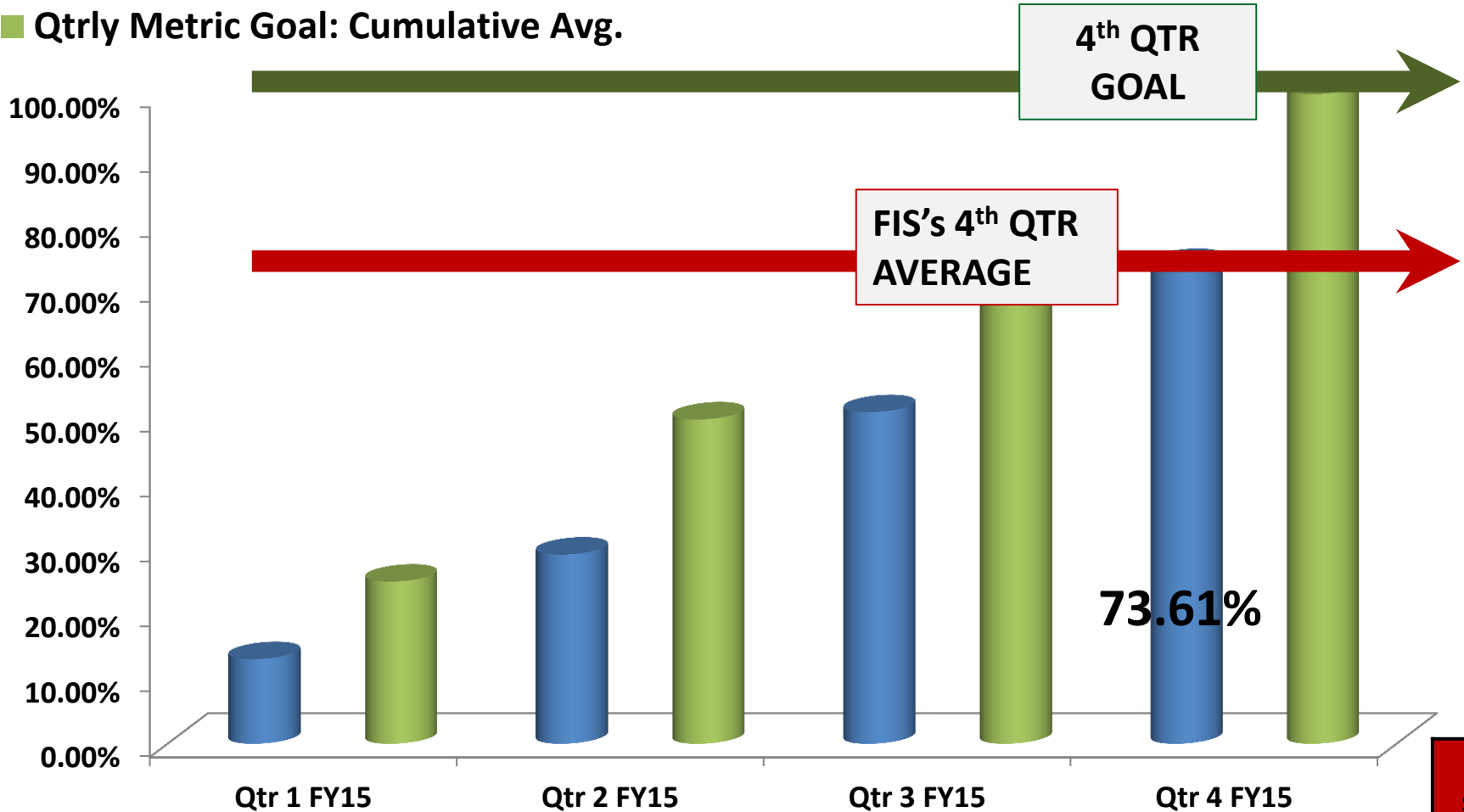
Lead  
FIS

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

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

**Balanced Scorecard Category:** Internal Business Processes

■ **FIS Project Task Cumulative Completion Avg.**  
■ **Qtrly Metric Goal: Cumulative Avg.**



STATUS

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2015**

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

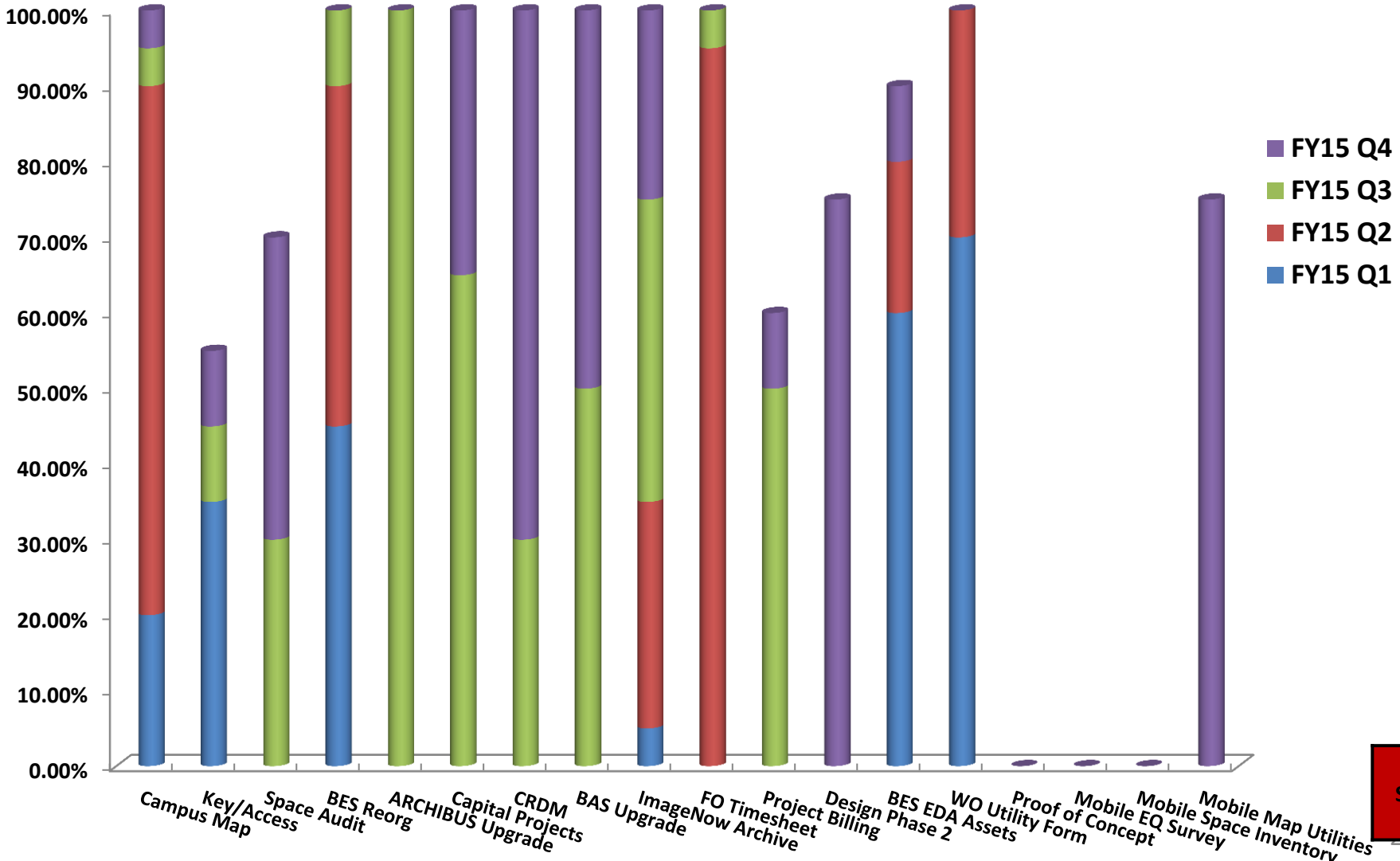
**Objective:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

**Lead FIS**

**Balanced Scorecard Category:** Internal Business Processes



**STATUS**



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

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

**ACTION PLANS FOR IMPROVEMENT**

**NEW IMPROVEMENTS**

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

- **Convert Scope & Budget to format in Archibus similar to Estimating Workbook.**  
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 - Work In Progress*
- **Convert Project Timeline to format in Archibus.**  
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 – Work In Progress*

**Reduce and Eliminate Paper Processes – Completed:**

- **Convert (old) Purchase Requisition to interactive Purchase Requisitions: (1) Commodities; (2) Services; (3) Change Orders.**  
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 - Success – It works.*
- Update Estimating Workbook to improve Contingency and Fee calculations.  
✓ *Timeline: FY15 QTR 3 - FY15 QTR 4 – Success – It works.*

**ONGOING IMPROVEMENTS**

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

**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

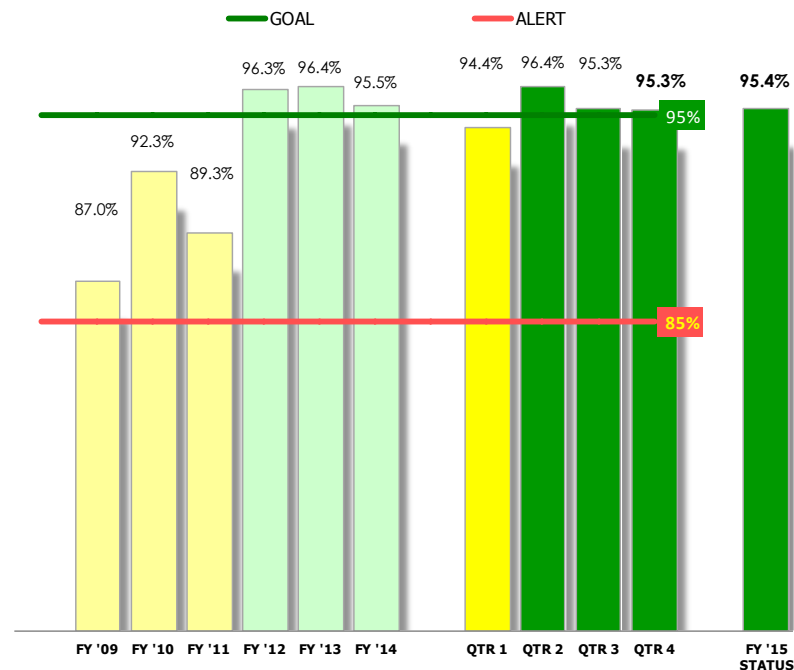
<b>YTD STATUS</b> 95.4%	<b>Annual GOAL</b> 95.0%	<b>4th QTR STATUS</b> 95.3%	<b>Lead Design Services</b>
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**Tactic 2.2.1:** 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)  
**Measure:** Percentage (Number of Construction Projects completed on or before delivery date divided by total number of projects completed.)

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

**Beneficial Occupancy Summary Graph**

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
FY '14	221	211	10	95.5%
QTR 1	18	17	1	<b>94.4%</b>
QTR 2	28	27	1	<b>96.4%</b>
QTR 3	43	41	2	<b>95.3%</b>
<b>QTR 4</b>	127	121	6	<b>95.3%</b>
<b>FY '15 STATUS</b>	216	206	10	<b>95.4%</b>



# Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

**ANNUAL STATUS**  
86%

**ANNUAL GOAL**  
100%

**Lead Design Services**

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

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

**Lead:** Design Services

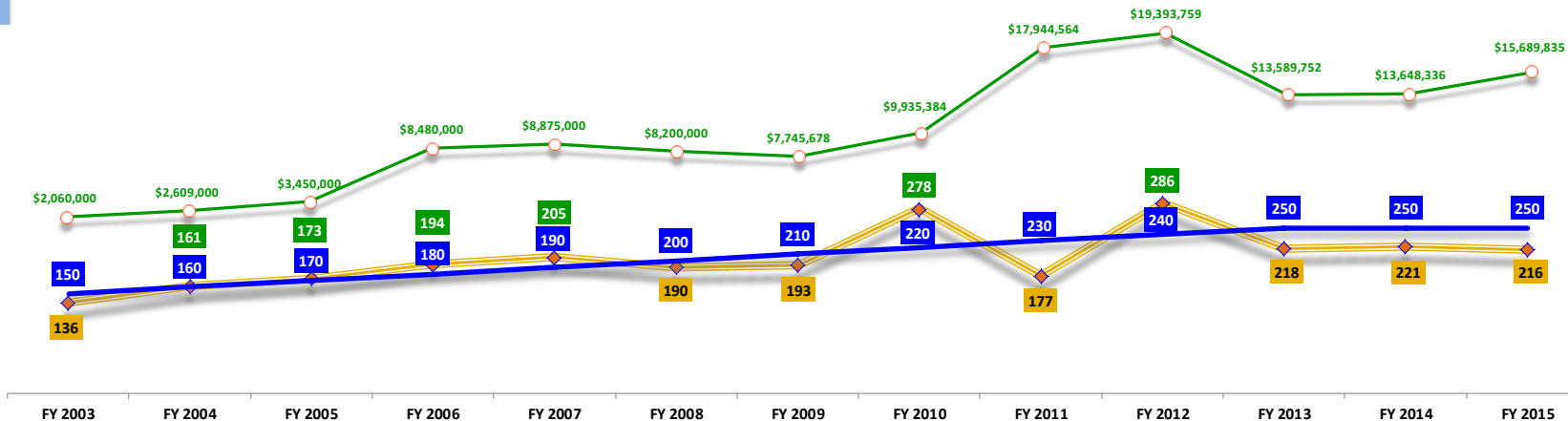
**Balanced Scorecard Category:** Internal Business Process

**Tactic 2.2.2:** Review Project Capacity - Goal 250 projects per year.

**Measure:** Number of Projects Completed

### Goal 250 Projects Per Year

Fiscal Year	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016
<b>GOAL</b>	150	160	170	180	190	200	210	220	230	240	250	250	250	250
<b>Projects Completed</b>	136	161	173	194	205	190	193	278	177	286	218	221	216	32
<b>Project Dollars</b>	\$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	\$15,689,835	\$3,581,793
<b>In Construction</b>														



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

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

**Tactic 2.3.1:** Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - **Recommend change.**

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Continue to update CRDM data (ongoing)**
- **Integrate feedback from users of map and master list (ongoing)**
- **Create FCI tracker by building which illustrates both FCAP changes and project completions to calculate movement in FCI (complete)**
- **Amend tactic (pending approval) to:**
  - **“Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT December 2015”**

**STATUS**

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

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

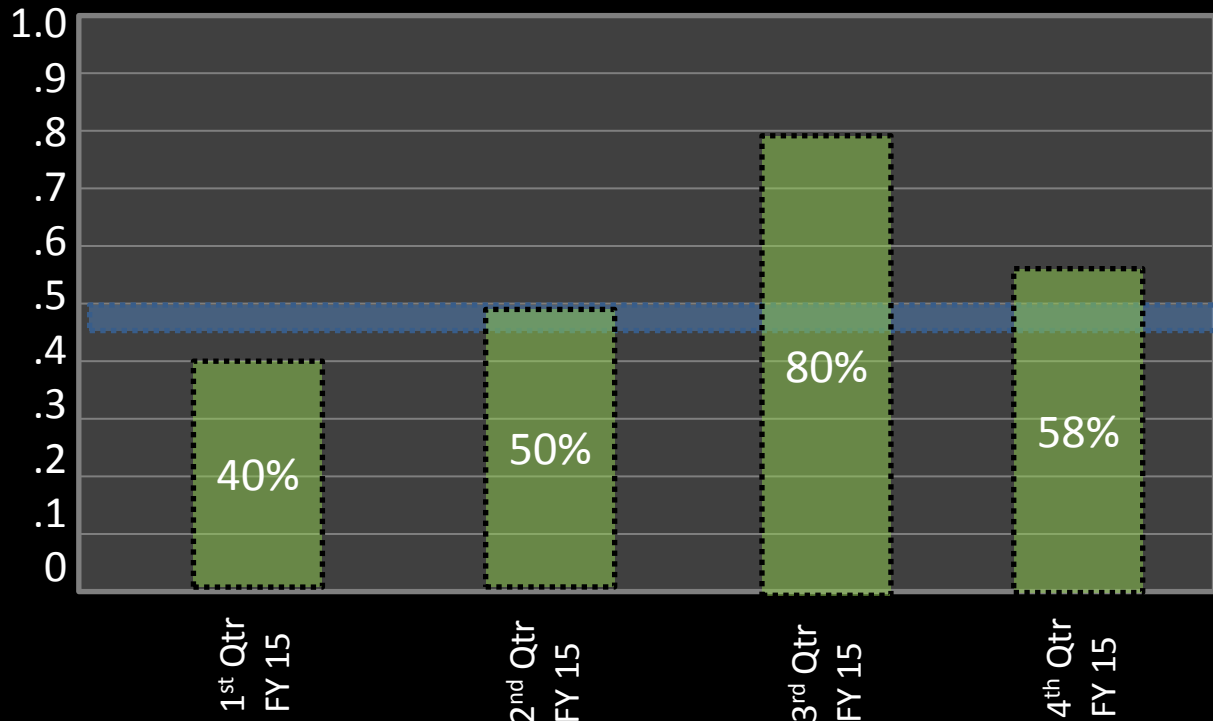
**Tactic 2.3.1:** Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - **Recommend change.**

**Measure:** Average Building FCI for campus

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

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

**Objective 2.4: Improve Campus Space Planning and Utilization**

**Tactic 2.4.1:** 80% of Departments/Colleges within +/- 5% of System-wide space standards **Recommend change.**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- **Compare sizes of existing spaces to UNC Charlotte approved space standard (In process)**
- **Complete space inventory by room category in ARCHIBUS (complete)**
- **Conduct space audit (October 2015)**
- **Compare inventory to standard and report % difference (April 2016)**
- **Work with FIS/AA to generate report by room use (NLT October 2015)**
- **Hand off objective to Director of Space Utilization (August 2015)**
- **Amend tactic (pending approval) to:**
  - **Improve utilization of office space in new/renovated projects to within 10% of space guidelines.**

**STATUS**

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

**Objective 2.4: Improve Campus Space Planning and Utilization**

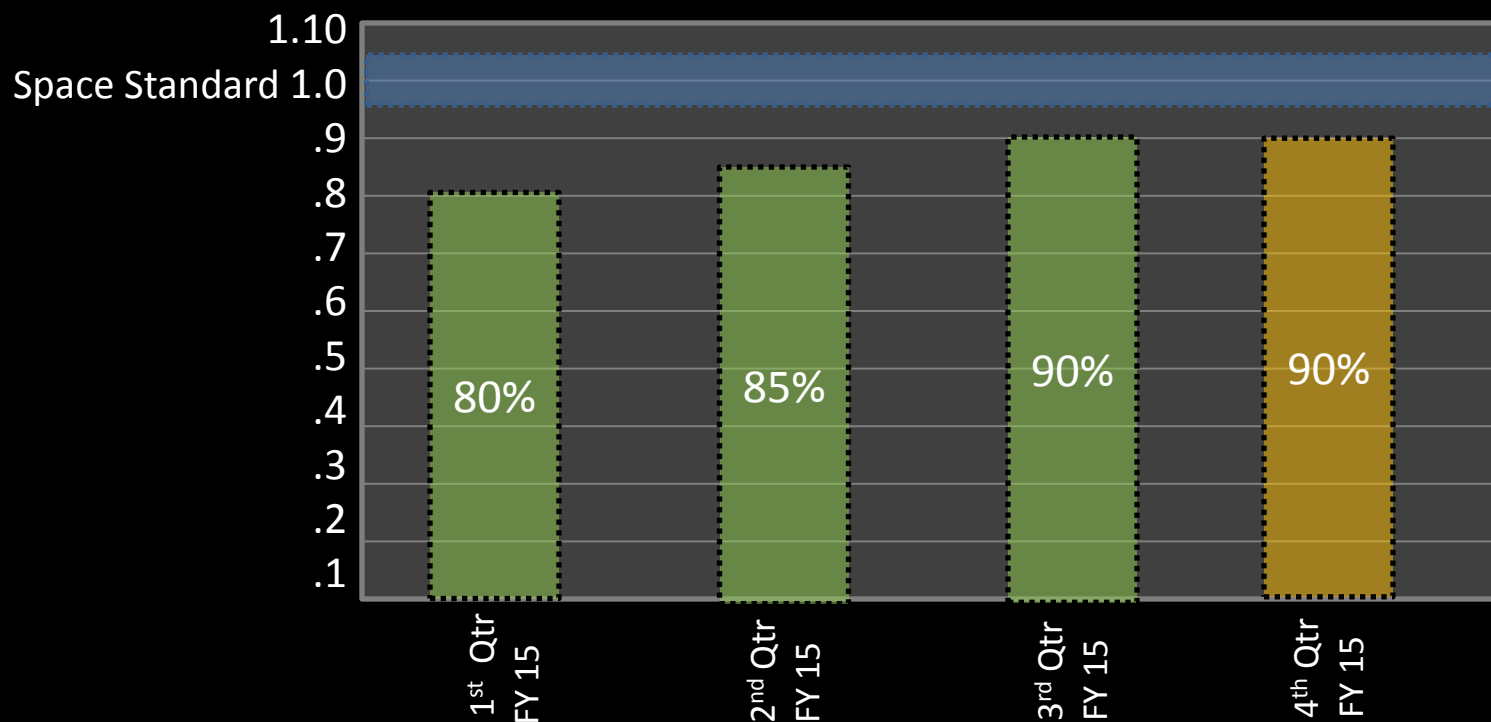
**Tactic 2.4.1:** 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of July 15.**

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

Percentage of Completion



Status

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

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

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

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

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

**STATUS**



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

Lead  
Capital

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

## ACTION PLAN

### Actions Completed

### Actions Planned

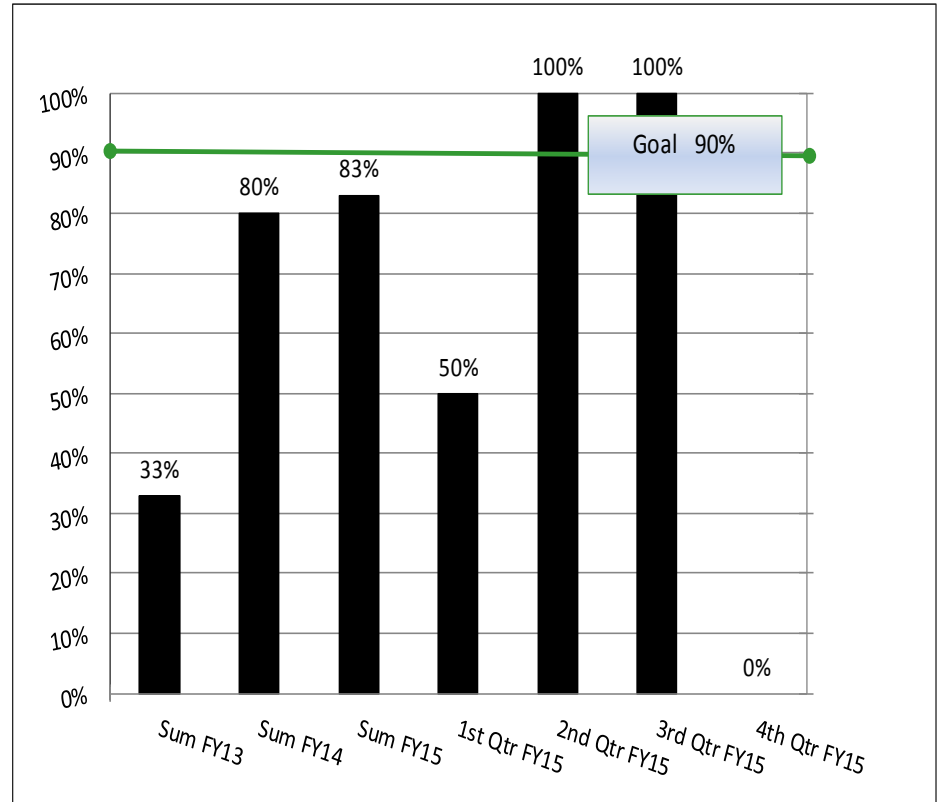
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules – accurate, used weekly by PMs & CMs
- PMs print project budget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

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

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

**Balanced Scorecard Category:** Internal Business Process

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



**Annual  
Status**

**4<sup>th</sup>  
Quarter  
Status**

Tactic Measurement for 4<sup>th</sup> Quarter is N/A

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2015**

**Lead Capital**

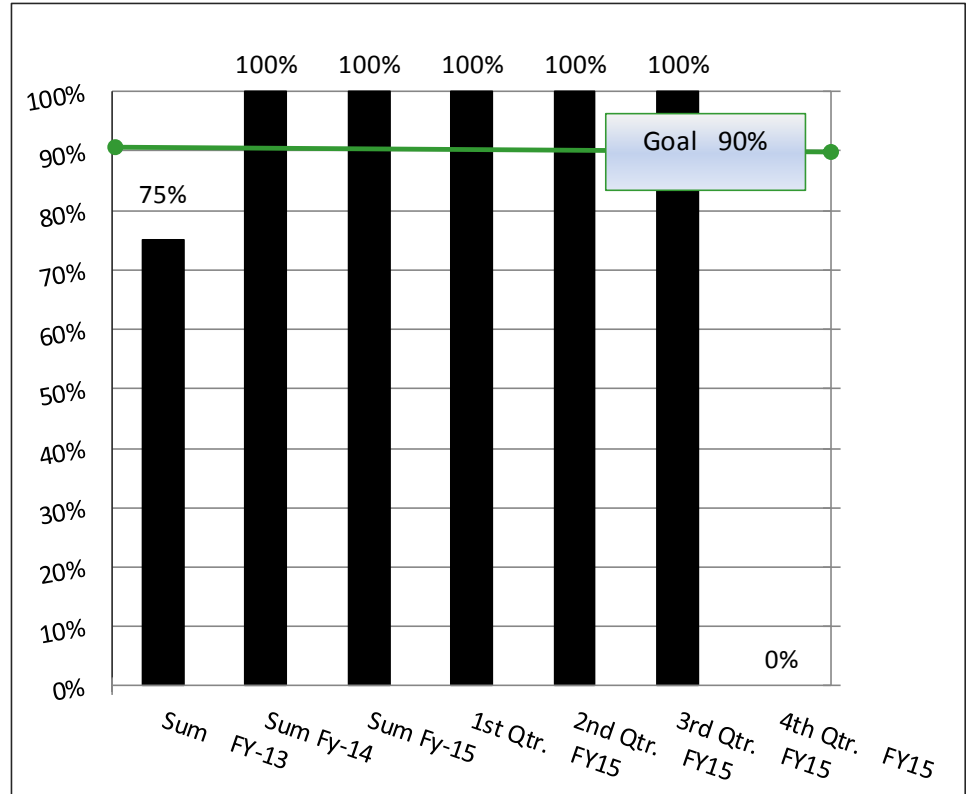
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

**Balanced Scorecard Category:** Internal Business Process

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



**Status**

Tactic Measurement for 4<sup>th</sup> Quarter is N/A

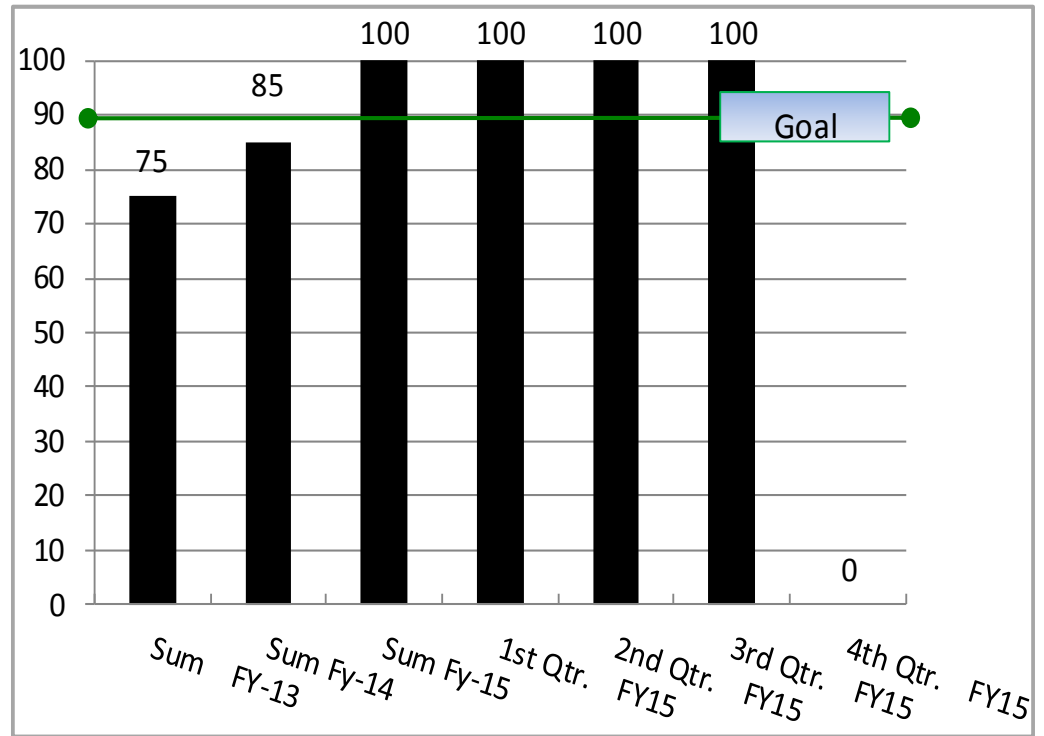
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

**Balanced Scorecard Category:** Internal Processes

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



Tactic Measurement for 4<sup>th</sup> Quarter is N/A

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

Lead  
Capital

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

## ACTION PLAN

### Actions Complete

- Colvard North Renovation

### Actions Planned

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

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2015**

**Lead Capital**

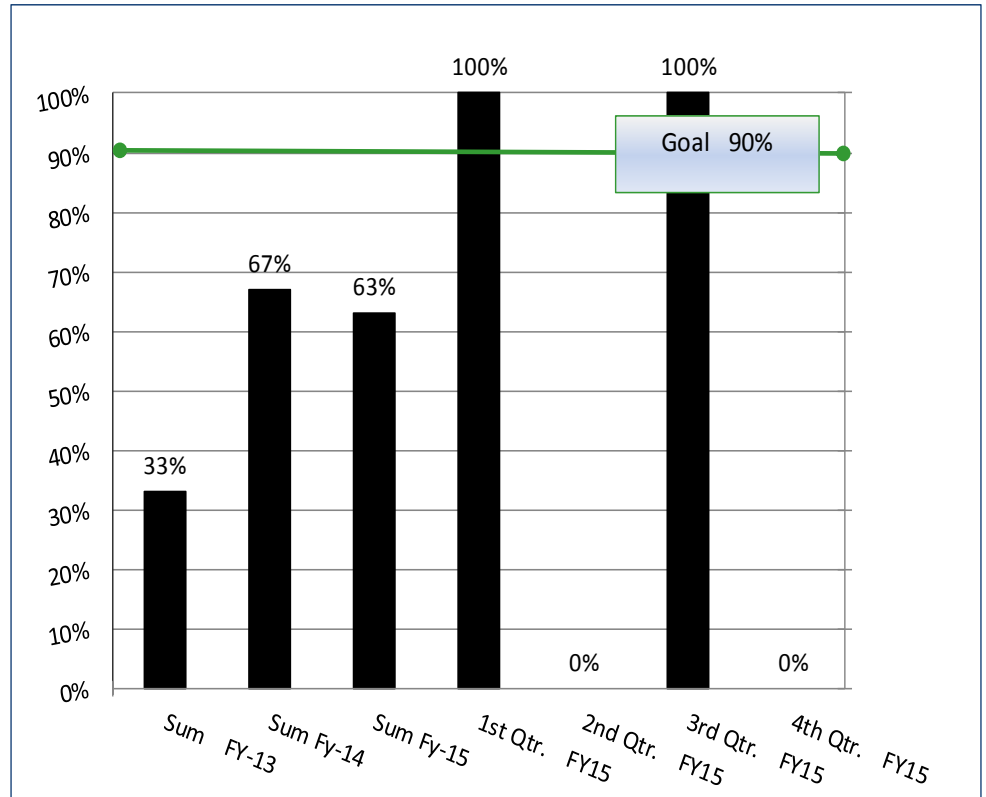
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

**Balanced Scorecard Category:** Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
Summary FY-14	6	3	67%
Summary FY-15	5	3	63%
1st Qtr. FY-15	2	0	100%
2nd Qtr. FY-15	0	2	0%
3rd Qtr. FY-15	3	0	100%
4th Qtr. FY-15	n/a	n/a	n/a



**Status**

Tactic Measurement for 4<sup>th</sup> Quarter is N/A

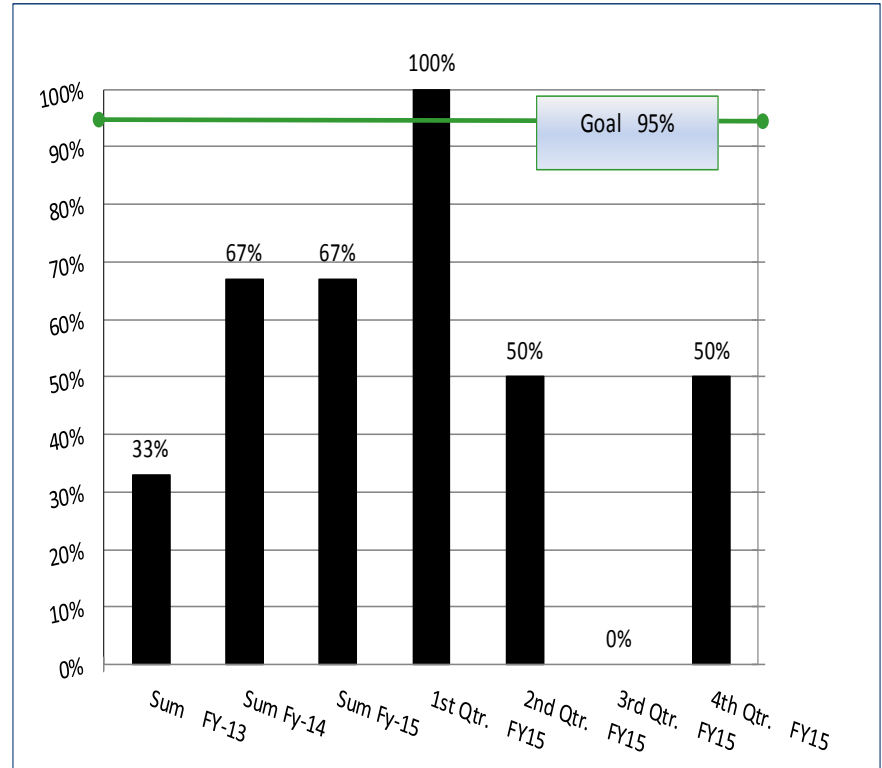
**GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure**

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

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

**Balanced Scorecard Category:** Internal Business Process

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



Status

Tactic Measurement for 4<sup>th</sup> Quarter is 50%



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: 3.1.2: 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

### Actions Planned

1. Support Capital to get buildings commissioned and retro-commissioned (ie, Kennedy Building).
2. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.
3. Continue to develop controls section and cross-train with Zones; July 2015.
4. Continue daily monitoring of building temperatures within Zones.

### Actions Completed

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

**GOAL #3 Foster a Customer Focused Organization****Objective 3.1:****Continuously improve customer service/satisfaction****Tactic 3.1.1:**Achieve overall customer satisfaction of 93% (**proposed**) for FM services.**Measure:**

Annual Customer Survey results: Percentage of customers selecting "fair, good or very good" with the statement: "Overall I am satisfied with &lt;the service&gt; I received from Facilities Management"

**Lead:** Facilities Management Wide**Balanced Scorecard Category:** Customer Perspective**ACTION PLAN****Customer Survey**

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

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

**Objective 3.1:**

**Continuously improve customer service/satisfaction**

**Tactic 3.1.1:**

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

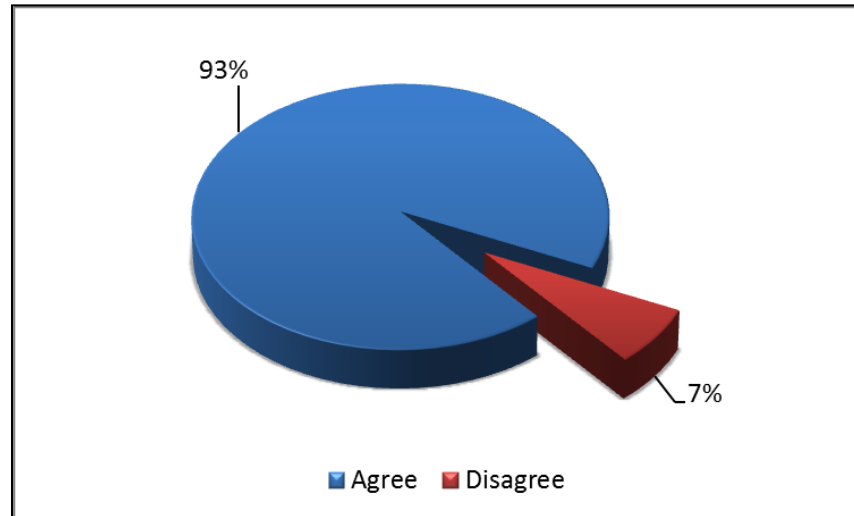
**Measure:**

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

**Lead:** Facilities Management Wide

**Balanced Scorecard Category:** Customer Perspective

**2014 Survey Overall Satisfaction: 93%**



Lead  
F. O.

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

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

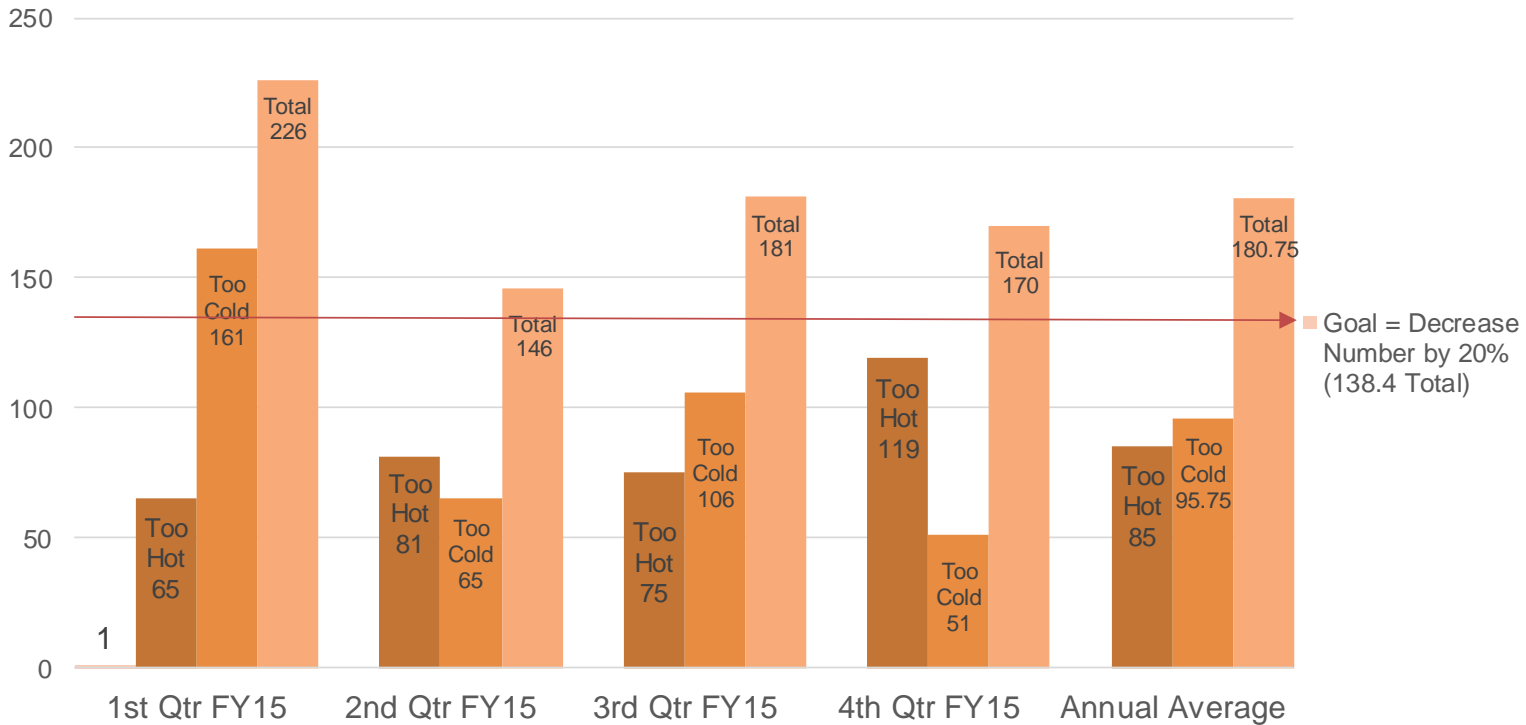
**Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%**

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

**Lead: Facilities Operations**

**Balance Scorecard Category: Customer Perspective**

## Decrease the Number of Hot/Cold Calls



**STATUS**

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

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

**ACTION PLANS FOR IMPROVEMENT**

**Archibus - Design Services Customer Survey:**

**Actions to be taken by Design Services Team based on Constructive Criticism received in 6 of 41 surveys:**

- **Keep Customers informed of any possible schedule changes (6 of 6):**
  - (1) More face to face meetings
  - (2) Telephone conversations
  - (3) Document what was said via Email
  
- **Consistent Communication (3 of 6):**
  - (1) Build up Customer relationships
  - (2) Focus on several short term goals
  - (3) Maintain and share project notes

**IMPLEMENTED ACTIONS AND PLANS**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2015

<b>YTD STATUS</b> 95%	<b>Annual GOAL</b> 90%	<b>4th QTR. STATUS</b> 100%	<b>Lead Design Services</b>
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**GOAL #3 – Foster a Customer Focused Organization**

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

**Lead:** Design Services

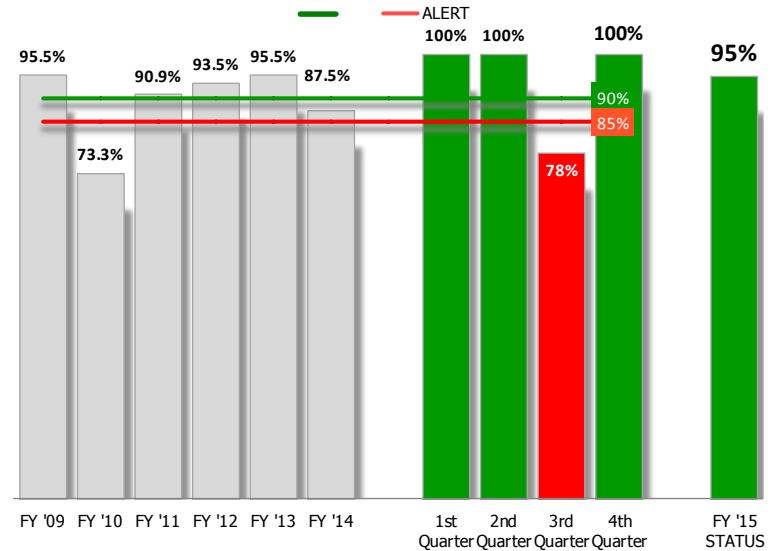
**Balanced Scorecard Category:** Internal Business Process

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

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

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less than Satisfied	Percent Satisfied
FY '09		22	18	3	0	95.5%
FY '10		30	17	5	0	73.3%
FY '11		33	24	6	2	90.9%
FY '12		31	27	2	0	93.5%
FY '13		22	18	3	0	95.5%
FY '14		24	19	2	0	87.5%
<b>FY - 2015</b>						
1st Quarter	27	5	5	0	0	100%
2nd Quarter	18	4	4	0	0	100%
3rd Quarter	21	9	6	1	2	78%
<b>4th Quarter</b>	<b>51</b>	<b>23</b>	<b>20</b>	<b>3</b>	<b>0</b>	<b>100%</b>
		<b>45%</b>				
<b>FY '15 STATUS</b>	<b>117</b>	<b>41</b>	<b>35</b>	<b>4</b>	<b>2</b>	<b>95%</b>
		<b>35%</b>			<b>GOAL:</b>	<b>90%</b>

**Customer Service Survey Summary Graph**



**Comments:**

**Constructive Criticism for Fiscal Year 2015 related to 6 Customer Comments:**

- Projects did not meet expected scheduled completion date: 6 of 6 Customer Comments
- Less than perfect communication from Project Coordinator: 3 of 6 Customer Comments

Lead  
F. O.

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

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

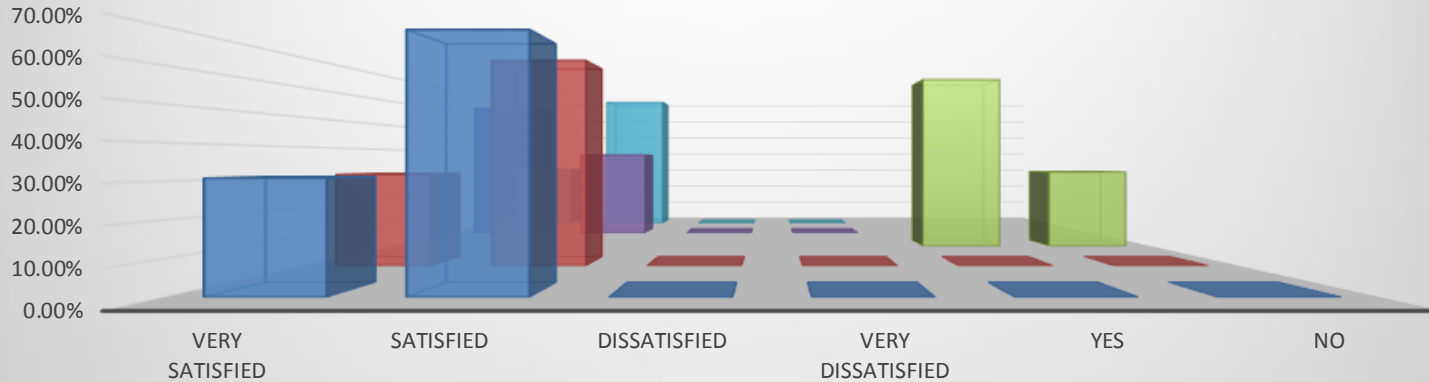
**Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied**

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

**Lead:** Facilities Operations

**Balance Scorecard Category:** Customer Perspective

### Improve Customer Service Satisfaction



	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Yes	No
How satisfied were you with the time it takes for Fac Ops staff to respond to you issue?	30.77%	69.23%	0.00%	0.00%	0	0
How satisfied were you with the resolution of your issue or concern?	30.77%	69.23%	0.00%	0.00%	0	0
Was there follow-up? Yes/No					69.23%	30.77%
How satisfied were you with our staff's courteousness and professionalism?	61.54%	38.46%	0.00%	0.00%		
How satisfied were you with your overall experience?	30.77%	69.23%	0.00%	0.00%		

100%  
Satisfied

STATUS

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

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

**Lead:** Facilities Business Office - Communications

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN****Customer Communication Initiatives (interrelated):**

- **Launch 2<sup>nd</sup> customer feedback interviews On Hold**
  - Share results with Directors **On Hold**
  - Results will assist with customer survey action plans to be developed by Directors **On Hold**
  
- **External Marketing Campaign\*:** “Creating A Campus of Distinction”
  - Project Signage launch **This launched in February, 2015, as scheduled.**
    - Operations and Design Services have implemented and now manage.
  - Solicit feedback/input from Directors **On Hold**
  - Execute campaign tactics (testimonials, LCD signage, website, etc.) **On Hold**
  
- **SOP review, development On Hold**
  
- **Customer Handbook\* update, launch and remarket; digital and print On Hold**
  
- **Website and QA\* On Hold**
  - Review web comm. key QA issues/reminders
  - Review requested pages from different units for content/QA
  - User testing
  
- **Customer Facing technology Scheduled to launch March, 2015**
  - Communication plans and user testing assistance with Campus Map and CRDM report



## GOAL #3 Foster a Customer Focused Organization

Lead  
FBO

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

**Lead:** Facilities Business Office - Communications

**Balanced Scorecard Category:** Customer Perspective

# ACTION PLAN

## Special Projects:

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

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

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

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

**Lead:** Facilities Business Office - Communications

**Balanced Scorecard Category:** Customer Perspective

## ACTION PLAN

### Publicity/Public Relations:

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

### Internal Communications:

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



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



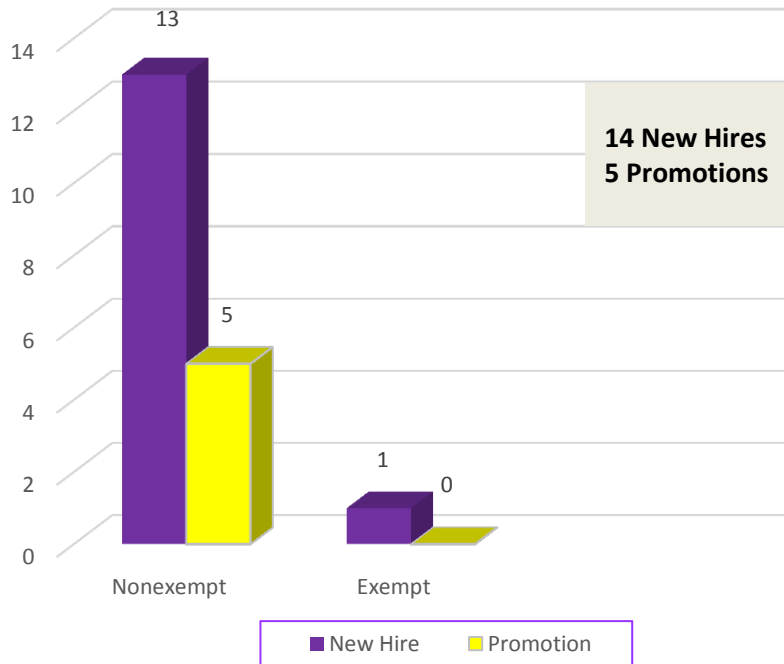
Lead  
FBO

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

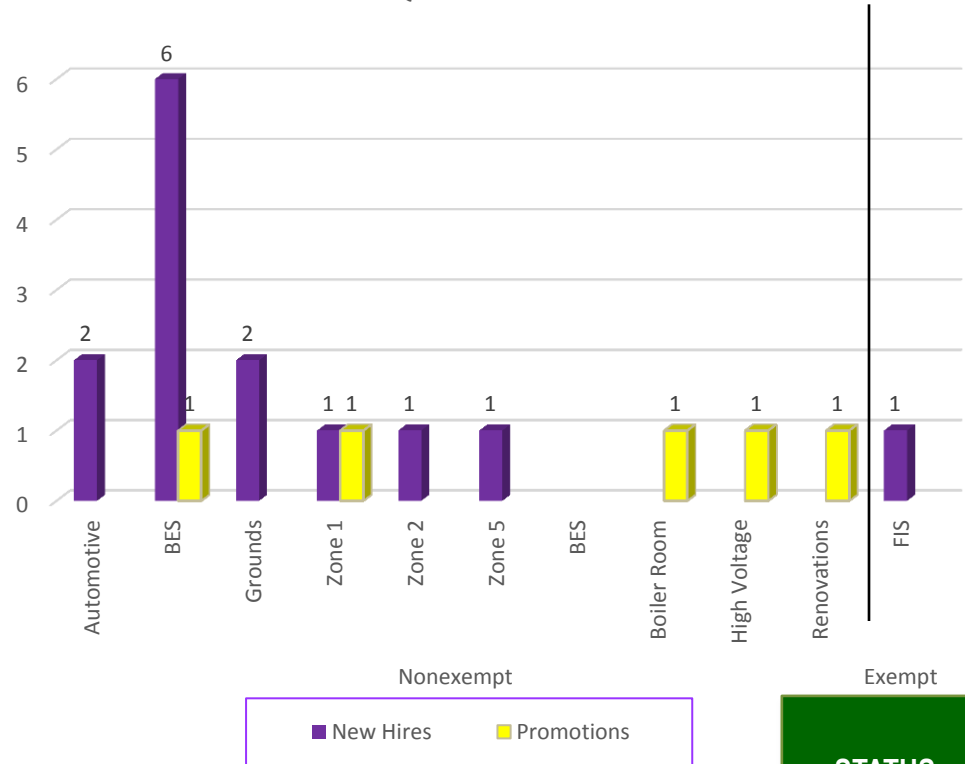
**Objective 4.1:** Recruit a Qualified Workforce in a Timely Fashion  
**Tactic 4.1.1:** Vacancy time of no longer than 80 calendar days – Nonexempt  
 Vacancy time of no longer than 120 calendar days - Exempt  
**Measure:** Days needed to fill vacant positions

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

FM New Hire/Promotion  
4th Quarter FY 2015



FM New Hire/Promotions Per Department  
4th Quarter FY 2015



STATUS

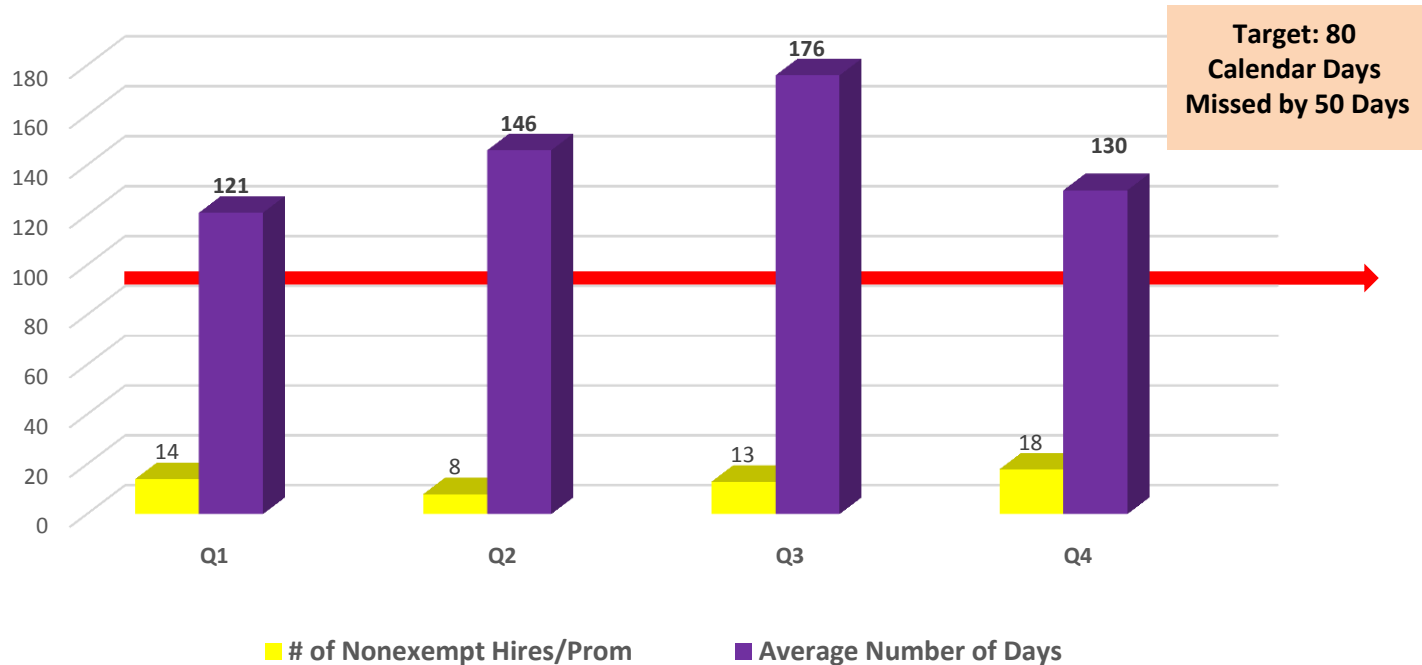
Lead  
FBO

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

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

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

Average Number of Days to Fill Nonexempt Vacancies FY 2015



**STATUS**

Lead  
FBO

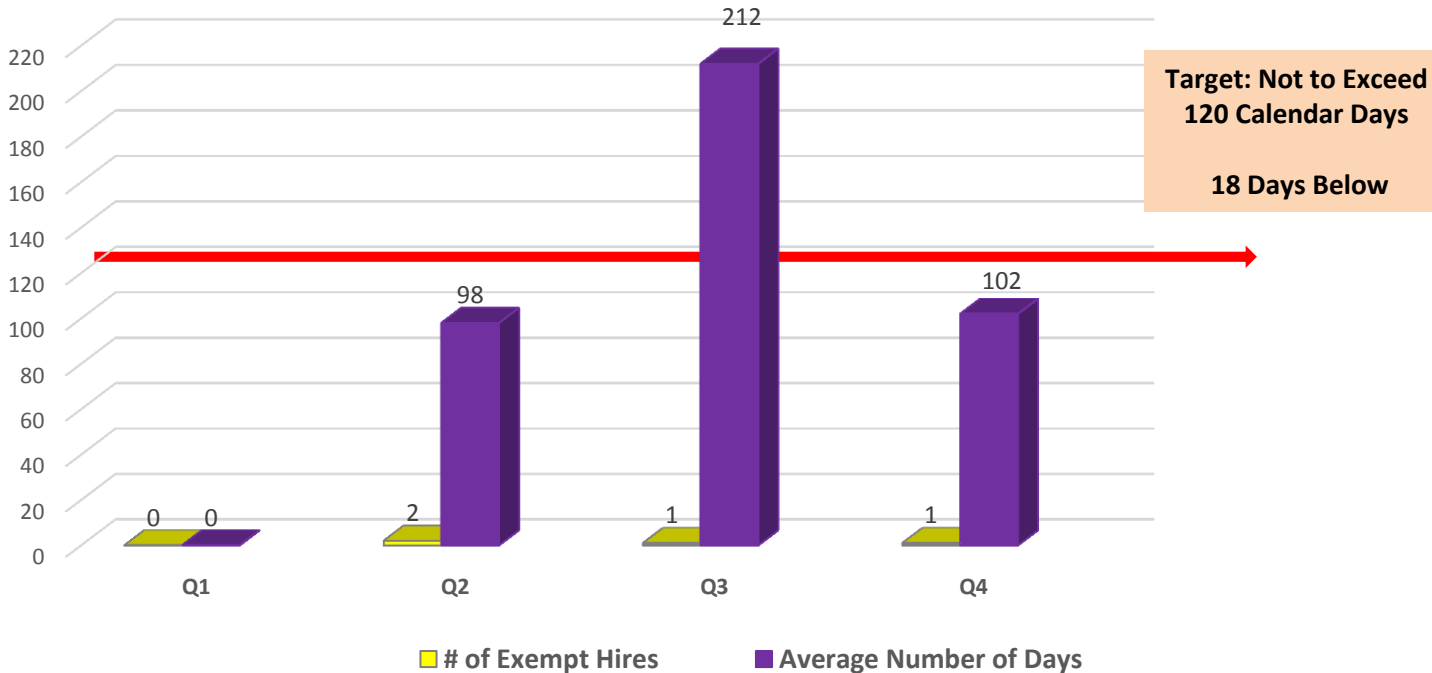
**GOAL #4 Recruit, Develop and Retain Quality Employees**

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

Target: 120 Calendar Days  
 Missed by 92 Days

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

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



STATUS

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

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

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

**Measure:**  
**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**ACTION PLAN**

**Recruitment / Retention thru 06/30/15**

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

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

**Culture of Engagement**

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

**Professional Development**

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

**Position Description**

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

**Mentioning**

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

**Employee Relations thru 06/30/15**

**Discipline**

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

**Documentation**

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

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

**Supervisors Need to Know**

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

Lead  
FBO

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

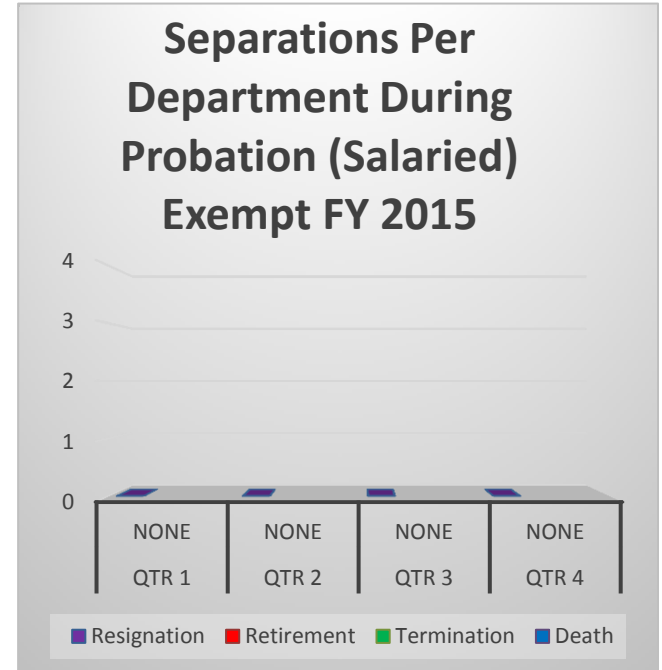
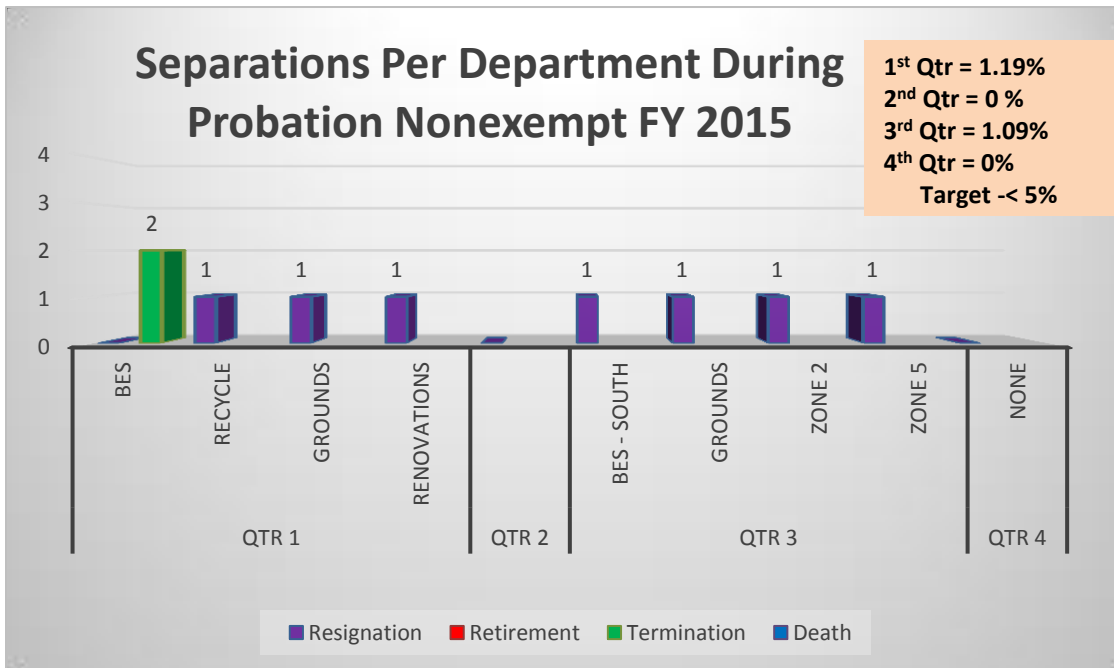
**Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion**

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

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning



Status



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

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

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

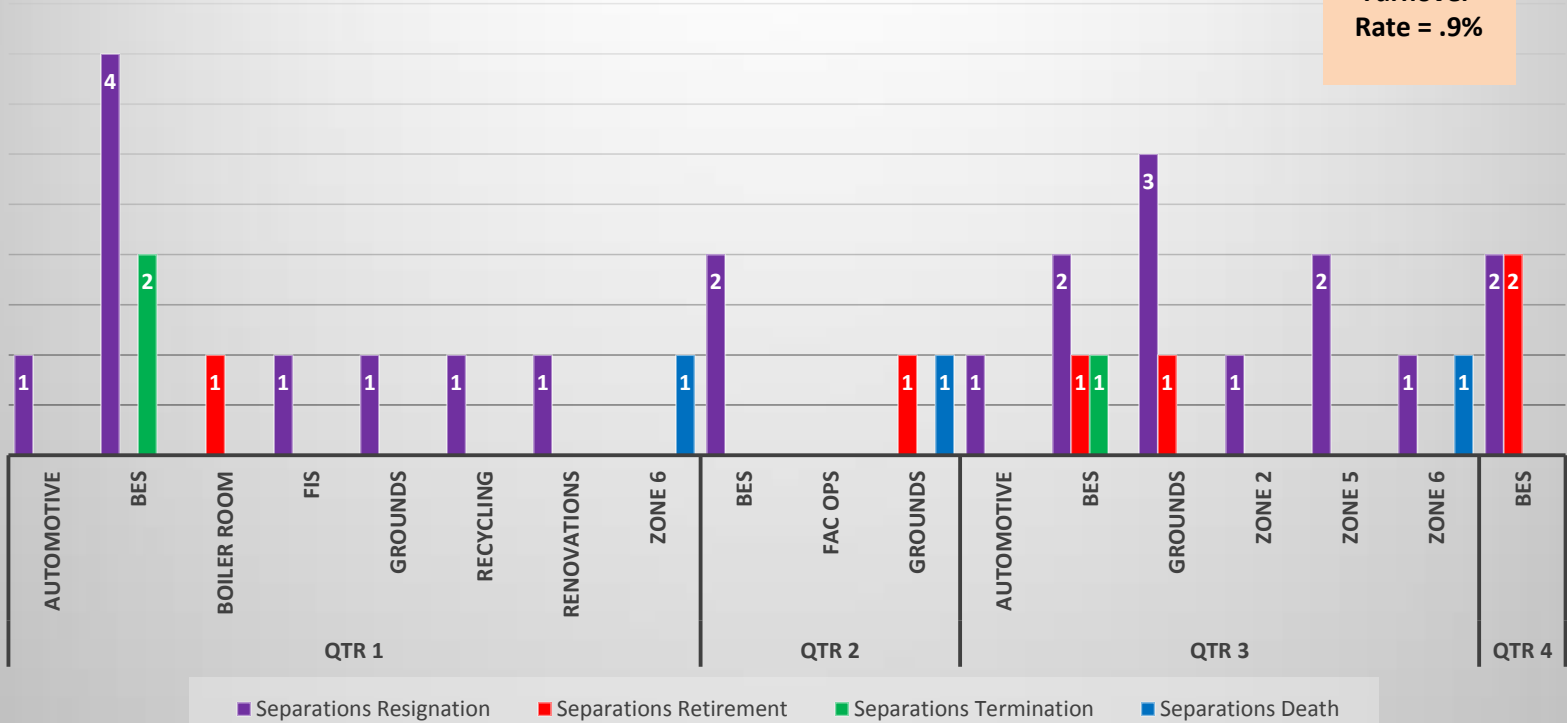
**Measure:** Percent Employees Terminated before end of probationary period

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**FM Total Separations Per Department  
FY 2014-15 Nonexempt**

Total  
Nonexempt  
Turnover  
Rate = .9%



Status

Lead  
FBO

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

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

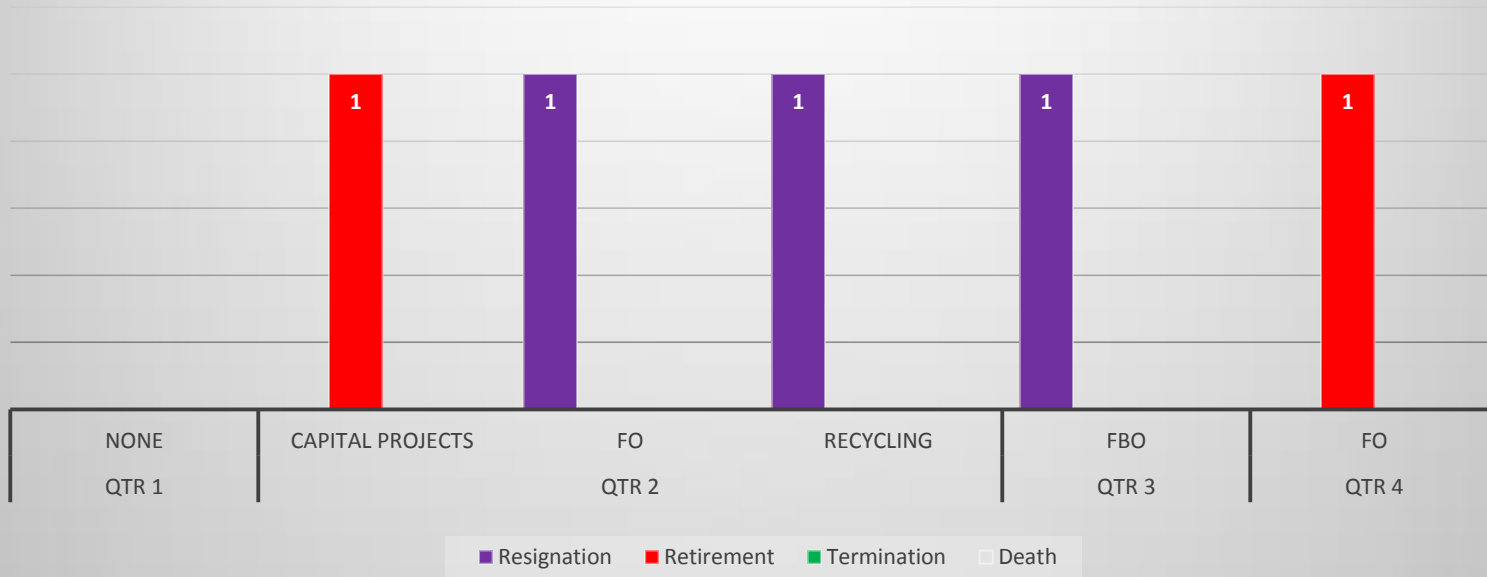
**Tactic 4.1.2:** Reduce Number of Employees Terminated During Probationary Period to less than 5%

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Innovation & Learning

**FM Total Separations Per Department FY 2014-15 Exempt**



Status

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

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

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

FM ACADEMY

**ACTION PLAN**

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

Lead  
FBO

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

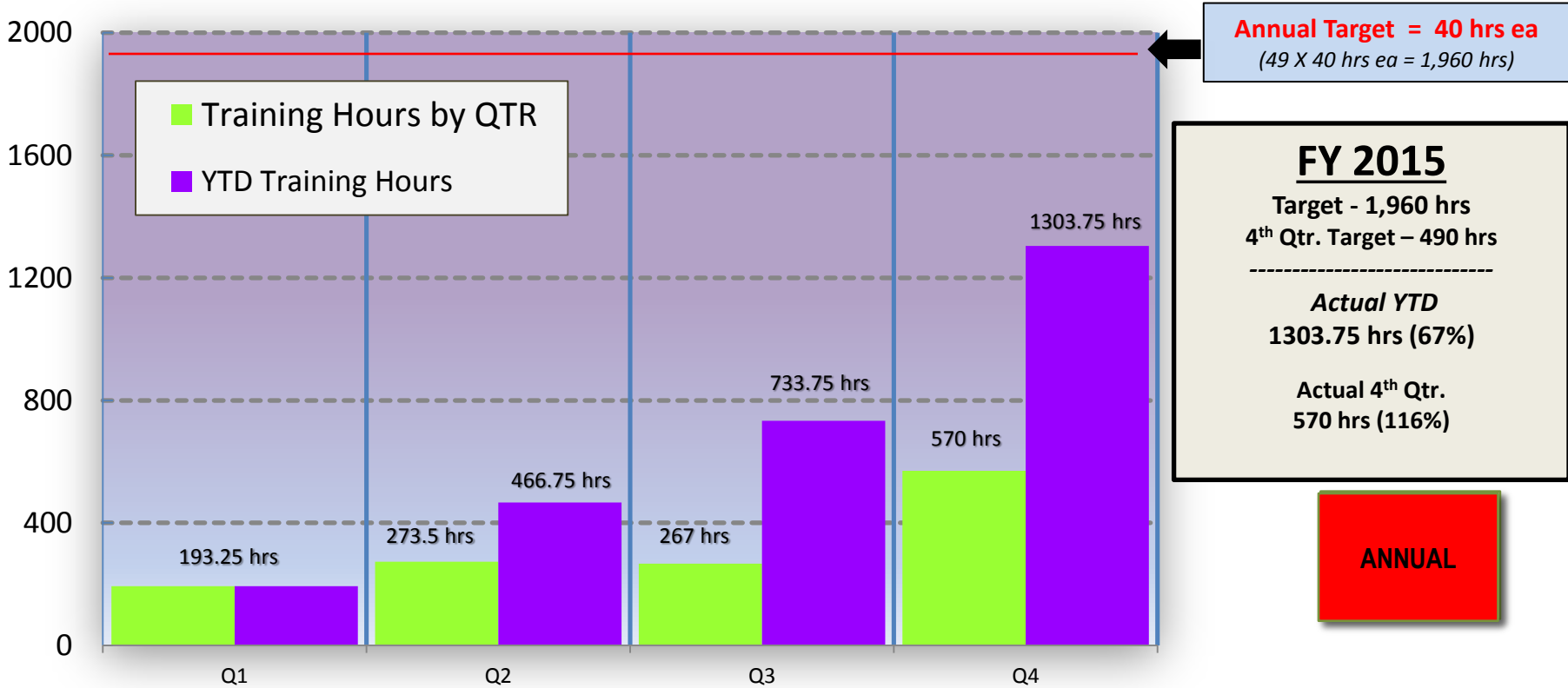
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year  
**Measure:** Average Hours of Training completed by Supervisors and Managers

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

Training  
Hours

**FY 15**

*Training Hours for Supervisors & Managers by Quarter*



Lead  
FBO

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

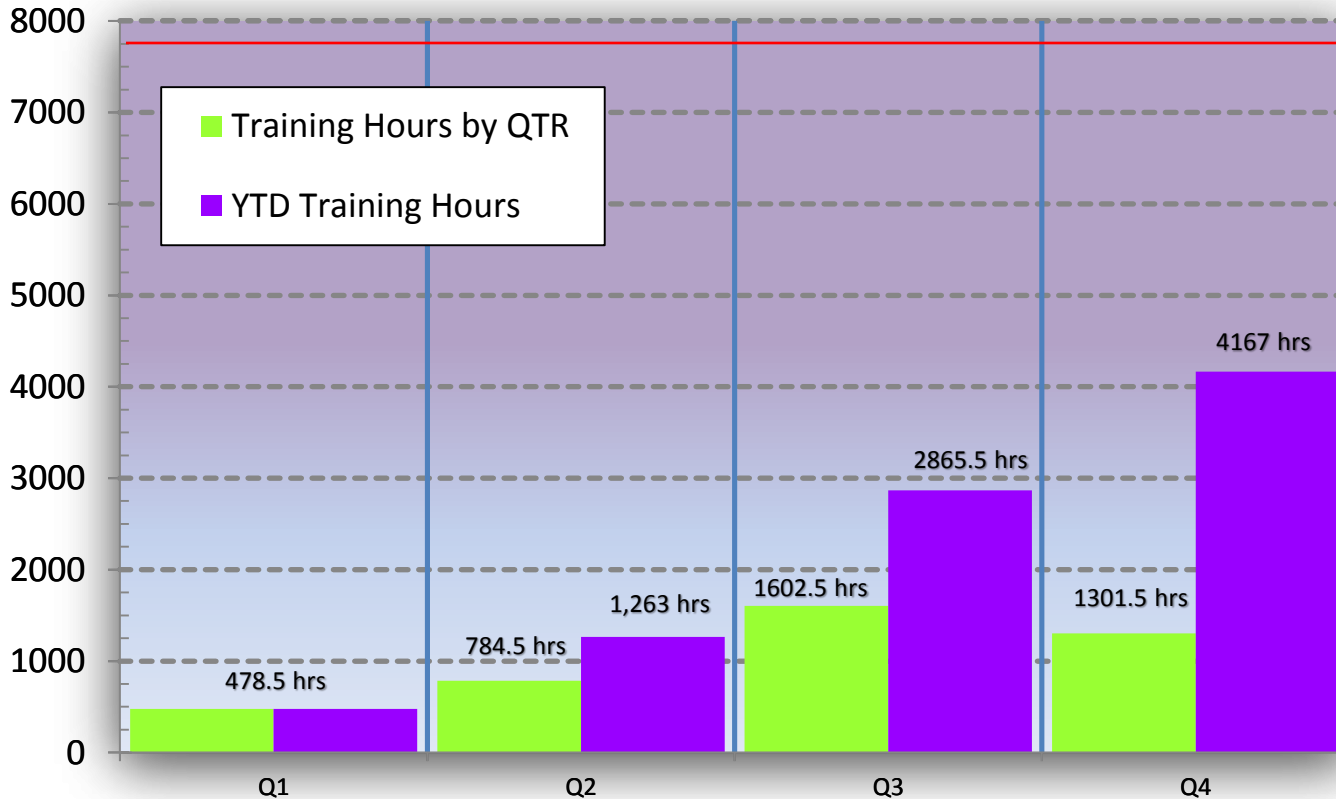
**Objective 4.2:** Improve Workforce Development  
**Tactic 4.2.2:** Increase Employee Training to **20 hours/year**  
**Measure:** Average Hours of Training completed by front line employees

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

Training  
Hours

**FY 15**

*Training Hours for front line employees by Quarter*



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

**FY 2015**  
 Annual Target - 7,760 hrs  
 4<sup>th</sup> Qtr. Target - 1,940 hrs  
 -----  
**Actual YTD**  
 4167 hrs (54%)  
  
 Actual 4<sup>th</sup> Qtr.  
 1301.5 hrs (67%)

**ANNUAL**

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

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Customer Perspective

**ACTION PLAN****Survey Results and Data Review:**

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

**Survey Logistics:**

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

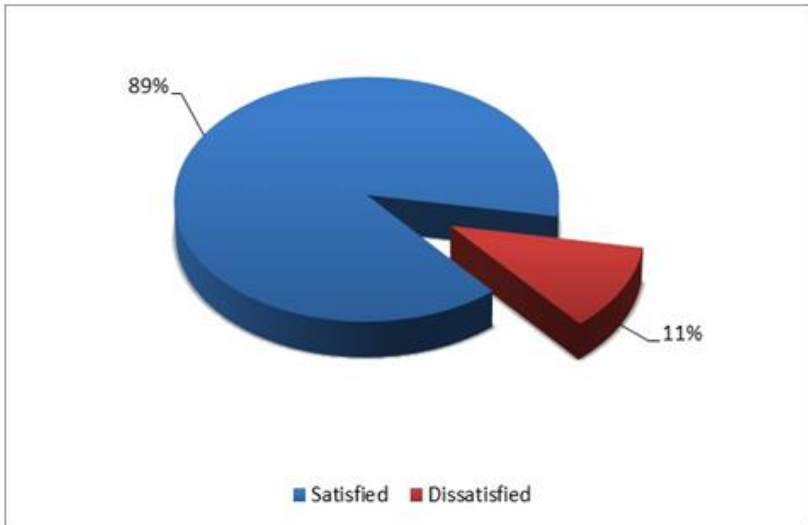
**GOAL #4 Recruit, Develop and Retain Quality Employees**

**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

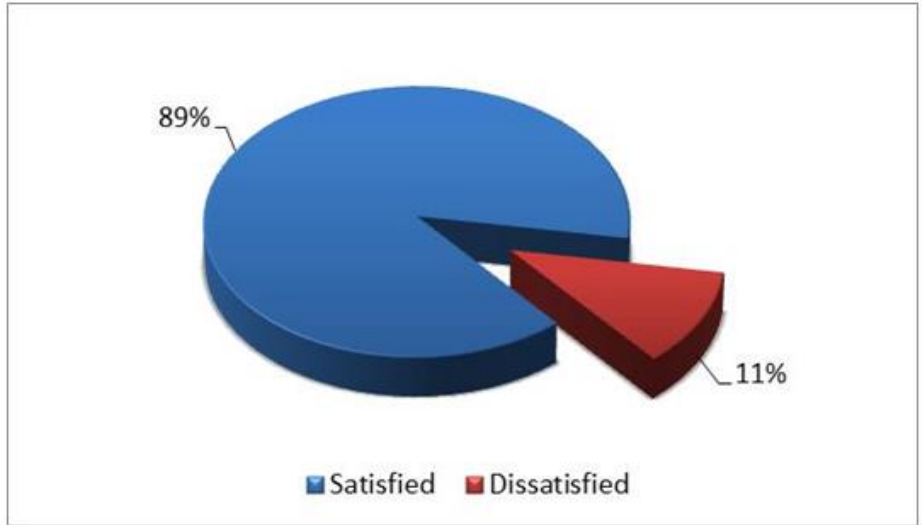
**Lead:** Facilities Business Office  
**Balanced Scorecard Category:** Customer Perspective

FY 2014 Annual Satisfaction: 89%

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



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

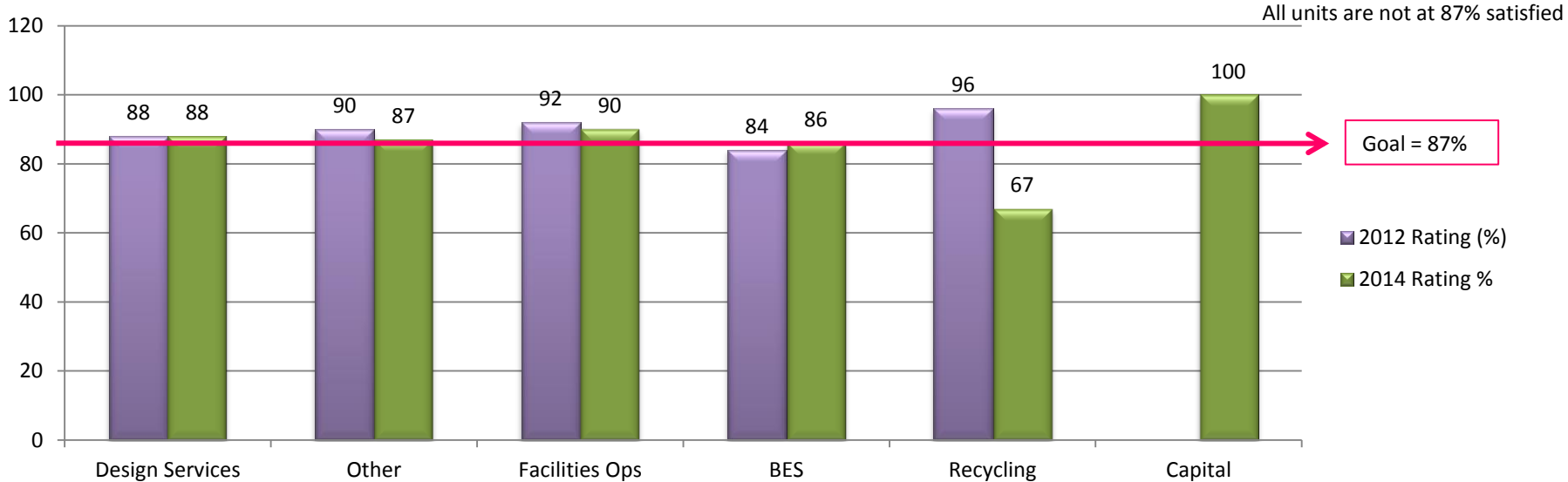


**GOAL #4 Recruit, Develop and Retain Quality Employees**

**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

**Unit Customer Satisfaction Survey FY Rating Comparison (%)**



Unit	2014 Rating	Extremely Satisfied	Very Satisfied	Satisfied
Design Services	88	0	44	44
Other	87	0	56	31
Facilities Ops	90	16	35	39
BES	86	16	33	40
Recycling	67	17	25	25
Capital	100	25	63	12

**STATUS**



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

<b>Objective 4.4:</b>	<b>Improve Employee Safety</b>
<b>Tactic 4.4.1:</b>	Reduce the number of reportable accidents by 20%
<b>Tactic 4.4.2:</b>	98% of Mandatory Compliance Training completed annually
<b>Measure:</b>	Percent of employees completing mandatory compliance training

**Lead:** Facilities Business Office

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

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

- Supervisor Safety Talks (SST) - monthly
- 5<sup>th</sup> Annual FM Safety Fair - May 6, 2015
- 7<sup>th</sup> Annual FM Safety Slogan Contest winner - *"Safety Pays In Many Ways"*

**Compliance Training**

- Periodic meetings with EH&S to review needs, processes, etc.
  - Bloodborne Pathogen training
  - Sub-Contractor Safety Program
- Research training providers/vendors to address training gaps, as needed

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

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

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

**FM ACADEMY**

**ACTION PLAN**

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

**Safety Training stats FY15 YTD – 2,147 hrs attended by 3,600 employees**

- Safety related activities
  - FM Safety Committee meeting Bi-monthly
  - Supervisor Safety Talks Monthly
  - 2015 Safety Fair Annual
    - Approximately 250 in attendance
    - 21 vendors participated
    - Fire extinguisher mini-training provided
  - Safety Slogan Contest - *Winning Slogan* – **“Safety Pays In Many Ways”** July 2015
- Accident/Incident totals YTD (calendar year)
  - Accidents - 10 2015 YTD
  - Minor incidents - 1 2015 YTD
  - 11 year trend: **2004** – 45 accidents / **2015** – 10 accidents
- Compliance and/or Safety based training from EHS
  - Blood Borne Pathogen (BBP) training May 2015
  - Sub-Contractor Safety Programs June 2015
  - Automated External Defibrillator (AED) training July 2015

**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
-------------	-------------

- FM Academy – “*visit the website*”  
<https://facilities.uncc.edu/our-services/business-related-services/facilities-business-office/fm-learning-and-development-academy>
  - Content Development Ongoing
    - Recent addition - Online training evaluation form ready for launch, on approval
  - Training vendor sourcing & selection As Needed/As Funded
  
- 4<sup>th</sup> Quarter Training**
  - Hosted APPA Leadership Academy (Level one) May 2015
    - Tentative agreement with APPA to host Levels 2 & 3
  - Troubleshooting Mechanical Drive Systems & Rotating Equipment Jun 2015



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**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

## ACTION PLAN

### Finance/Budget:

- Call for Recurring and One-Time funding completed on time; Total FM request approx. \$13M;
- Prepare Divisional one-time funding list for FY 16; awaiting budget call;
- Awaiting new budget for FY 16 – General fund anticipated late Fall (November 2015); Currently operating using FY 15 budget amounts;
- Continue to hold Budget Meetings for BES and FO Departments monthly with director and quarterly with respective leadership teams; First FY 16 meetings scheduled for week of July 20<sup>th</sup>;
- Reestablish capital project budget meetings with Capital team;
- FM Budgeting 101 training development to begin in July 2015 with “color of green” sessions/meetings to be scheduled in September 2015;
- Continue work with Budget Office to determine submission date for new operating reserve templates to the Office of State Budget and Management; Develop templates for Music Annex (Band), Medical Condos and HRL “trees”; Submission Date TBD.

### Supplemental Grant/Award Funding:

- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2016;

## GOAL #6 –Promote Good Stewardship

**Objective: 5.1:** Promote Fiscal Responsibility

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

Lead  
BES

### ACTION PLAN

- Actions Completed
  - Reordered SDI scanner for McEniry 020
  - Implemented Team cleaning model in all BES Zones
- Actions Planned
  - Complete logistics portion of Supply Chain Management Project in McEniry
  - Implement new Budget process for BES Zone Supervisors
  - 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
  - EPIC laundry room installation

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2015**

**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

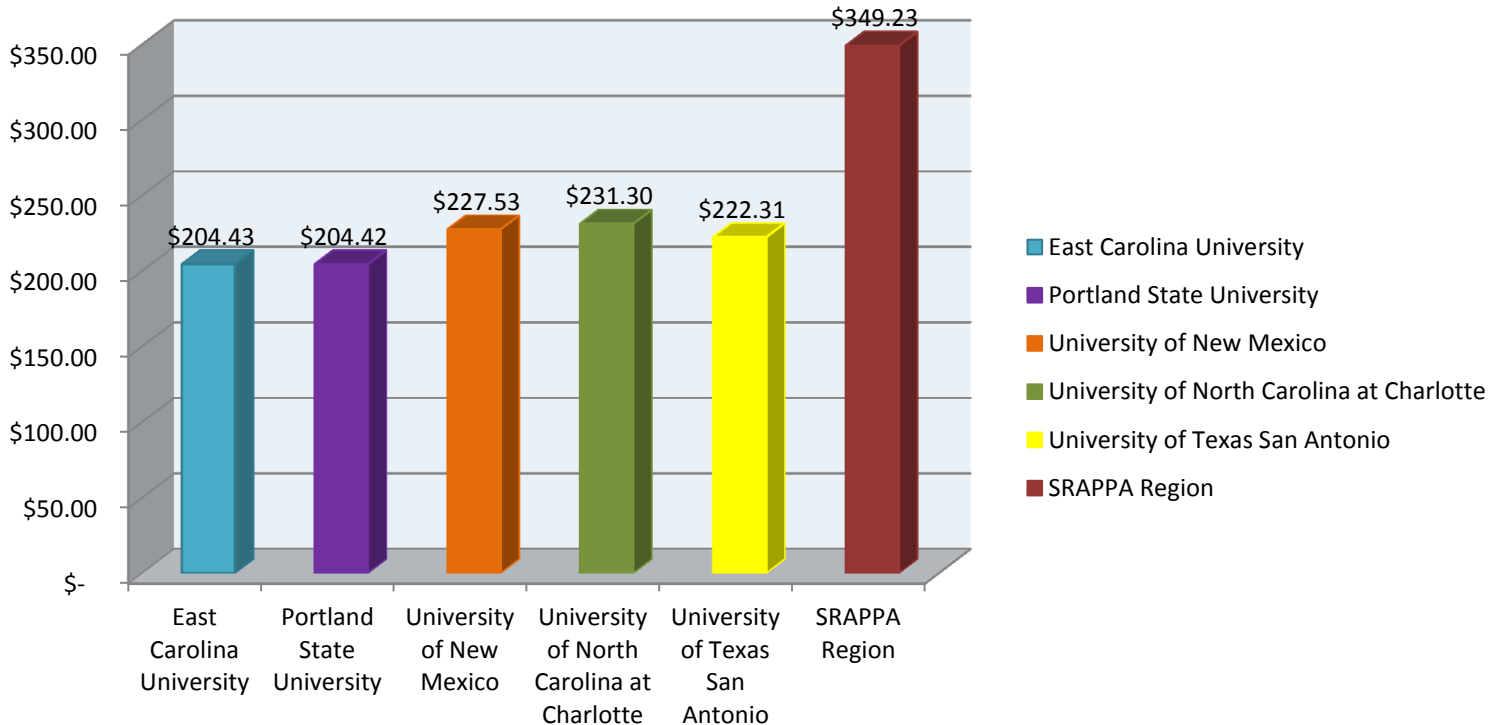
**Balanced Scorecard Category:** Financial Perspective

Avg. cost/student = \$217.99

UNCC = 6.105% above average

UNCC = 33.774% below SRAPPA average

**Custodial-Total Cost/Student FTE**



**STATUS**

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

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

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

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

Lead  
F. O.

## ACTION PLAN

### Actions Planned

1. Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not to Charge) by July 2015.
2. Weekly review of Facilities Operations Labor pool before going outside for additional staff support.

### Actions Completed

1. Identified opportunities to expand reimbursable work in an effort to support labor services funds by Nov 2014.
2. Realigned the labor services positions to ensure maximum utilization of resources by Jan 2015.
3. Reviewed monthly Labor Service accounts with FBO to identify gaps and improved processes. **Finished end of fiscal year in the black.**



Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

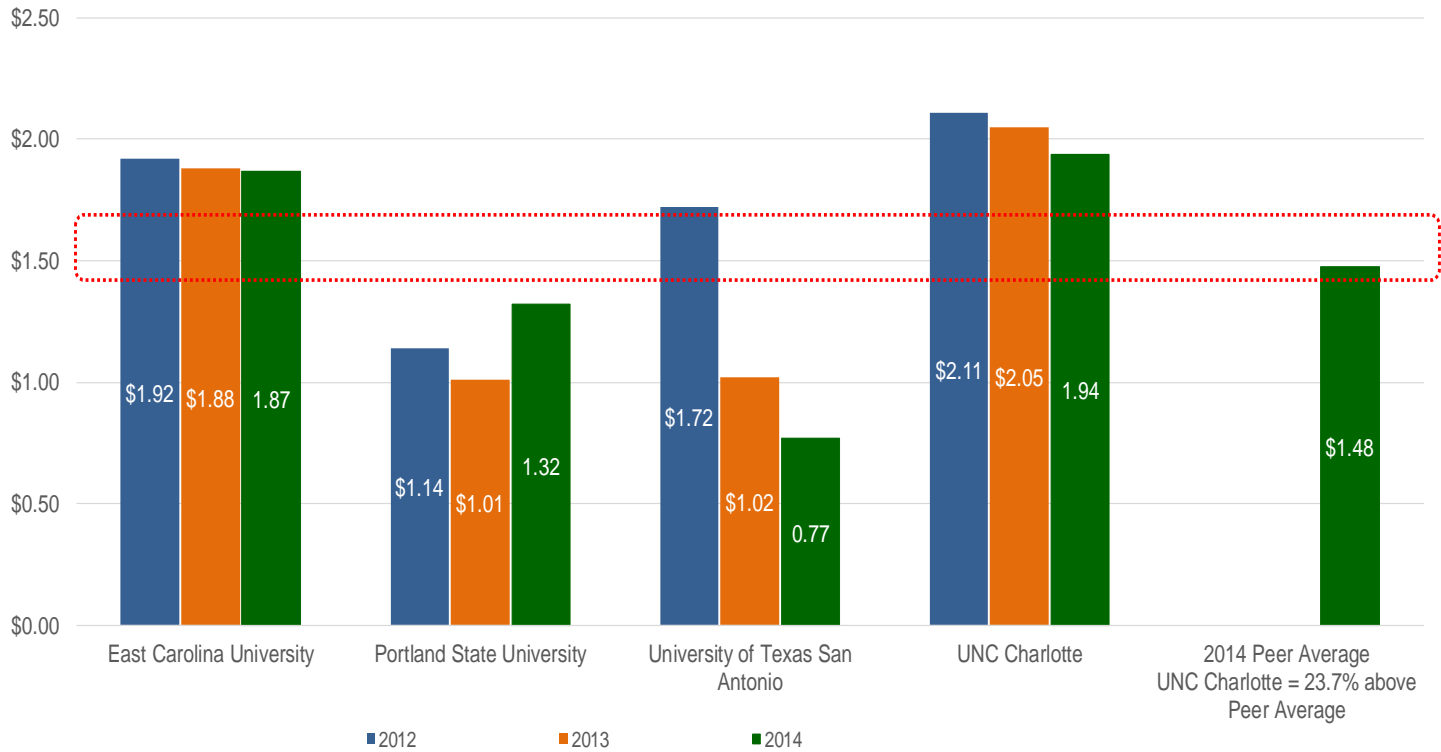
**Tactic: 5.1.5:** Achieve total Maintenance cost/GSF  $\pm$  5% of APPA Average for Peer Institutions

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

### Maintenance Total Cost per GSF



**STATUS**

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2015



Objective 5.2: Develop a Sustainable Campus

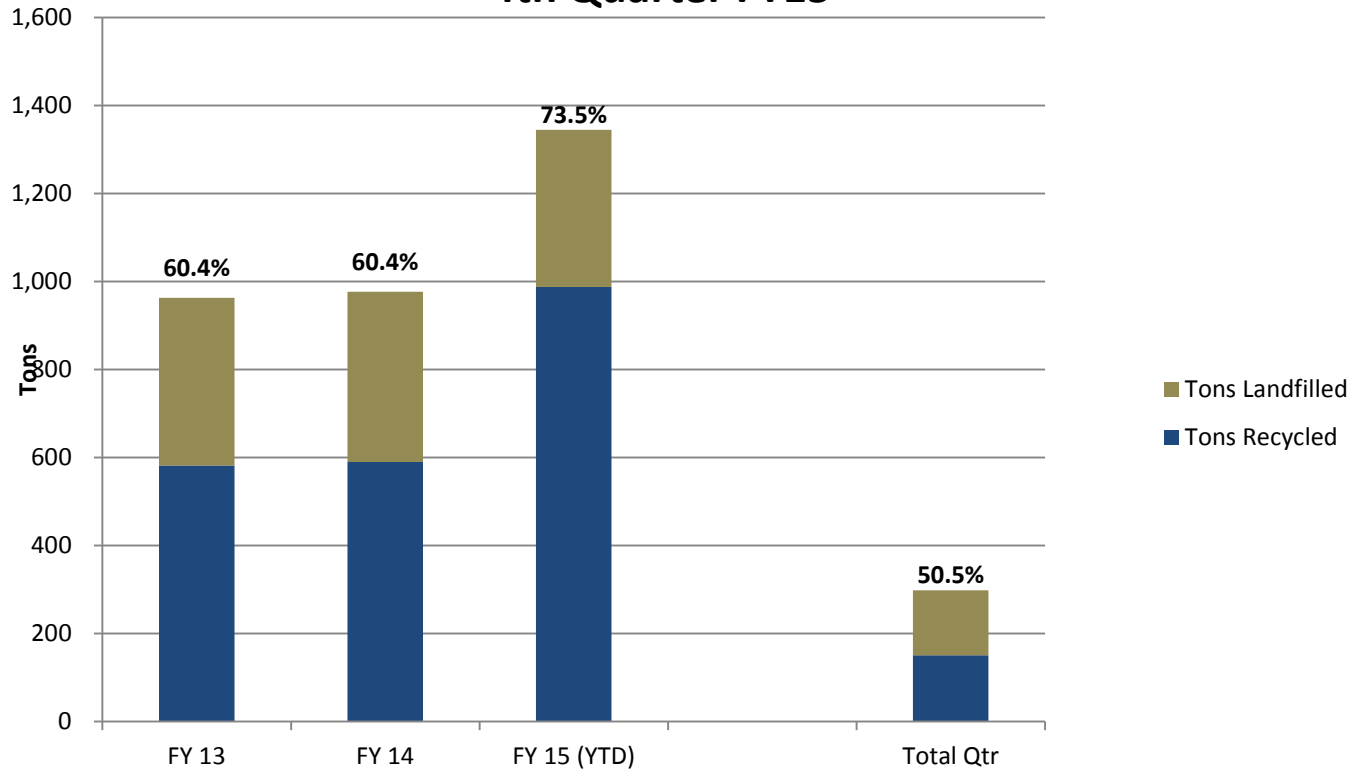
## Tactic 5.2.1

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

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

Balanced Scorecard Category: Innovation and Learning Perspective

## Construction & Demolition Debris Diversion 4th Quarter FY15



**STATUS**  
4<sup>th</sup> Quarter

**STATUS**  
Annual  
Average

## GOAL #5 – Promote Good Stewardship

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

Lead  
Recycling

### ACTION PLAN

#### • Waste Reduction and Recycling

##### Actions Complete

- Completed spring tree planting, campus cleanup, and Earth Day events
- Completed move-out collections (13,000 lbs)
- Began working more with HRL on plans to be able to increase recycling rates in residence halls
- C&D Coordinator/Contract Administrator position posted and closed
- Replaced plastic recycling bins with campus standard in most areas

##### 1st Quarter Actions Planned

- Interviews and hiring for C&D Coordinator (**Interviews complete**)
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream – **ON HOLD (space constraints and scheduling)**
- Conduct waste audits in housing quads where there are no recycling bins (continue working with HRL to pair up all trash and recycling bins) – **ON HOLD (space constraints and scheduling)**
- Prepare for Football season (**signage, volunteer plan, materials sorting, training staff**)
- Expand green events and explore going zero waste at basketball
- Continue working with FIS to update recycling location map

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2015



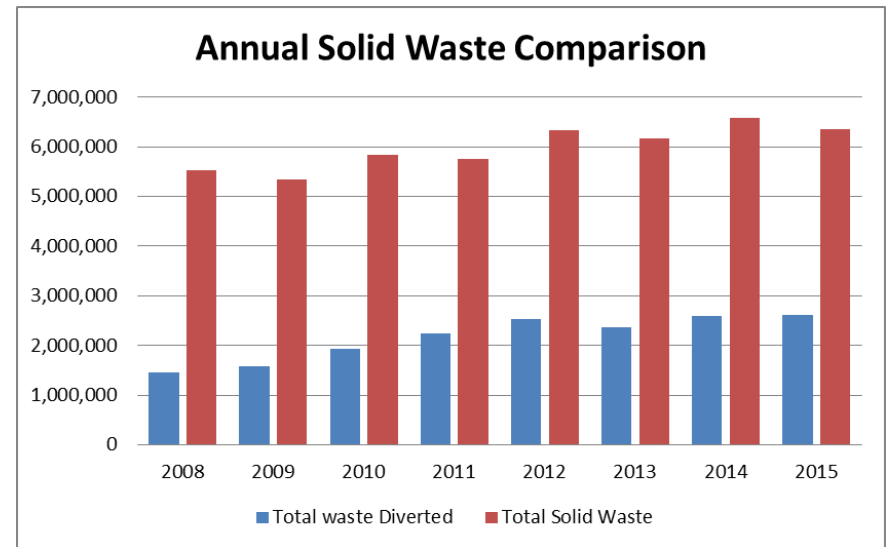
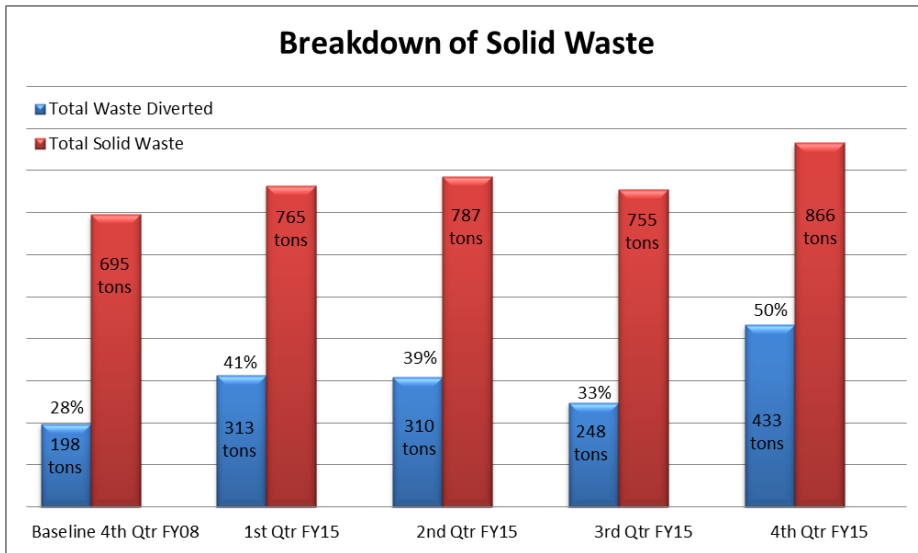
## Tactic 5.2.2

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

Measure: Pounds of Solid Waste Recycled, composted and reused

Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective



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



**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

**ACTION PLAN**

- **Assess additional actions list for achieving STARS Silver (completed – documentation actions only).**
- **Achieve silver rating by end of FY 15 (Submission in August).**

## Facilities Management Strategic Planning Session – Fiscal Year Recap

Lead  
Capital

### GOAL #5 – Promote Good Stewardship

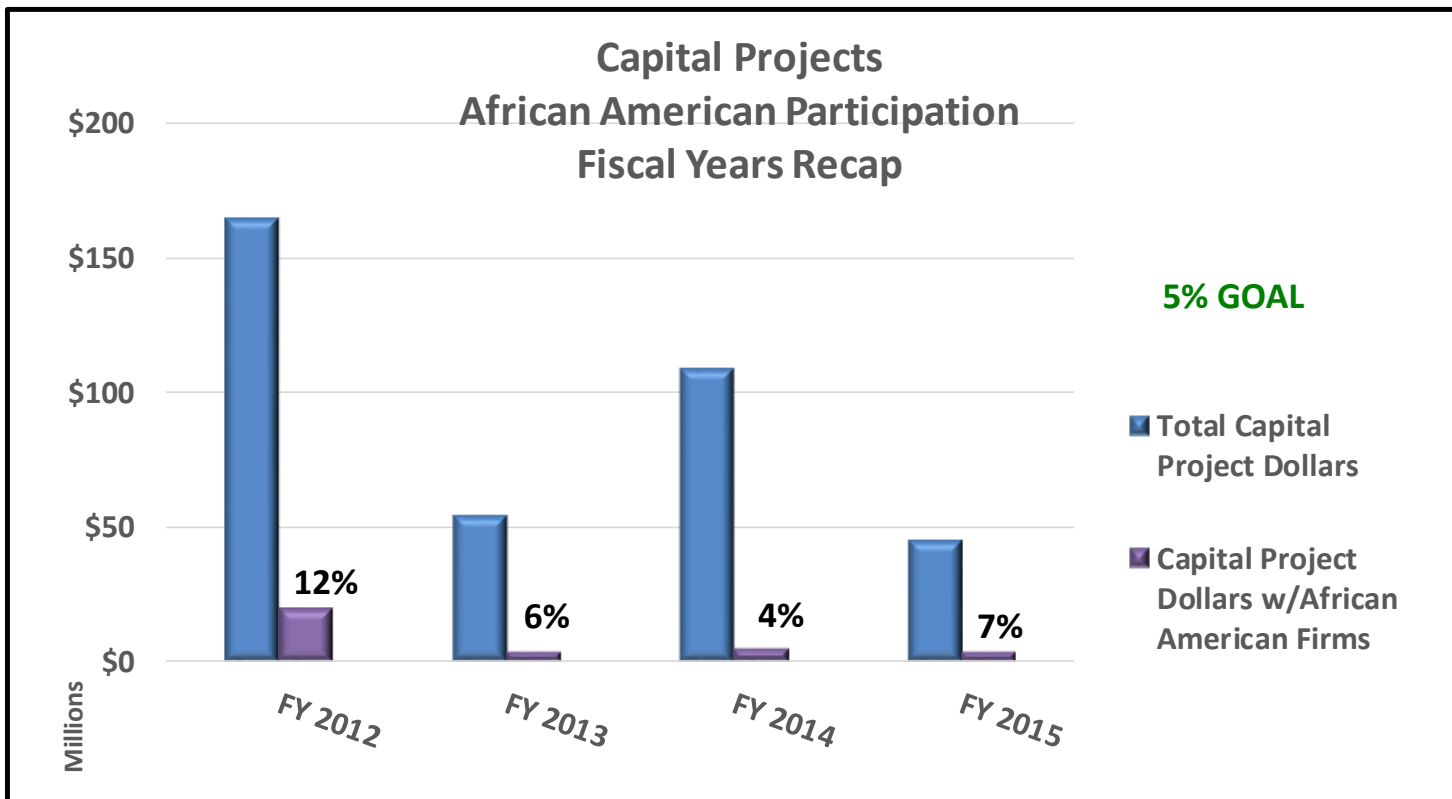
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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



FY2015  
STATUS

## GOAL #5 – Promote Good Stewardship

Lead  
Capital

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

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

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

## ACTION PLAN

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

**GOAL #5 Promote Good Stewardship**

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

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Financial Perspective

## ACTION PLAN

### Cost Accounting:

- Devise strategy to improve cost accounting measures within all areas of Facilities Management – FY 2016
  - Improve org code usage – July 2015 through June 2016; Three part org code concerns being addressed to include home org, timesheet org and pay/funding org;
    - Home Org completed for KRONOS pilot;
    - Timesheet org complete
    - Funding org underway with several changes made in June 2015; Additional changes are under discussion with Position Control and should be completed by September 2015.
  - Reviewing budget revision process departmental wide to begin July 2015 – will not be completed until the new FY 16 budget has been allocated by the AVC;
  - Review changes to approvals for 49er Mart to be reviewed and completed in July 2015;
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - **1<sup>st</sup> of each month;**
- Requested an entry-level accountant position for FY 16 to improve and monitor use of account codes across FM;
- APPA Survey – Data gathering for the FY 15 APPA FPI Survey to begin in August 2015; **Due September 18th**

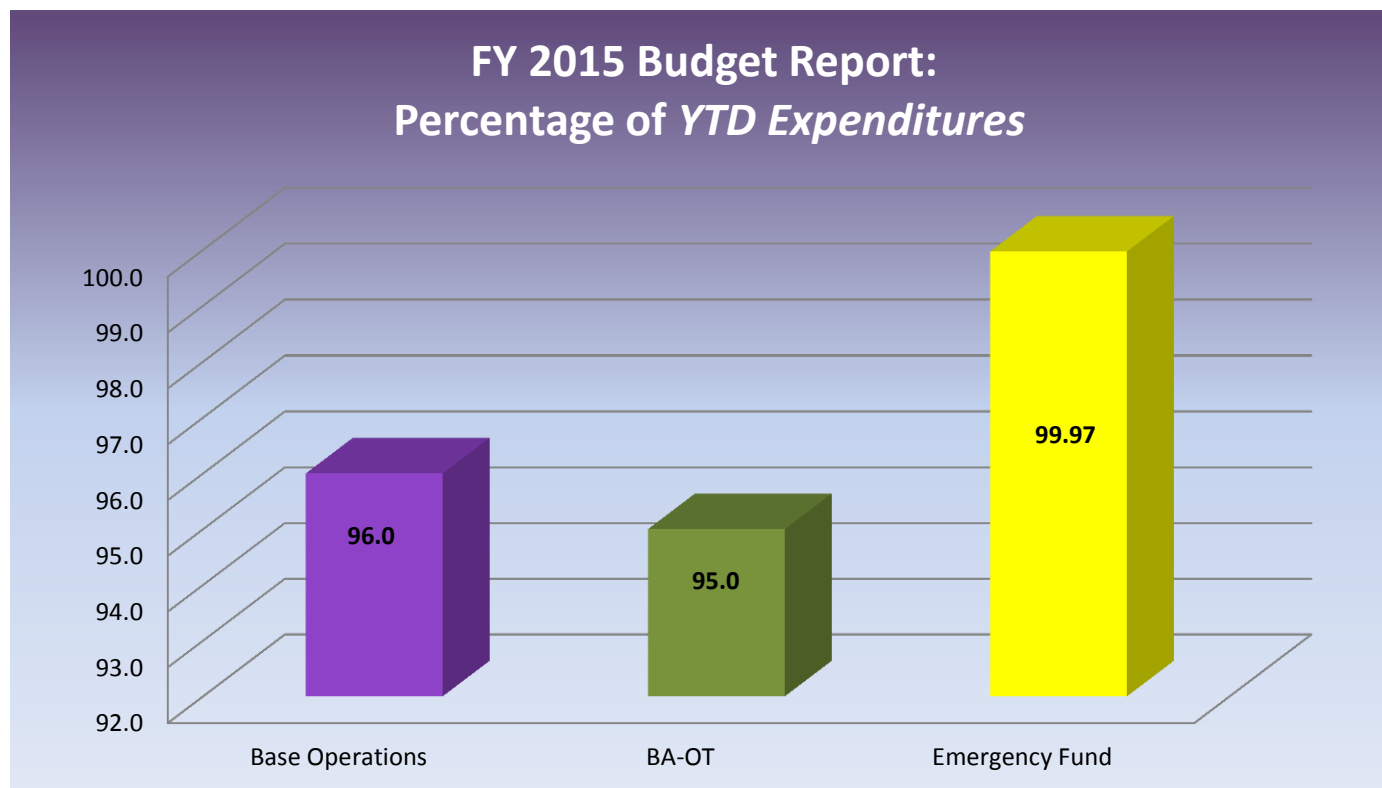


Lead  
FBO

**GOAL #5 Promote Good Stewardship**

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

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



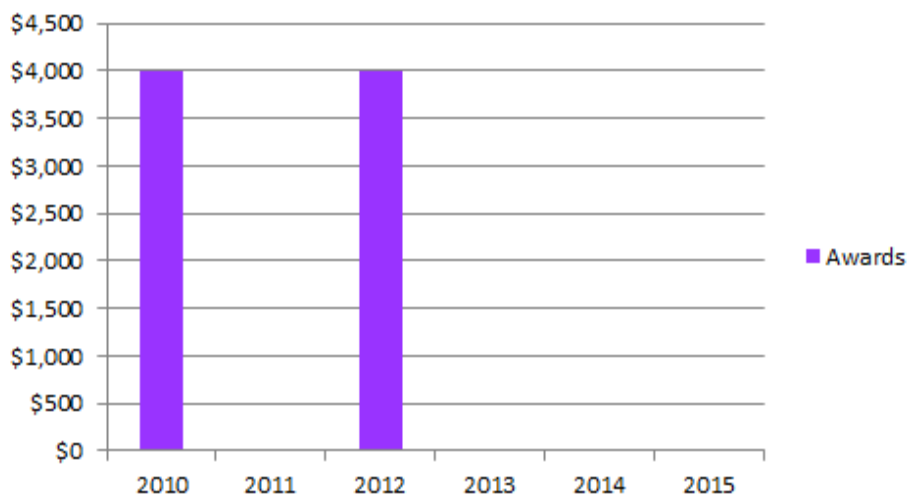
ANNUAL

**GOAL #5 Promote Good Stewardship**

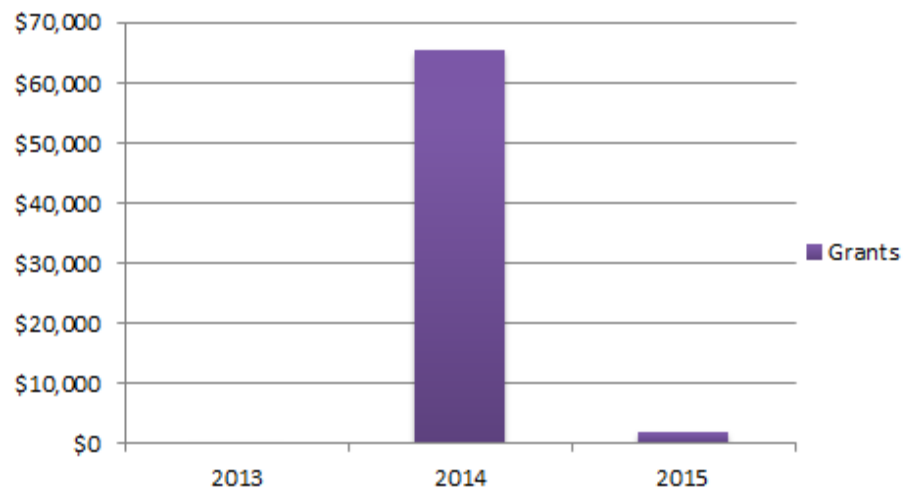
**Objective 5.1:** Promote Fiscal Responsibility  
**Tactic 5.1.2:** Increase Supplemental Funding to the Department by 10% annually  
**Measure:** Percent increase in supplemental funding

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

**Monetary Awards**



**Grants**



**GOAL #5 Promote Good Stewardship****Objective 5.1:****Promote Fiscal Responsibility****Tactic 5.1.3:**Achieve Administrative cost/GSF  $\pm$  5% of APPA Average for Peer Institutions**Measure:**

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

**Lead:** Facilities Business Office**Balanced Scorecard Category:** Financial Perspective**ACTION PLAN****FY 15 APPA Survey:**

- Data collection for FY 15 survey is anticipated to occur in July 2015; APPA to be contacted regarding date during second week of July;
- Upon opening of survey, questions will be reviewed; participants (data providers) will be given a heads up and the survey questions will be delivered.
- Anticipated due date for data is September 18<sup>th</sup>, 2015.

**GOAL #5 Promote Good Stewardship**

**Objective 5.1:**

**Promote Fiscal Responsibility**

**Tactic 5.1.3:**

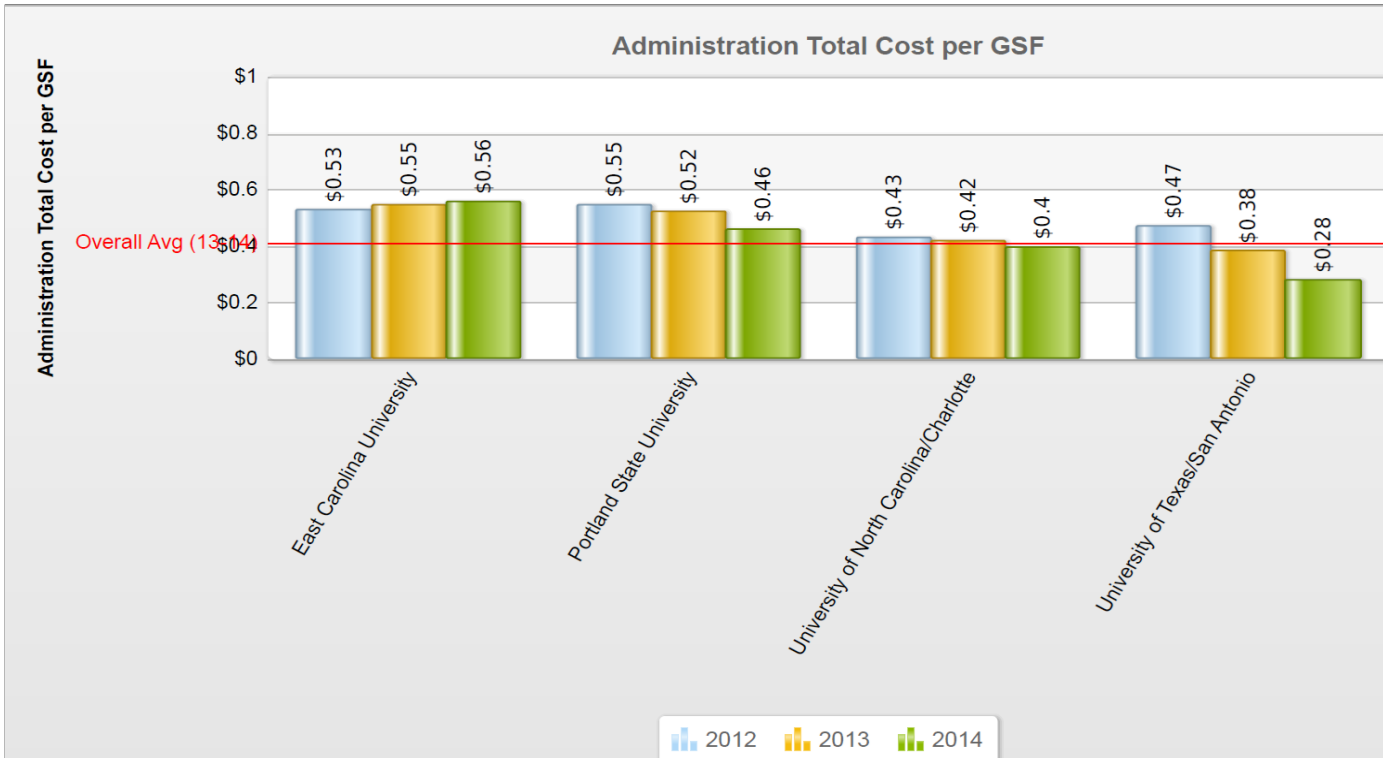
Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

**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. = \$0.55  
 SRAPPA Avg = \$0.44  
 Target = \$0.404 (-5%)  
 UNC Charlotte = \$0.40

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1:** Promote Fiscal Responsibility

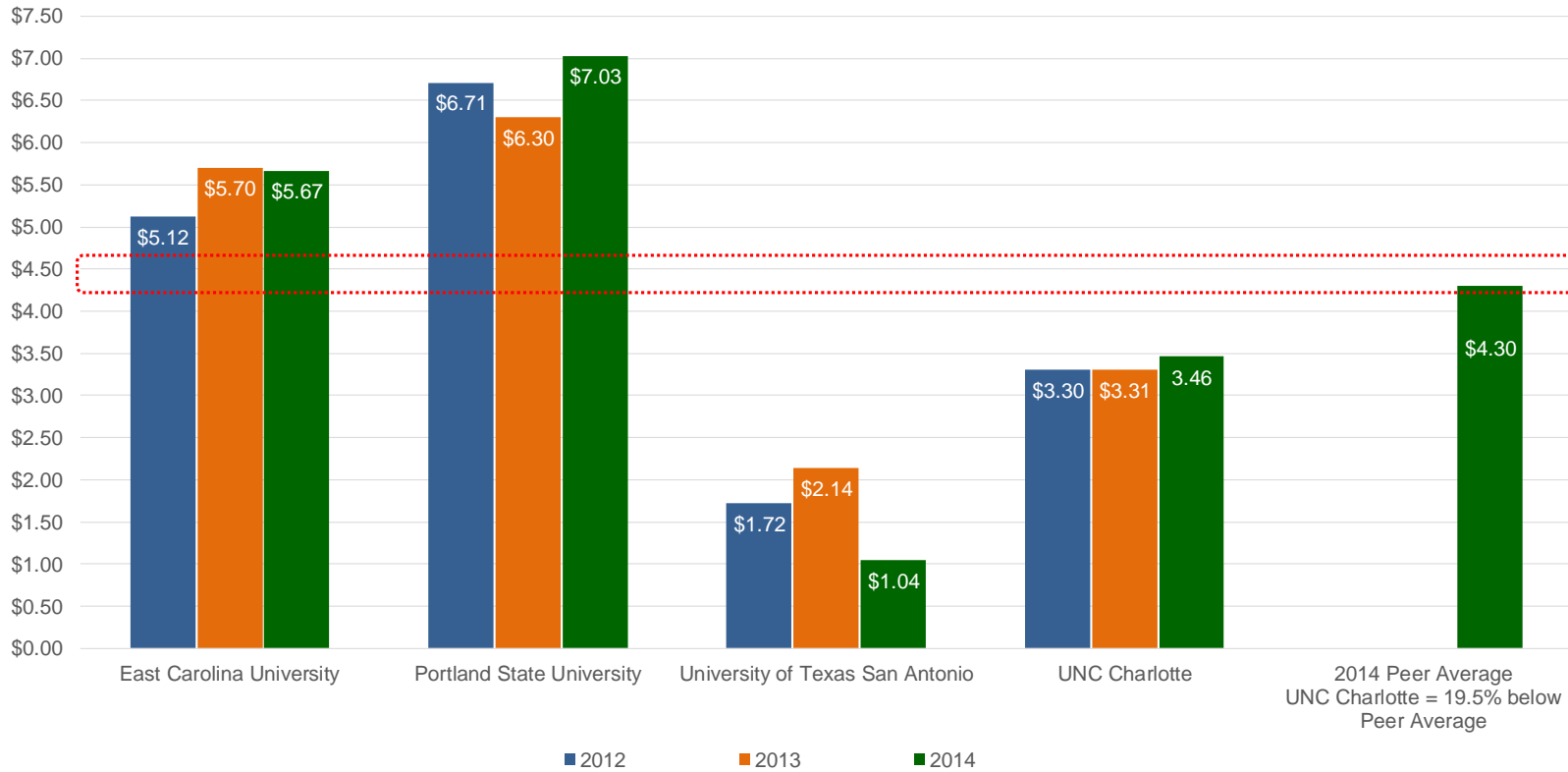
**Tactic: 5.1.6:** Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions

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

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

Grounds Total Cost per Acre



**STATUS**

Lead  
F. O.

**GOAL #5 – Promote Good Stewardship**

**Objective: 5.1: Promote Fiscal Responsibility**

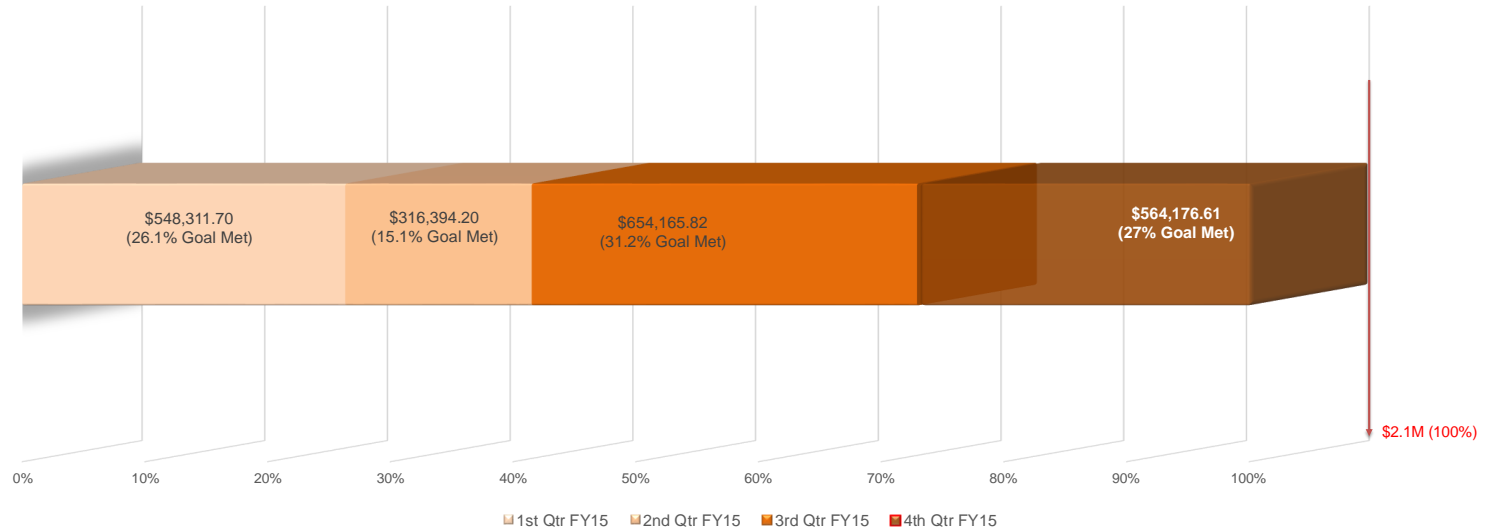
**Tactic: 5.1.7:** All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

**Measure:** Dollars in account at end of fiscal year

**Lead:** Facilities Operations

**Balance Scorecard:** Financial Perspective

**Dollars in Account at End of Fiscal Year**



**STATUS**

**GOAL #5 – Promote Good Stewardship**

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

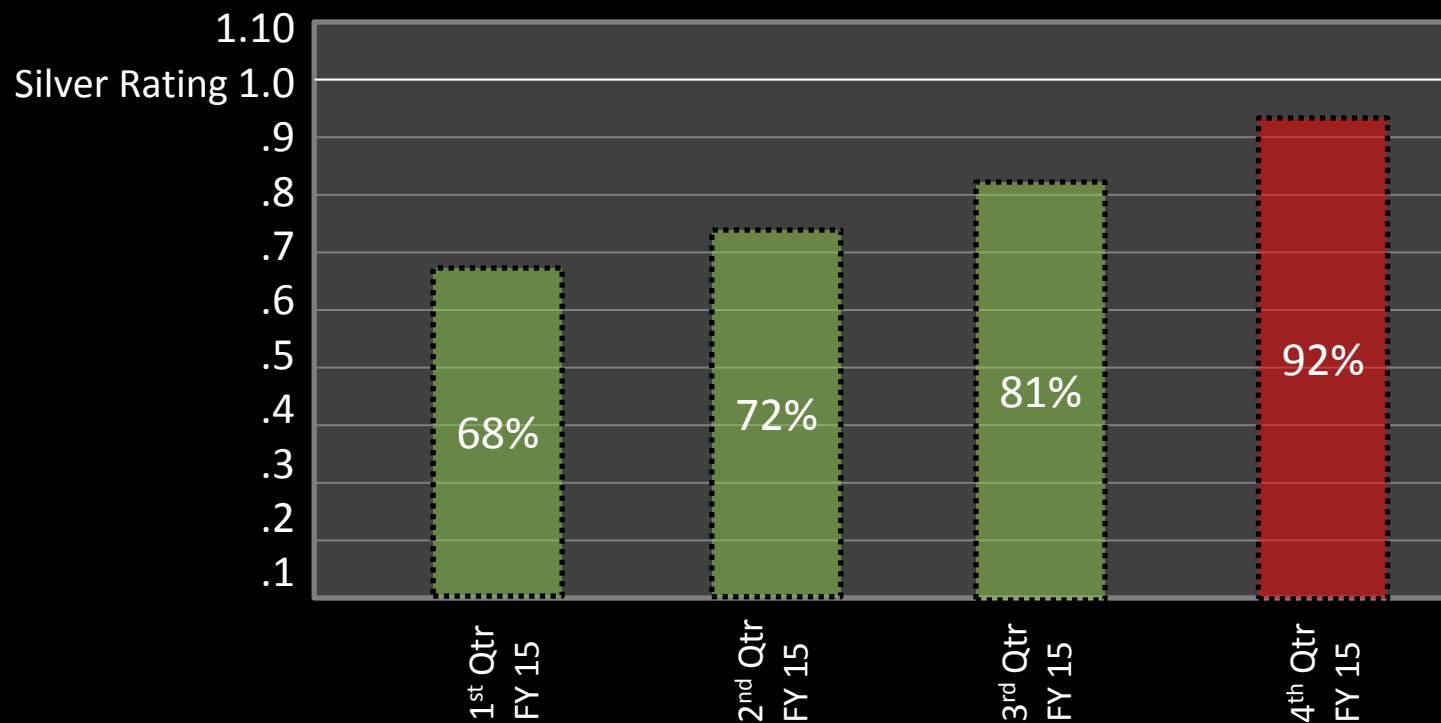
**Tactic 5.2.3:** Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.

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

**Lead:** Facilities Planning

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

Percentage of Completion



**STATUS**

**GOAL #5 – Promote Good Stewardship**

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

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

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

**Lead:** Facilities Planning

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

**ACTION PLAN**

- **Applying 7 themes for implementing best practices:**
  1. **Assessment (August STARS Submission)**
  2. **Faculty Development for Curriculum (Completed May Workshop for Faculty)**
  3. **Campus as a Laboratory (CGI: \$28k for studies, supplies)**
  4. **Outreach Communications (CGI: \$5k for signs)**
  5. **Design Standards (CGI: \$92k for biking, water, recycling, gardens, etc.)**
  6. **Standard Operating Procedures (CGI: \$15k for EV monitoring)**
  7. **Purchasing Practices (Start new Task Force)**
  
- **Reached 61% of best practices implemented by July 2015 (COMPLETED):**
  - **New: In-house certifications (e.g. Green Office)**
  - **Next: Sustainability Website based on 7 Themes**

STATUS



**GOAL #5 – Promote Good Stewardship**

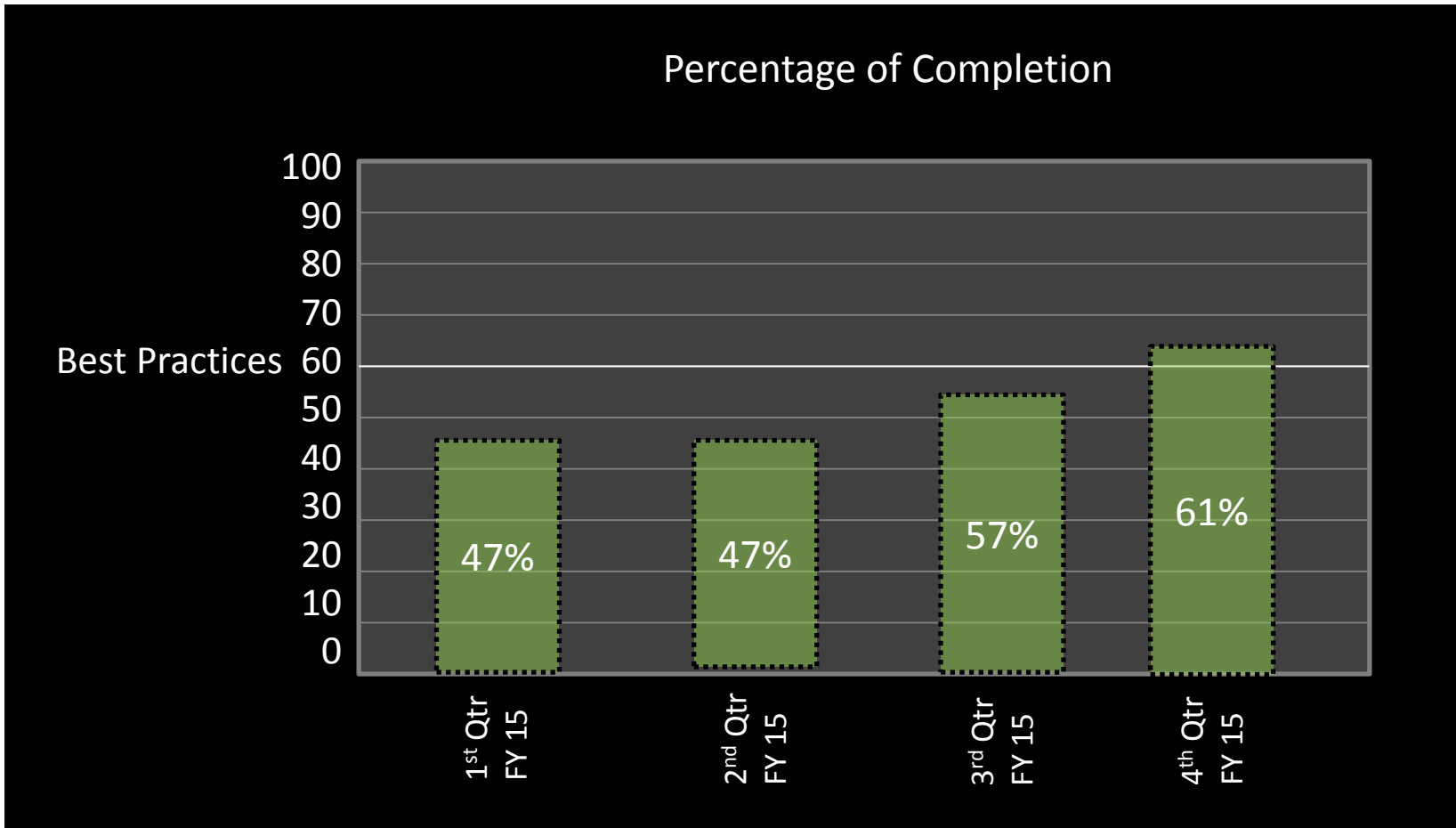
**Objective: 5.2: Develop a Sustainable Campus**

**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



## GOAL #5 – Promote Good Stewardship

<b>Objective</b>	<b>5.3</b>	Conserve Natural Resources
<b>Tactics</b>	<b>5.3.1</b>	Decrease Energy Usage 30% by FY2015

Lead  
Capital

### ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- System Wide Lighting Performance Contract
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
  - Street light replacements fixtures have been finalized project to be complete by Sep.
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 35% reduction by 2020

**GOAL #5 – Promote Good Stewardship**

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

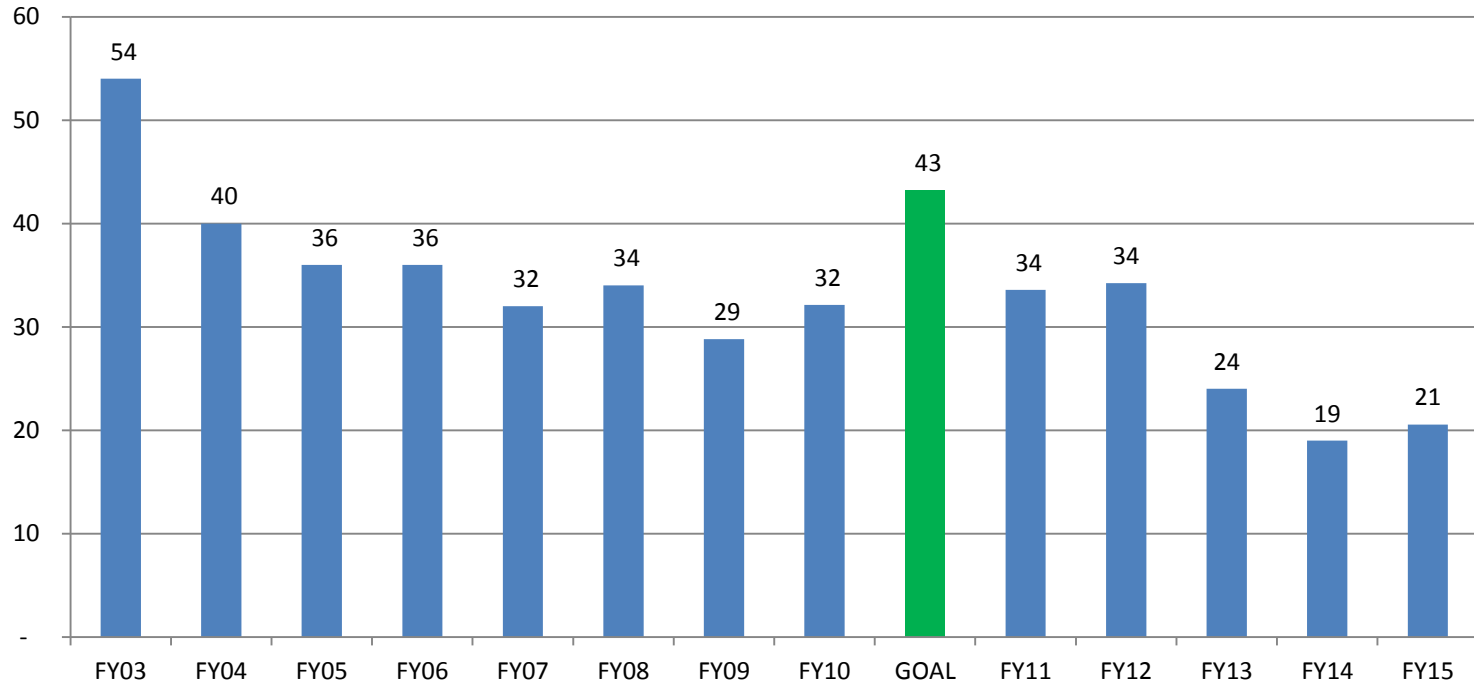
**Measure:** Gallons/GSF/Year consumed on campus

**Balanced Scorecard Category:** Financial Perspective

**STATUS**

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

Goal 43 Gal/GSF  
Actual 21 Gal/GSF



**GOAL #5 – Promote Good Stewardship**

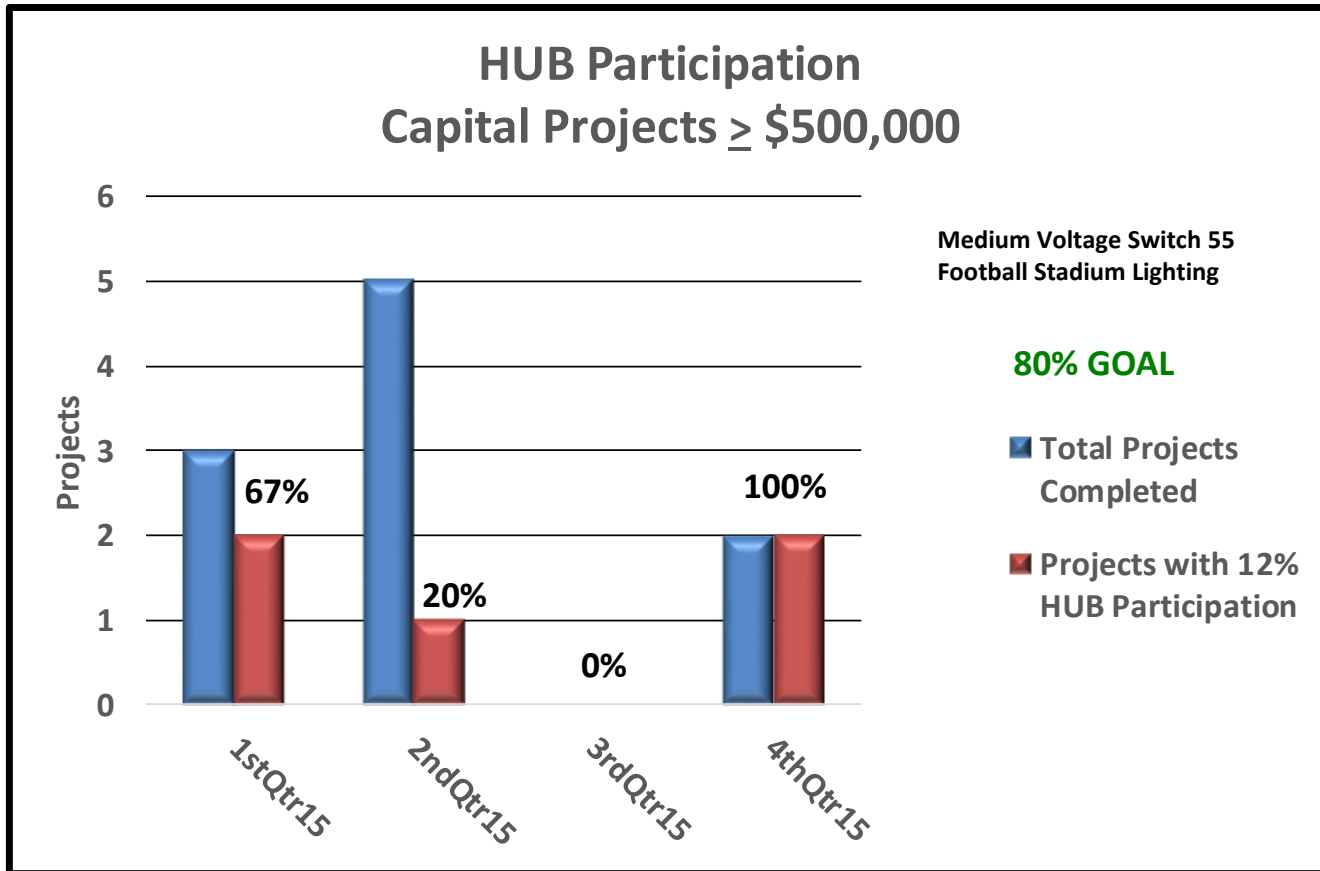
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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



4thQtr  
STATUS

**GOAL #5 – Promote Good Stewardship**

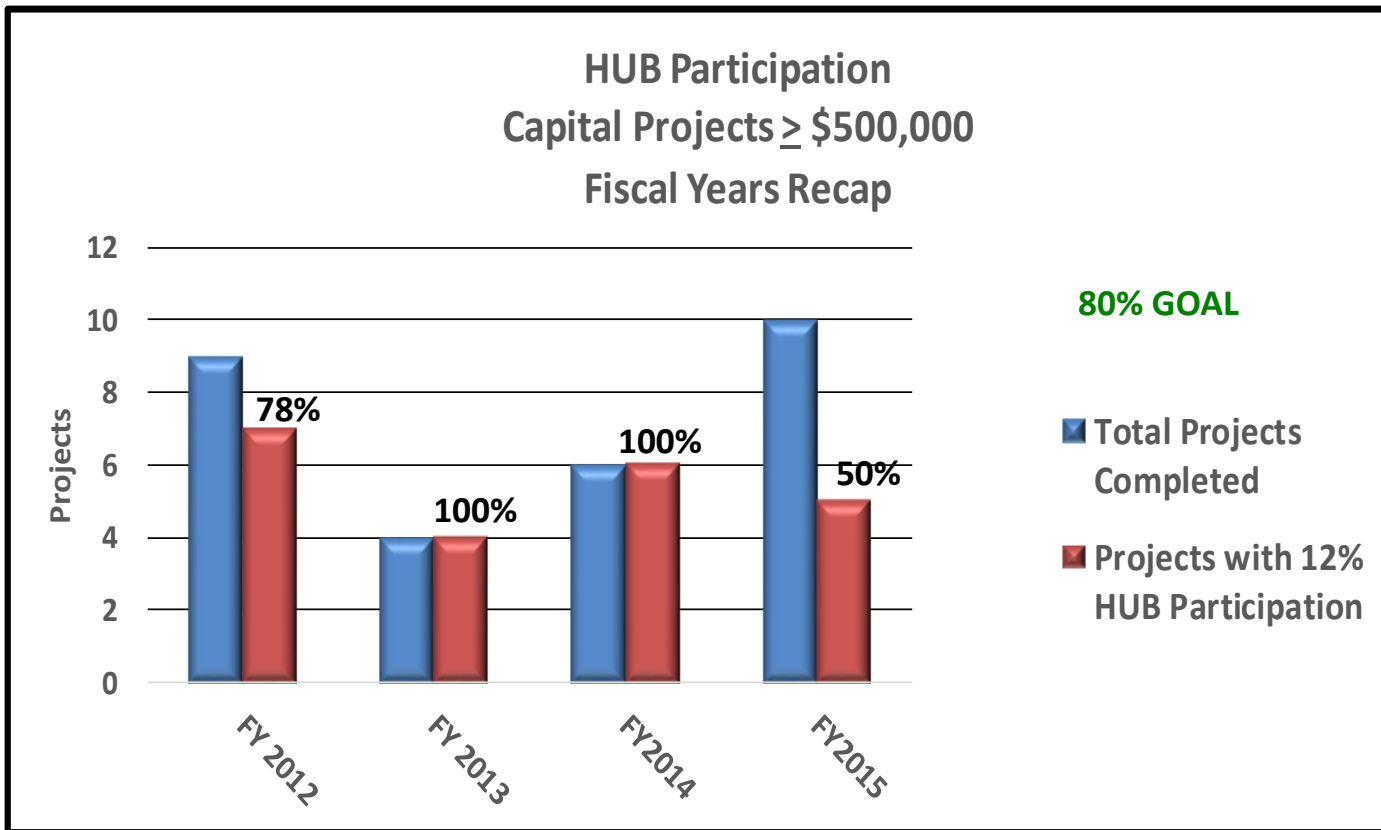
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

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

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

**Lead:** Capital Projects

**Balanced Scorecard Category:** Financial Perspective



**FY2015  
STATUS**

**GOAL #5 – Promote Good Stewardship**

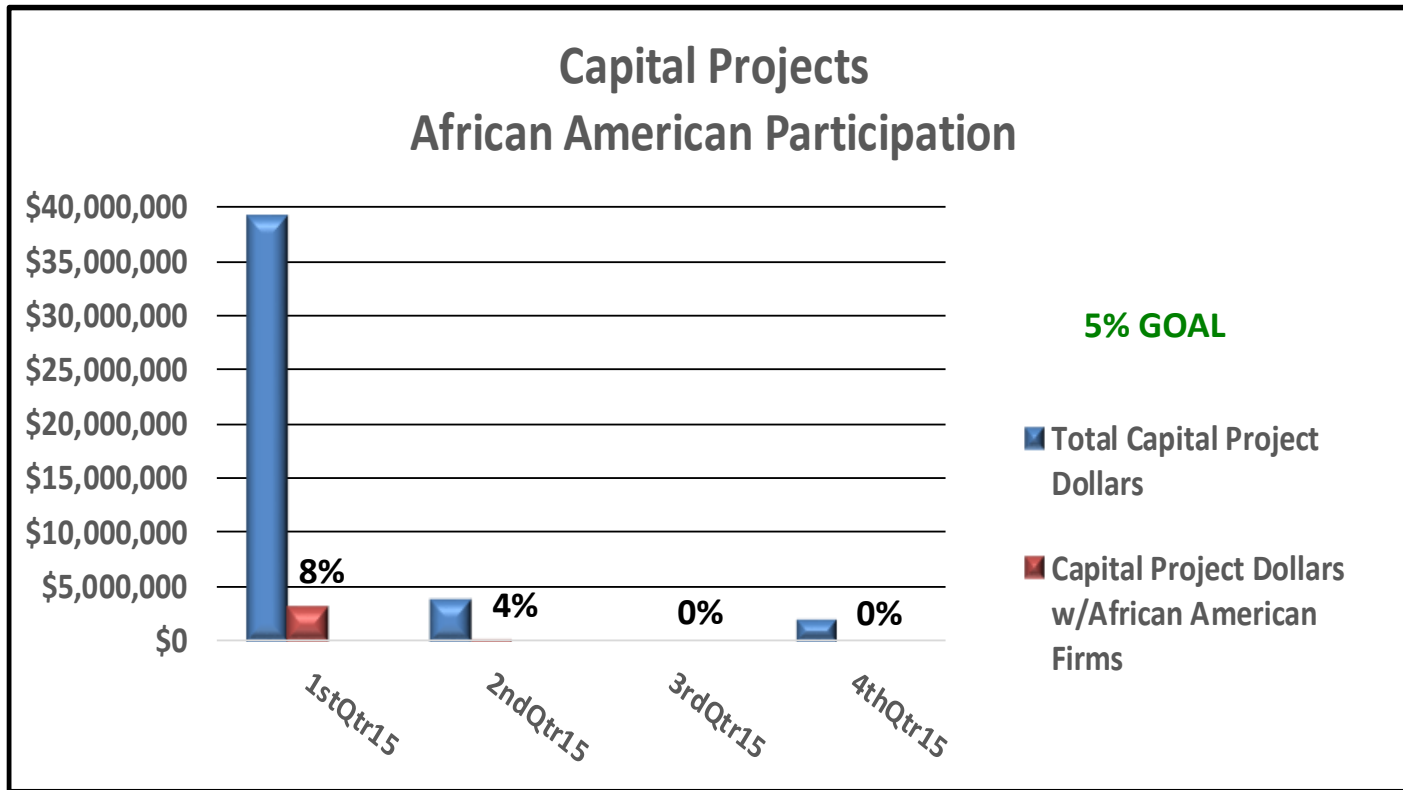
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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



**4thQtr  
STATUS**

**GOAL #5 – Promote Good Stewardship**

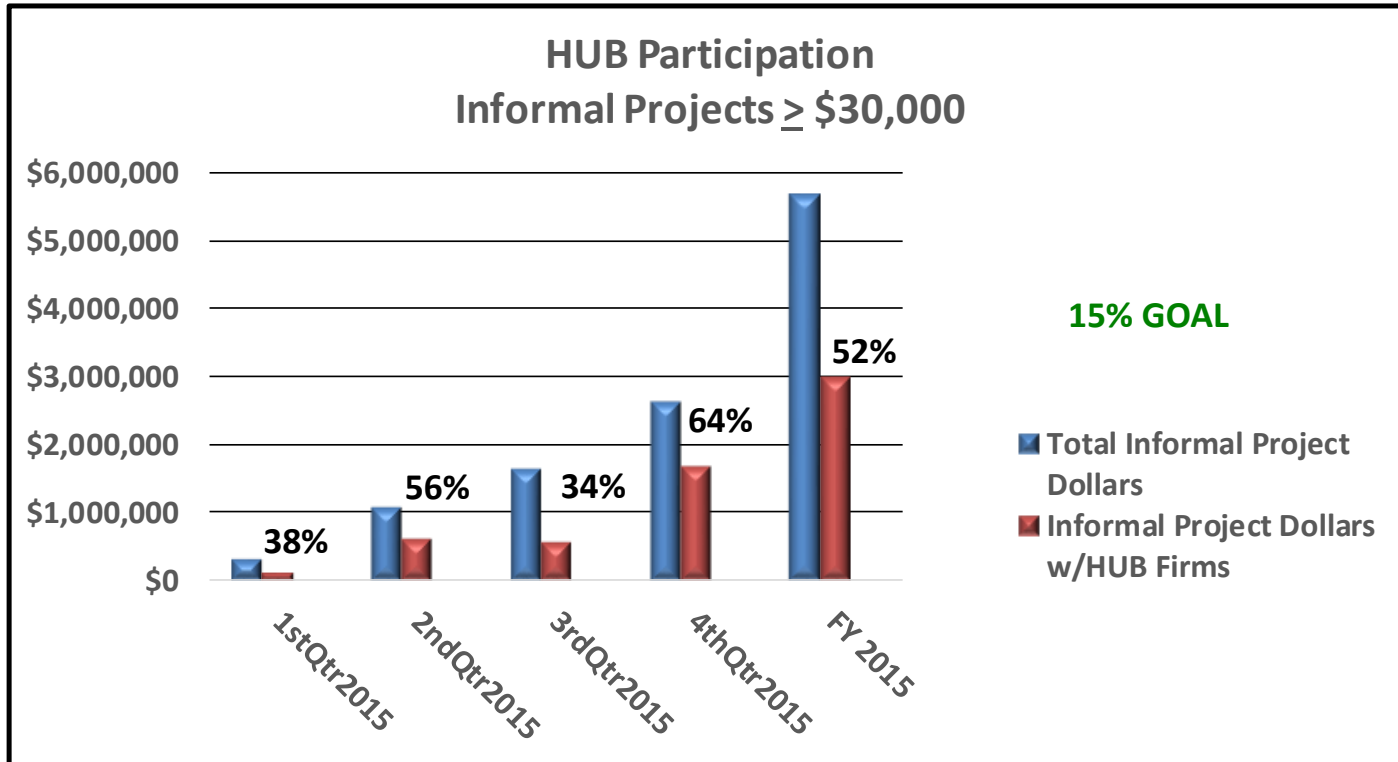
**Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation**

**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



4<sup>th</sup>Qtr  
STATUS

<b>YTD STATUS</b> 43.3%	<b>Annual GOAL</b> 13.0%	<b>4th QTR. STATUS</b> 46.5%	<b>Lead Design Services</b>
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**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

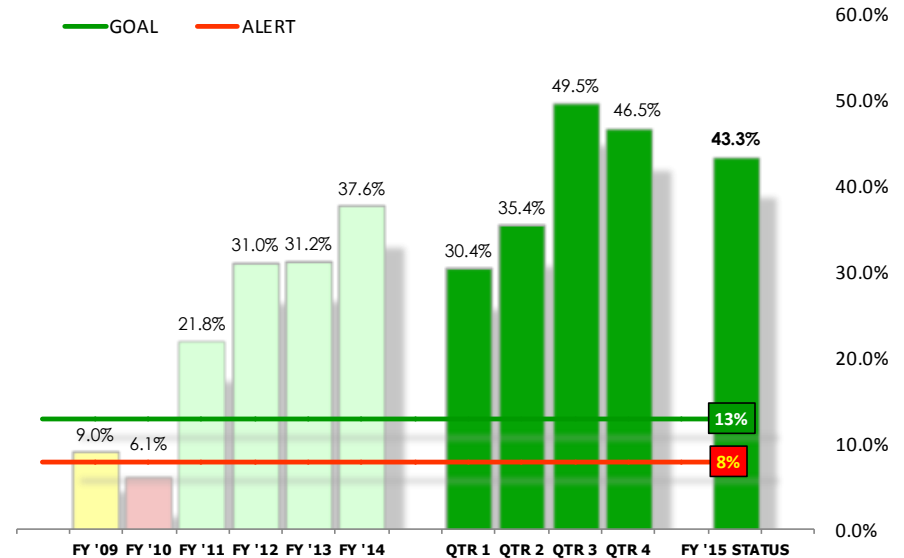
**Balanced Scorecard Category:** Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
FY '14	\$ 1,863,533	\$ 700,603	37.6%
QTR 1	\$ 495,625	\$ 150,457	<b>30.4%</b>
QTR 2	\$ 296,965	\$ 105,061	<b>35.4%</b>
QTR 3	\$ 937,226	\$ 464,038	<b>49.5%</b>
<b>QTR 4</b>	\$ 926,066	\$ 430,838	<b>46.5%</b>
<b>FY '15 STATUS</b>	\$ 2,655,882	\$ 1,150,394	<b>43.3%</b>

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





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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

## ACTION PLANS FOR IMPROVEMENT

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### NEW IMPROVEMENTS

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

- **First and Second Quarters of FY-2016: Concentrated effort to bring in new contractors to present their qualifications at our weekly Design Services Team Meetings**

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

### ONGOING IMPROVEMENTS

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

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

<b>YTD STATUS</b> <b>1.8%</b>	<b>Annual GOAL</b> <b>3.0%</b>	<b>4th QTR. STATUS</b> <b>0.0%</b>	<b>Lead Design Services</b>
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**GOAL #5 – Promote Good Stewardship**

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

**Lead:** Design Services

**Balanced Scorecard Category:** Internal Business Process

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

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
FY '14	\$ 1,863,533	\$ 103,513	5.6%
QTR 1	\$ 495,625	\$ -	<b>0.0%</b>
QTR 2	\$ 296,965	\$ 7,695	<b>2.6%</b>
QTR 3	\$ 937,226	\$ 38,800	<b>4.1%</b>
<b>QTR 4</b>	\$ 926,066	\$ 300	<b>0.0%</b>
<b>FY '15 STATUS</b>	\$ 2,655,882	\$ 46,795	<b>1.8%</b>

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

