



UNC CHARLOTTE
Facilities Management

A large group photograph of UNC Charlotte staff members, many wearing light-colored polo shirts, posing on the steps of the Cone University Center. The building's name is visible on the wall behind them.

**Strategic Planning Session
Fourth Quarter – Fiscal Year 2018
April – June 2018**

...Creating a Campus of Distinction

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

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

-- Harold Geneen, industrialist

GOAL # 1

Continuously Improve Operations of
Campus



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

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

ACTION PLAN

Actions Planned

- 1. Daily assignment; coordinating and monitoring of work effort (on-going)
- 2. Working with FIS on the “work order reinvention project” July 2018

Actions Completed

- 1. Hired an Admin Support Supervisor
- 2. Completed consolidation of the Admin Support Group
- 3. Working w consultant to discuss WO process and materials acquisition strategies
- 4. Implemented 4-10 work hours

GOAL #1 – Continuously Improve Operations of Campus Facilities

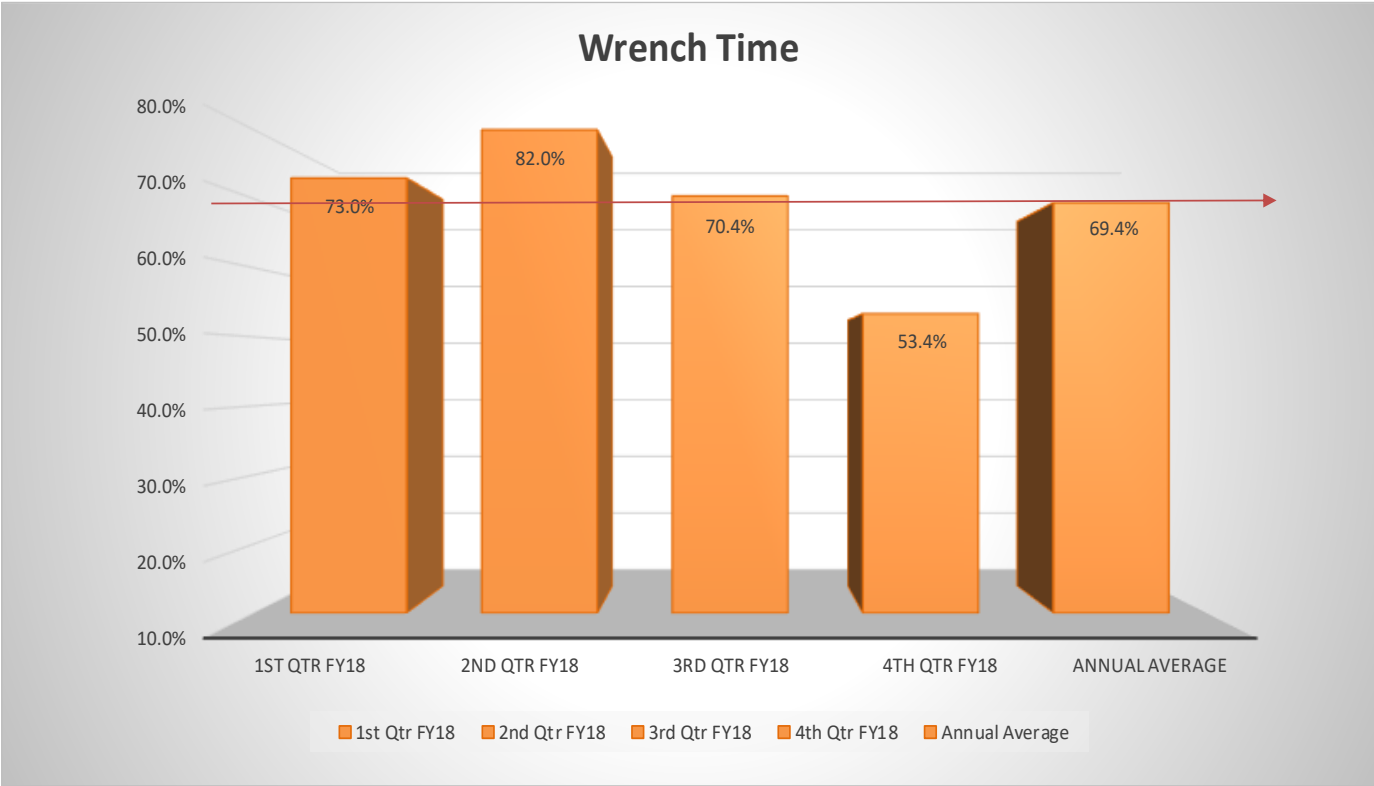
Objective: 1.1: Improve Labor Availability

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

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS
4th
Quarter

STATUS
Annual

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

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

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

ACTION PLAN

Actions Planned

1. Continue to identify items that have been repeatedly ordered as non-stock items to become stock items; continue to streamline existing stock inventory (Monthly).
2. Implement daily scanning of material pick-up slips from SDI to ADMIN GROUP (July 2018)
3. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers)
4. Continue to monitor the requisition to PO processing time.
5. RFP for warehousing contract (Implement December 2018)
6. Implement central receiving for Facilities Operations (October 2018)

Actions Completed

1. Met with vendor to discuss the work order material ordering process
2. Created Google Groups to expedite approvals and pick-up notices
3. Streamlined stock inventory

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

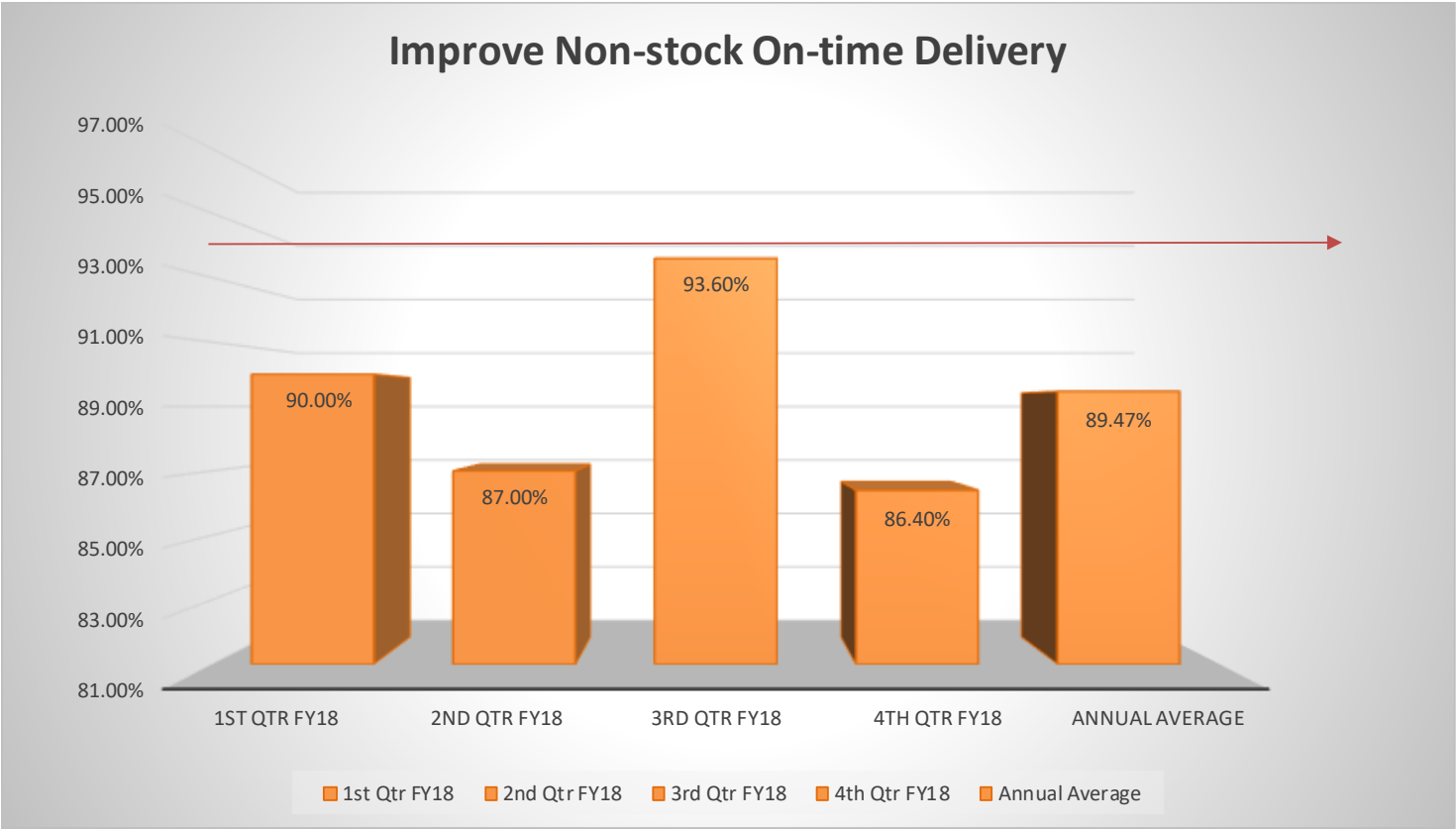
Objective: 1.2: Improve Logistics Efficiency

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

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS
4th
Quarter

STATUS
Annual

GOAL #1 – Continuously Improve Operations of Campus Facilities

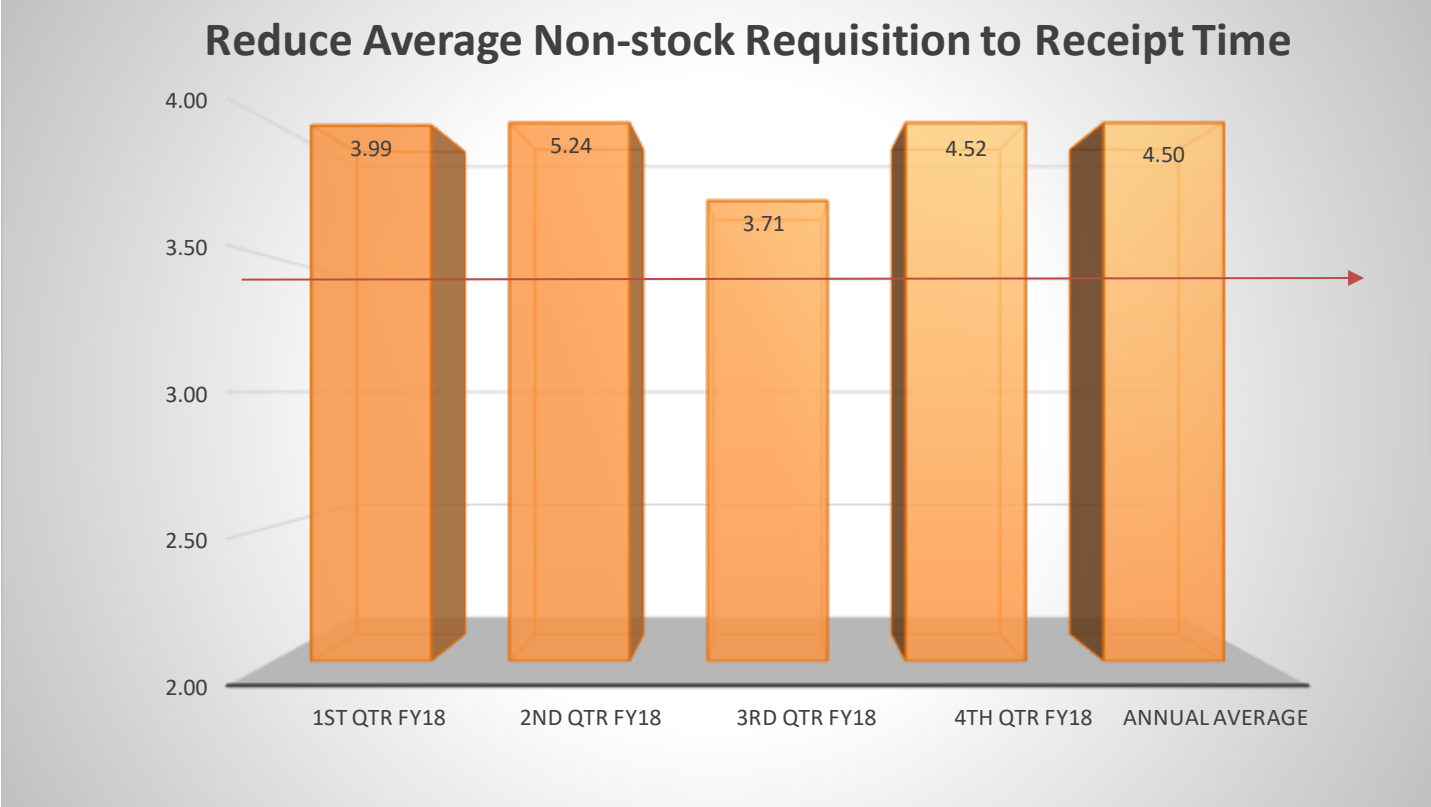
Objective: 1.2: Improve Logistics Efficiency

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

Balanced Scorecard Category: Internal Business Process



STATUS
4th
Quarter

STATUS
Annual

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

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

ACTION PLAN

Actions Planned

1. Implementing tablets for technicians; working with FIS to complete implementation (led techs; looking to expand to all techs Oct 2018)
2. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request. (on-going)
3. Monthly review (Supervisors and admin support group) to monitor 30 Day Report
4. Supervisors met daily with technicians to prioritize work assignments. (on-going)
5. Grounds process improvement (Admin Support Group)(July 2018)
6. ARCHIBUS Console, a paperless system, speeds up turn around time on completions (July 2018)

GOAL #1 – Continuously Improve Operations of Campus Facilities

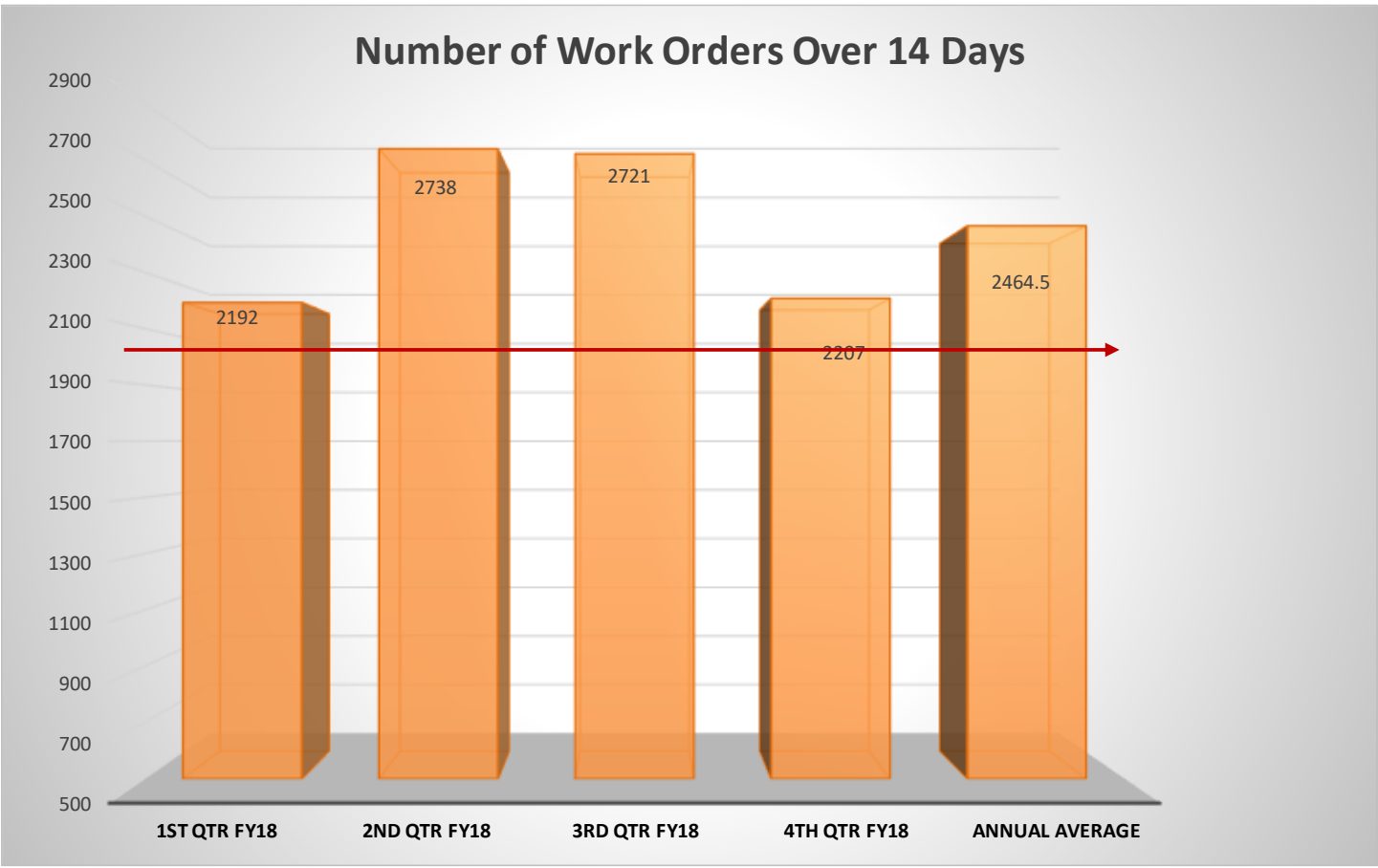
Objective: 1.3: Improve Work Request Process

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

Balanced Scorecard Category: Customer Perspective



STATUS
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Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

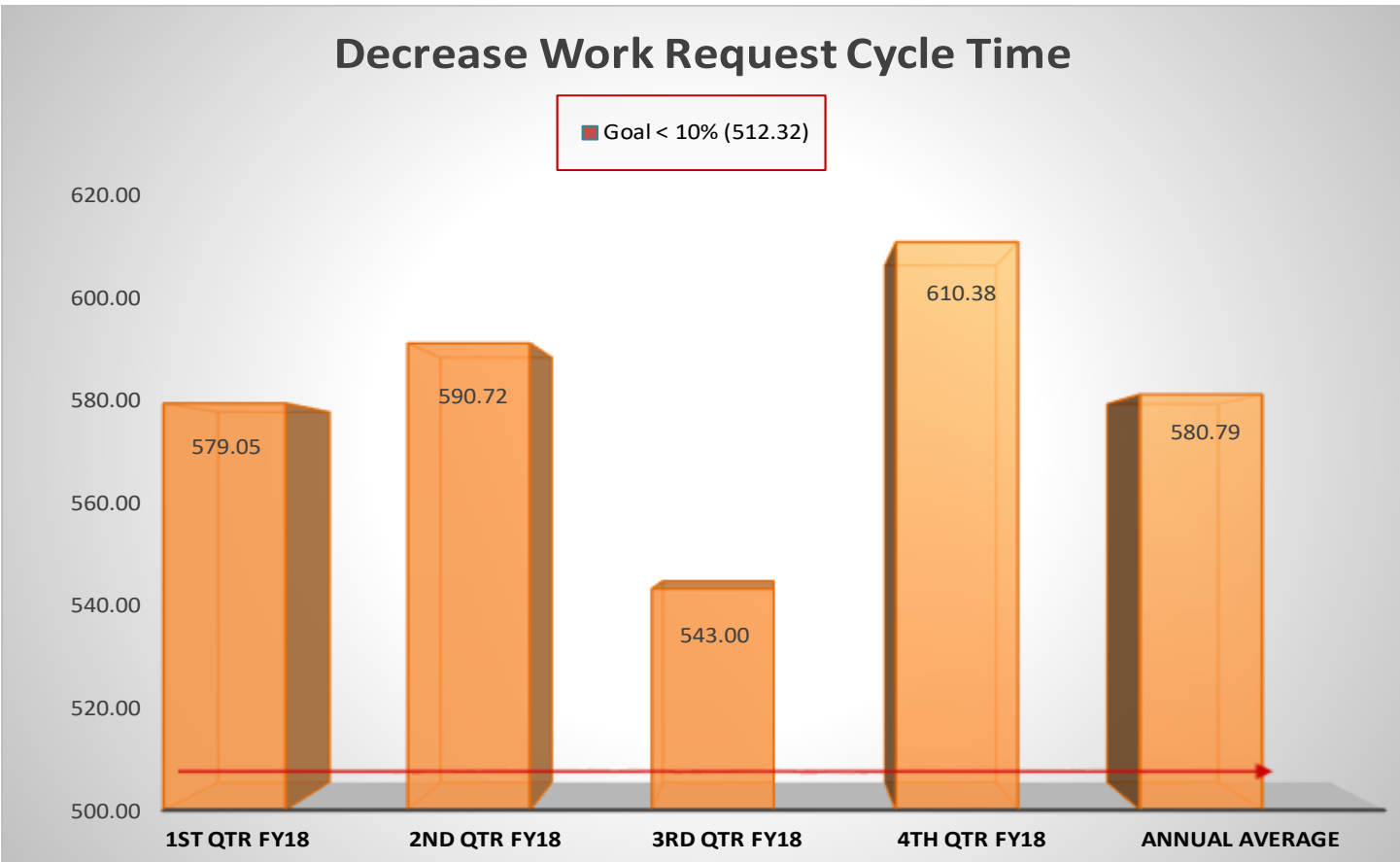
Objective: 1.3: Improve Work Request Process

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

Balanced Scorecard Category: Customer Perspective



STATUS
4th
Quarter

STATUS
Annual

GOAL #1 – Continuously Improve Maintenance and Operations

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

Lead
BES

ACTION PLAN

- **Actions Completed**
 - Completed 4 Contributing Technician Hiring Pool Cycles
 - Completed 4th cycle of “Expect What You Inspect” Inspections
- **Actions Planned**
 - Implement new HPTC Digital Training Platform (8/2018)
 - Develop new APPA Appearance forms into quarterly audits (8/2018)
 - Develop Digital Workloading for HTPC Zones (9/2018)
 - Implement High Performance Team Cleaning in all Academic and Administrative buildings (3/2022)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

Lead
BES

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

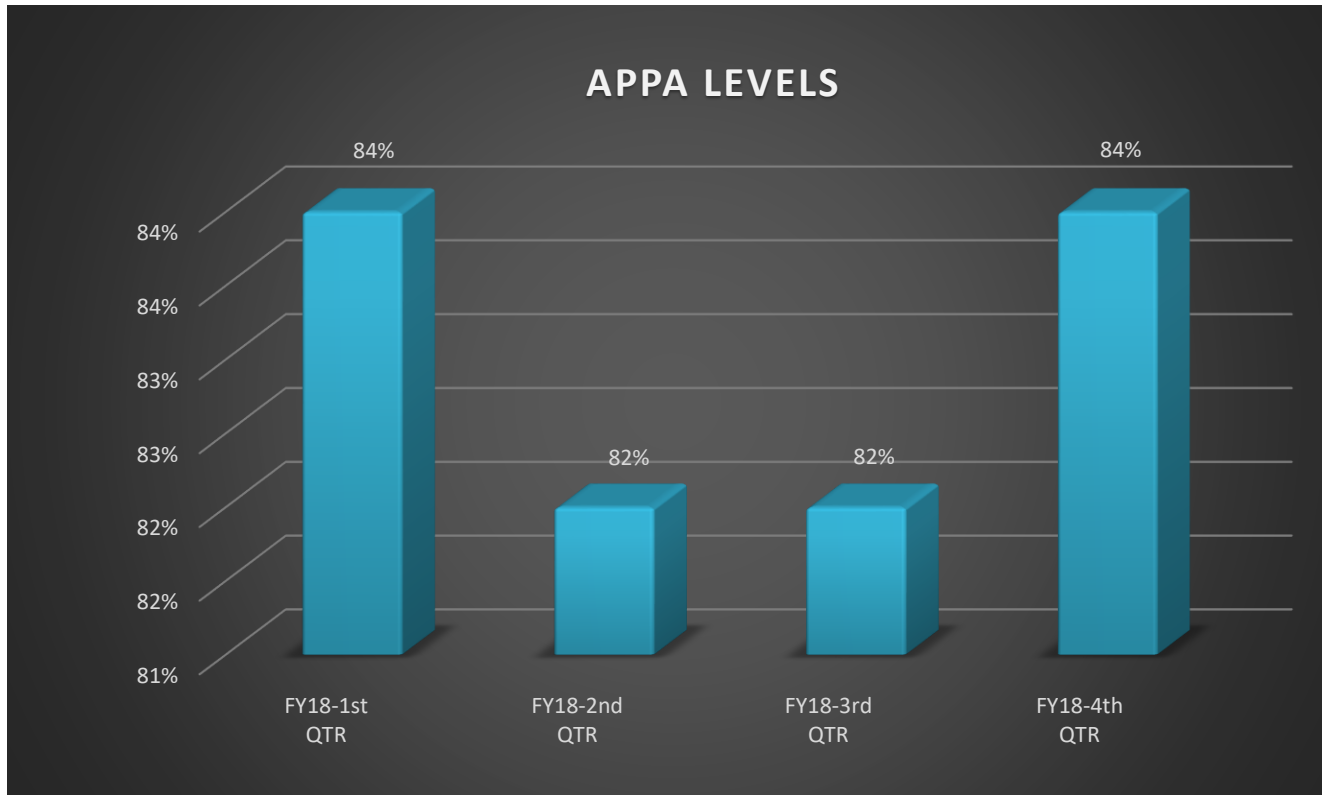
Objective: 1.4: Improve BES Processes

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

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

Lead: Building Environmental Services

Balanced Scorecard Category: Customer Perspective



Percentage = 84%

STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

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

ACTION PLAN

Actions Planned

1. Realign PM Program; targeting specific areas Fire Systems, High Voltage, Zone 4/Dining Services (On going)
2. Continue expansion of PM Program; Work with key customers – Auxiliary Services (**March 2018 completion**)
3. Using the FIN Project to perform PM's, collect asset data and perform select retro commissioning activities (on-going)
4. FCAP will continue to identify and prioritize equipment conditions and needs, for replacement; This information is used to support CRDM projects. (on-going)
5. Developing predictive maintenance condition monitoring program (Implement in 2020)
6. Activate Zone 8 to perform critical PM after normal working hours (Implement staffing plan by December 2018)
7. Increased number of PMs in the system (building reset process)

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations
2. Restructure the ARCHIBUS PM Equipment Manager module
3. Acquired vibration monitor device
4. Hired Zone 8 supervisor (June 2018)

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

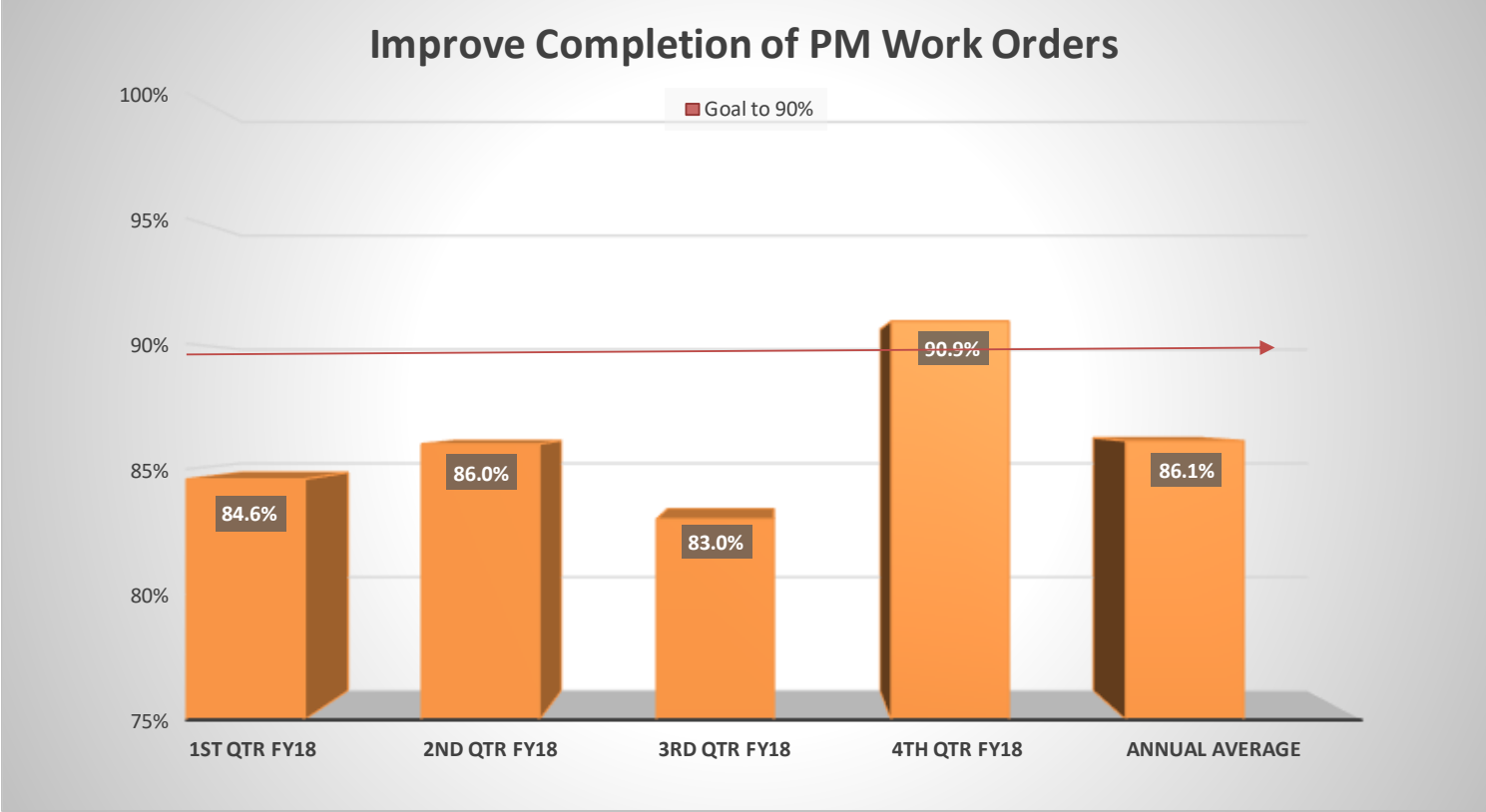
Objective: 1.5: Improve Facility Systems Reliability

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

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS
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Quarter

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GOAL #1 – Continuously Improve Operations of Campus Facilities

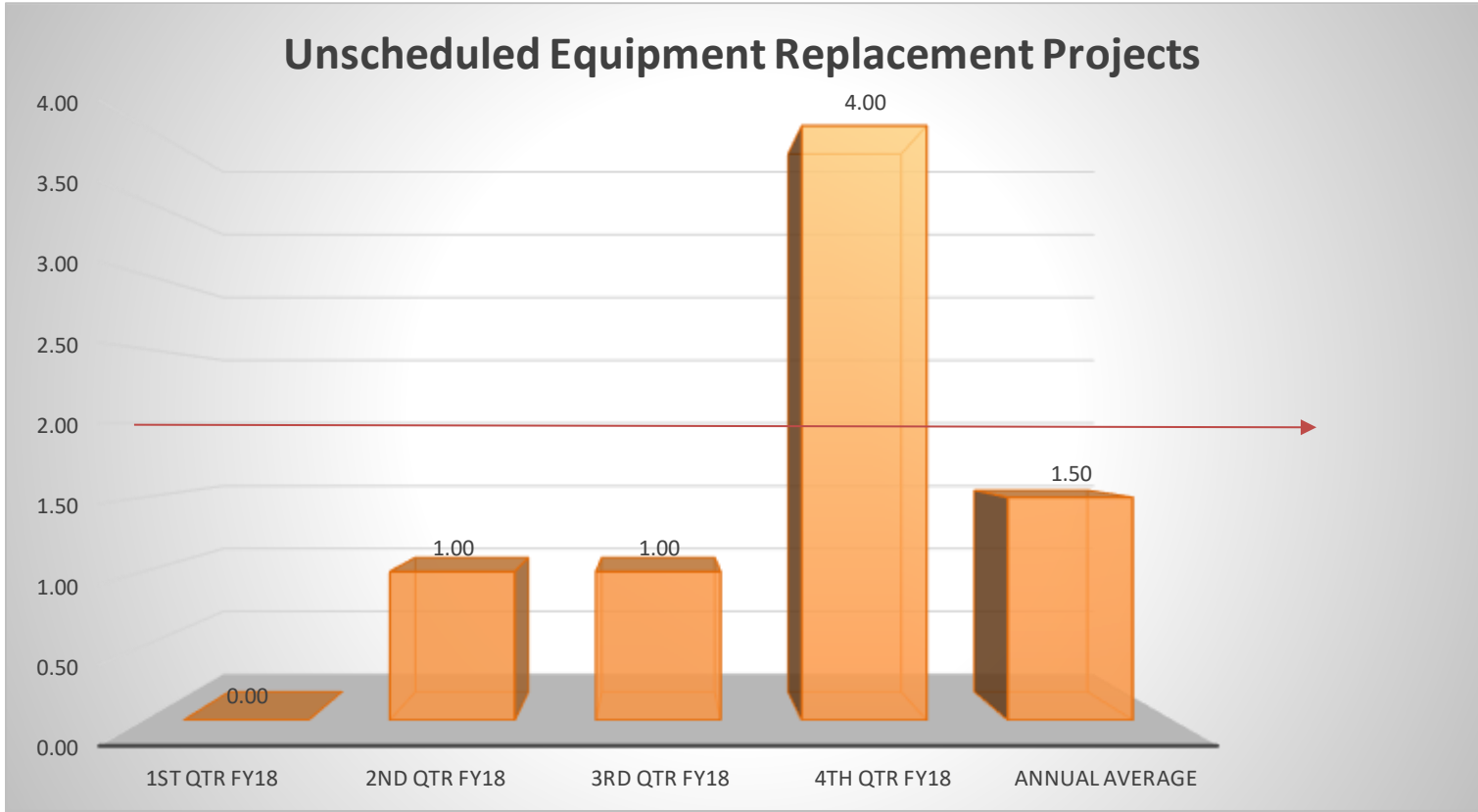
Objective: 1.5: Improve Facility Systems Reliability

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

Balanced Scorecard Category: Internal Business Process



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GOAL #1 – Continuously Improve Operations of Campus Facilities

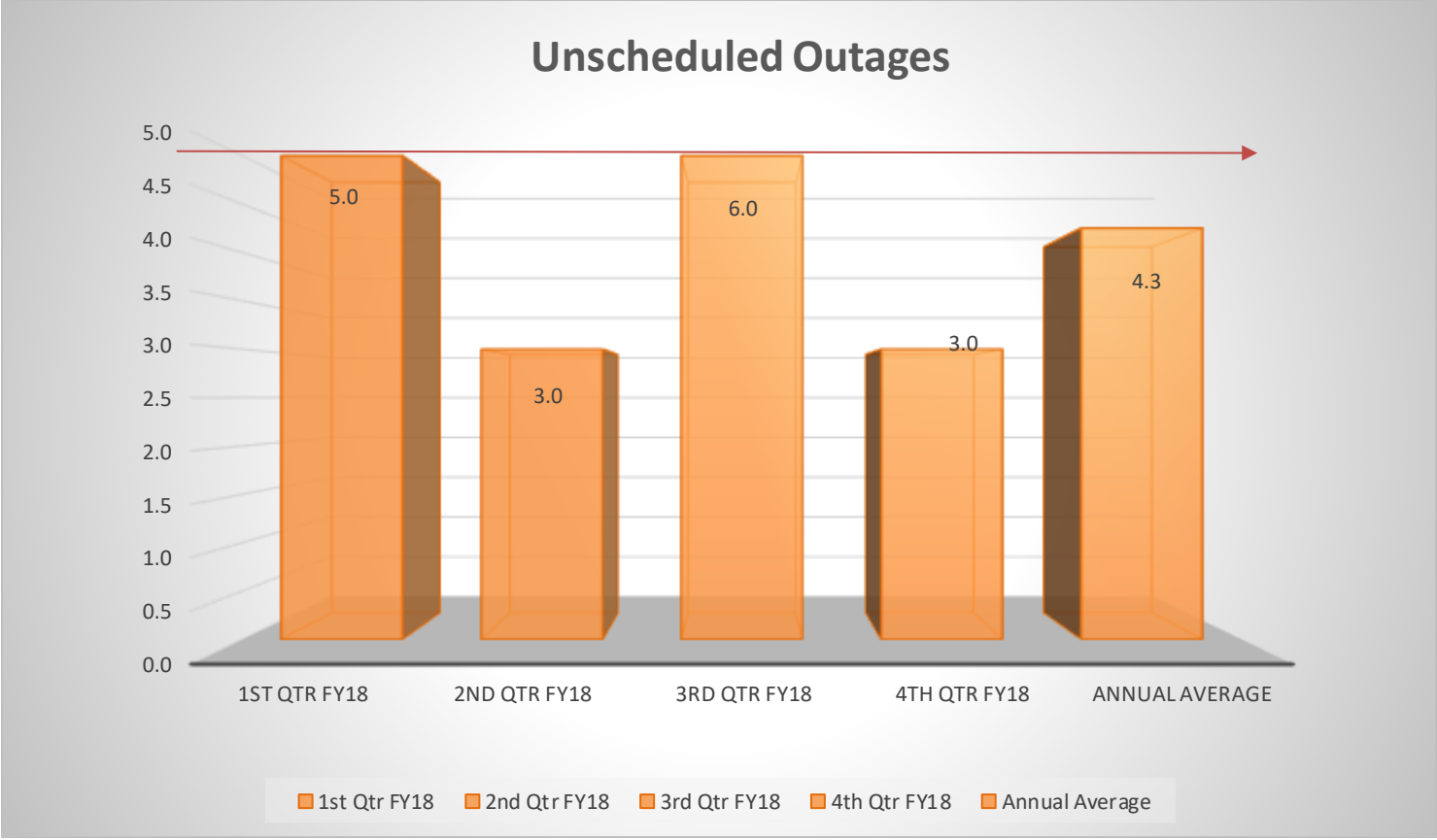
Objective: 1.5: Improve Facility Systems Reliability

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

Balanced Scorecard Category: Customer Perspective

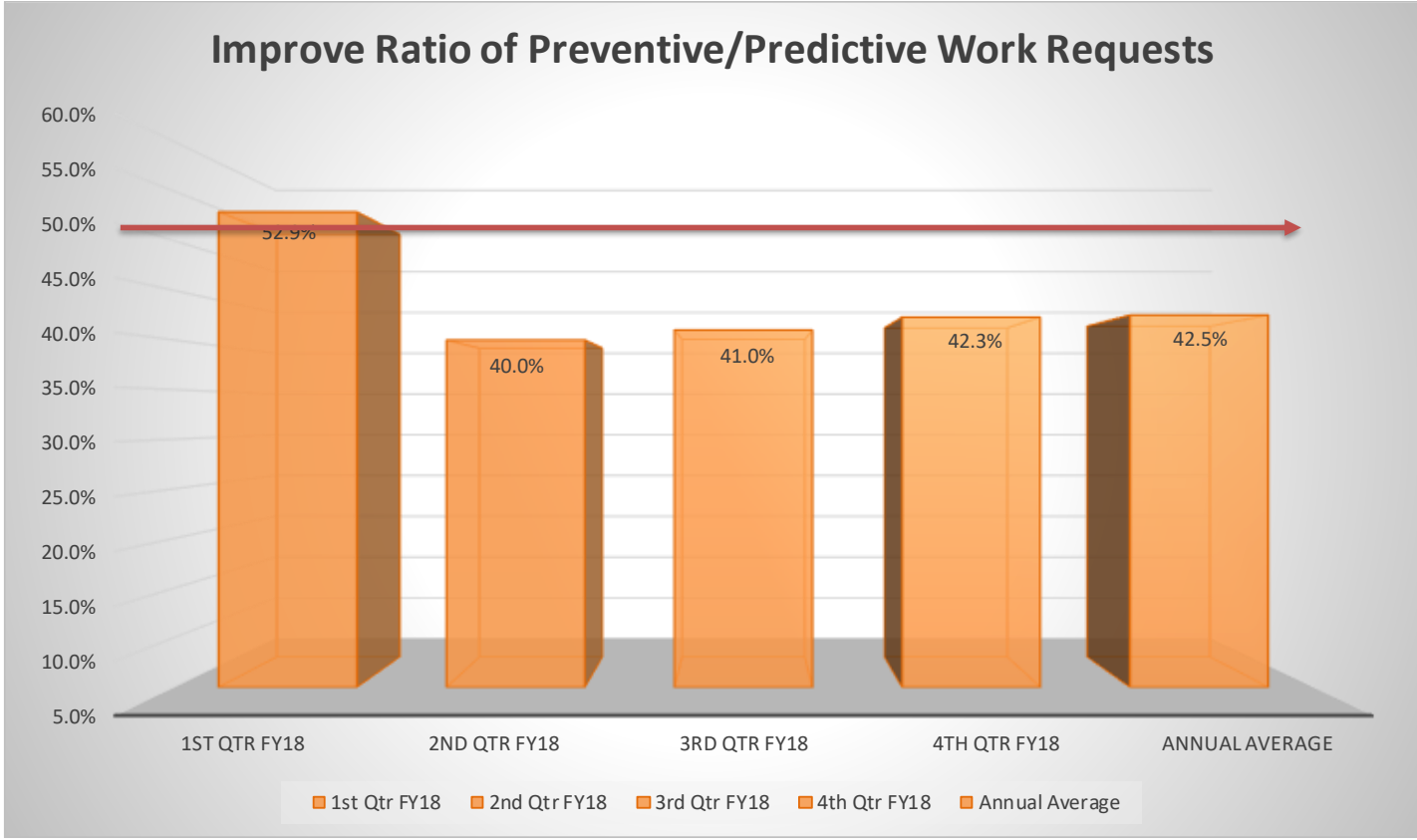


STATUS
4th
Quarter

STATUS
Annual

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective



STATUS
4th
Quarter

STATUS
Annual

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Planned:

1. Hire AutoCAD Technician temp position by Aug 30, 2018.
2. Meet with FO on Work Request Console reported issues and requests by Aug 30, 2018.
3. Complete Zone Shop Supervisor and Lead Tech Work Request Console Training by Aug 15, 2018.
3. Begin project meetings for BAS Analytics project by Aug 15, 2018.
4. Schedule and conduct project meeting with FM departments on Drop box and Google Drive use by Aug 10, 2018.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Lead
FIS

ACTION PLAN

Actions Completed:

1. Completed Work Request Console development.
2. Completed Refrigeration CANVAS Training.
3. Completed Phase 1 FIN VAV and Metering Data.
4. Deployed new Recycling Mobile device replacements.
5. Completed Risk Management integration.
6. Complete updates to PM/EQ views.
7. Completed Evacuation Maps (for EHS).
8. Completed remainder of AHU FIN Graphics updates.

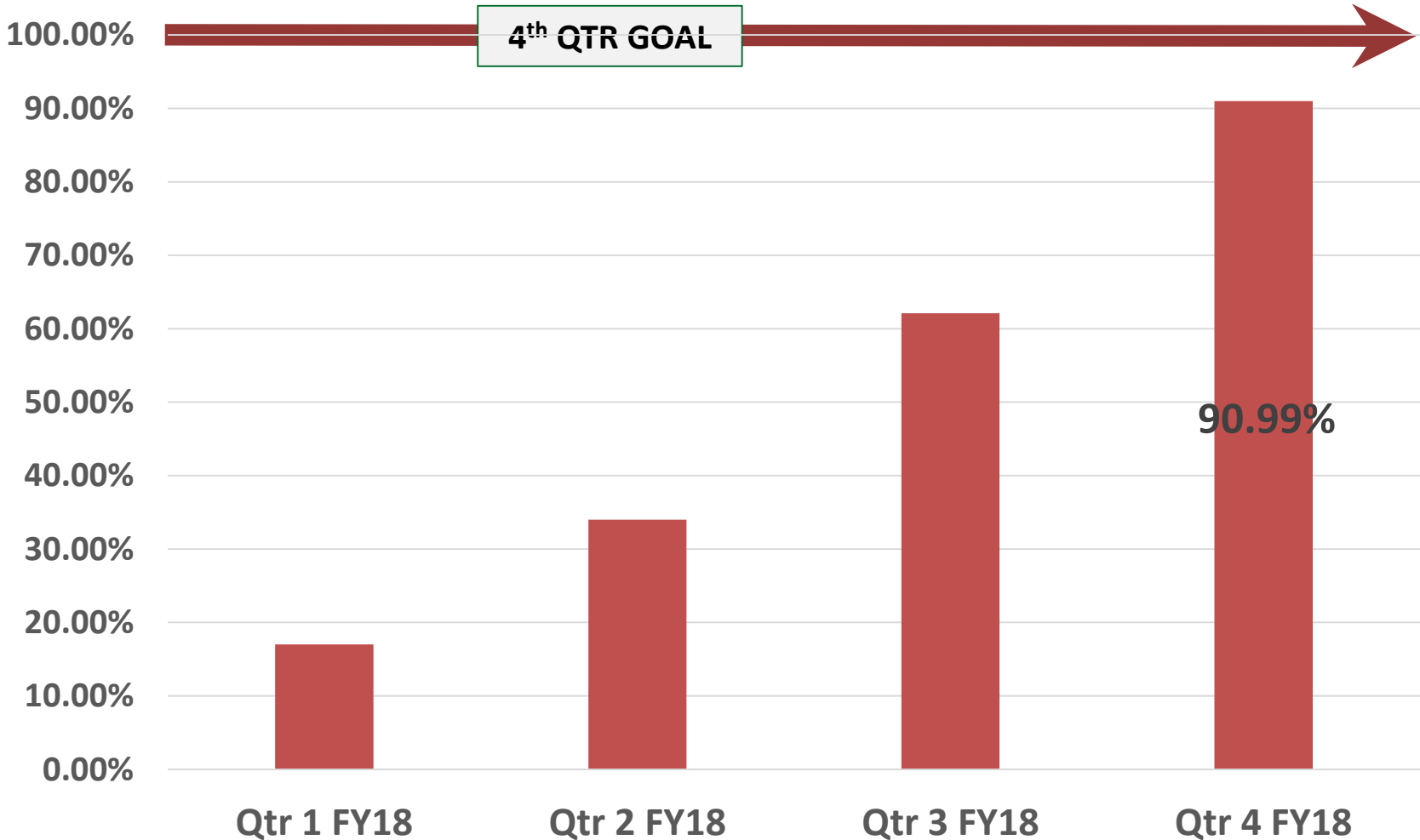
Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Processes

Cumulative Project Task Completion Percentage



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

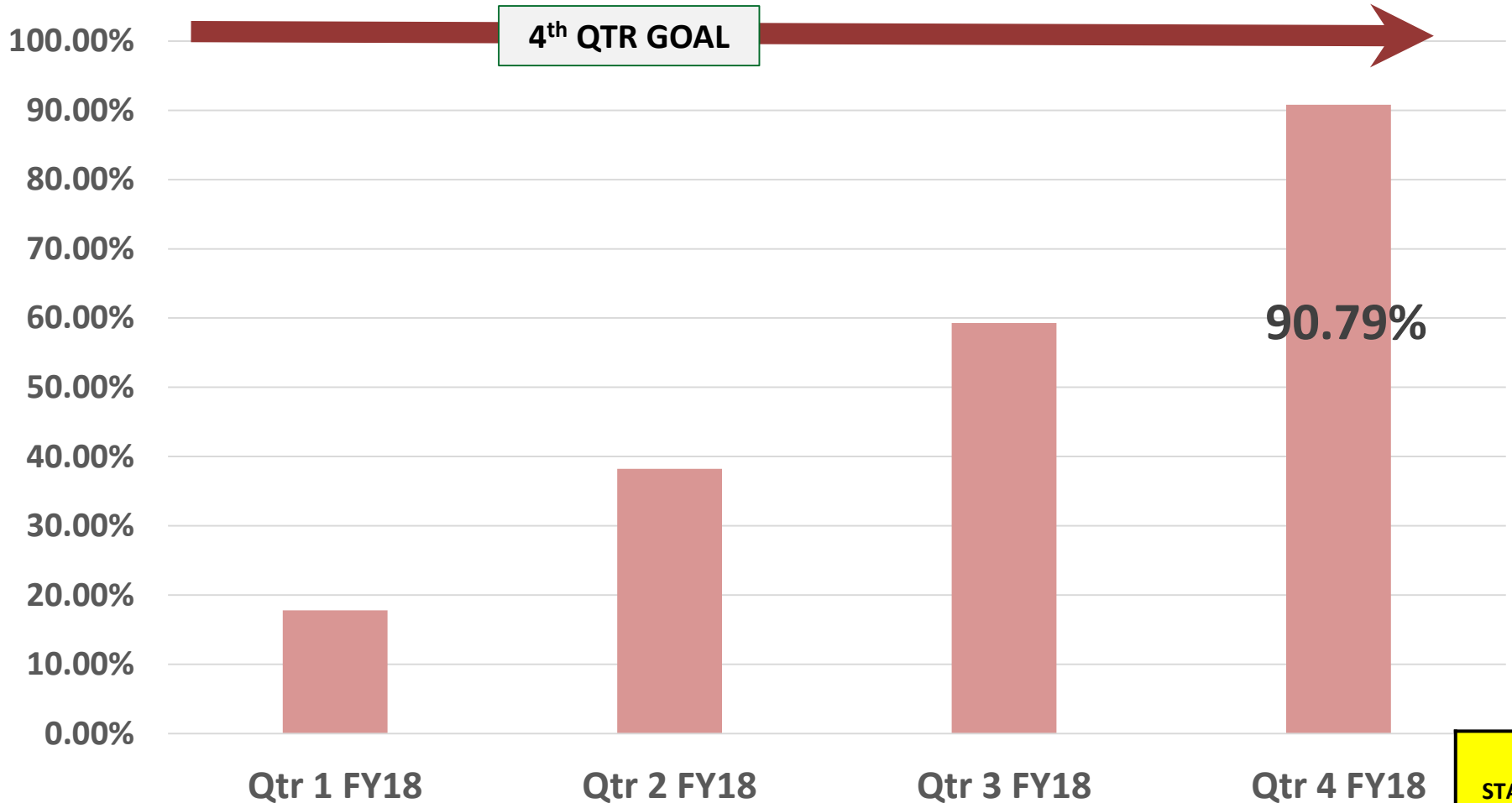
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

Balanced Scorecard Category: Internal Business Processes

FIS Weighted Project Average Completion



Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

**Lead
FIS**

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

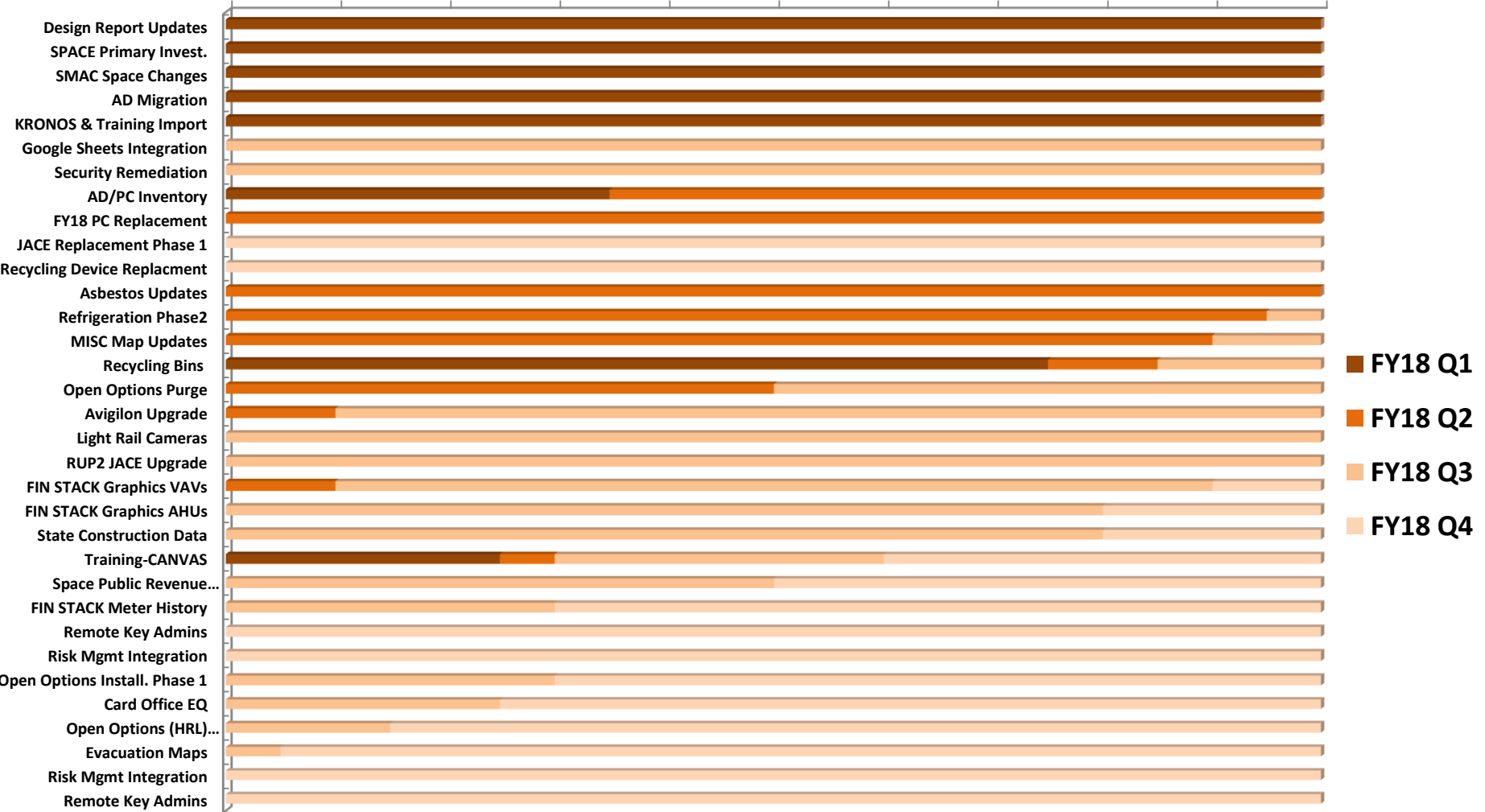
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

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

Balanced Scorecard Category: Internal Business Processes

COMPLETED PROJECTS TO DATE

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



FM Prioritized Projects – FY18

COMPLETED PROJECTS:

1. Primary Investigators (SPACE)
2. Design Services Report Updates
3. KRONOS ARCHIBUS Training Import
4. Google Sheets Integration
5. AD PC Inventory Clean Up
6. Active Directory Migration
7. FY18 Computer Replacement Project
8. Asbestos Updates
9. Classroom Support Asset Tracking
10. Space Committee Changes (SMAC)
11. Refrigeration Compliance Phase 2
12. BES Recycling Bin & APP Revamp
13. Avigilon Upgrade
14. Open Options Data Purge
15. MISC Map Updates
16. ARCHIBUS Security Remediation
17. Light Rail Cameras (Genetec)
18. RUP2 JACE Integration
19. ARCHIBUS WO Reinvention
20. ARCHIBUS Canvas Training
21. Open Options Integration (HRL)
22. Open Options Conversion Project Phase 1
23. Space Revenue Tracking (Private/Public) Report
24. Remote Key Admins
25. Evacuation Maps (EHS)
26. Card Office EQ Management
27. Risk Management Integration
28. FIN STACK Graphics AHUs
29. FIN STACK Graphics VAV
30. FIN STACK Graphics Meter History Import
31. State Construction Property Analysis
32. Recycling Device Replacements
33. JACE Replacement Phase 1

FM Prioritized Projects – FY18

PROJECTS IN PROGRESS:

- 1. Real Estate Phase 3 – Est. July 30, 2018**
- 2. BAS FIN Tagging – Est. July 30, 2018**
- 3. FIN STACK Energy Report – Est. Aug 30, 2018**
- 4. FCAP: PM & Equipment – Est. Aug 30, 2018**
- 5. Critical Alarms (Periscope & FIN) – Est. Aug 30, 2018**
- 6. ASP Printing – Est. Aug 15, 2018**
- 7. Radio Canvas Training – Est. Aug 30, 2018**
- 8. Radio Inventory – Est. Aug 30, 2018**

FM Prioritized Projects – FY18

CANCELLED PROJECTS

1. GIS Parking Counts – Cancelled by CIO
2. GIS Department Map – Cancelled by FIS

*OTHER PROJECTS – Moved to Next Fiscal Year:

1. ARCHIBUS Fleet Module – *(Awaiting Funding)*
2. 49er Mart Integration (Jaggaer) – *(Awaiting Funding)*
3. GIS Wayfinding Signage – *(Moved to FY19)*
4. ARCHIBUS Lockout/Tag Out (LOTO) – *(Moved to FY19)*
5. Equipment Maps – *(Moved to FY19)*
6. FIN STACK Hot Water Chill Water Graphics – *(Moved to FY19)*
7. BAS Analytics – *(Moved to FY19)*
8. Department Drop boxes – *(Moved to FY19)*
9. Mobile Floor Plans – *(Moved to FY19)*
10. Mobile Intent Reinvention – *(Moved to FY19)*
11. ARCHIBUS Testing Framework – *(Moved to FY19)*
12. Project Management Tools/Updates – *(Moved to FY19)*

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

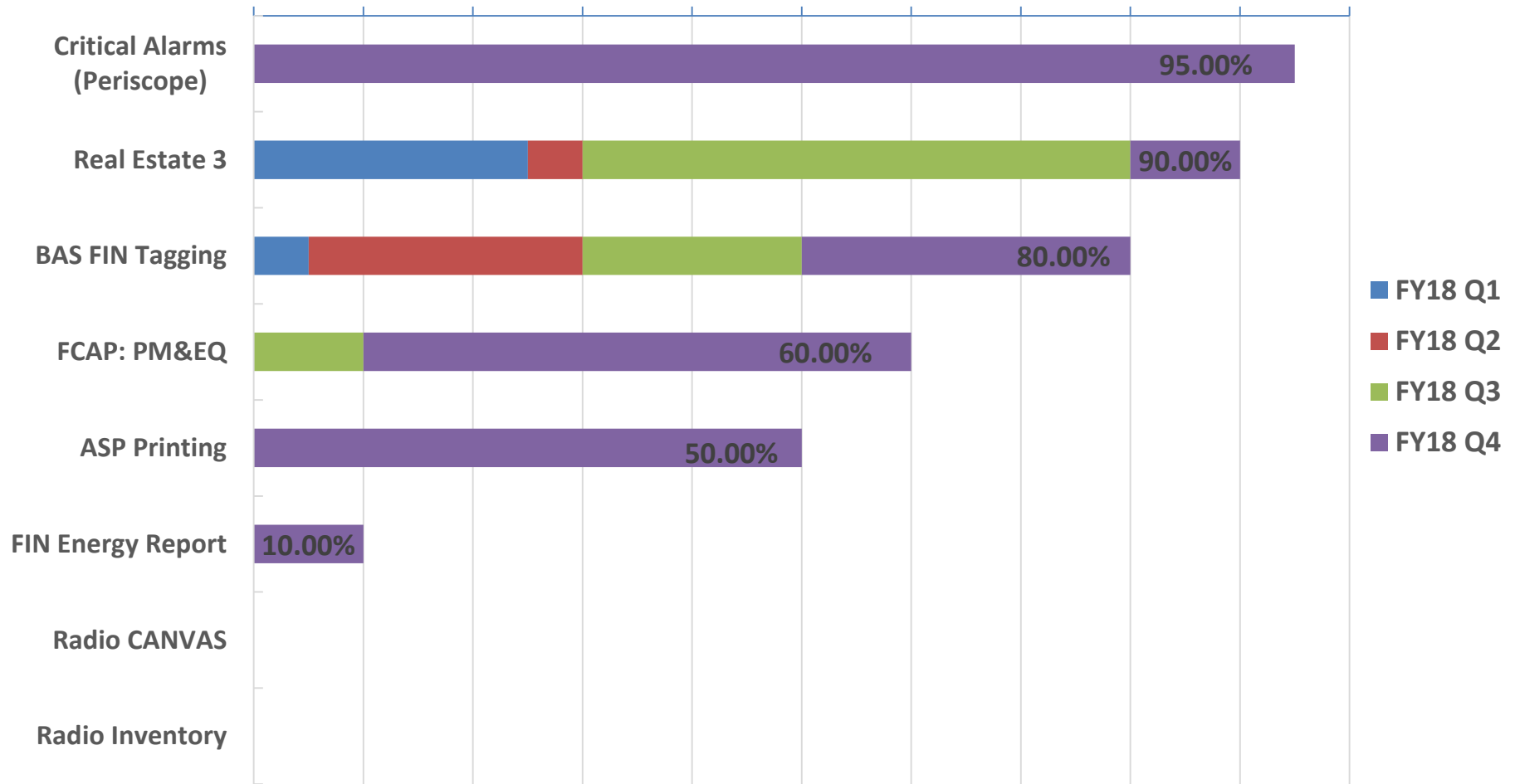
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

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

Balanced Scorecard Category: Internal Business Processes

PROJECTS IN PROGRESS

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



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1:	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure:	Percentage (Number of Construction Projects Completed on or before Delivery Date Divided by Total Number of Projects Completed)
Tactic 2.2.2:	Review Project Capacity - Goal 220 projects per year
Measure:	Number of Projects Completed (Annual Goal)

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Design Services Engineering: Monthly meetings to review projects having multiple design disciplines.
Coordinate project requirements & assist other staff with engineering needs.

✓ *Timeline: **FY19 QTR 1 - FY19 QTR 4 – Work In Progress***

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

✓ *Timeline: **FY18 QTR 3 - FY19 QTR 4– Work In Progress***

Job Order Contracting (JOC) Renewal Process: Reviewing Possibility for Electrical JOC and Civil JOC.

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

ONGOING IMPROVEMENTS

- Continue to assign Classroom Capacity and provide ADA egress information per building.
- Meet with Customers to clarify full set of Design Services processes. May occur via telephone.
- Meet with Customers during Punch List Phase to validate project complete status.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Annual Goal
95%

QTR 4 Status
95.3%

Lead
Design Services

Annual Status
95.2%

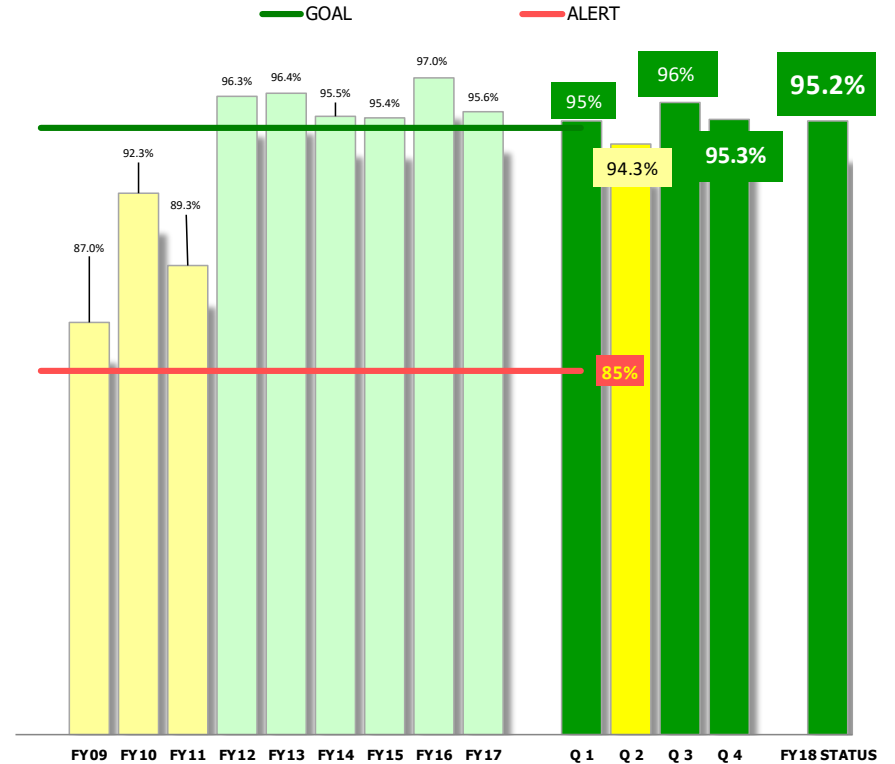
Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects Completed on or before Delivery Date Divided by Total Number of Project Completed)

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

FY 18

QUARTERLY REVIEW

	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY09	115	100	15	87.0%
FY10	182	168	14	92.3%
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
FY16	233	226	7	97.0%
FY17	205	196	9	95.6%
Q 1	21	20	1	95.2%
Q 2	35	33	2	94.3%
Q 3	25	24	1	96.0%
Q 4	129	123	6	95.3%
FY18 STATUS	210	200	10	95.2%



Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Annual Goal
220

Annual Status
210

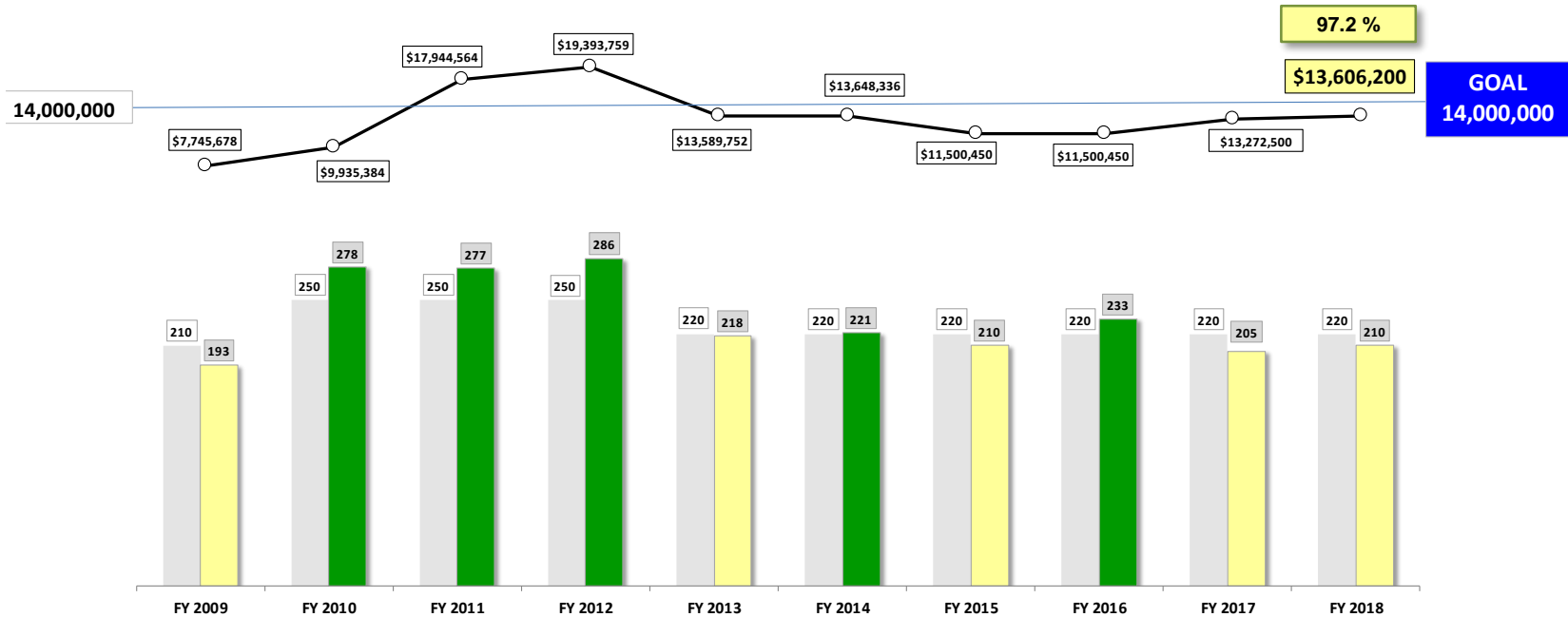
Lead
Design Services

95.5 %

Tactic 2.2.2: Review Project Capacity - Goal 220 projects per year.
Measure: Number of Projects Completed

Goal 220 Projects Per Year

	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018
GOAL	210	250	250	250	220	220	220	220	220	220
Projects Completed	193	278	277	286	218	221	210	233	205	210
Project Dollars	\$7,745,678	\$9,935,384	\$17,944,564	\$19,393,759	\$13,589,752	\$13,648,336	\$11,500,450	\$11,500,450	\$13,272,500	\$13,606,200



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.2: Assess existing and proposed space for adherence to campus space guidelines.

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

Lead: Space Management

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**

- **Conduct annual physical audit of all campus space**
- **Develop Space Guidelines – incorporate in Space Management Policy**
- **Develop Metrics for Room Use Categories based on national standards**
- **Assess proposed space use for new construction and renovation projects to evaluate alignment with accepted metrics**
- **Conduct studies to assess space use and develop recommendations for space needs**

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY2018

GOAL #2 Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.2: Assess existing and proposed space for adherence to campus space guidelines.

Status

- Conduct annual physical audit of all campus space
- Develop Space Guidelines
- Develop Metrics for Room Use Categories
- Assess proposed space use for new construction and renovation projects to evaluate alignment with accepted metrics
- Conduct studies to assess space use and develop recommendations for space needs

Tactic 2.5.1: Develop Five-Year Capital Plan

Status *

- Work with divisions and departments to identify needs and priorities for capital projects
- Conduct studies to identify programmatic and space needs
- Work with Financial Services to identify potential funding for Capital Plan
- Develop initial project budgets in consultation with Capital Projects
- Establish project priorities and align with funding
- Present plan to Chancellor and Cabinet for review and input
- Complete operating Budget sheets for new capital projects for new projects

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 Five-year Capital Plan

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - ✓ ○ **Work with divisions and departments to identify needs and priorities for capital projects**
 - ✓ ○ **Conduct studies to identify programmatic and space needs**
 - ✓ ○ **Work with Financial Services to identify potential funding for Capital Plan**
 - ✓ ○ **Develop initial project budgets in consultation with Capital Projects**
 - ✓ ○ **Establish project priorities and align with funding**
 - ✓ ○ **Present plan to Chancellor and Cabinet for review and input**
 - ✓ ○ **Complete operating Budget sheets for new capital projects for new projects**

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.5	Improve the Capital Planning and Design Process
Tactic	2.5.2	90% of designers under contract within 120 days of the Project posting in INTERSCOPE PLUS
	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

- Sycamore Hall Renovation (2.5.4)

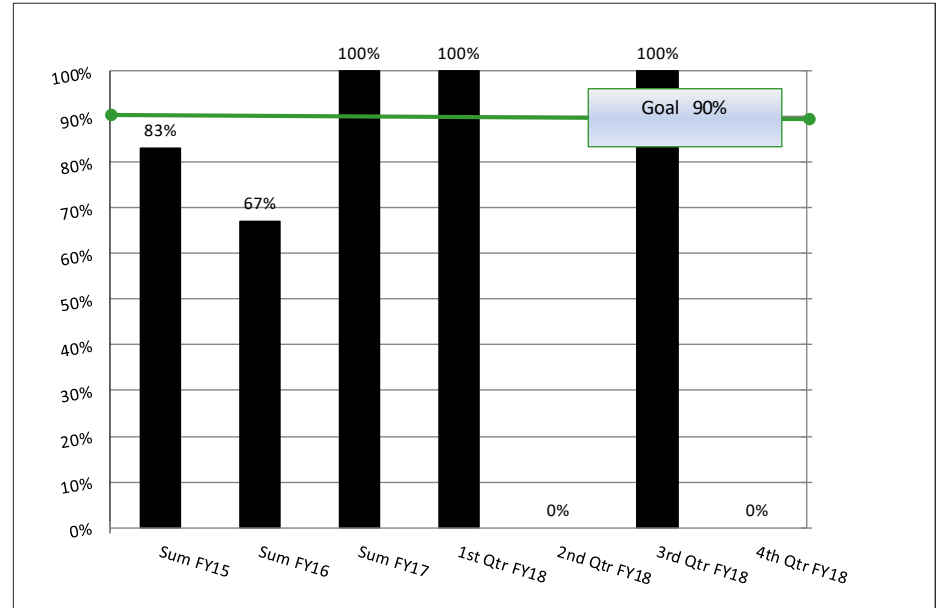
Actions Planned

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

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



Status

Tactic Measurement for 4th Quarter is N/A

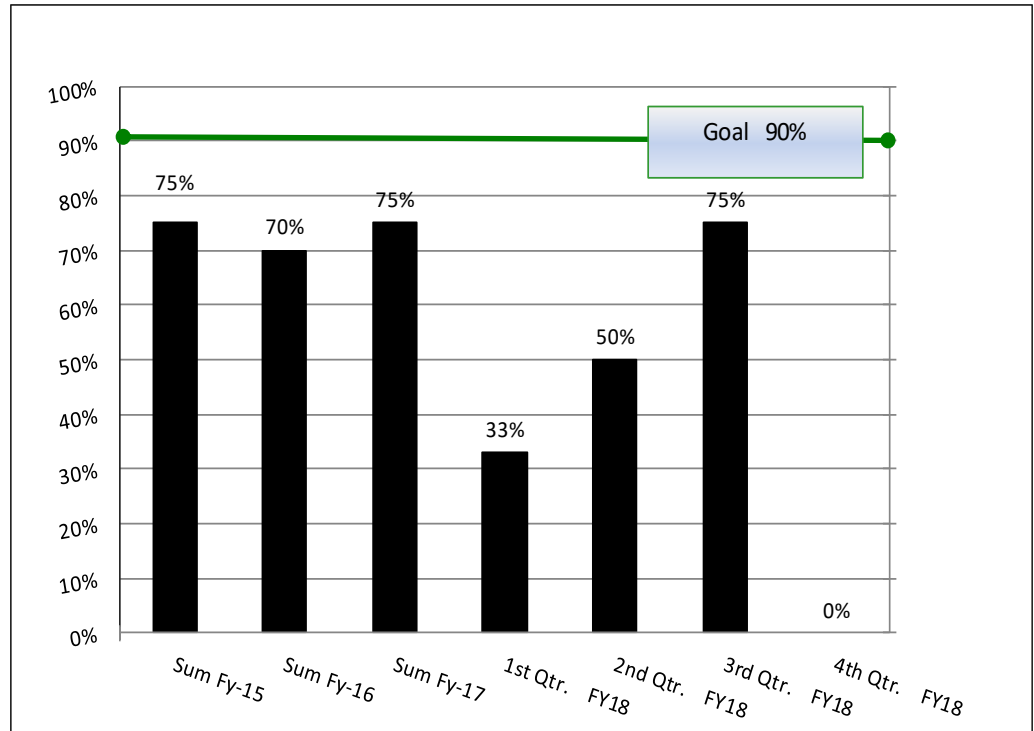
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	NO. of projects completed by scheduled time	#not completed by scheduled time	% Designs complete by completion time
Summary FY-15	3	1	75%
Summary FY-16	7	3	70%
Summary FY-17	6	2	75%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	2	1	50%
3rd Qtr. FY-18	3	1	75%
4th Qtr. FY-18	0	0	N/A



Status

Tactic Measurement for 4th 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

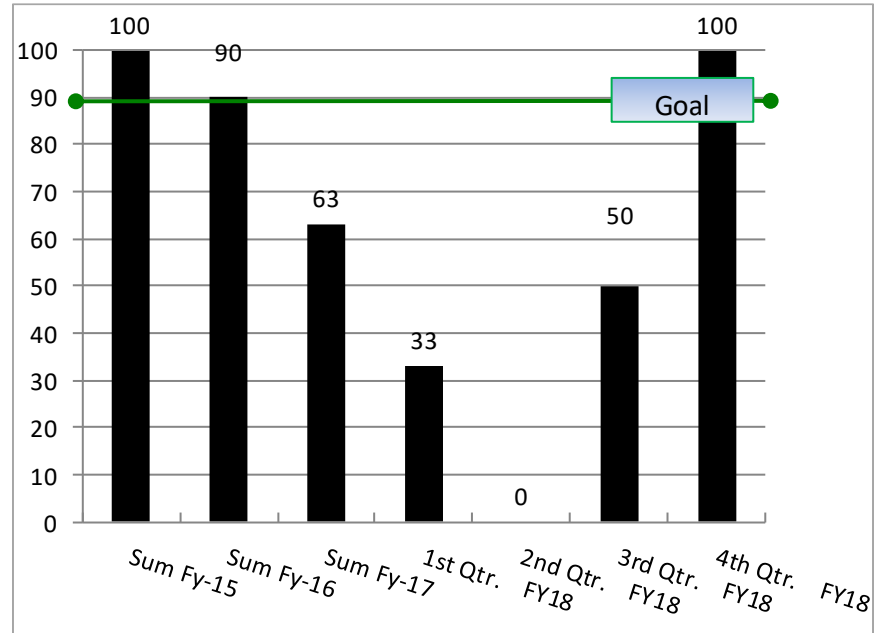
Measure: Percentage of designs completed within the original design contract amount

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-15	3	0	100%
Summary FY-16	9	1	90%
Summary FY-17	5	3	63%
1st Qtr. FY-18	1	2	33%
2nd Qtr. FY-18	0	2	0%
3rd Qtr. FY-18	2	1	50%
4th Qtr. FY-18	1	0	100%



Sycamore Hall Renovation



Tactic Measurement for 4th Quarter is 100%

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

Actions Complete

- Campus Infrastructure Renewal (Atkins)

Actions Planned

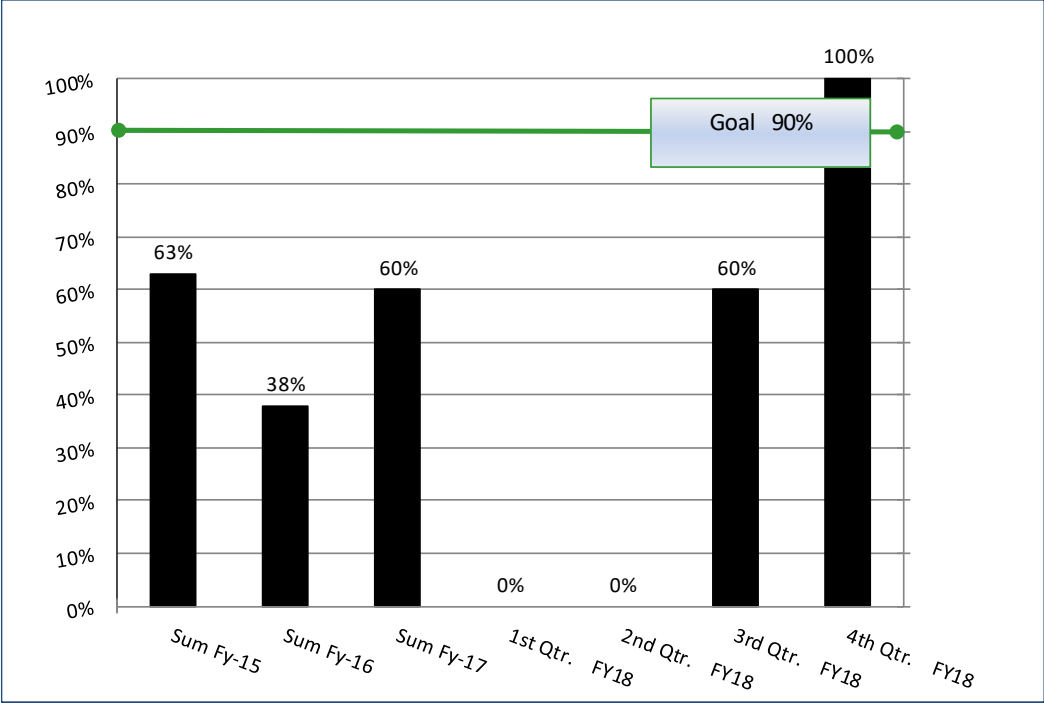
- CMs keep schedules current & refer to them regularly.
- CMs discuss schedule (baseline & current) with end users, designers & contractors.
- CMs maintain project budgets & account reports monthly.
- Maintain control over use of owner contingency.
- Oversee proper use of CM contingency.
- Manage construction scope creep
- Use Earned Value Management
- Occupy the following projects:
Union Deck, Scott Hall, Belk Plaza, FOPS, Campus Circulation (Wallis speed table),
Baseball Indoor Training, Phase 16 Early Site, Science Phase 1, CIR 3,
Academic Complex Phase 2

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 STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-15	5	3	63%
Summary FY-16	3	5	38%
Summary FY-17	3	2	60%
1st Qtr. FY-18	0	0	0%
2nd Qtr. FY-18	0	3	0%
3rd Qtr. FY-18	3	2	60%
4th Qtr. FY-18	1	0	100%



Campus Infrastructure (Atkins), completed 3 months ahead of schedule.

Tactic Measurement for 4th Quarter is 100%

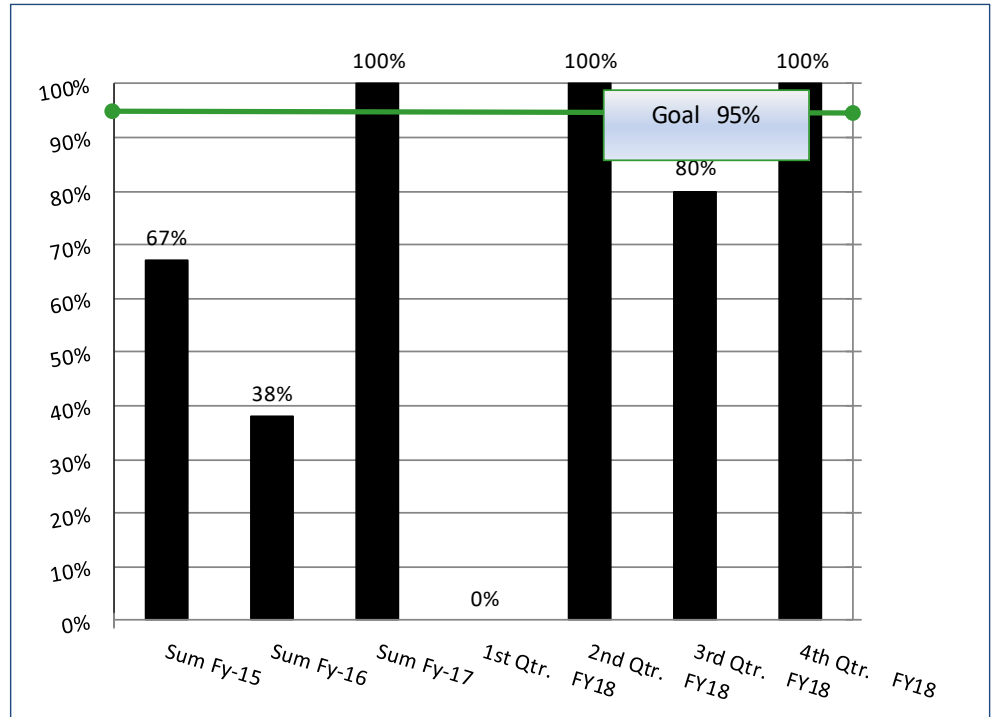
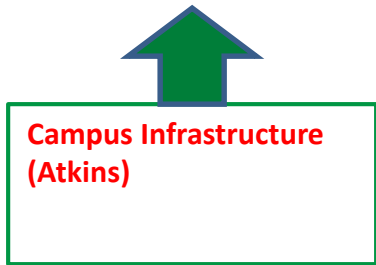
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

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



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

1. Improvements and Upgrades to the MV power distribution system (Includes non destructive cable testing, automated switching capability and equipment upgrades - Aug 2020 – needs funding)
2. Continue monthly and annual PM service on generators
3. Predictive maintenance -implement Di-electric Oil Testing on transformers (2020 - needs funding)
4. Monthly coordination meetings with critical facility customers – on-going
5. Continuing conversations with key customers on campus-wide Service Level Agreement (SLA) and Memorandum of Understanding (August 2018)
6. Gathering critical systems data to assist Academic Affairs with their equipment maintenance
7. Working with lab managers to implement equipment monitoring system

Actions Completed

1. Hired critical facilities intern

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.X	Improve Customer Satisfaction for Capital Projects Clients (Proposed New Metric)
Tactic	2.X.1	Substantive project updates provided no less than monthly for design and construction status
	2.X.2	Score of 90% or better for key customer satisfaction survey metrics
	2.X.3	Significant customer issues addressed no later than the next business day

ACTION PLAN

Actions Complete

- TBD

Actions Planned

- PMs and CMs update and distribute monthly project updates with revised milestones and descriptive narrative of project status
- PMs and CMs invite stakeholders to key meetings and provide minutes to absentees and ensure critical issues are addressed when key attendees are not present
- PMs and CMs discuss evaluation metrics periodically with client before survey to ensure desired scores are obtained
- PMs and CMs discuss underperforming metrics with client after survey to determine why desired scores were not obtained and to see if actions can be taken to warrant revised scoring
- When a client discusses - in person or via phone/email - a significant concern, the PM or CM addresses that concern immediately; when additional time is needed, at a minimum respond that the concern has been received and a response will be provided by some date certain

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

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

- Theo Michelson, State Farm Insurance

GOAL #3

Foster a Customer Focused Organization



GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

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

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Online updates every four weeks. **April, May, and June 14**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - **Inside UNC Charlotte** – Phil Jones receives Frank B. Turner Award, RecycleMania results and Earth Month participation shows improvement, Motor Fleet improves ranking in 100 Best Fleets program, Bruchok joins FM as director of capital projects, and Lizotte talks sustainability on ‘Sustainable Nation’ podcast
 - **SYC Newsletter** – Construction Update (*published in Issue 44 on June 22*)

Customer Communication Initiatives (interrelated):

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

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

ACTION PLAN

Actions Planned

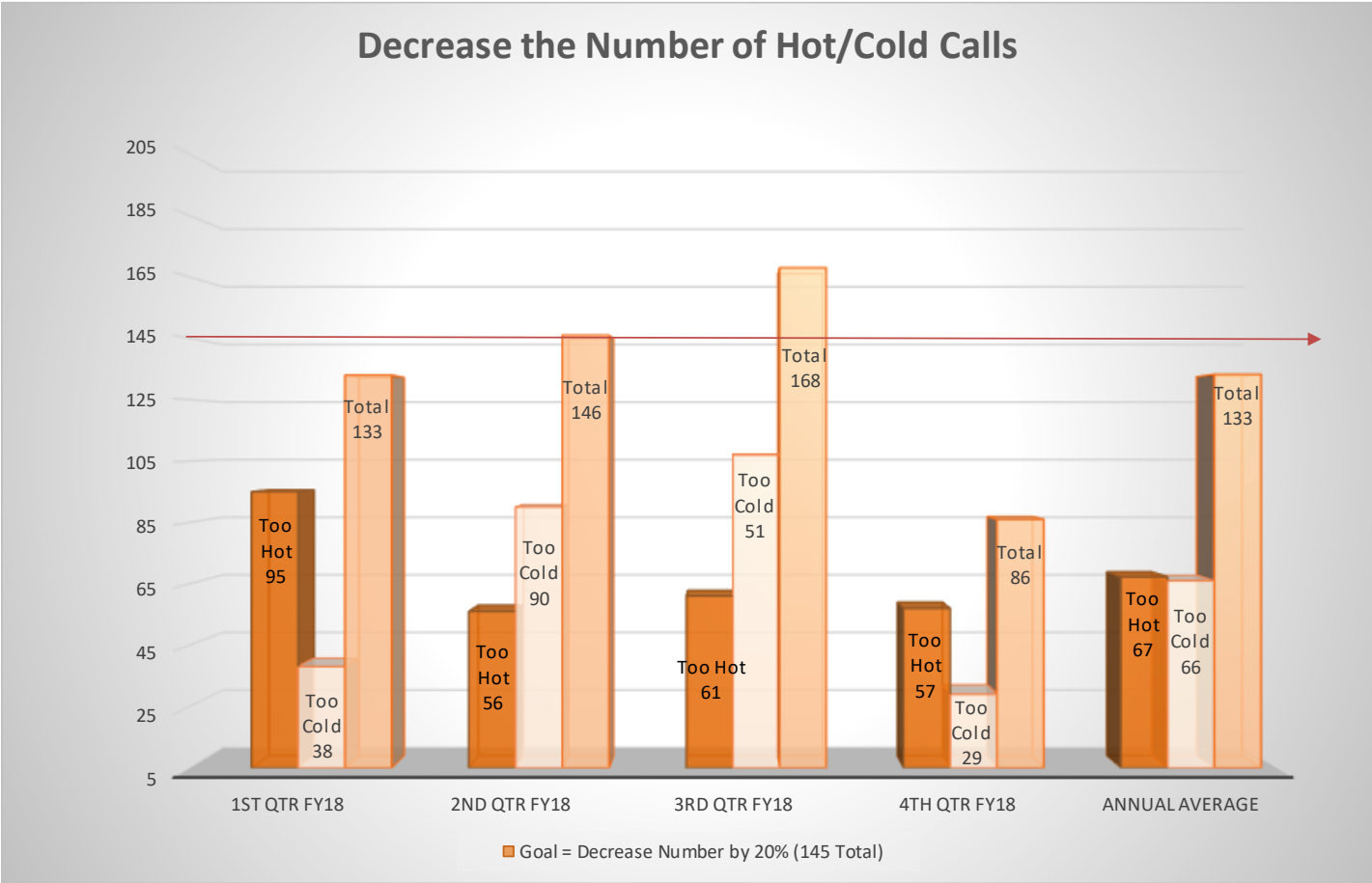
1. Continue to work with customers; educate them on the UNC Charlotte Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Working with FIS on FIN Project upgrade
4. Develop Retro Commissioning program; hire retro commissioning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

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Hired BAS Controls Specialist – Jan 2018
3. Abolished BAS position and outsourced BAS support

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
Balanced Scorecard Category: Customer Perspective



STATUS
4th
Quarter

STATUS
Annual

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Archibus – Design Services Projects Customer Survey

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Surveys:

Actions taken by Members of the Design Services Team:

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Customer Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

Measure: Results from Project Related Customer Surveys

Annual Goal
95%

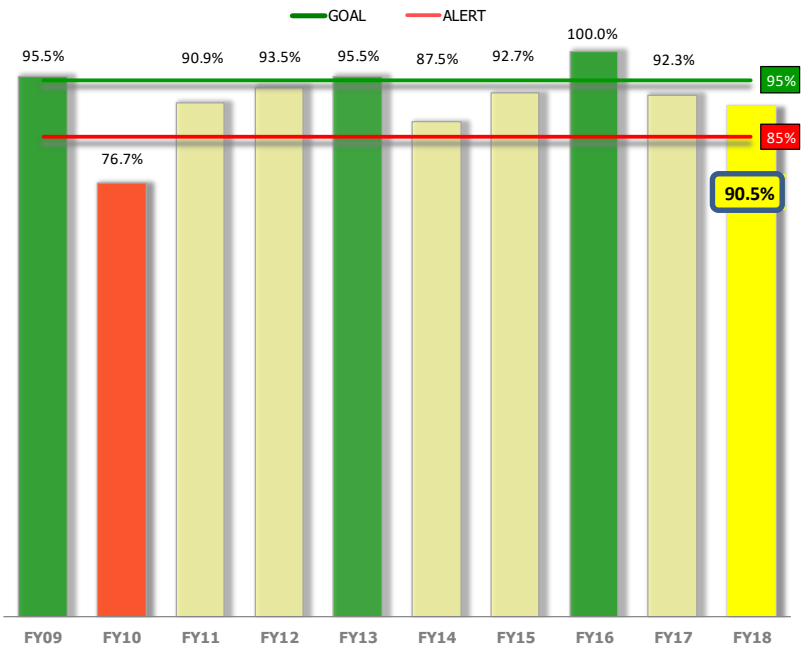
QTR 4 Status
87.5 %

Lead
Design Services

Annual Status
90.5 %

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

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less then Satisfied	Percent Satisfied
FY09	22	22	18	3	0	95.5%
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
FY16	115	32	28	4	0	100.0%
FY17	38	13	6	6	1	92.3%
FY18	91	21	13	6	2	90.5%
Q 1	20	3	2	1	0	100%
Q 2	15	5	4	0	1	80.0%
Q 3	18	5	3	2	0	100%
Q 4	38	8	4	3	1	87.5%
YEAR TO DATE	91	21	RESPONSE RATE - TOTAL			23%



GOAL: 95.0%
ANNUAL STATUS: 90.5%

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Ongoing:

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

GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

SPECIAL PROJECTS

Completed:

- Earth Month communication initiatives
- FM Business Affairs Annual Report
- SACSCOC Fifth-year audit narrative (13.7 Physical Facilities)
- Web site briefing with AVC

Upcoming:

- Assisting FO with revision of University Policy 708
- FOPS/Lock and Key Shop Moves communication plan
- FM Screens assessment and strategy plan
- Reinstate Web Advisory Group (web site overhaul)
- Establish FM Communications Task Force and Working Group
- Develop department social media strategy
- FM Communication Guidebook
- Update Professional Communications Policy #10

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

GOAL #4

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

Recruit, Develop, and Retain Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Vacancy time of no longer than 120 calendar days - Exempt

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2018

Recruitment and Retention Strategies:

- New Interview Preparation Strategy
 - a) Meet with Hiring Manager for more insight on hiring needs
 - b) Position Description – Need more specific details of job duties
 - c) Hiring Manager to review and update (with guidance from FM HR) interview questions to meet the needs of the position
 - d) Gloria Verlezza will be the point of contact for creation of the interview guides

- New Orientation/On-boarding process with main HR

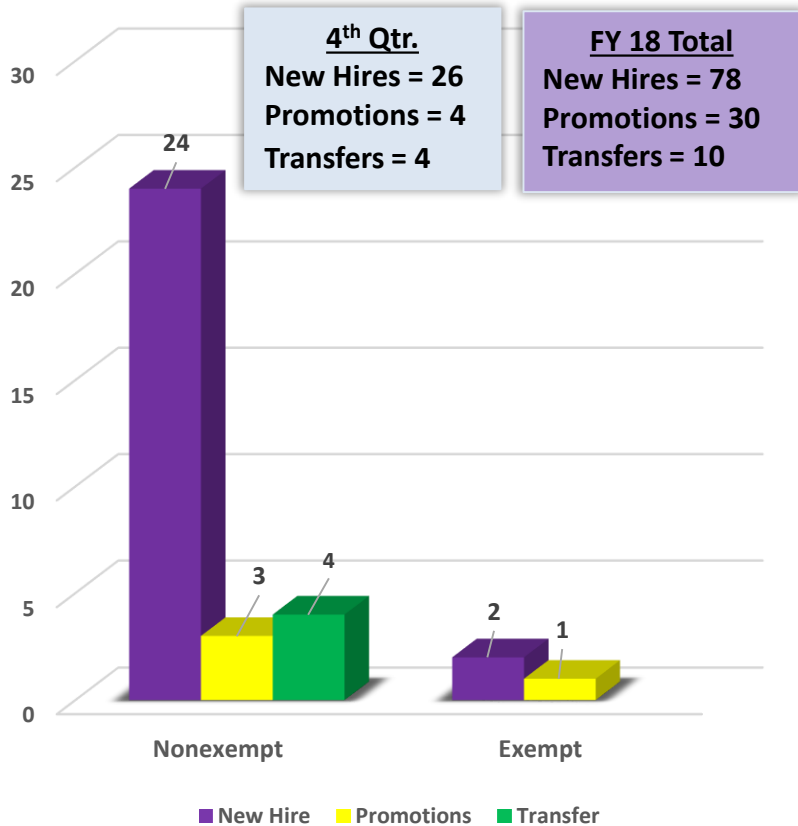
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

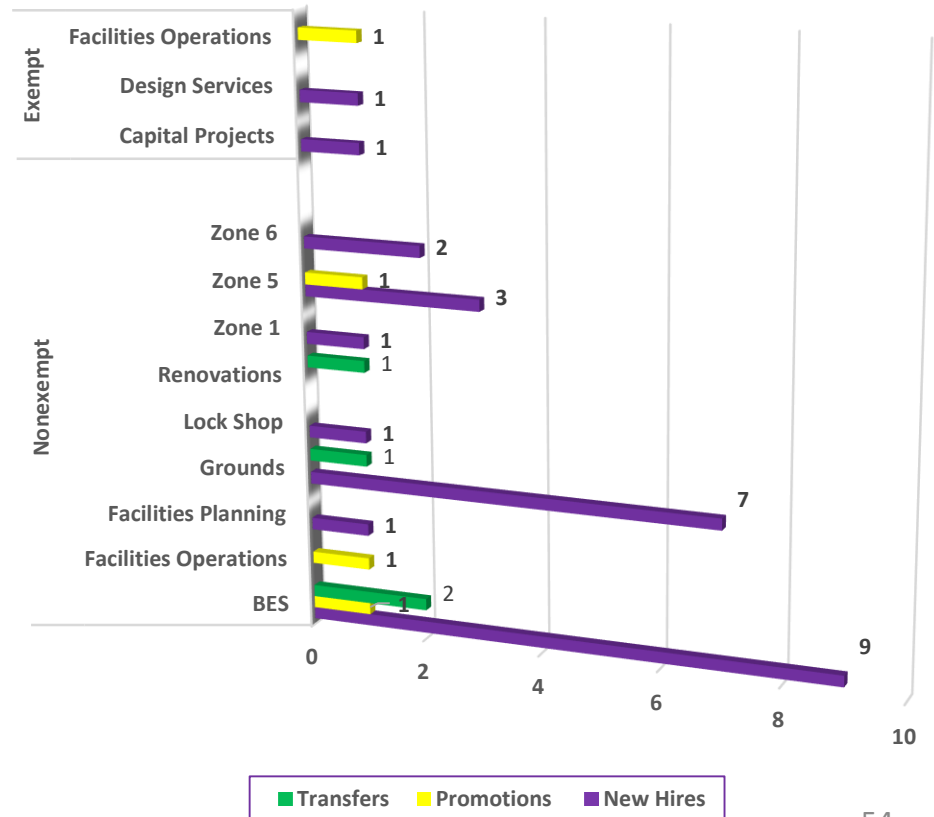
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
 Vacancy time of no longer than 120 calendar days - Exempt
Measure: Days needed to fill vacant positions

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

FM New Hire/ Promotion 4th Quarter FY 2018



FM New Hires / Promotions per Unit - 4th Quarter FY 2018



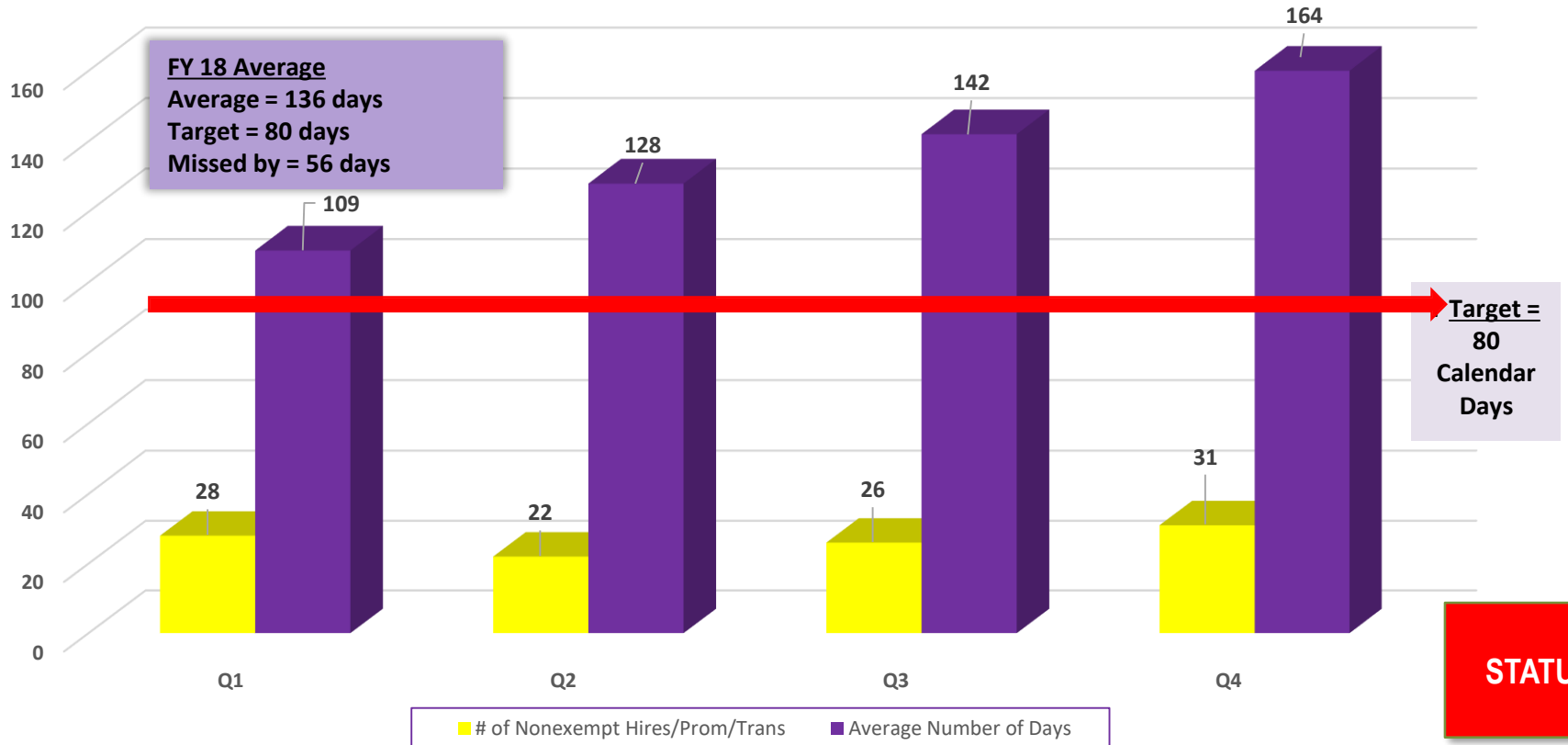
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

Average Number of Days to Fill Nonexempt Vacancies - FY 2018



Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

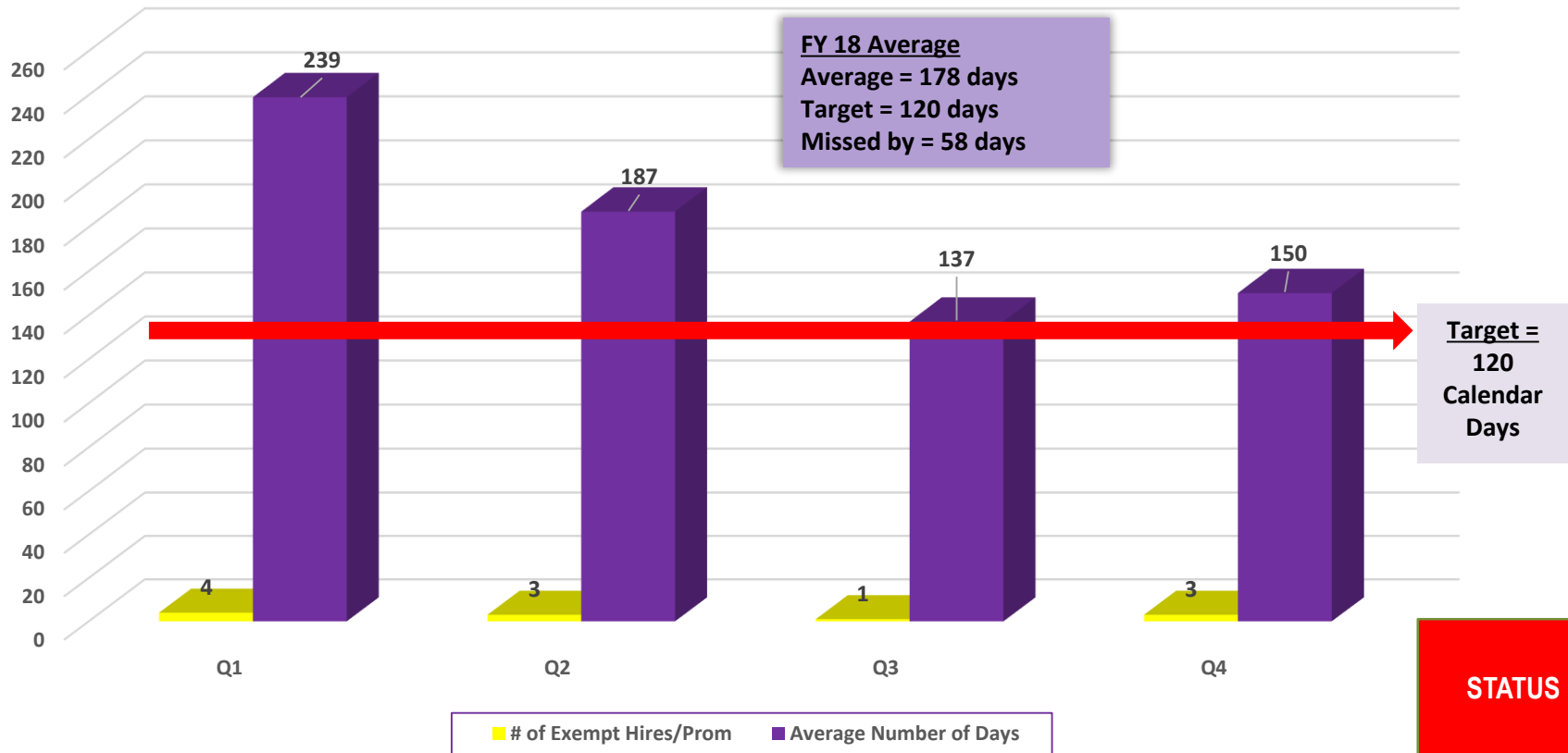
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Exempt (Salaried) Vacancies - FY 2018



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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

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

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2018

- 2017/2018 Performance Appraisal Process is completed
- Work Plans were due June 30, 2018. We still have some outstanding
- Off-cycle Reviews – Supervisors please remember to do Off-cycle reviews in NinerTalent quarterly. This is an informal process to give feedback on performance
- Employee Relations Issues – Charleata Neal and Leigh Richardson are the points of contact. Charleata can be reached at 7-8470 and Leigh can be reached at 7-8002

Facilities Management Strategic Planning Session - Fourth Quarter FY 2018

**Lead
FBO**

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

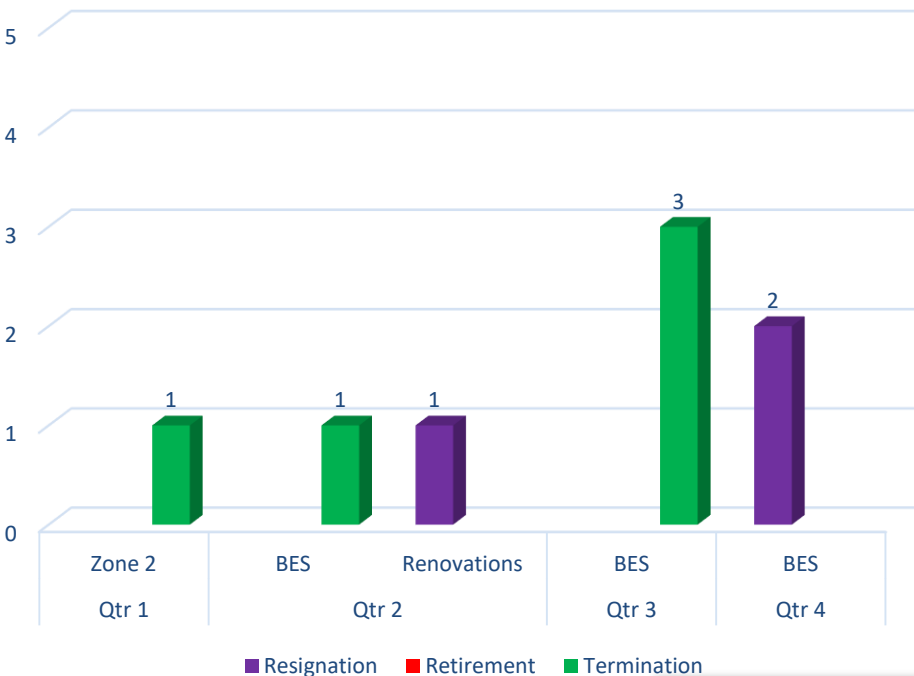
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Separated before end of probationary period.

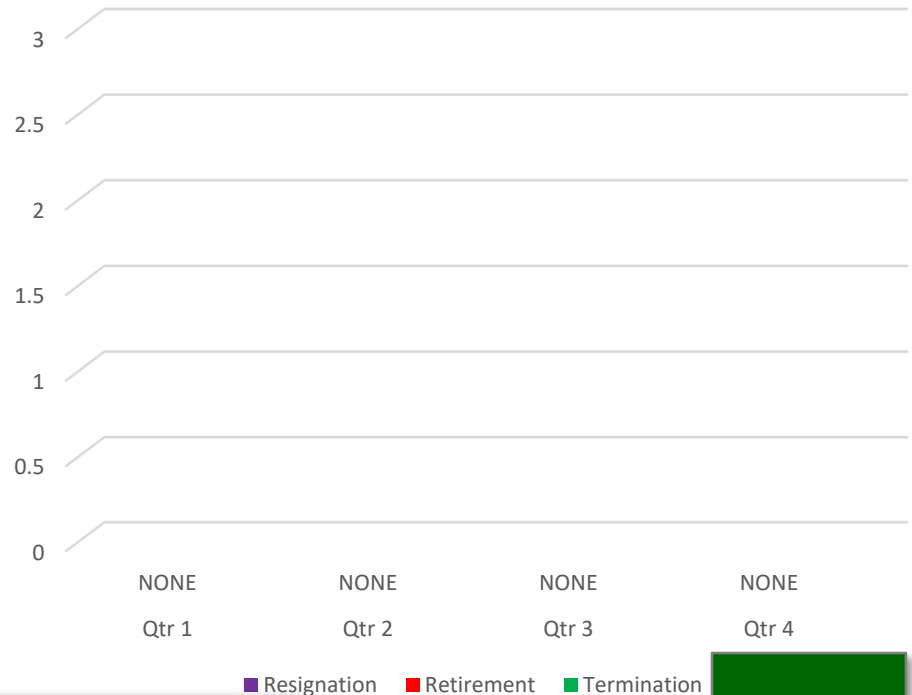
Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

**Separations by Unit During Probation
Nonexempt FY 2018**



**Separations by Unit During Probation
Exempt (Salaried) FY 2018**



Total Turnover Rate (Exempt & Nonexempt):

FY 2018 = 3%

4th Qtr. = 0.1%

Status

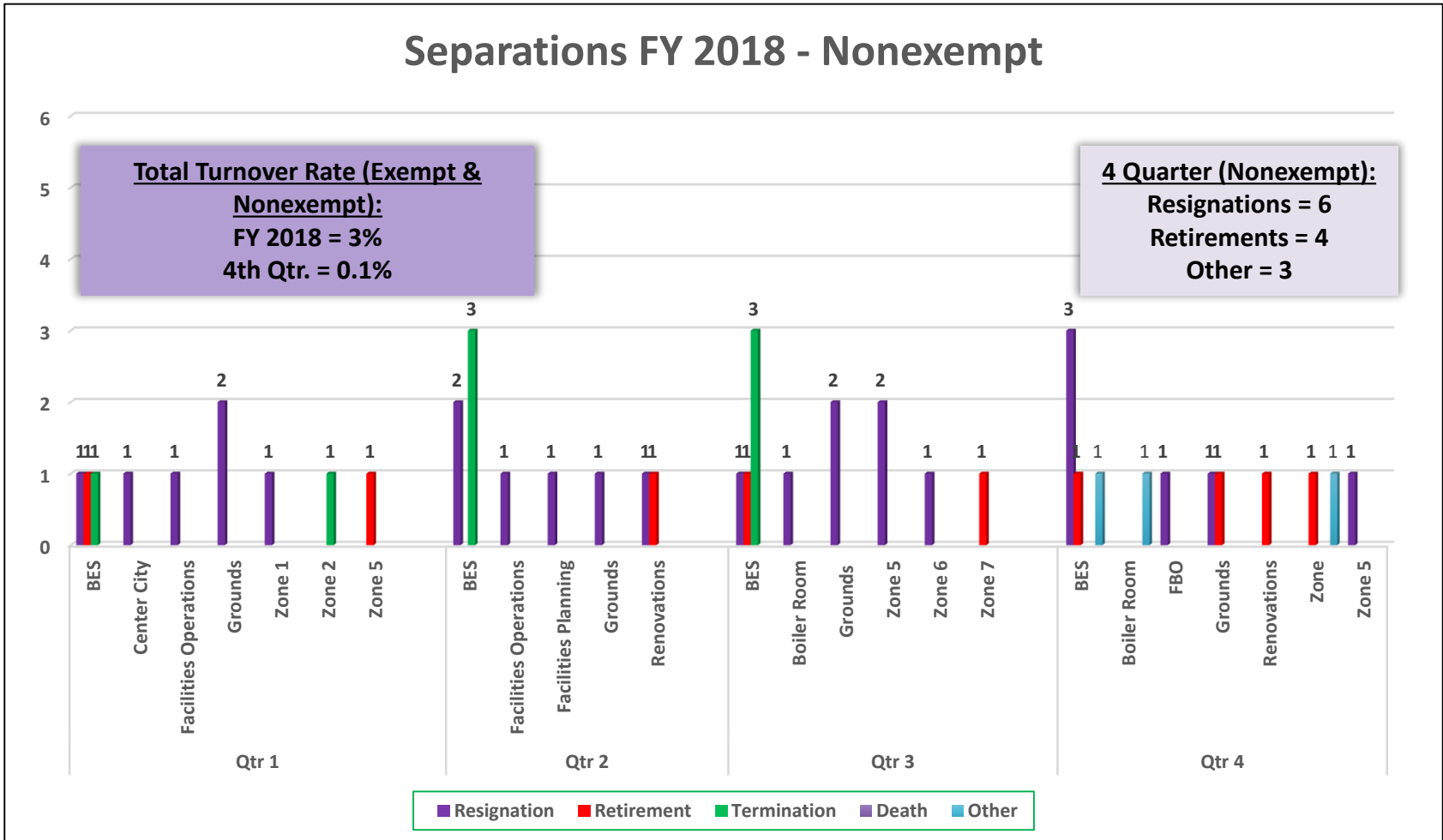
GOAL #4 Recruit, Develop and Retain Quality Employees

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



GOAL #4 Recruit, Develop and Retain Quality Employees

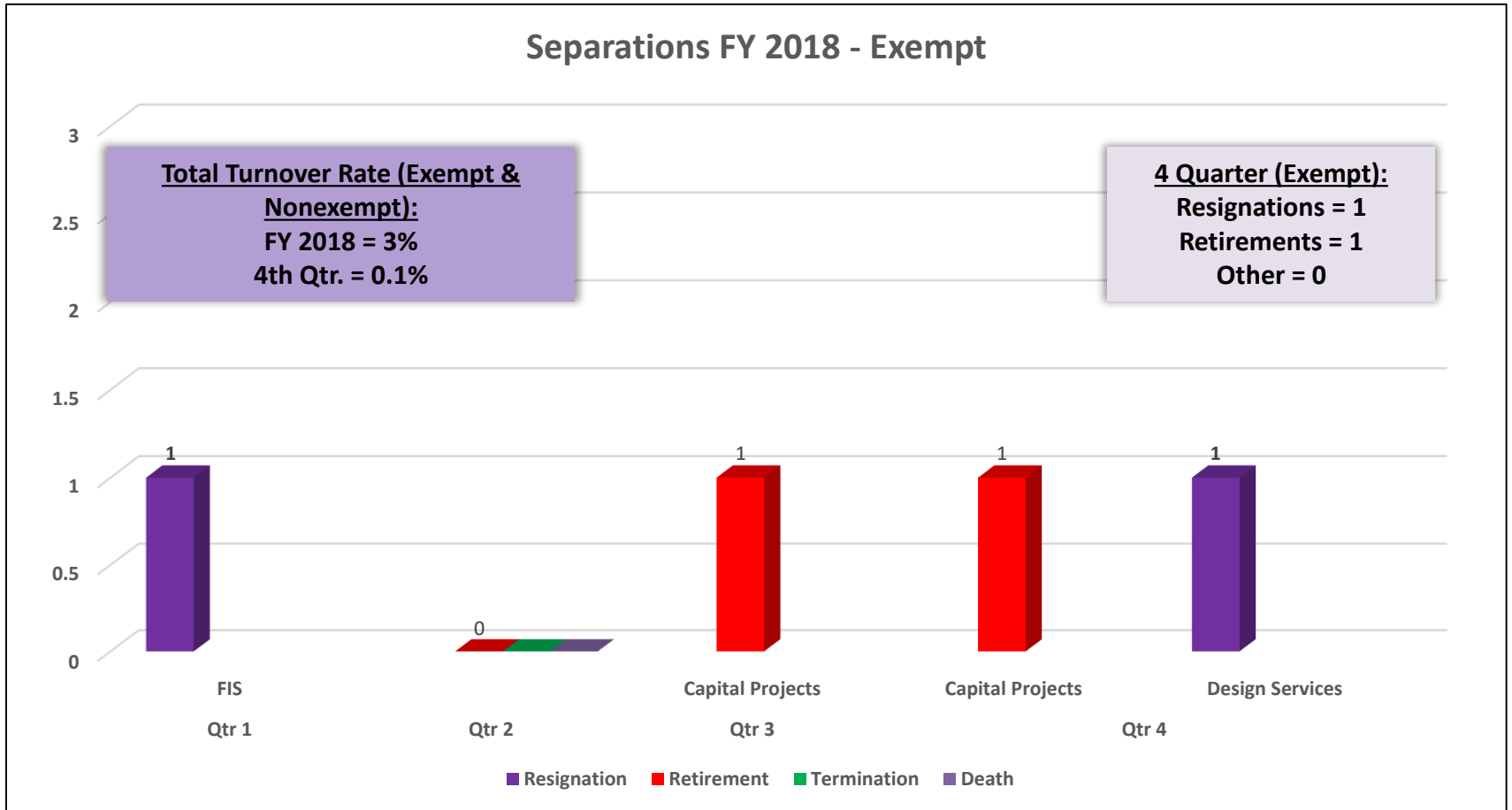
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

Departmental Development

- **FM Apprenticeship Program** developments to date:
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and classroom instruction.
 - DOL Journeyman Credential received upon successful completion of program.
 - Committee in place working with program standards and operational guidelines
 - Steering Committee and Workgroups identified (HR, L&D, FO, Marketing)
 - Program Standards completed
 - Engaging with community colleges (CPCC & RCCC) to create educational partnerships
 - Apprentice Position Description submitted to campus HR.
 - Electrician apprentice positions approved for recruitment (HVAC positions to be added later)
 - FBO-Communications is creating marketing materials and a webpage with FAQs to be updated as needed.
- **Program status as of July 2018:** Facilities Management has decided to push back the apprentice hire date until spring 2019
 - Mentors will be identified and trained (which will meet program approval requirements.)
 - Mentors to be granted 75% credit towards DOL Journeyman credential
 - Currently developing Mentor training materials
 - **Provisional Approval** for FM Apprenticeship program received from Apprenticeship NC

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

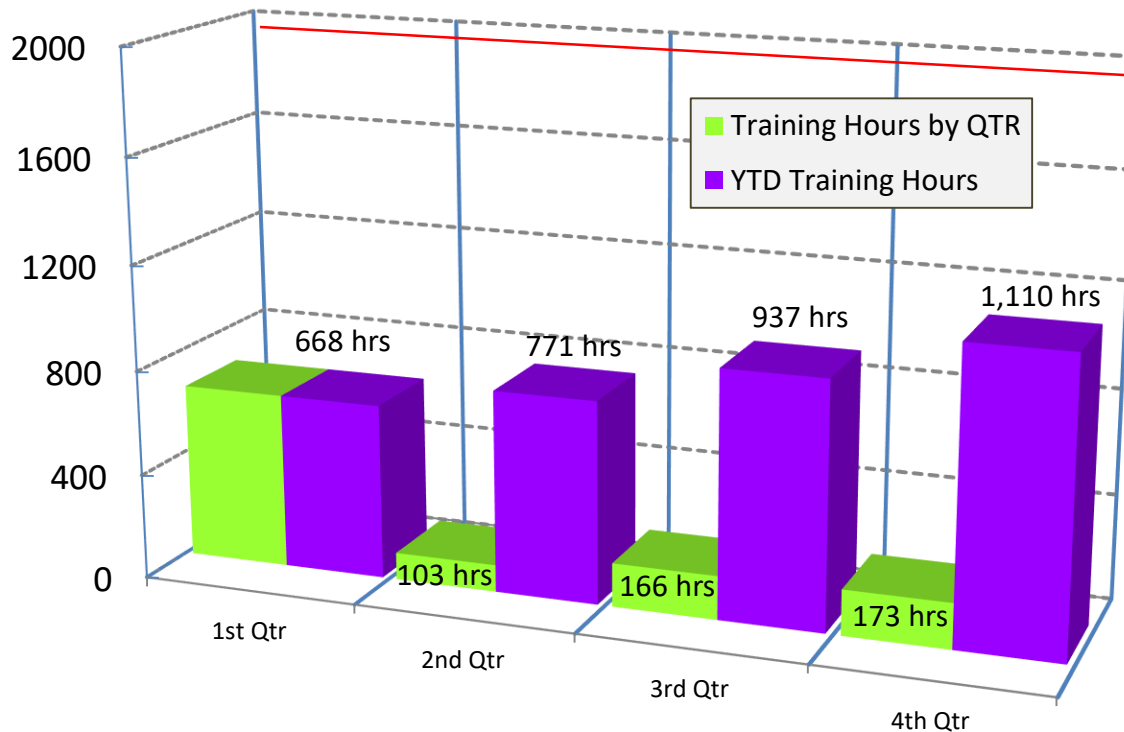
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 18

Training Hours for Supervisors & Managers by Quarter



← Annual Target

<p><u>FY 2018</u> Target - 1,960 hrs</p> <hr/> <p>Actual YTD 1,227 hrs (57 %)</p>
--

Annual

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

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

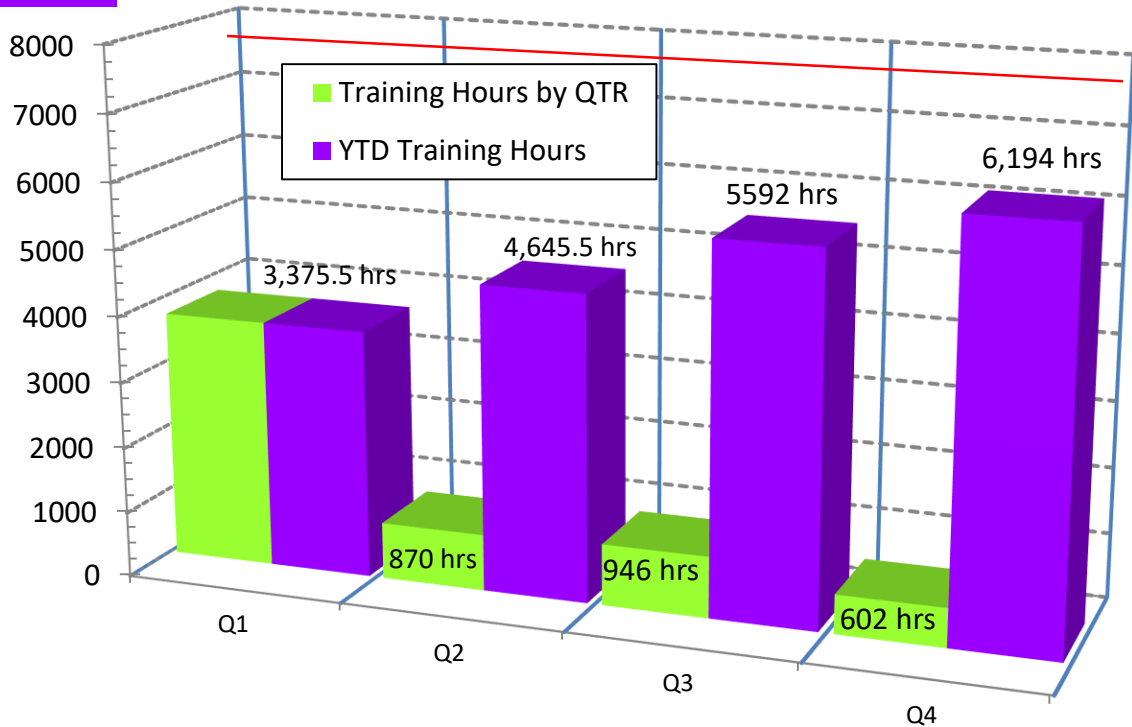
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 18

Training Hours for front line employees by Quarter

Training
Hours



Annual Target

FY 2018
 Annual Target - 7,760 hrs

 Actual YTD
 6,194 hrs (80 %)

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 FOR IMPROVEMENT

Survey Logistics:

- Survey findings:
 - Report distributed May 2017;
 - Briefing to AVC-FM and directors – July 18, 2017;
 - Briefing to staff – 4th Quarter AEM (August)
- Next Steps:
 - Develop action plan to address issues identified in survey.

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

FIGURE 150: OVERALL, HOW SATISFIED ARE YOU WORKING IN THE FACILITIES MANAGEMENT DEPARTMENT (2011, 2013, AND 2017).

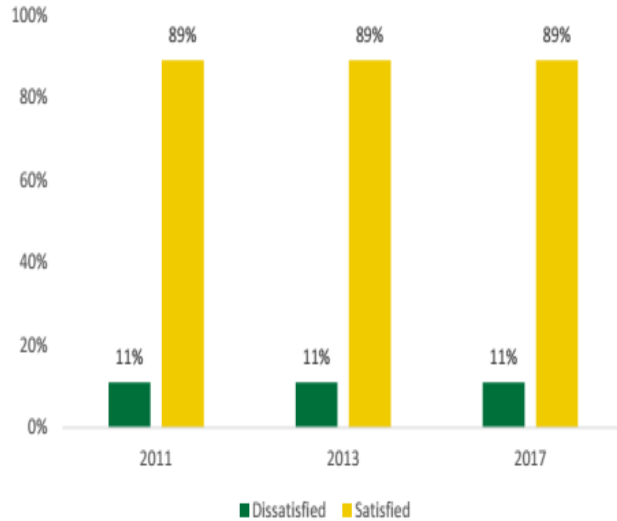
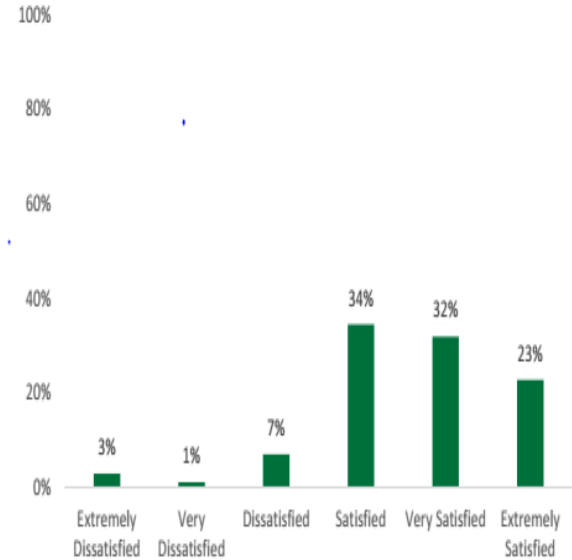


FIGURE 148: OVERALL, HOW SATISFIED ARE YOU WORKING IN THE FACILITIES MANAGEMENT DEPARTMENT?



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

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

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

Efforts to reduce accidents: (412 hours of safety training recorded)

- Safety Training - 4th Qtr. training hours recorded – 412 hours
 - Hearing Conservation training
 - Heat Stress Awareness
 - Archibus WR Console training
- Safety related activities:
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks training – Monthly
 - July – Working in the Heat
 - Aug – Slips, Trips, and Falls
 - 8th Annual FM Safety Fair – May 2nd at Hauser Pavilion
 - 10th annual FM Safety Slogan Contest – *winner to be announced at July AEM*
- Current Accident/Incident Stats (**CY18**)
 - Accidents - 19
 - Minor incidents - 1
 - Near Miss - 0

Lead
FM Wide

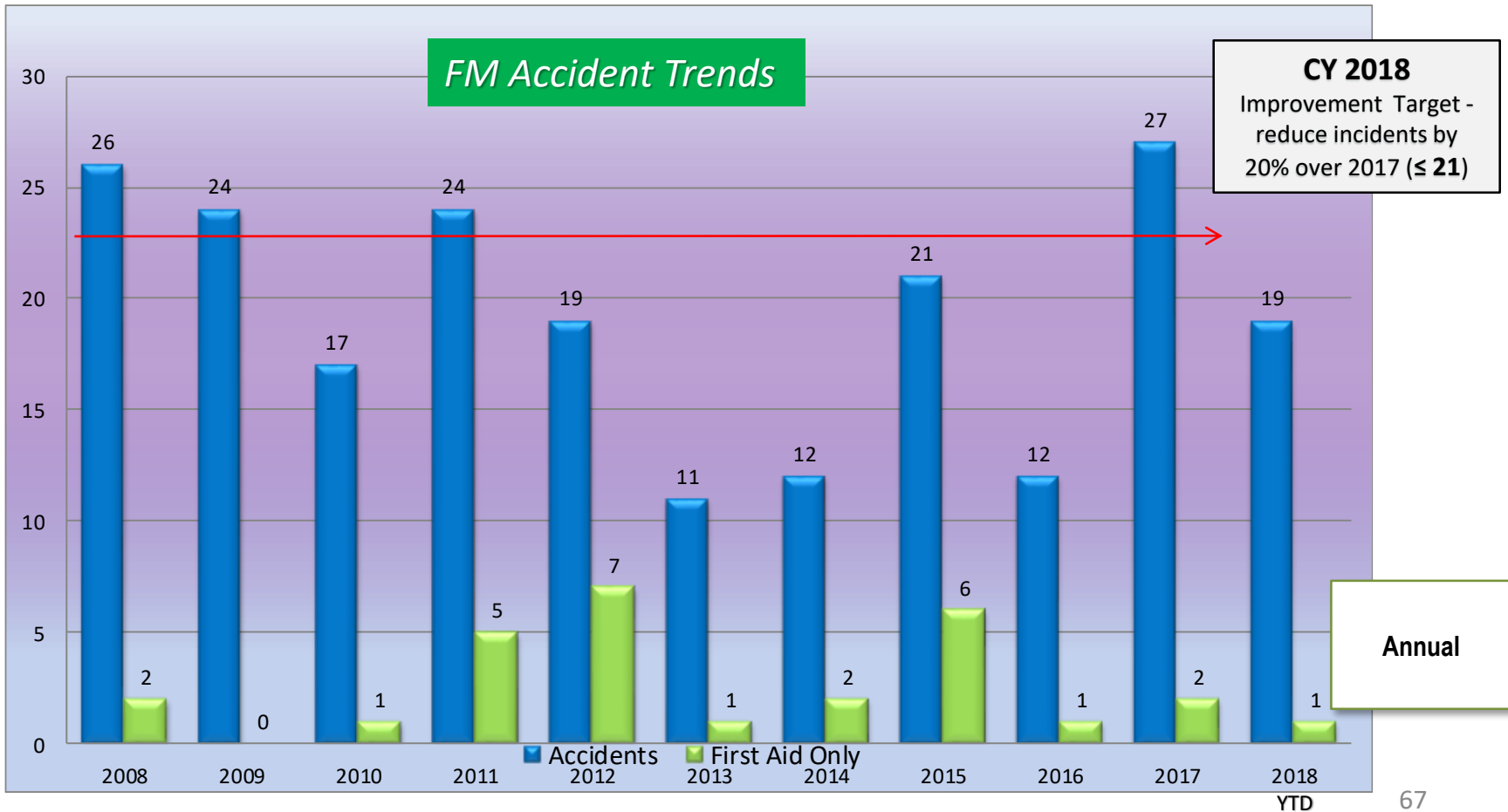
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

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

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

Action Item

Target Date

- FM Apprenticeship Program
 - Apprentice(s) will participate in a four year program consisting of mentored OJT and designated classroom instruction. DOL Journeyman Certification received upon successful completion of program.
 - Committee in place working with program standards and operational guidelines
 - Steering Committee and Workgroups identified
 - Program Standards completed
 - Engaging with community colleges (CPCC & RCCC) to create educational partnerships
- **Program status as of July 2018:** the decision was made in Facilities Management to move apprentice recruitment to spring 2019
 - Minimum requirement of 6 months of classroom based experience added
 - Mentors will be identified and trained which will meet initial approval requirements.
 - Mentors to be granted 75% credit towards DOL Journeyman credential after three months
 - **FM received Provisional Approval from Apprenticeship NC in April 2018.**

(Continued on next slide)

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

FM Academy

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

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

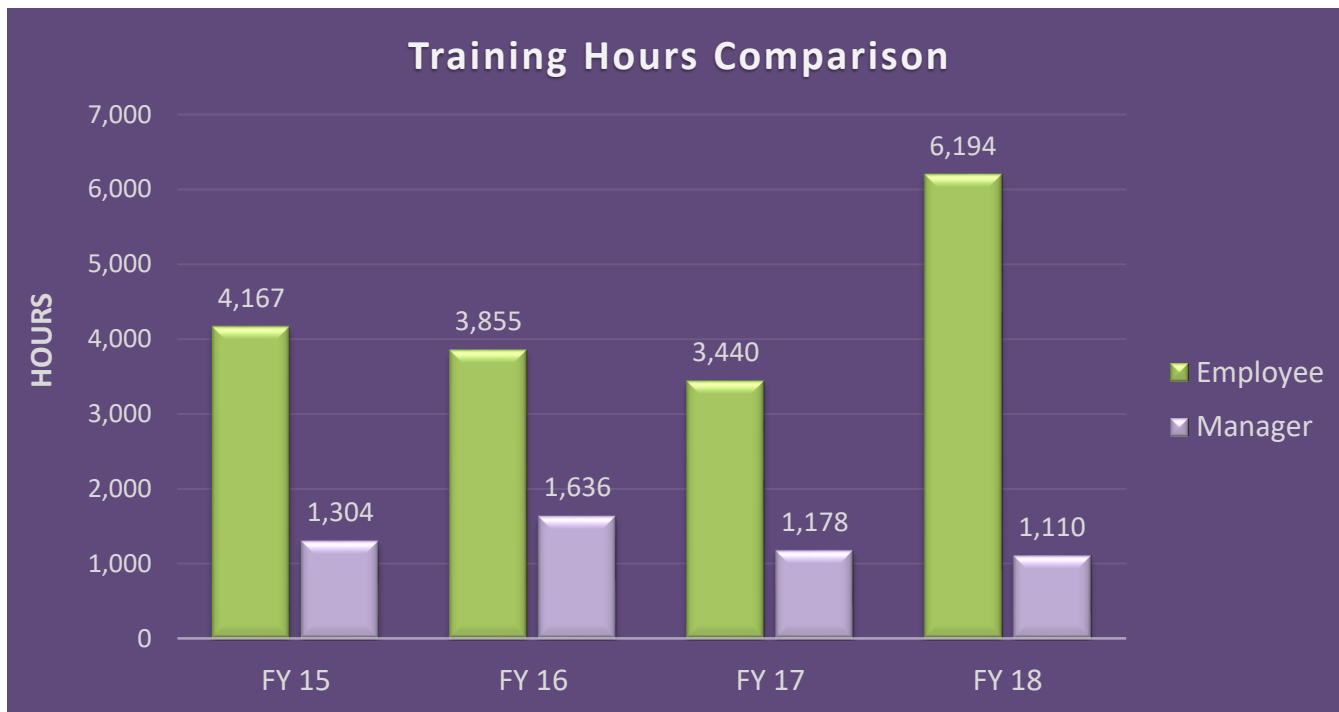
Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective



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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Finance/Budget:

- Preparations for year-end are now underway to include:
 - more frequent communication,
 - analysis of where we actually stand;
 - Incorporation of Admin Unit Supervisor (Sofsky) into FBO YE prep meetings: May – June 2018; Process will be reinstated in January 2019.

Budget Memo and Instructions

- Based on results from submittals and solicited feedback, the FBO has begun making improvements to instruction manual and spreadsheets for FY19;

Supplemental Grant/Award Funding:

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

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Cost Accounting: Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management;
- Analysis of receipts supported funds to begin in FY19 for Labor Services. First steps include the creation of a new MRO pass-through fund for FO for all non-personnel transaction. Effective Date = July 1, 2018;
- Spending trend analysis to assist with better budget projections for maintenance and service agreements is also underway. Anticipated completion: July 2018
- Financial Reports Budget Spreadsheet reviewed for reporting improvements; New spreadsheet will roll out in FY 19 (July); New budget meetings will commence in FY 19;
- Still struggling with the new FTR electronic process implemented by Financial Services.

APPA Administrative Cost/GSF Analysis:

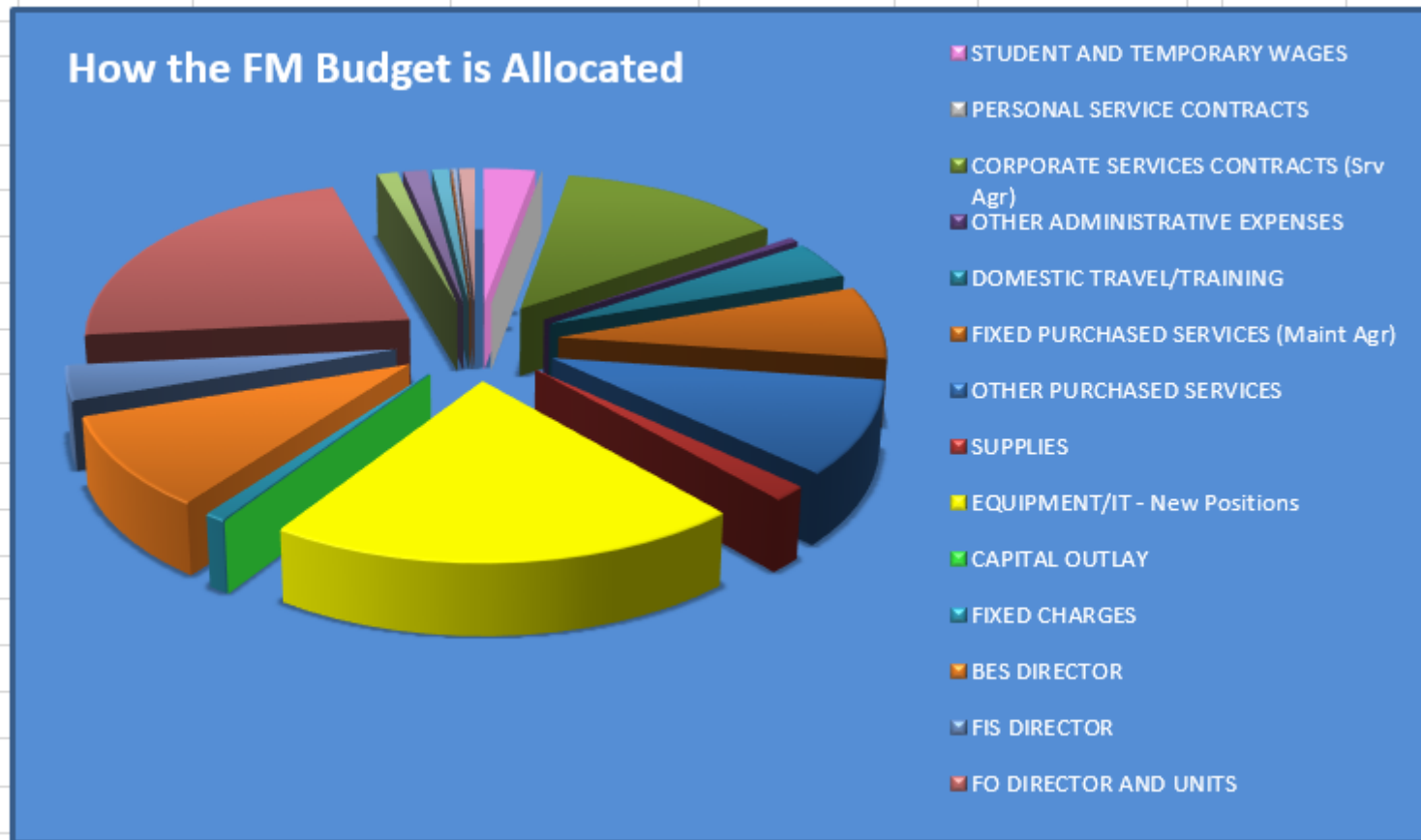
- APPA FY 18 FPI and NACUBO Key Metrics Surveys should open in July 2018;
- Cost per GSF for administration – analysis for past 5 years completed.

FY 18 Yearend Status of Funds

Facilities Management FY 2018 Appropriations Fund Balances			
	Spent	Remaining	
	(%)	(%)	
BA-OT	97%	3%	COMPLETE
UER	99%	1%	COMPLETE
CR	87%	13%	COMPLETE
HAC	100%	0%	COMPLETE
Class Furn	99%	1%	COMPLETE
MOA	96%	4%	COMPLETE

Facilities Management FY 2018 Receipts-Supported Fund Balances			
			<u>NOTES:</u>
Labor Services		\$ 478,732.98	
NCRC		\$ 394,181.53	
Fac Reserves		\$ 1,181,576.19	BALANCE OVERSTATED: includes acad. complex move money and Atkins 3th flr
Informal Projects (Pass Thru Fund)		\$ 397,734.79	
Motor Fleet		\$ 119,541.11	
Aluminum Can		\$ 125,709.09	
Playing Fields		\$ 292,417.81	

FM Operational Base Budget FY 18



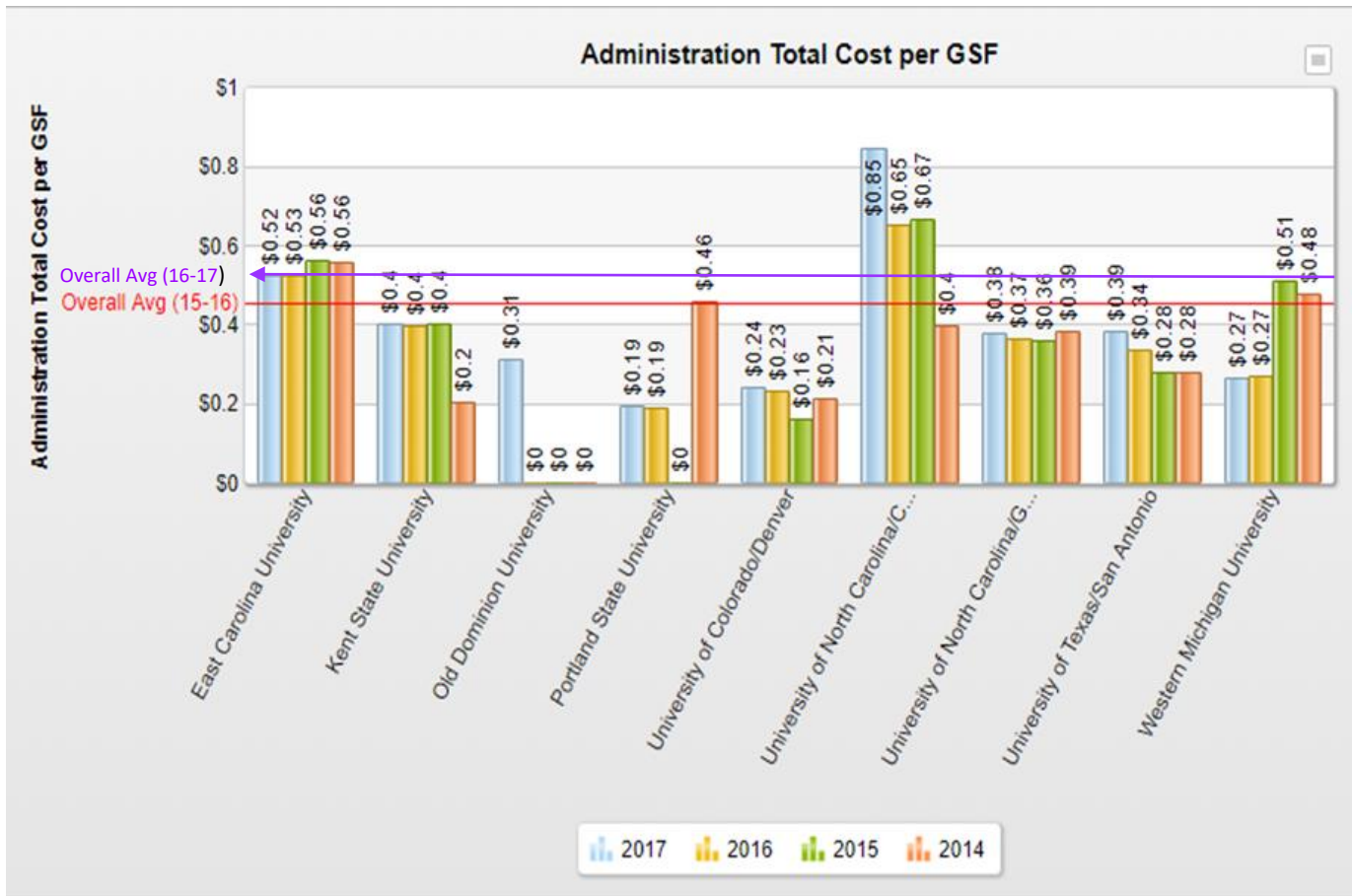
GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



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

ANNUAL

GOAL #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)

Lead
BES

ACTION PLAN

- **Actions Planned**

- Implement In-House Temp System (8/2018)
- Implement separate budget for Floor Crew (8/2018)
- Development of BES&R 3-year plan with budget projections (10/2018)
- Implement team cleaning model throughout all BES zones (3/2022)
- Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey (Ongoing)
- Develop a BES strategic dashboard that tracks cost, quality, and process data points over time (Ongoing)
- Developed Production Tracking tool based on attendance and staffing (Ongoing tracking)

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #5 –Promote Good Stewardship

Objective: 5.1:

Promote Fiscal Responsibility

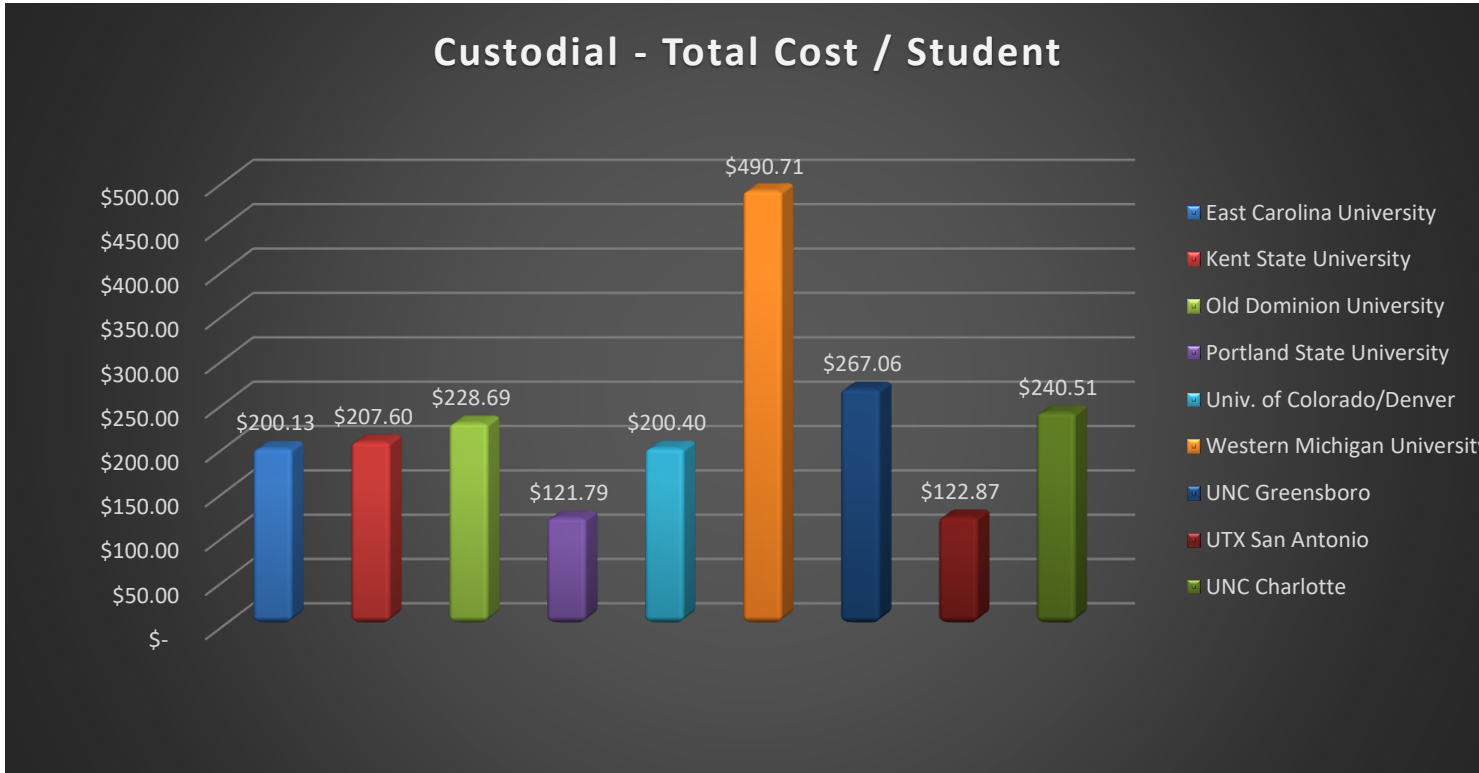
Tactic 5.1.4:

Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina, UNC Greensboro) (National Peers – Kent State University, Old Dominion University, Portland State University, University of Colorado at Denver, Western Michigan, 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 = \$231.08

UNCC = 4.08% above average

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

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

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

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

ACTION PLAN

Actions Planned

1. Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not to Charge) by Aug 2018.
2. Weekly tracking of earnings with the FBO.
3. FBO to create separate FM MRO account (July 2018).

Actions Completed

1. Completed APPA survey.
2. Holding vacant labor services positions.

Lead
F. O.

GOAL #5 – Promote Good Stewardship

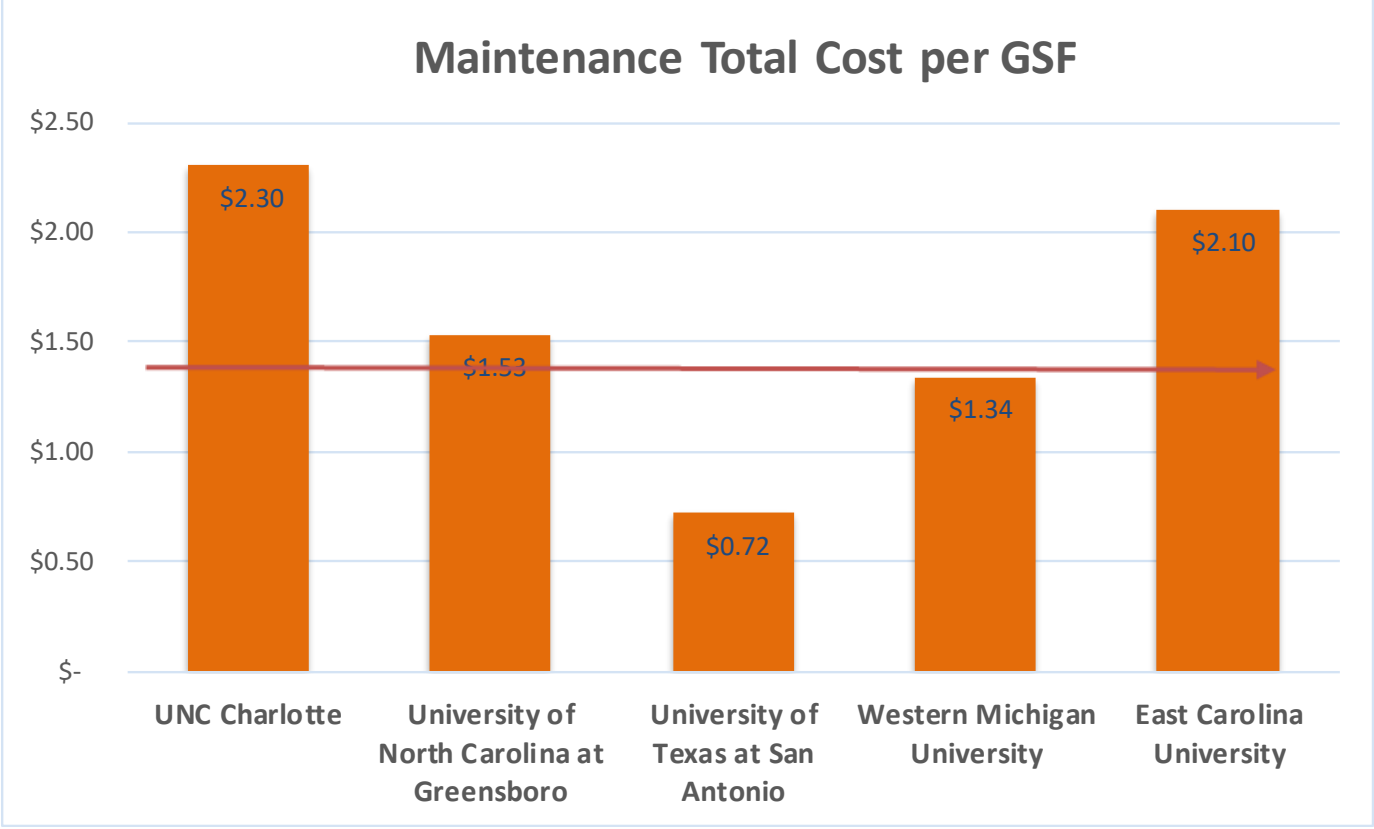
Objective: 5.1: Promote Fiscal Responsibility

Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions \$1.42 per GSF

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

Lead: Facilities Operations

Balanced Scorecard Category: Financial Perspective



STATUS
Annual

GOAL #5 – Promote Good Stewardship

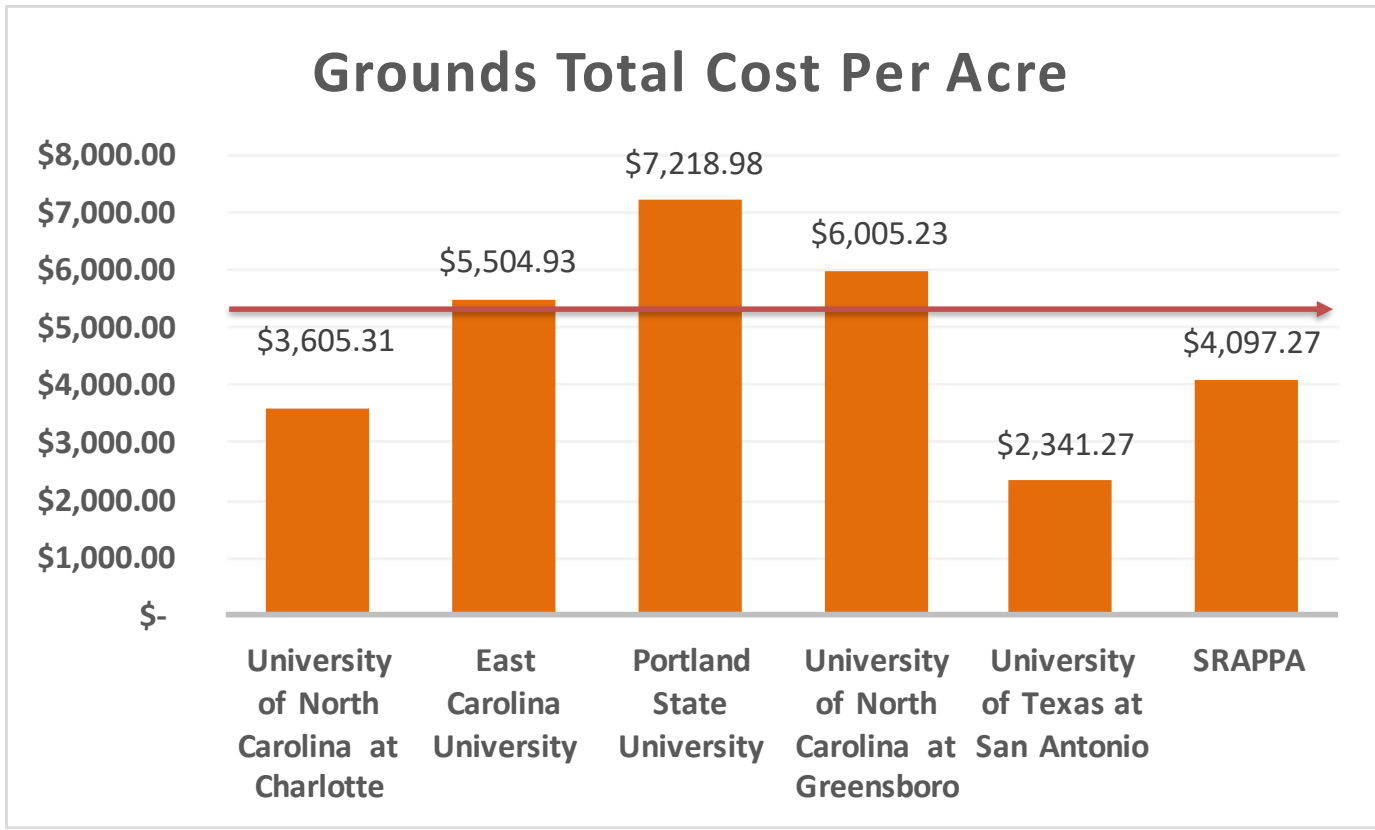
Objective: 5.1: Promote Fiscal Responsibility

Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions - \$5,267.60

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

Lead: Facilities Operations

Balanced Scorecard Category: Financial Perspective



STATUS
Annual

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

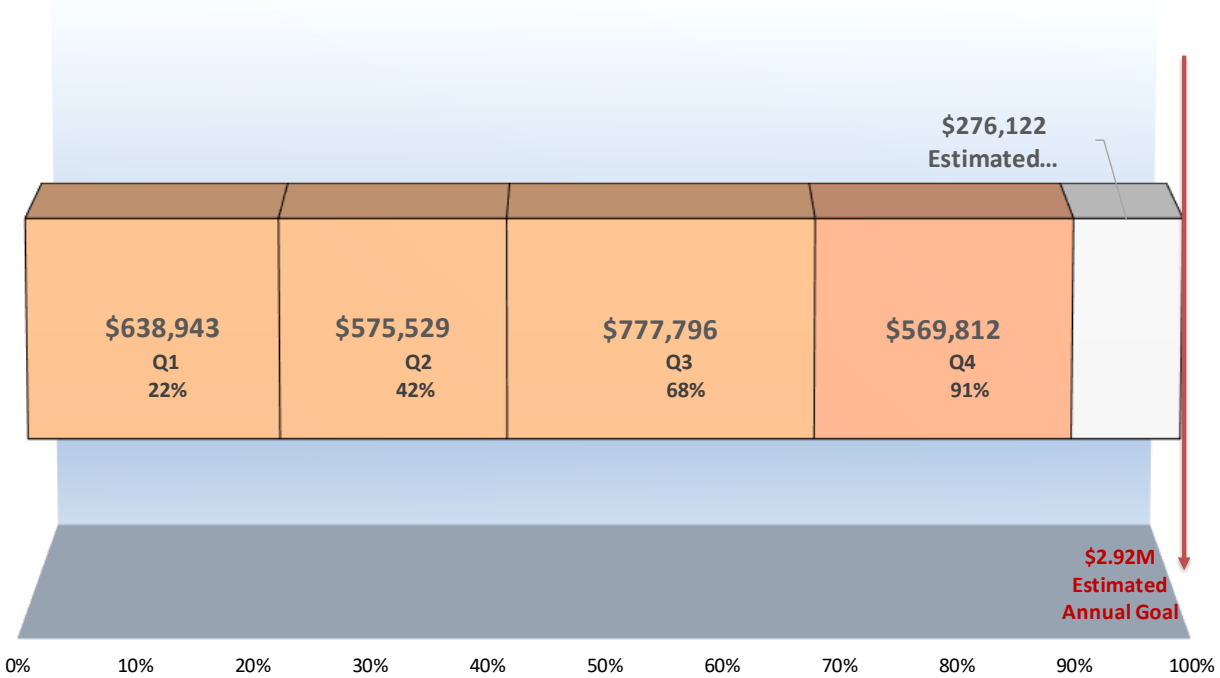
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balanced Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



GOAL #5 – Promote Good Stewardship

Objective	5.2	Develop a Sustainable Campus
Objective	5.2.2	Increase Percent of Solid Waste diversion on Campus to 45% by 2020



ACTION PLAN

Waste Reduction and Recycling

Actions Complete

- Education & Outreach Coordinator position hired – **Steve Olson!!!**
- Earth Month Activities – Tree Planting (**57 trees planted**); Campus Cleanup (**110+ volunteers; 420+ lbs. litter picked up**); Earth Day Celebration
- Move-out (with Housing and Residence Life). Collected items went to Salvation Army and Jamil Niner Student Pantry. (**collected 15,300 lbs of food, clothing, and household goods**)
- Updated Recycling Policy – 713. (**submitted in May**)
- Plastic film recycling started at the Student Union
- Waste Audits on all dining halls as well as a few academic buildings including FM/PPS (15% of trash could have been easily recycled, 56% of it could have been composted, and 29% of it really was trash)

1st Quarter Actions Planned

- Reworking campus waste hauling contract (**RFP needs to go out July/August**)
- Consistent labelling/signage project.
- Football – Zero Waste Initiative.
- Continue work with Chartwells (**Mainstreet Market and Prospector begin compost programs this fall**)

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018



Tactic 5.2.2

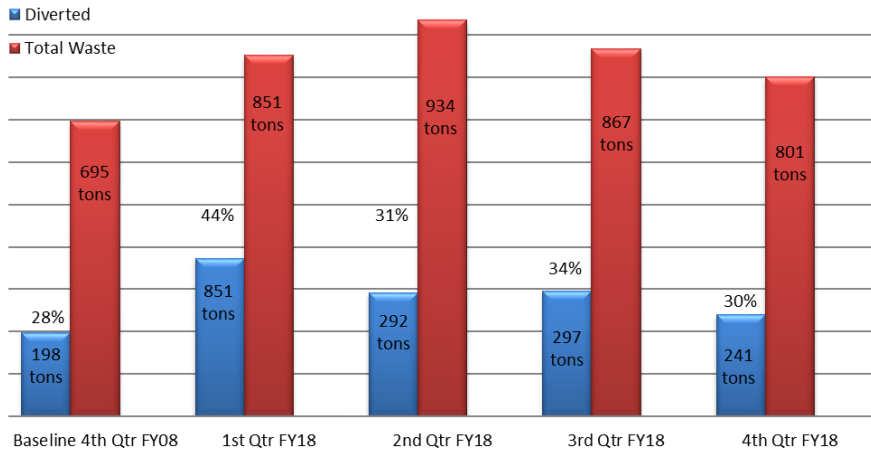
Increase Percent of Solid Waste Diversion on Campus to 45% by 2020

Measure: Pounds of Solid Waste Recycled, composted and reused

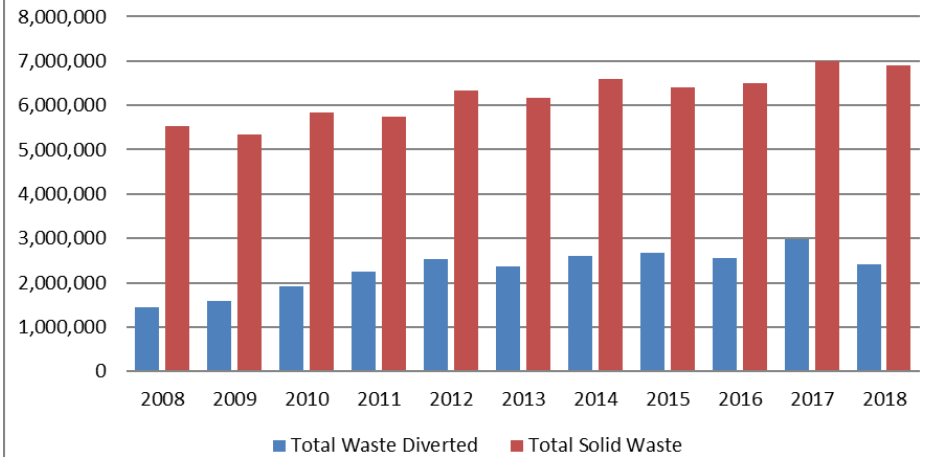
Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste



Annual Solid Waste Comparison



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points documented to achieve gold rating.

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Achieved STARS 2.0 Rating of Silver in October 2016**
- **Re-set goal: STARS 2.1 Gold by December 2018**
 - **Monthly meetings with Chartwells for Food Credits**
 - **Interns hired to assist – ca. 60% completed**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by October 2018**
 - **Executive Committee: Base on Compliance with UNC Sustainability Policy (*italics*)**
 - **2 Priorities (ongoing)**
 - **Academics:** *Integration of Sustainability Principles*
 - **Operations:** *Operations & Maintenance; Design & Construction; Master Planning*
 - **3 Initiatives (5 years, 2018-2023)**
 - **Zero Waste**
 - **Responsible Purchasing**
 - **Transportation Planning**
 - **1 Commitment (32 years – 2050)**
 - **Carbon Commitment (Chancellor)**
 - **Presentation to Chancellor’s Cabinet (April 30)**

STATUS

Objective
Tactics

5.3
5.3.1

Conserve Natural Resources
Decrease Energy Usage 40% by FY2025

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Retro-commissioning program
 - Begin Bioinformatics on July 30 / Still working on King internally – continue to Retro-Cx at least one building each FY
 - Strong emphasis to continue on energy usage reduction in Woodward (looking at temp. setback on “A-wing”, looking at ultrasonic occupancy sensors installation)
 - Activation of Load Shedding program on BAS RUP1 close to completion
- Cold weather in FY18 had major negative impact on Kbtu/GSF
- Repair Campus energy metering in BAS, JACE or the meters themselves
- **WARNING!** – Going the wrong way toward reduction !

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

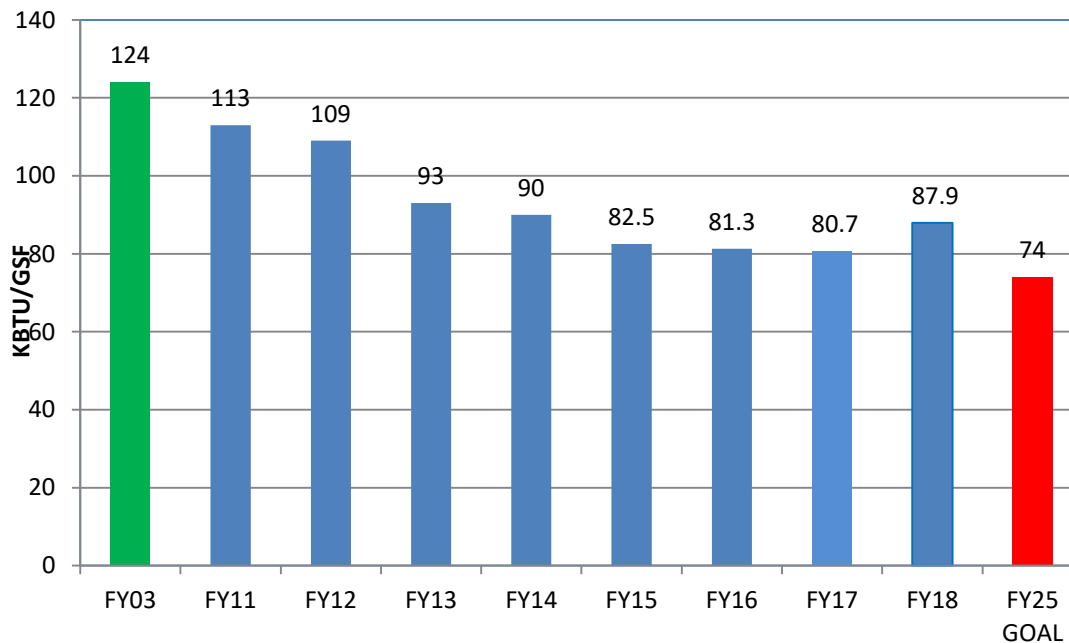
Measure: KBTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 29%
Goal of 40% by 2025

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



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

Continue . . .

- Establish project specific participation goals for single prime projects;
 - ✓ Parking Lots Revitalization – *10% goal / 72% achieved*
 - ✓ Sycamore Hall Renovation – *15% goal / 53% achieved*
 - ✓ CRI Entrance Improvements – *15% goal / 26% achieved*
- Challenge GCs to obtain 25% or better participation on CMAR projects
- Review *Good Faith Effort* documentation for compliance
- Work with internal/external groups to identify skilled subcontractors
- Encourage firms to bid our work

GOAL #5 – Promote Good Stewardship

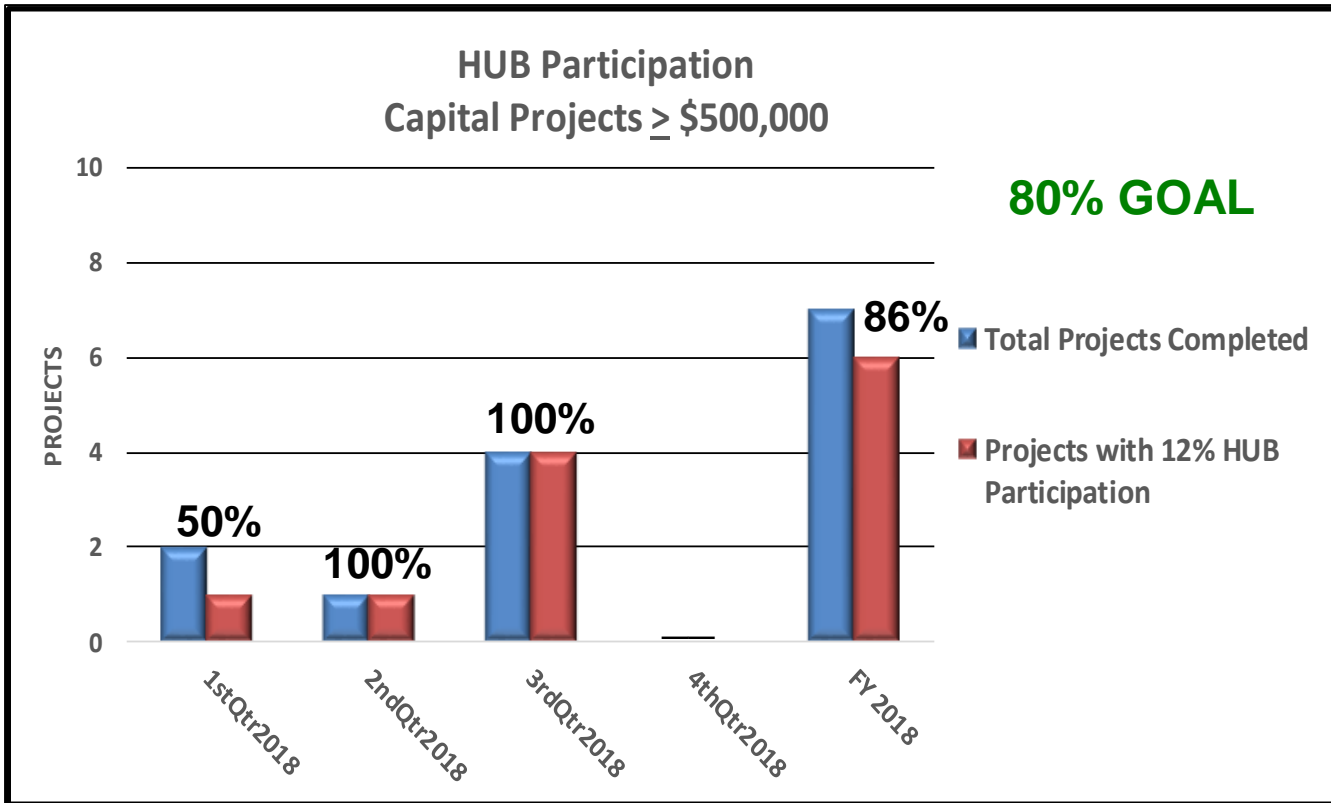
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



4thQtr
STATUS

FY 2018
STATUS

GOAL #5 – Promote Good Stewardship

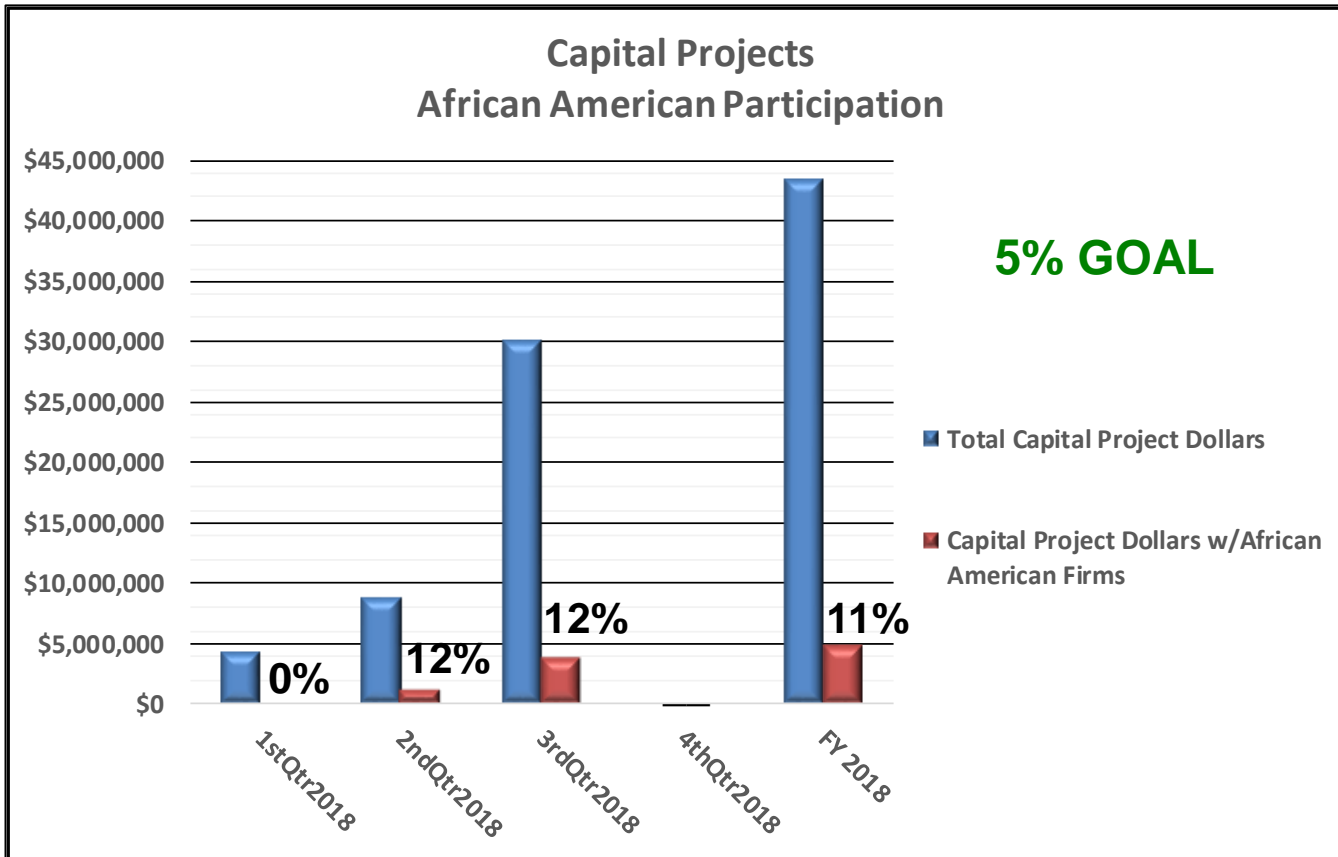
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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

FY 2018
STATUS

GOAL #5 – Promote Good Stewardship

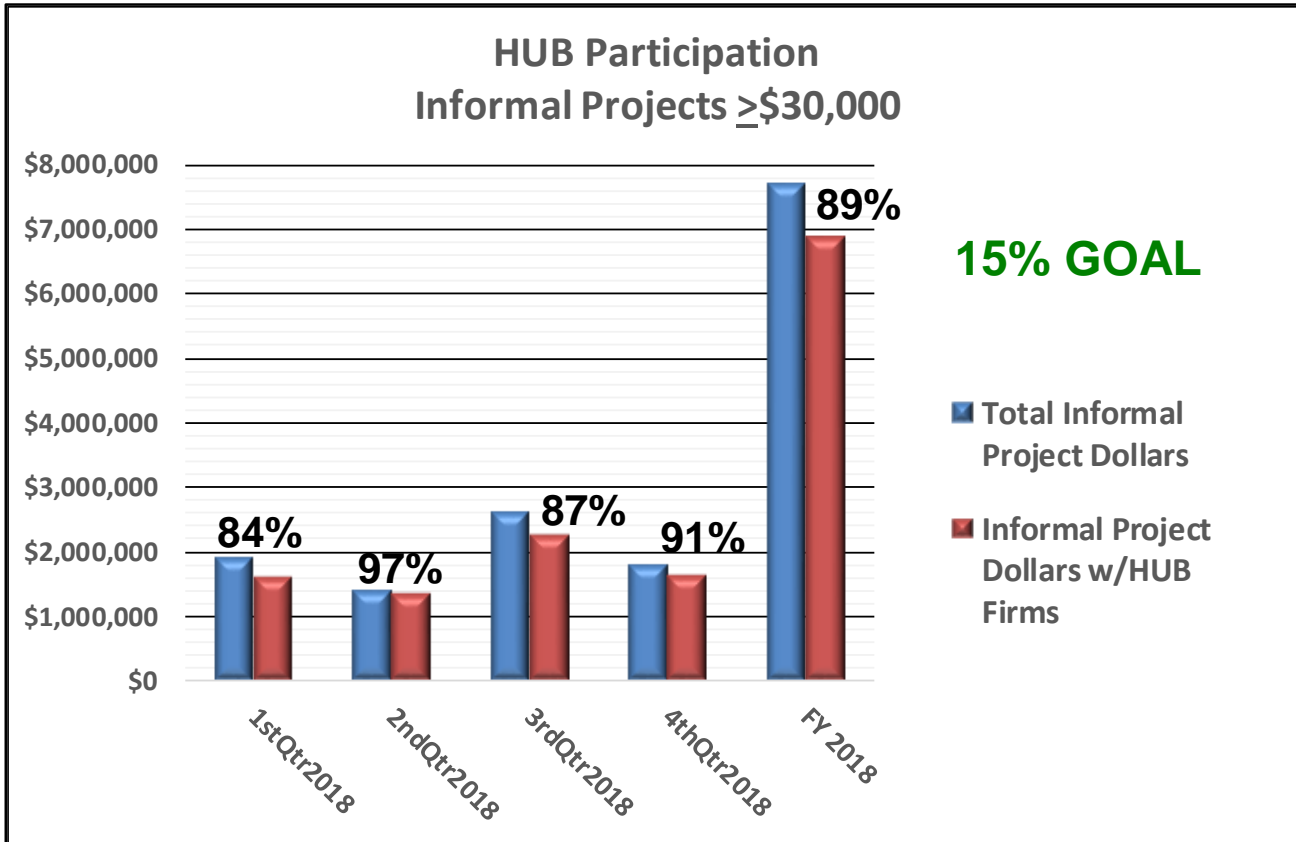
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



4thQtr
STATUS

FY 2018
STATUS

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

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

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

Evamarie started a new procedure welcoming any HUB company to present to Design Services team prior to our Team meetings.

The Boswell Group - Electrical & Plumbing Contractor - *State of North Carolina HUB Certified Woman-Owned*
Monroe, North Carolina

ONGOING IMPROVEMENTS

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

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

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Annual Goal
13 %

QTR 4 Status
30.0 %

Lead
Design Services

Annual Status
39.4 %

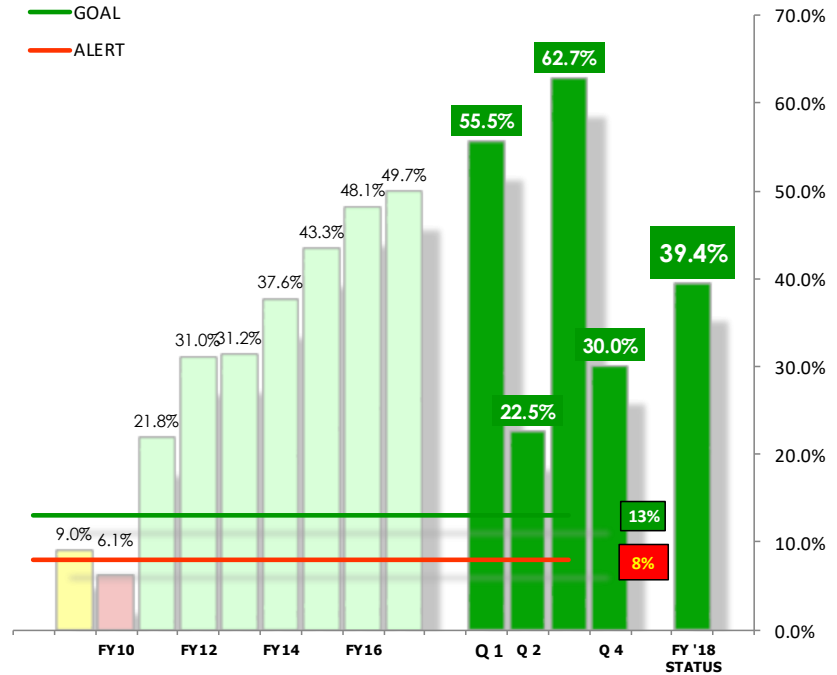
Tactic 5.4.4: 13% overall HUB Participation on Informal Projects Below \$30,000 Including 3% African American
Measure: Total Contract Dollars for HUB Participation on All Informal Projects Below \$30,000 (**Construction only**) Divided by Total Contracts

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

13% Overall HUB Participation – Summary Graph

FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
FY16	\$ 2,605,540	\$ 1,252,152	48.1%
FY17	\$ 2,122,583	\$ 1,055,439	49.7%
Q 1	\$ 414,160	\$ 229,963	55.5%
Q 2	\$ 354,275	\$ 79,808	22.5%
Q 3	\$ 386,332	\$ 242,403	62.7%
Q 4	\$ 1,034,065	\$ 309,771	30.0%
FY '18 STATUS	\$ 2,188,832	\$ 861,945	39.4%



HUB OVERALL GOAL: 13.0%

Facilities Management Strategic Planning Session – Fourth Quarter FY 2018

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Annual Goal
3%

QTR 4 Status
5.03 %

Lead
Design Services

Annual Status
5.13 %

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

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

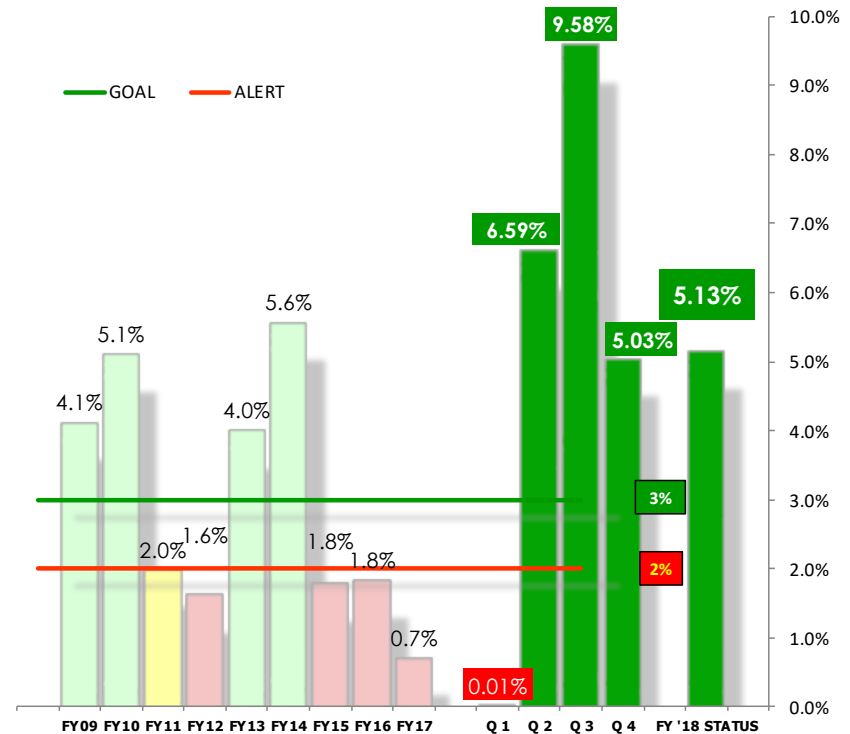
FY 18

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
FY16	\$ 2,605,540	\$ 47,345	1.8%
FY17	\$ 2,122,583	\$ 14,905	0.7%
Q 1	\$ 414,160	\$ 30	0.01%
Q 2	\$ 354,275	\$ 23,361	6.59%
Q 3	\$ 386,332	\$ 37,000	9.58%
Q 4	\$ 1,034,065	\$ 51,980	5.03%
FY '18 STATUS	\$ 2,188,832	\$ 112,371	5.13%

HUB AFRICAN AMERICAN GOAL:

3.0%

3% African American Participation – Summary Graph





UNC CHARLOTTE
Facilities Management

A large group photograph of UNC Charlotte staff members, many wearing light-colored polo shirts, posing on the steps of the Cone University Center. The photo is overlaid with a semi-transparent green filter.

Strategic Planning Session
Fourth Quarter – Fiscal Year 2018
April – June 2018
DISCUSSION

...Creating a Campus of Distinction