



Strategic Planning Session

Fourth Quarter – Fiscal Year 2013

April – June 2013



...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

Improve Maintenance and
Operation on the Campus



UNC CHARLOTTE

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements



UNC CHARLOTTE

"Fix your eyes forward on what you can do, not back on what you cannot change."

—Tom Clancy

GOAL #3

Deliver New Facilities that
Support the University's Mission



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 #4

Perfect a Customer Focused Organization





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 #5

Develop a Valued,
Well-trained, Motivated and
Diverse Workforce





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 #6

Promote Good Stewardship



UNC CHARLOTTE

Balance Score Card

CUSTOMER

Perspective

Strategic Objectives:

**Work Request Process, Housekeeping Processes,
Improve Process Reliability, Increase On-Time Delivery,
Informal Project Administration,
Enhance Customer Satisfaction**

GOAL #1 – Improve Facilities Operations

Strategy:	1.3	Improve Work Request Process
Objective:	1.3.1	Decrease Percentage of Reactive Work Requests to < 58%
	1.3.2	Decrease Work Request Cycle Time by 5% (300 hours)

Lead
F. O.

ACTION PLAN

- Actions Planned
 - 1 – Old and New PM Modules are not connecting so the data is not a true count; data shown is not accurate.
 - 2 - Continue to build PM program to cover all equipment and buildings.
 - 3 – Continue increasing predictive maintenance measures as funds permit.
 - 4 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.
 - 5 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

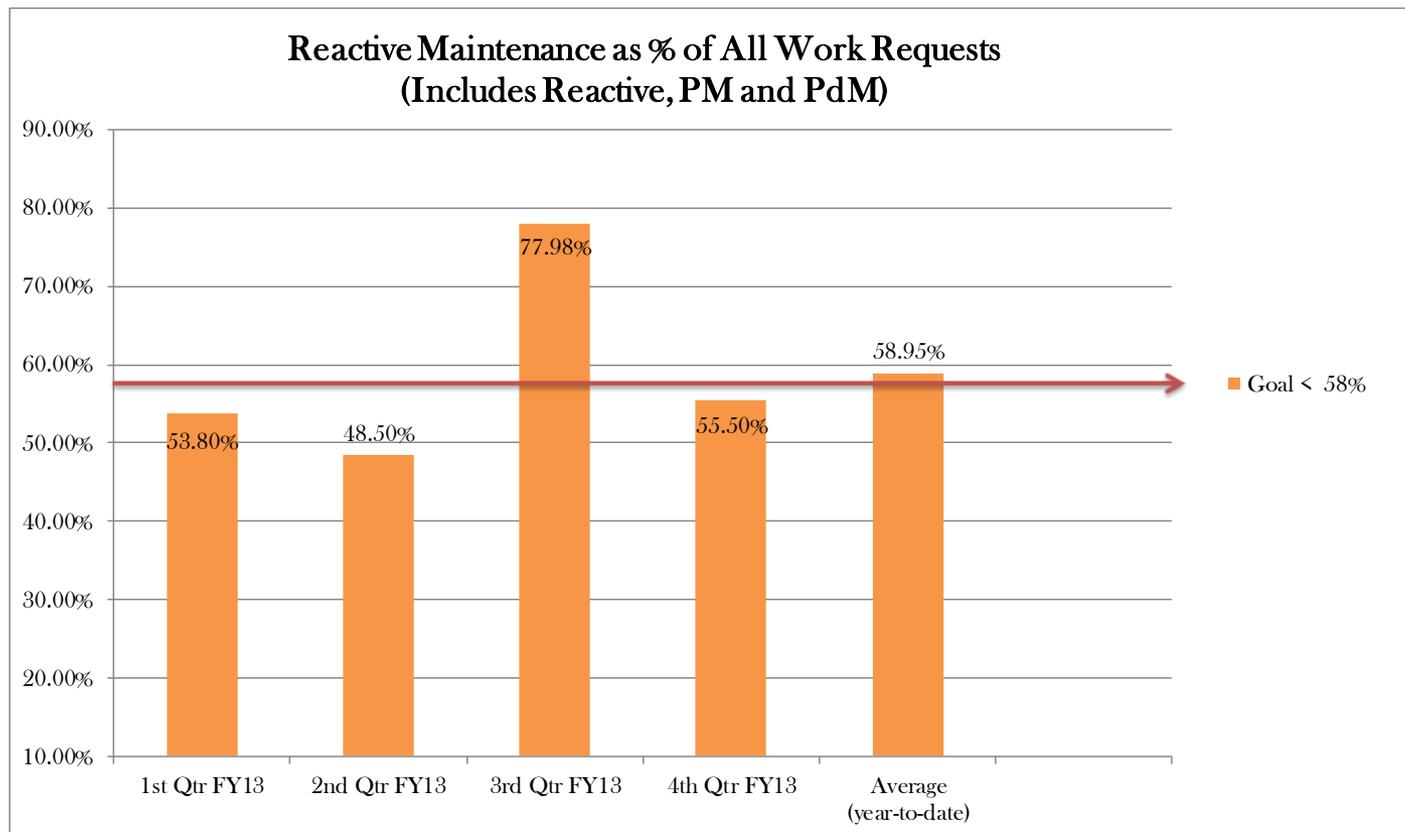
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.1 Decrease Percentage of Reactive Work Requests to less than 58%

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

Goal: Percentage to < 58% average for the year.

Balanced Scorecard Category: Customer Perspective



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

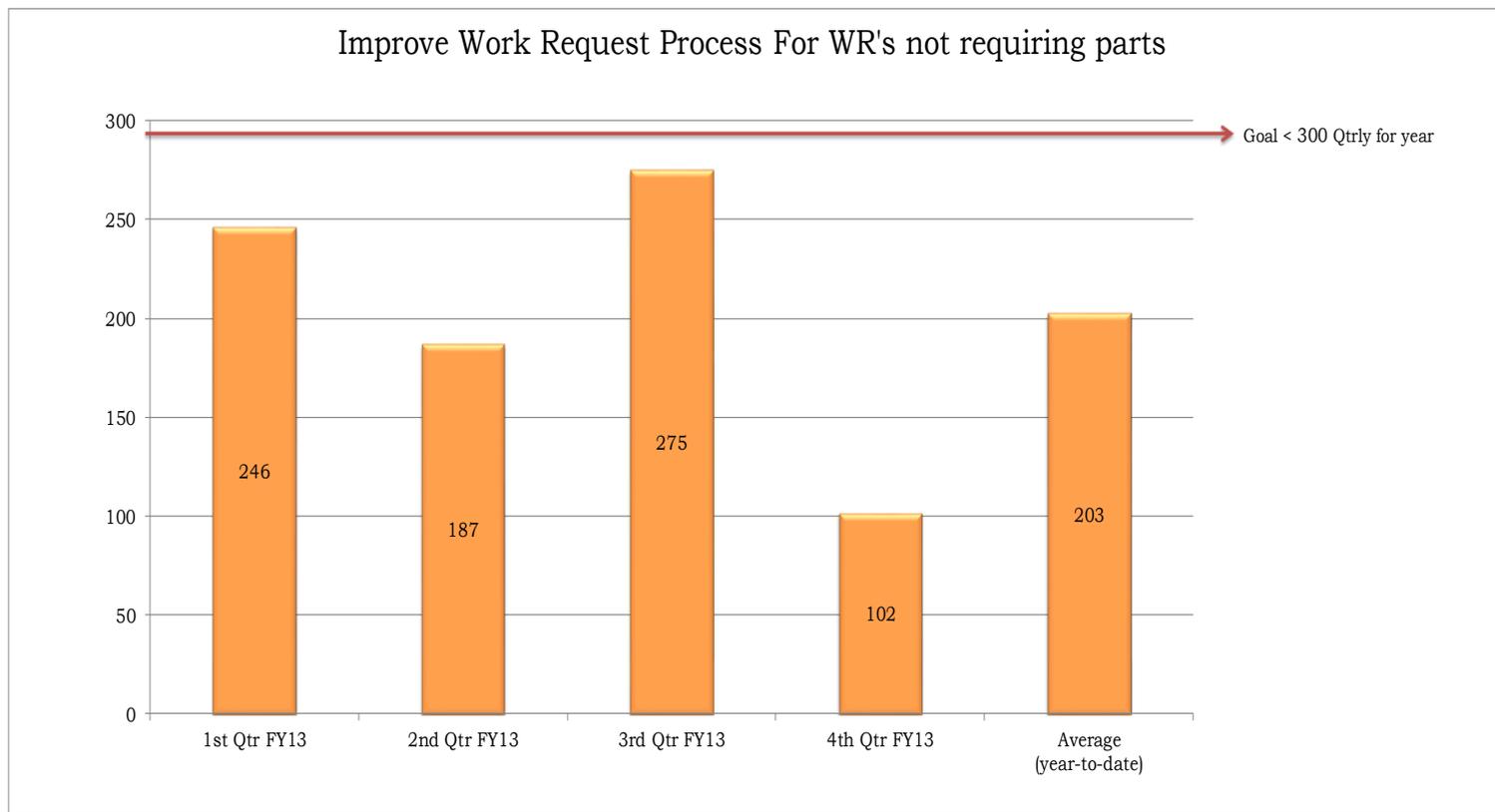
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Work Request Cycle Time by 5% (< 300 quarterly)

Measure: Hours from work request submission to work complete status (for WR's not requiring parts)

Goal: Less than 300 quarterly average for the year

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

Lead
Housekeeping

ACTION PLAN

- Actions Complete
 - All buildings not in renovation audited (self audit)
 - Changed chart to reflect summary data for last four quarters
 - Hired Program Development and Education Coordinator
- Actions Planned
 - Continue quarterly self audits
 - CIMS Certification/Green Cleaning Project (feasibility review)

Lead
Housekeeping

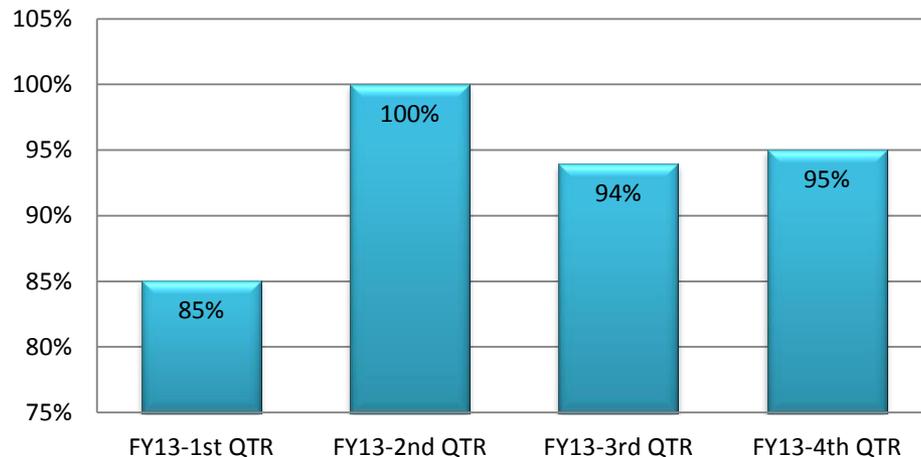
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.4 Improve Housekeeping Processes
Objective: 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)

Balanced Scorecard Category: Internal Business Process

APPA LEVELS



4th QTR 95%
YTD 93.5%

STATUS

GOAL #1 – Improve Facilities Operations

Strategy:	1.5	Improve Reliability
Objective:	1.5.3	Reduce Unscheduled High Voltage Electrical System Outages by 0.0069
	1.5.4	Reduce Unscheduled Fire Alarm Network Outages by 10%

Lead
F. O.

ACTION PLAN

- Actions Planned
 - Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
 - Continue working with Simplex/Siemens to bring the new buildings online with the network.

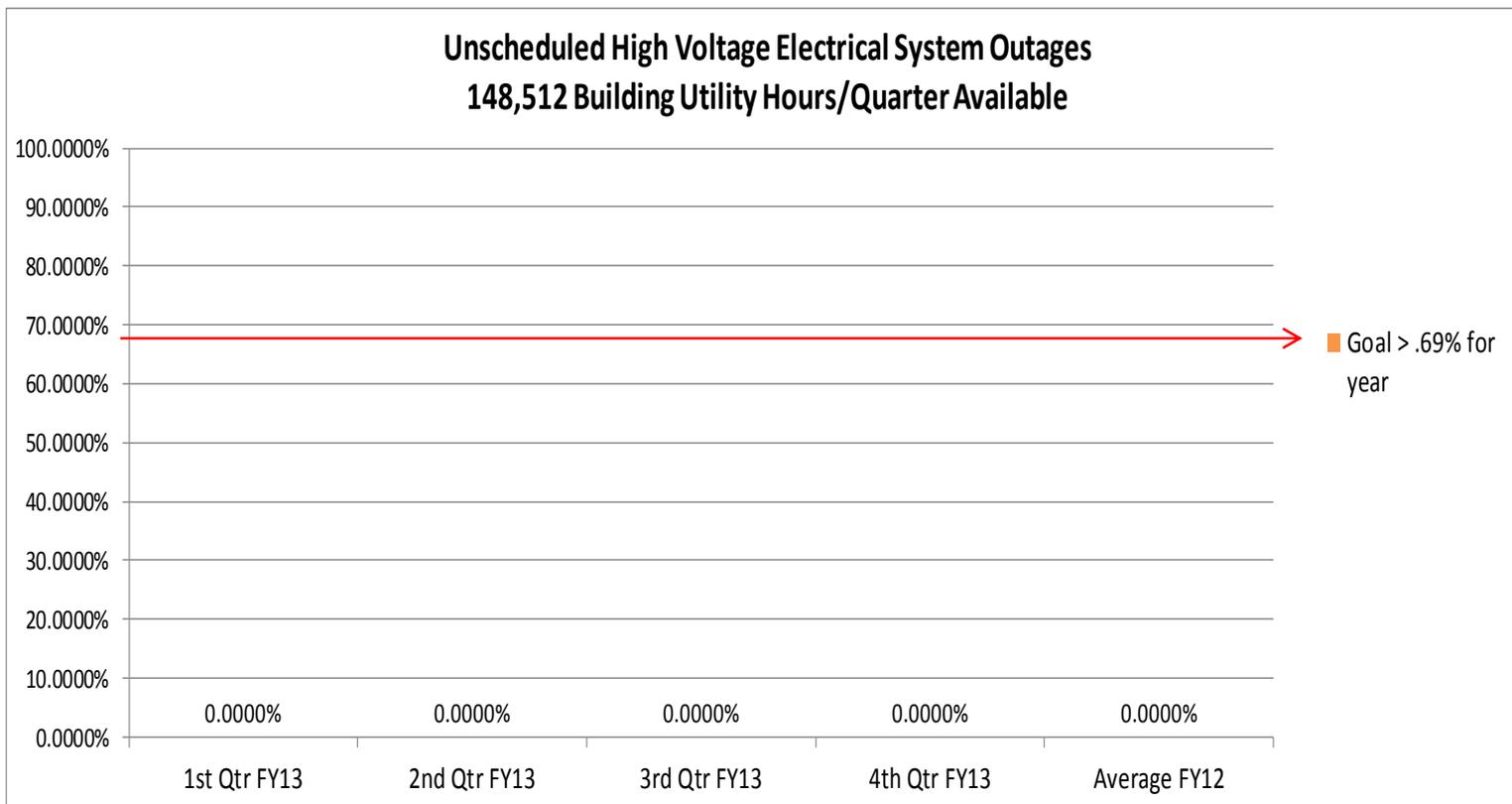
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by .69%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than .69% for year.

Balanced Scorecard Category: Customer Perspective



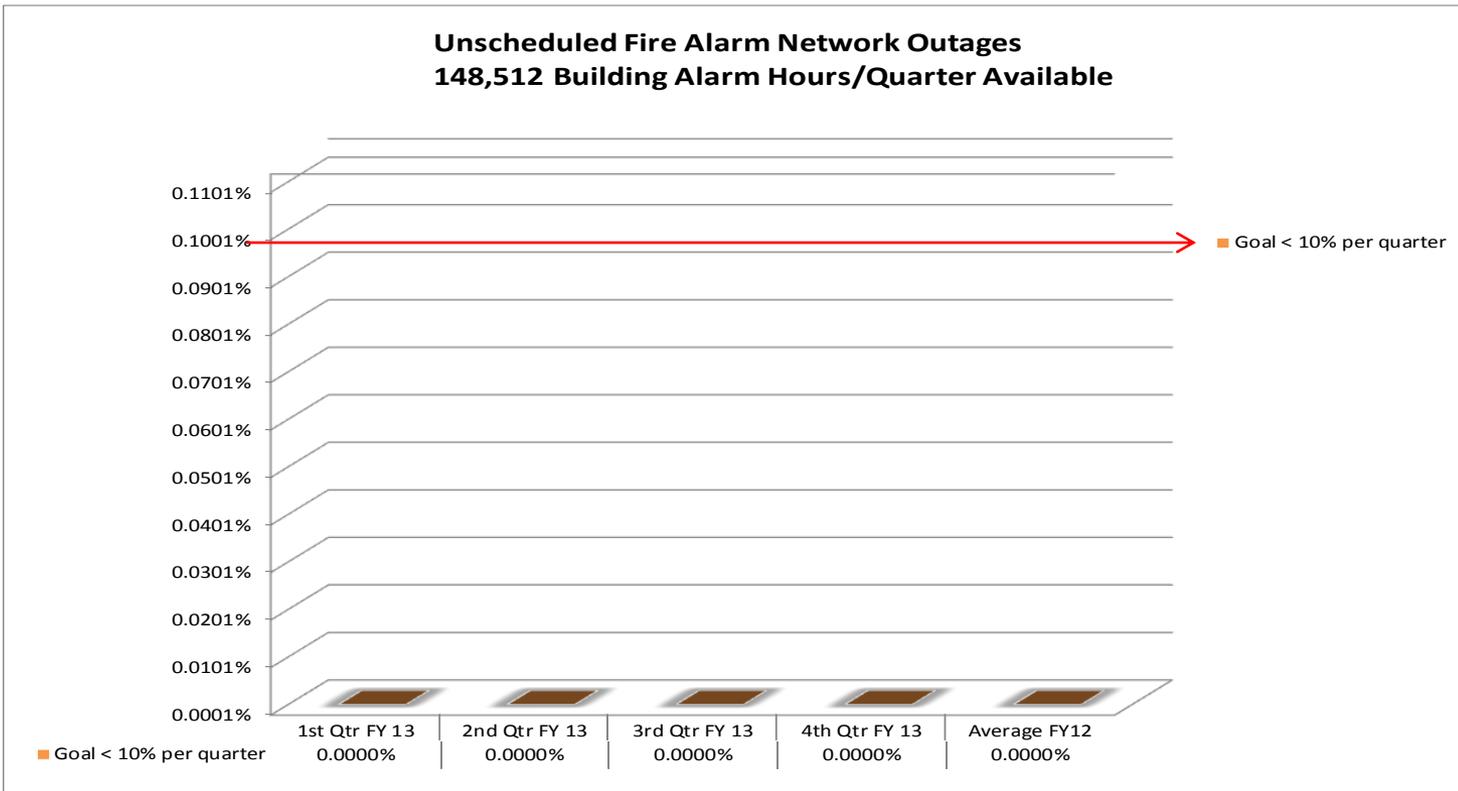
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.4 Reduce Unscheduled Fire Alarm Network Outages by 10%

Measure: Percentage of time system is fully operational (Hours of Outage divided by Total Hours in Quarter)

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process

Objective	2.2.1	95% of Projects Designed on Time 97.0% achieved for FY12 with 94.0% in the 4 th Quarter
Objective	2.2.2	85% of Estimates for in house construction within +/- 10% of Actual 97.2% achieved for FY12 with 96.6% in the 4 th Quarter
Objective	2.2.4	90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date 95.9% achieved for FY12 with 94.4% in the 4 th Quarter

**Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase
100% achieved for FY12 - (yearly goal only)**

ACTION PLANS FOR IMPROVEMENT

- **Implement process updates based on four committee recommendations identified 1st Quarter FY-13:**
 1. Streamline Processes
 2. Under \$30K Contracts
 3. Develop new Customer Survey
 4. Increase African American HUB usage
- **Continue efforts with assigning Classroom Capacity and providing egress information per individual buildings: Ongoing – driven by building and project needs.**

IMPLEMENTED ACTIONS AND PLANS

- Project schedules from Scope & Budget phase through Design, Construction and Closeout. **Ongoing.**
- Establish proven steps to beneficial occupancy via Customer and departmental meetings. **Ongoing.**
- Customer involvement with project Punch List process. **Ongoing**

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

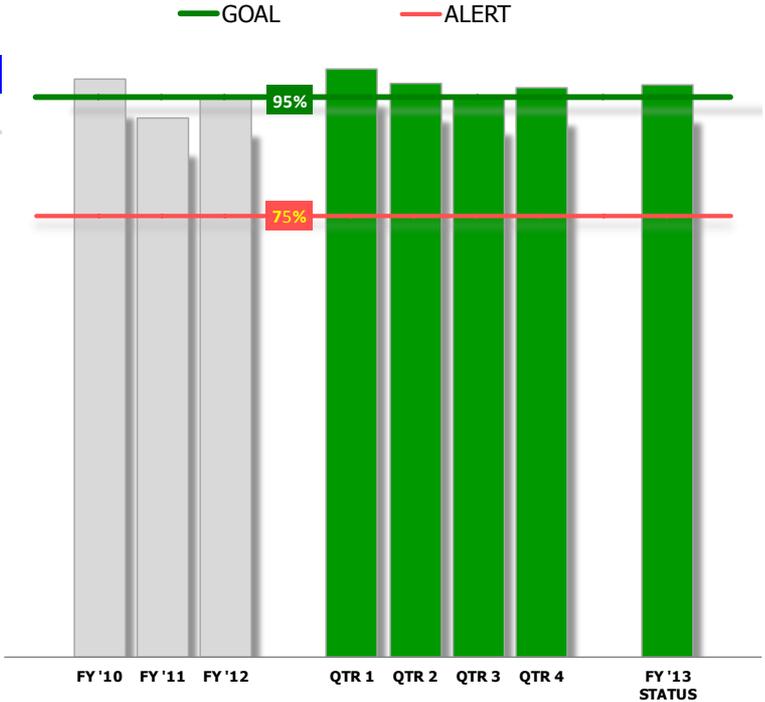
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.1 **95% of Projects Designed on Time**

Measure: Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)

Balanced Scorecard Category: Customer Perspective

95% of Projects Designed on Time

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not completed on time	Designed On Time
FY '10	173	170	3	98.3%
FY '11	300	275	25	91.7%
FY '12	240	228	12	95.0%
QTR 1	29	29	0	100.0%
QTR 2	38	37	1	97.4%
QTR 3	42	40	2	95.2%
QTR 4	30	29	1	96.7%
FY '13 STATUS	139	135	4	97.1%



GOAL
95.0%

STATUS
97.1%

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

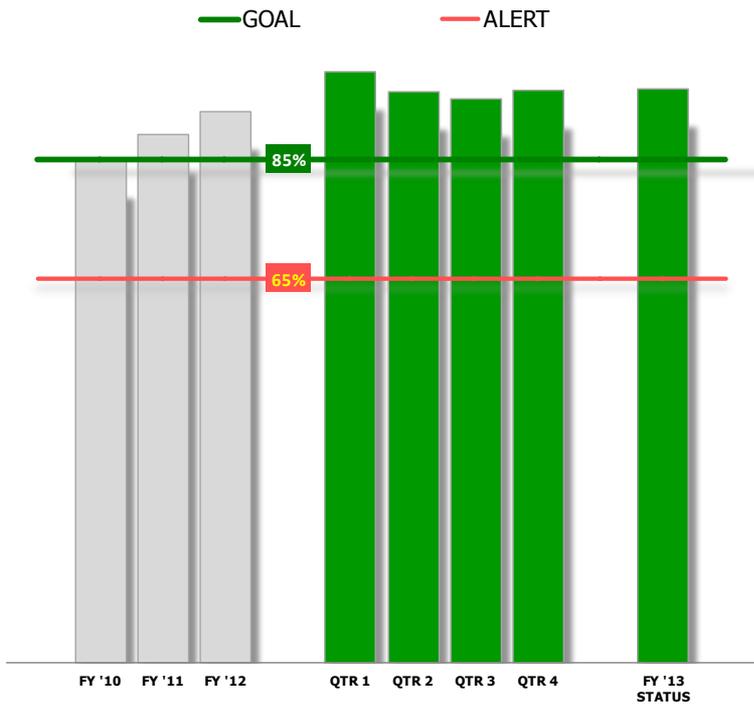
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 **85% of Estimates for All Construction within +/- 10% of Actual.**

Measure: Percentage (Number of Projects designed with actual costs within +/- 10% of estimate, divided by total number of projects designed)

Balanced Scorecard Category: Customer Perspective

85% of Estimates for All Construction within 10% - 2.2.2

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '10	182	155	27	85.2%
FY '11	224	200	24	89.3%
FY '12	240	224	16	93.3%
QTR 1	32	32	0	100.0%
QTR 2	30	29	1	96.7%
QTR 3	44	42	2	95.5%
QTR 4	33	32	1	97.0%
FY '13 STATUS	139	135	4	97.1%



GOAL
85.0%

STATUS
97.1%

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

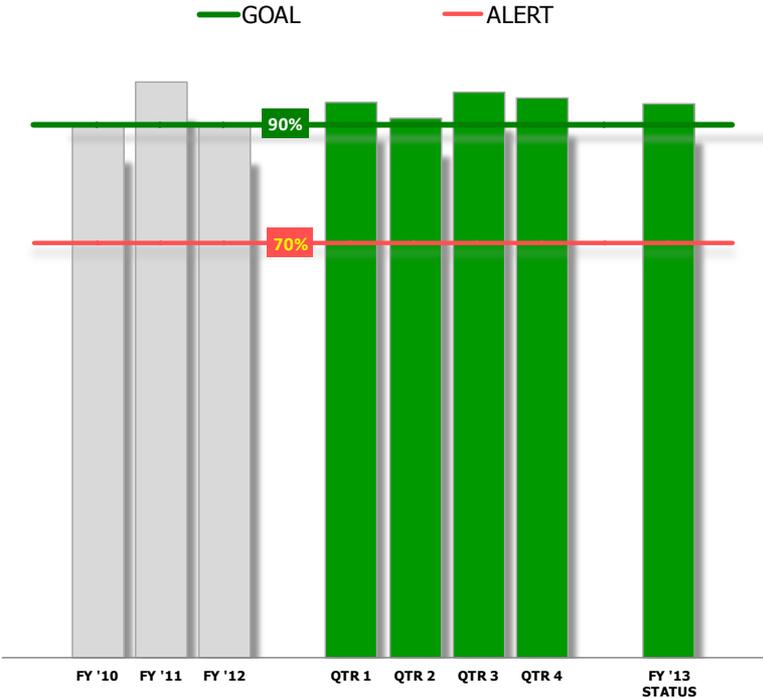
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 **90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

Measure: Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)

Balanced Scorecard Category: Customer Perspective

90% of All Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.4

QUARTERLY REVIEW	No. of Projects	No. that met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '10	182	164	18	90.1%
FY '11	297	289	8	97.3%
FY '12	240	216	24	90.0%
QTR 1	32	30	2	93.8%
QTR 2	45	41	4	91.1%
QTR 3	44	42	2	95.5%
QTR 4	18	17	1	94.4%
FY '13 STATUS	139	130	9	93.5%



GOAL
90.0%

STATUS
93.5%

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

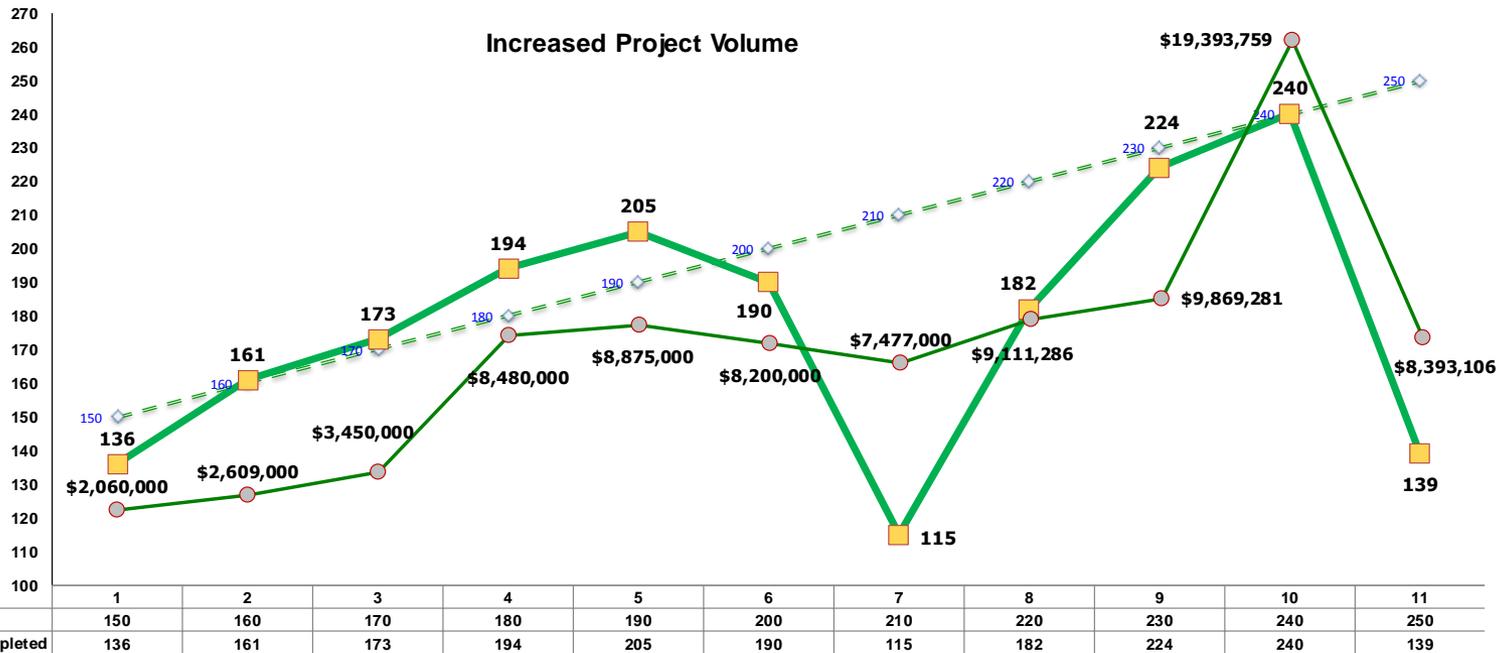
Strategy 2.2 Improve Informal Project Design and Construction Process
 Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Perspective

Increase Project Volume by 10 Projects per year

	1	2	3	4	5	6	7	8	9	10	11
GOAL	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
	136	161	173	194	205	190	115	182	224	240	139
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,286	\$9,869,281	\$19,393,759	\$8,393,106
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$44,059	\$80,807	



GOAL 100%

STATUS 55.6%

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.4
Objective 3.4.1

Improve Administration of the Capital Construction Process
90% of Capital Construction Projects completed on Schedule

Lead
Capital

ACTION PLAN

- Actions Planned
 1. Keep schedules current & refer to them monthly
 2. Discuss schedule (baseline & current) with end users
 3. Inform designer and CM of each other’s contractual agreements

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

**Lead
Capital**

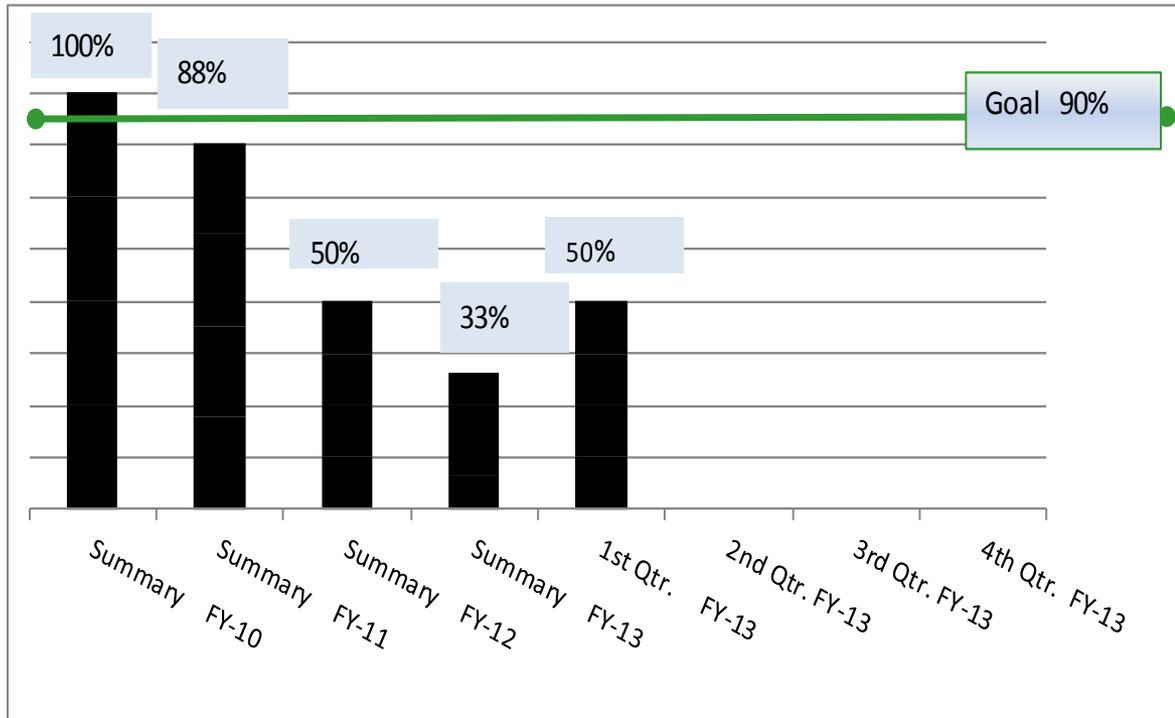
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.1 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

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-10	6	0	100%
Summary FY-11	7	1	88%
Summary FY-12	6	6	50%
Summary FY-13	1	2	33%
1stQtr. FY-13	1	1	50%
2ndQtr. FY-13	0	1	0%
3rd Qtr. FY-13	n/a	n/a	n/a
4th Qtr. FY-13	n/a	n/a	n/a



4th Qtr. Objective is n/a
 Year to date is 33%

Status

GOAL #4 – Perfect a Customer Focused Organization

Lead
FBO

Strategy 4.1 Continually Improve Customer Service/Satisfaction

Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%

Objective 4.1.2 Achieve overall FM Unit Customer Satisfaction of 85% (Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

ACTION PLAN

- ❑ Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers.

- ❑ Development of a Communications Strategy recommendation underway.
 - ❑ Web Advisory Group (WAG) has been formed to address customer usability, design and university compliance of FM entire website.
 - ❑ Continual customer, community and UNC system education of services (e.g. Customer Handbook, Sustainability Report). Environmental scans to continue, ensuring needs and issues are addressed.
 - ❑ Increased external publicity (i.e. UNC Charlotte Magazine, Observer)
 - ❑ Research and visitations of other peer institution Communication Offices for learning opportunities, processes, challenges, pitfalls, etc.

- ❑ Review processes and procedures from the Business and HR side
 - ❑ Review (lean) Time Sheet Processing. Processes have been mapped. **Project on hold** due to new university initiative?

GOAL #4 – Perfect a Customer Focused Organization

Lead
Design
Services

Strategy 4.1 Continually improve customer service/satisfaction

Objective 4.1.4 90% of Informal Project Customers Satisfied or Very Satisfied

ACTION PLAN FOR IMPROVEMENT

- Currently Customers are reluctant to respond to the Archibus questionnaire due to its length and requested level of detail.
- **Work are revising the questionnaire as currently sent to our Customers and will deliver and receive questionnaire outside of Archibus - We would like this to be accomplished within the next 90 days.**
- We are working to find ways to encourage much more Customer participation.

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually improve customer service/satisfaction
Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

Measure: Results from Interactive Web-based Customer Questionnaire. (Process automated through Archibus)

Balanced Scorecard Category: Customer Perspective

90% of Informal Project Customers Satisfied or Very Satisfied with services Received

QUARTERLY SURVEY	Number of Projects Surveyed	Very Satisfied 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1 +	Unsatisfied 0+	Percent Satisfied
FY '09	0	0	0	0	0	0	0	0.0%
FY '10	30	18	5	0	6	1	0	76.7%
FY '11	33	24	6	2	0	1	0	90.9%
QTR 1	1	1	0	0	0	0	0	100.0%
QTR 2	4	2	1	0	0	1	0	75.0%
QTR 3	4	4	0	0	0	0	0	100.0%
QTR 4	14	11	2	0	1	0	0	92.9%
FY '13 STATUS	23	18	3	0	1	1	0	91.3%

GOAL: 90.0%

This survey document is no longer viable. New document under development for review FY-14 second quarter.

**GOAL
90.0%**

**STATUS
91.3%**

GOAL #4 – Perfect a Customer Focused Organization

Strategy	4.1	Continually Improve Customer Service/Satisfaction
Objective	4.1.3	Decrease the Number of Hot/Cold Calls by 15%

Lead
F. O.

ACTION PLAN

- Actions Planned
 - 1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
 - 2 – Ensure that Zones are checking BAS and monitoring conditions
 - 3 – Continue to develop controls section and cross train with Zones.
 - 4 – Continue to work with Capital to get buildings commissioned and retro commissioned.
 - 5 – Ensure that we are following UNCC Temperature Control Policy

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

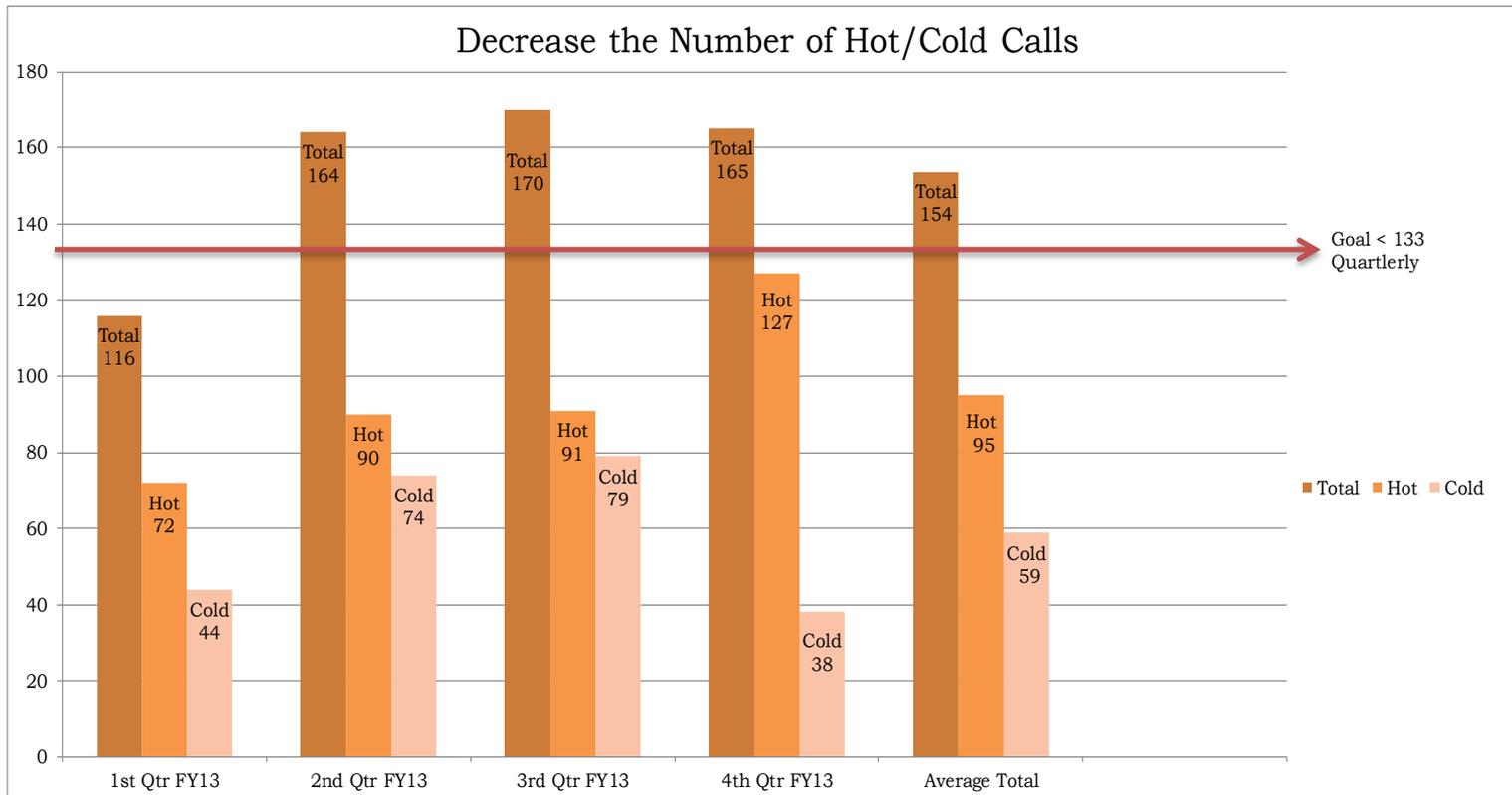
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% (Goal < 133)

Measure: Number of hot/cold calls submitted on work requests.

Goal: Less than 133 per quarter

Balanced Scorecard Category: Customer Perspective



STATUS

Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	YTD
Customer <i>To achieve our vision, how must we view & treat our customers?</i>	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%	55.50%					58.95%
		1.3.2	Decrease Work Request Cycle Time by 5%	<300 hrs	102					203
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	95%					93.5%
	Improve Process Reliability	1.5.3	Reduce Unscheduled HV outages by 10%	<=0.0069	0.0%					0%
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<10%	0.00%					0%
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	96.7%					97%
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	97.0%					97.1%
		2.2.3	Combined with 2.2.2							
		2.2.4	All IP construction meets BOD	90%	94.4%					93.5%
		2.2.5	Combined with 2.2.4							
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 250	55.6%				Annual	139
		3.4.1	90% Cap Construction Projects on Schedule	90%	no data					33%
	Enhance customer satisfaction	4.1.1	Improve: Overall satisfaction rating	85%		no survey in FY 2013				
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%		no survey in FY 2013				
	4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-10% or <133	165					154	
	4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	92.9%					91.3%	



UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Strategic Objectives:

- Manage Budget, Maximize Revenue Stream**
- Promote Fiscal Responsibility**
- Sustainable Practices**
- Conserve Natural Resources**
- Improve Employee Safety**
- Improve HUB Participation**

GOAL #6 – Promote Good Stewardship

Lead
FBO

Strategy 6.1 Promote Fiscal Responsibility

- Objective 6.1.1** Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.
- Objective 6.1.2** Increase Grants and Supplemental Funding to the Department by 25%
- Objective 6.1.3** Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

- FM completed FY 2013 with all funds in the black.
- Expenditures for state appropriated funds were as follows:
 - Emergency Reserve = 99.2% expended
 - Main Operations = 95.8% expended
 - One-Time Funds = 99.6% expended
- The Labor Services fund continues to experience instability in its fund balance. The Business Office will work with FO to identify issues; Request for a cost accounting intern to assist with this and other projects is being considered.
- Development of a FM Budgeting Basics Training program is underway; It is expected that there will be several sections, each targeted to specific areas, actions, etc. Sherry Ceallaigh (Capital Projects) will assist the Business Office by creating the section for Capital Finance. This program will be geared to FM leadership.
- Continue to work through accounting issues such as use of account codes, receiving, after the fact vs. non-compliant requisitions, etc. Send reminders to responsible parties. Review cost accounting centers in preparation for future reporting requirements.
- Boost effort to locate external funding opportunities that align with FM's strategic vision, mission and goals;

Facilities Management Strategic Planning Session – 4th Quarter FY 2013



GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.1 Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS: June 30, 2013

ACCOUNT DESCRIPTION	2012-13 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE
OVERTIME AND PREMIUM PAY	\$ 308,912	8%	\$ 308,912	\$ 0	\$ 308,912	\$ -
STUDENT AND TEMPORARY WAGES	\$ 53,395	1%	\$ 53,395	\$ -	\$ 53,395	\$ -
PERSONAL SERVICE CONTRACTS	\$ 44,432	1%	\$ 44,432	\$ -	\$ 44,432	\$ -
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 759,199	19%	\$ 756,922	\$ 2,277	\$ 759,199	\$ -
OTHER ADMINISTRATIVE EXPENSES	\$ 52,604	1%	\$ 43,404	\$ 9,200	\$ 52,604	\$ -
DOMESTIC TRAVEL/TRAINING	\$ 131,631	3%	\$ 131,631	\$ -	\$ 131,631	\$ -
FIXED PURCHASED SERVICES (Maint Agr)	\$ 241,001	6%	\$ 241,001	\$ -	\$ 241,001	\$ -
OTHER PURCHASED SERVICES	\$ 472,629	12%	\$ 344,495	\$ 128,134	\$ 472,629	\$ -
SUPPLIES	\$ 1,575,222	39%	\$ 1,555,597	\$ 15,612	\$ 1,571,209	\$ 4,013
EQUIPMENT/IT	\$ 317,274	8%	\$ 306,146	\$ -	\$ 306,146	\$ 11,129
CAPITAL OUTLAY	\$ 5,463	0%	\$ 5,463	\$ -	\$ 5,463	\$ -
FIXED CHARGES	\$ 30,829	1%	\$ 30,829	\$ -	\$ 30,829	\$ -
RECYCLING	\$ 39,602	1%	\$ 39,602	\$ -	\$ 39,602	\$ -
FACILITIES MANAGEMENT Main Operating Funds	4,032,194		3,861,829.35	155,222.41	4,017,051.76	15,142.05

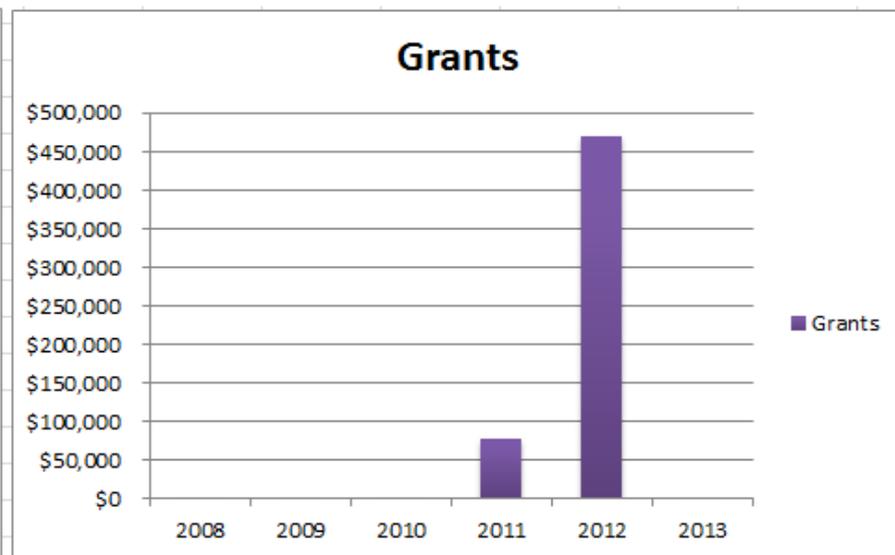
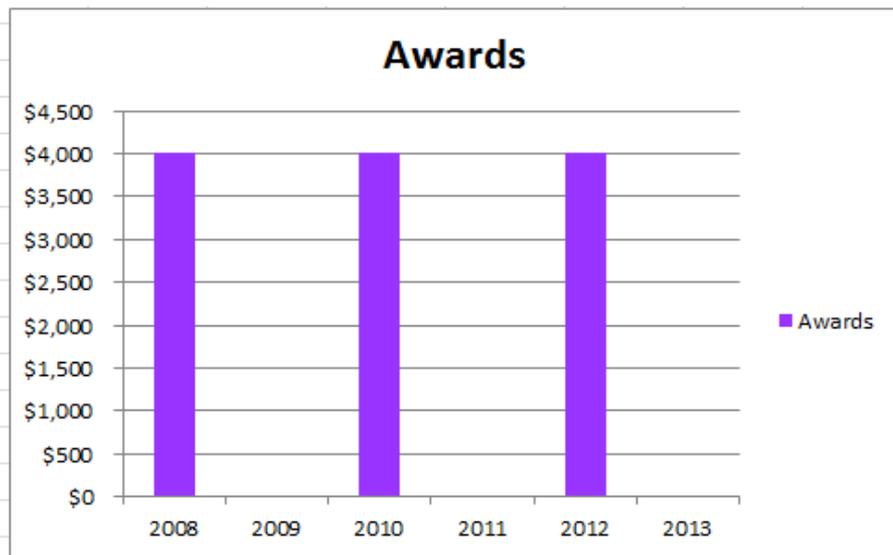


GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.2 Increase Grants and Supplemental Funding to the Department by 25%

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective



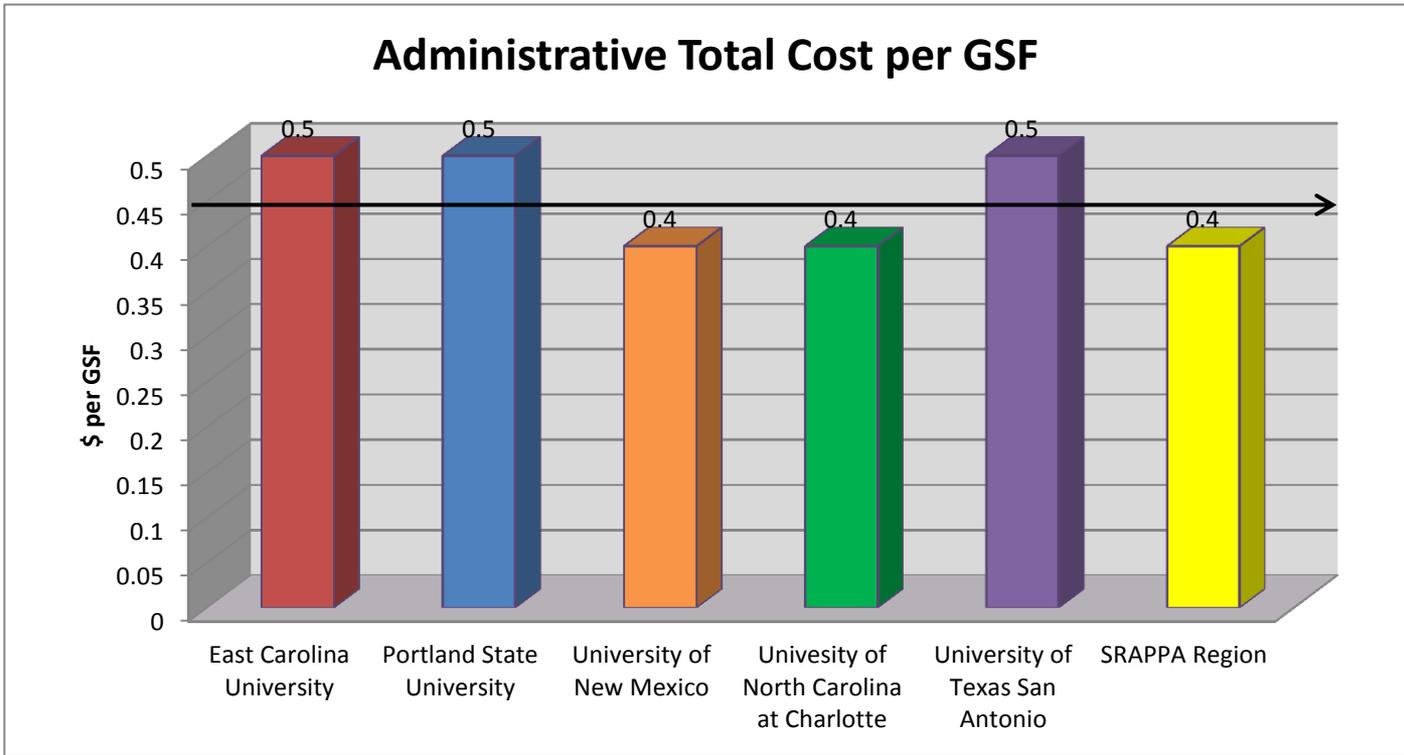
STATUS

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

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

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship

Lead
Housekeeping

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.4	Achieve Custodial Costs/Student FTE Plus or Minus 5% of the APPA Average for Peer Institutions (Internal UNC Peers = East Carolina, Greensboro) (National Peers = University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University.

ACTION PLAN

- Actions Planned
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
 - Supply chain management project (feasibility review)

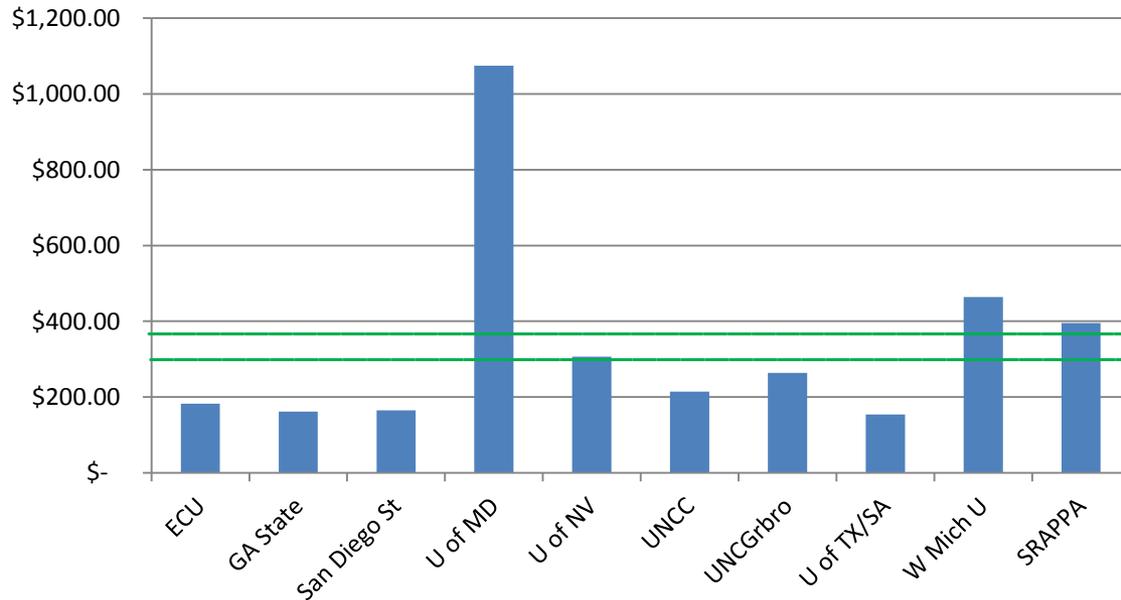
Facilities Management Strategic Planning Session – 4th Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.4 Achieve Custodial Costs/Student between Plus or Minus 5% of the APPA Average for Peer Institutions (Internal Peers = East Carolina, Greensboro) (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University of Texas at San Antonio, Western Michigan University.)
 UNC

Measure: Custodial Costs/Student from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/GSF

Balanced Scorecard Category: Financial Perspective



Avg. cost/student = \$338.35
 UNCC = 37% below average

\$355.26 plus 5% of avg.
 \$321.43 minus 5% of avg.

STATUS

GOAL #6 – Promote Good Stewardship

Lead
F. O.

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.5	Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average
	6.1.6	Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average
	6.1.7	Exceed Labor Services Payroll requirements by 10%

ACTION PLAN

- Actions Planned
 - 1 – Make sure that data submitted is correct.
 - 2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
 - 3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.
 - 4 – Utilize UPA to help identify when falling behind in data entry

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

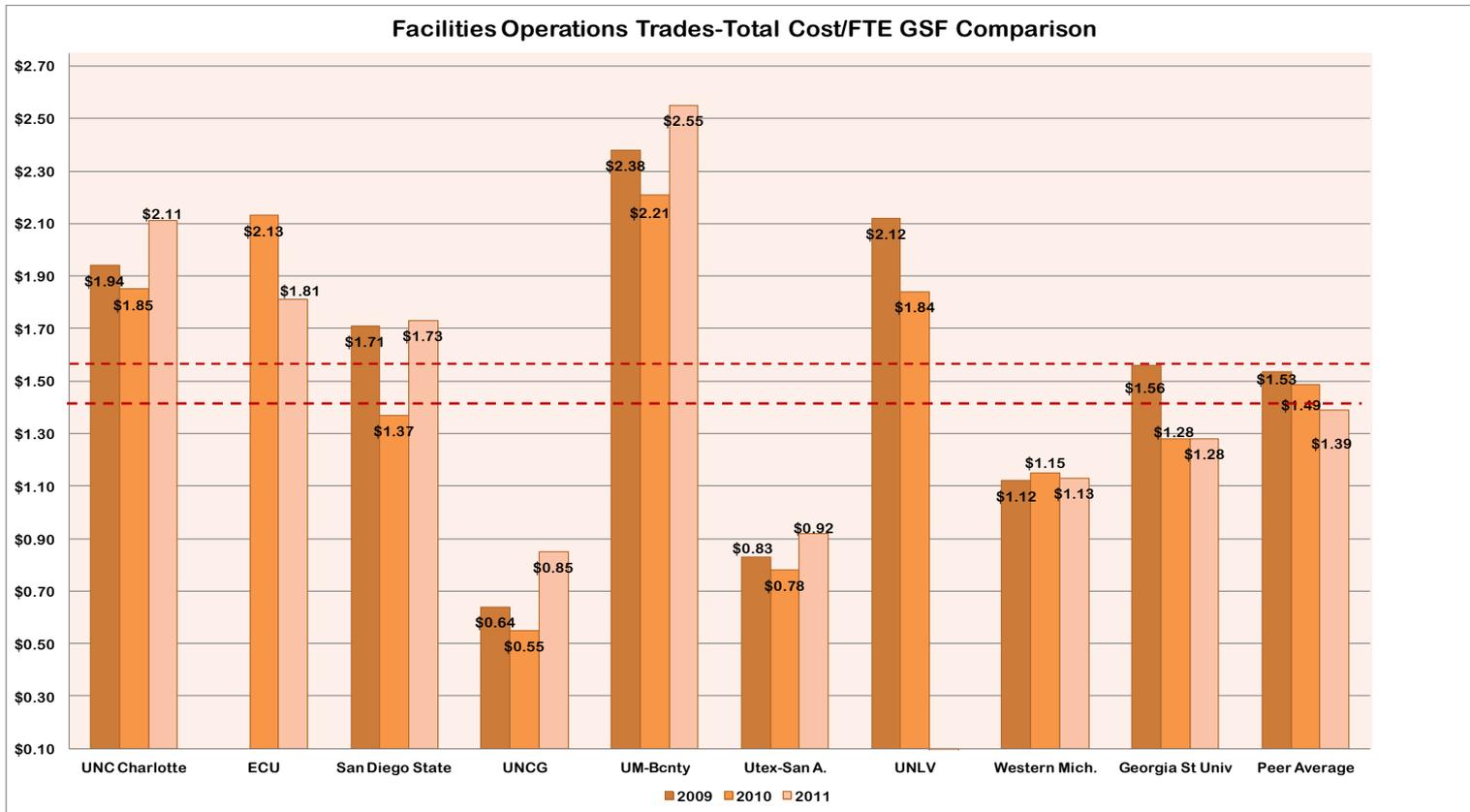
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.5 Achieve Total Maintenance Cost/GSF \pm 5% of APPA Average for Peer Group .

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

Balanced Scorecard Category: Financial Perspective

Note: Peer average does not include institutions not reporting nor those which included auxiliaries (Western Michigan).



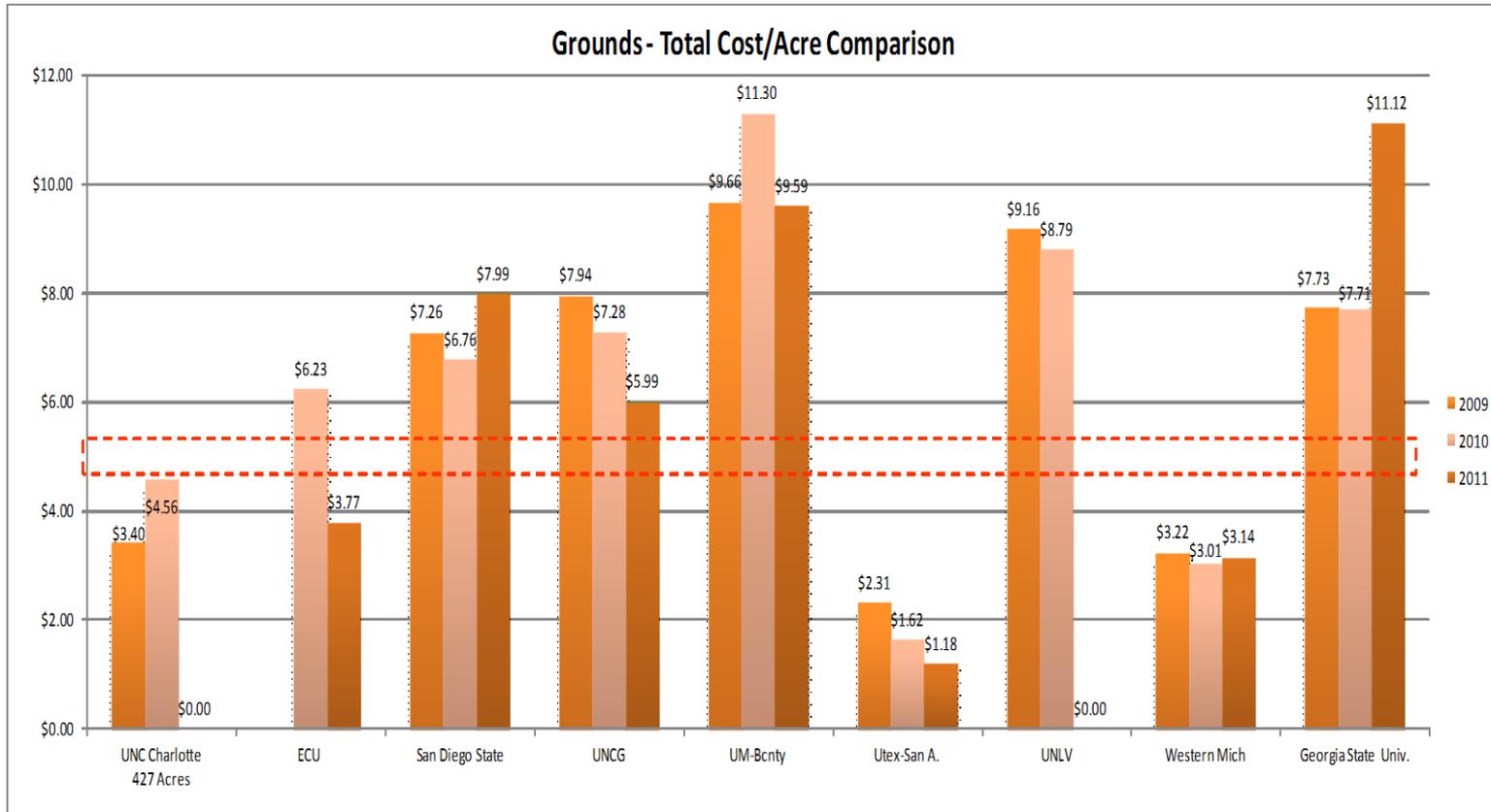
STATUS

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.6 Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group .

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

Balanced Scorecard Category: Financial Perspective



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

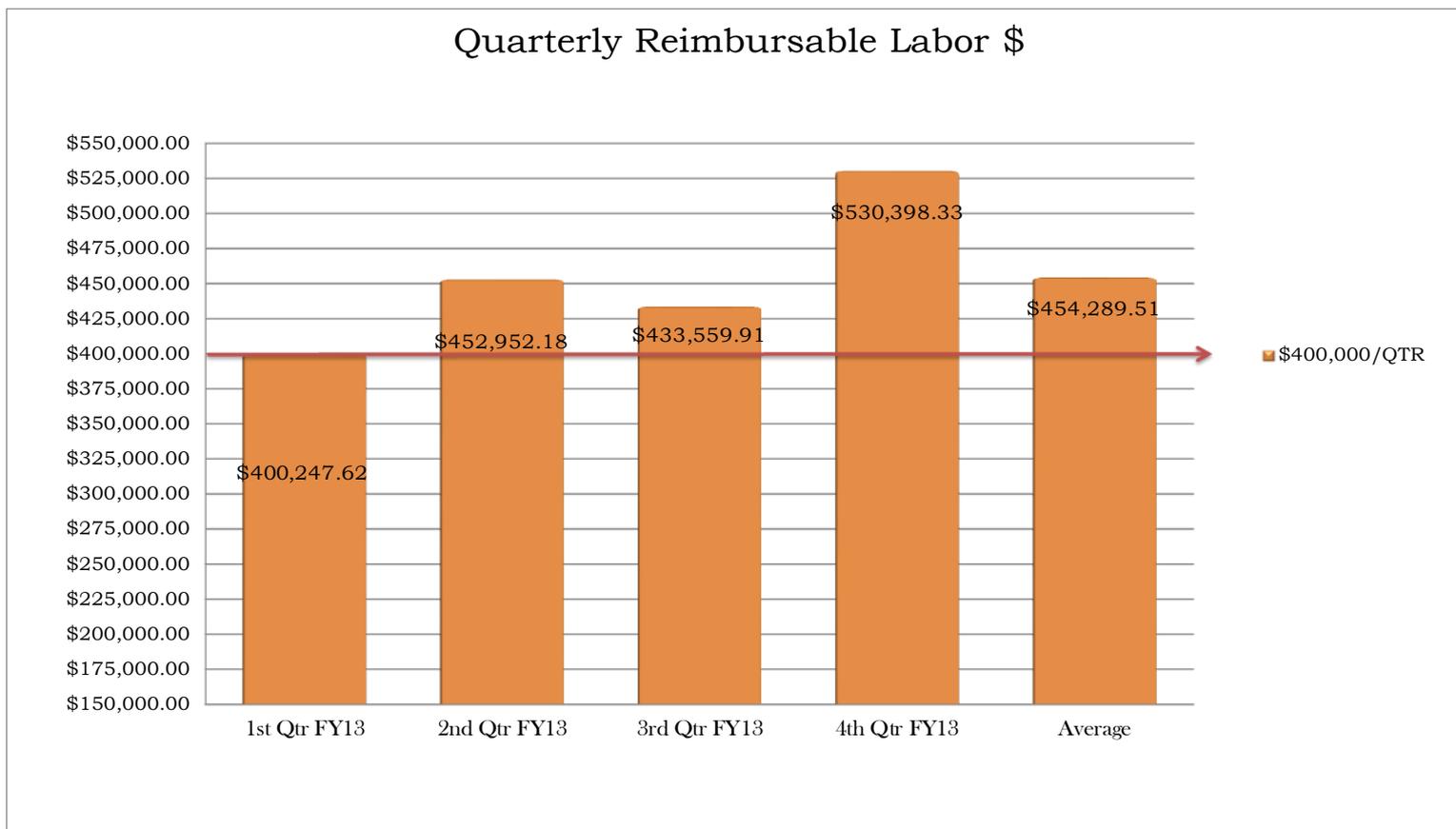
GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.7** Exceed Labor Services Payroll requirements by 10%

Measure: Projected verses actual earnings by shop by quarter (\$400,000/Qtr) at current levels

Goal: \$400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective



STATUS



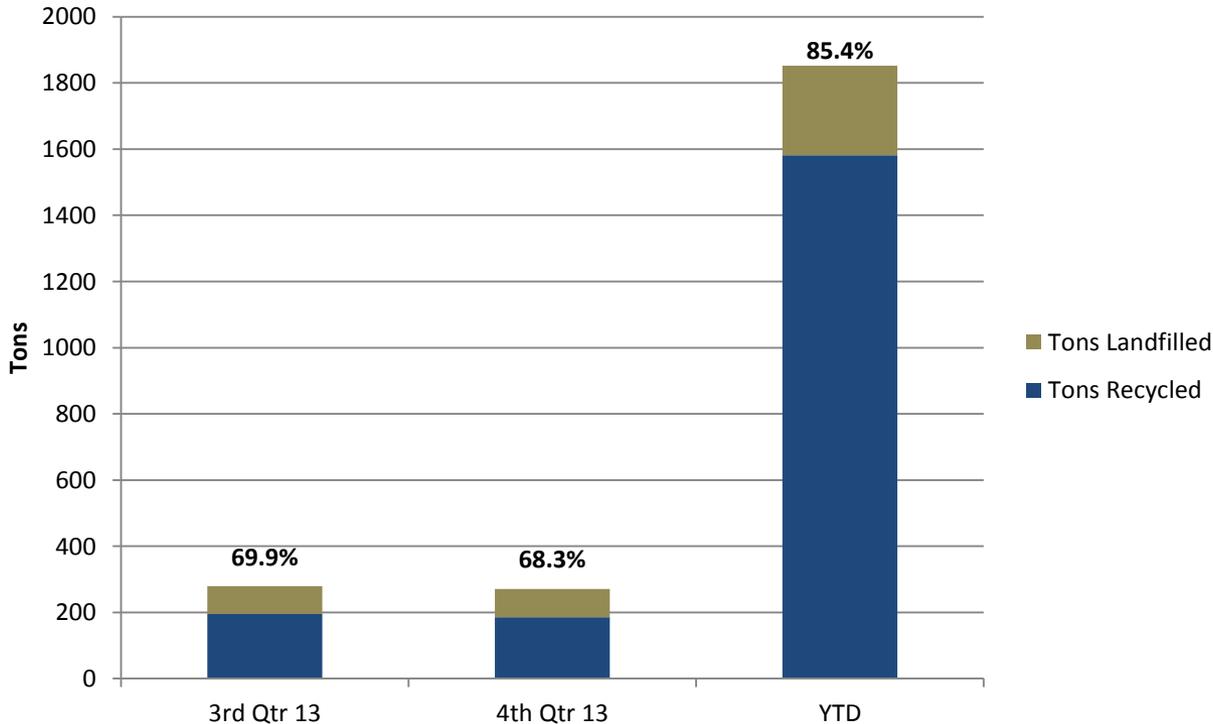
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 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: Financial Perspective

Capital Projects Diversion 4th Quarter FY13



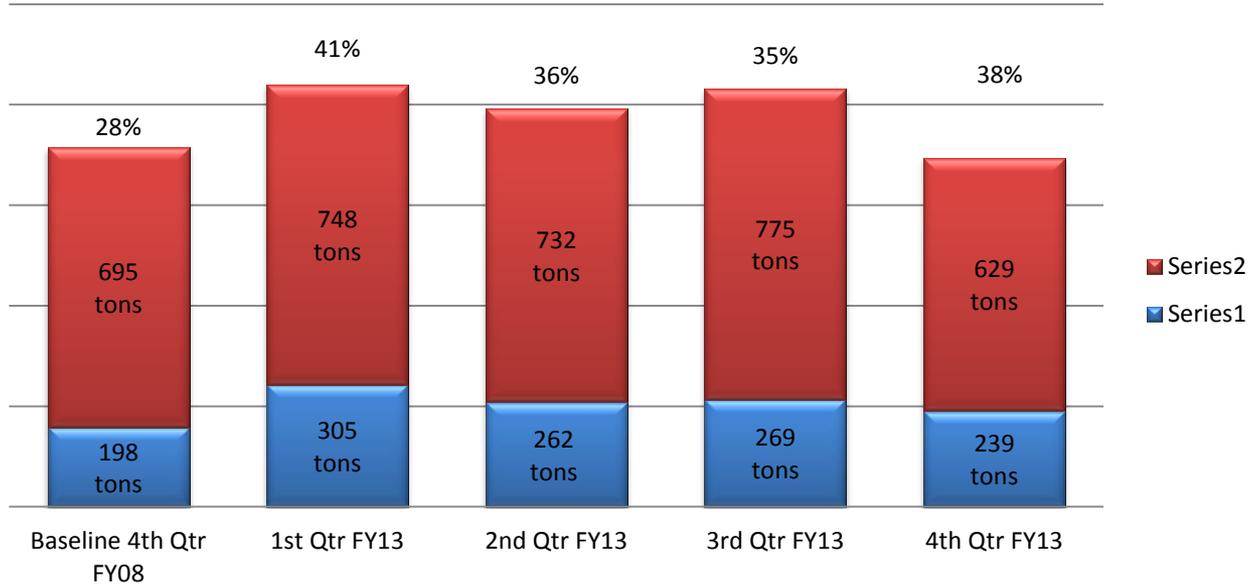


GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.2 Increase Percent of Solid Waste diversion on Campus to 40% by 2018
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



GOAL #6 – Promote Good Stewardship

Strategy	6.2	Develop a Sustainable Campus
Objective	6.2.3	Increase Percent of Solid Waste Recycled on Campus by 5% in five year (base year 2008)

Lead
Recycling

ACTION PLAN

- **Waste Reduction and Recycling**

- **Actions Complete -**

TOTAL recycling for quarter ___% (all totals are not in) , ___% (all totals are not in) for the year

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
- Held Spring Campus Clean UP and Tree Plantings in March , EARTH DAY 2013 Festival, provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, designing Zero Waste Options for FOOTBALL, assisted Brian Guns and NC APPA for the 2013 NC APPA conference at UNC Greensboro

- **1st Quarter Actions Planned**

- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
- First Zero Waste FOOTBALL Game- work with FOOTBALL committees and several student organizations

- **C & D**

- **Actions Complete -**

- Overall C&D recycling rate for Capital Projects is 88%; recycling rate for informal projects is 54%.

- **1stQuarter Actions Planned**

- Continue collecting/tracking recycling information and acting as resource for contractors.

GOAL #6 – Promote Good Stewardship

Strategy 6.2: Develop a Sustainable Campus

Objective 6.2.4. Achieve 60% of STARS credits

Lead
Facilities
Planning

ACTION PLAN

This objective will be replaced by new Tactic 5.2.3: Achieve Bronze rating on Sustainability tracking and reporting system (STARS).

Measure: Number of points completed in each category.

Lead: Facilities Planning

Balanced Scorecard Category: Financial

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
Planning

GOAL #6 – Promote Good Stewardship

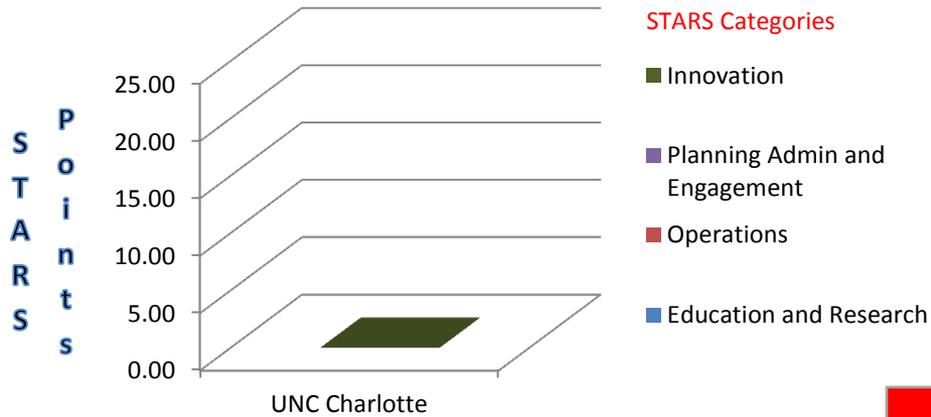
Strategy 6.2 **Develop a Sustainable Campus**

Objective 6.2.4 **Achieve 60% of STARS credits**

Measure: **Number of points completed in each category.**

Balanced Scorecard Category: Financial

Bronze Rating



Status

GOAL #6 – Promote Good Stewardship

Strategy

6.3

Conserve Natural Resources

Objective

6.3.1

Decrease Energy Usage 30% by FY2015

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Pursue lighting retrofits in buildings that still have T-12's
 - GA lighting only PC Construction by cal year end
 - IGA Starts in June
- Continue retro-commissioning program
- Upgrade BAS to enable setbacks
- Energy efficient equipment upgrades
- Complete Performance Contract into construction
- Exterior Lighting upgrades to LED

Lead
Capital

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 30% by FY2015

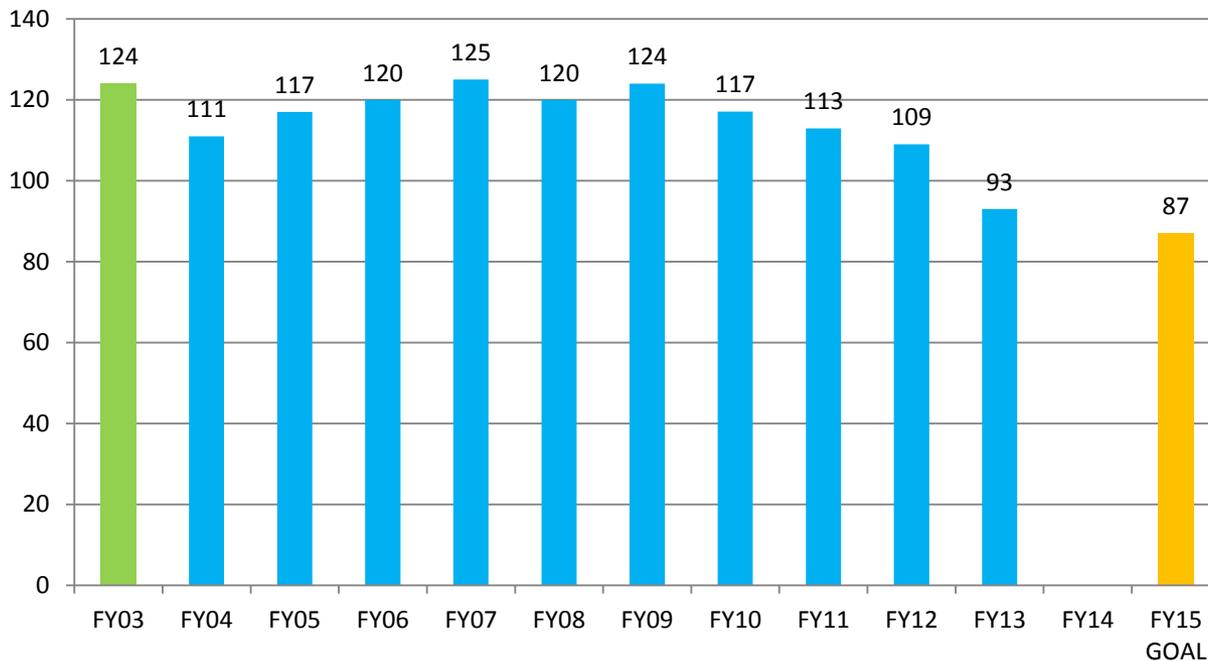
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 25%
Mandated Reduction 30%

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF

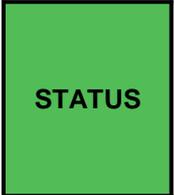


GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.2 Decrease Water Usage by 20% by FY2010

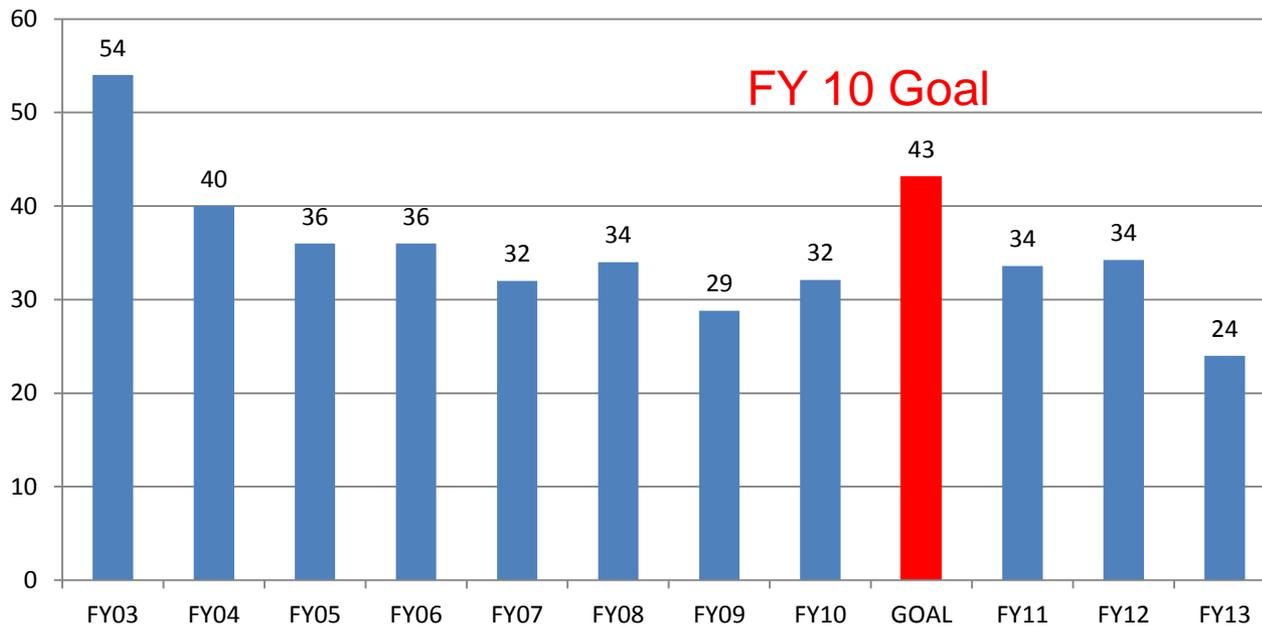
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective



Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 24 Gal/GSF



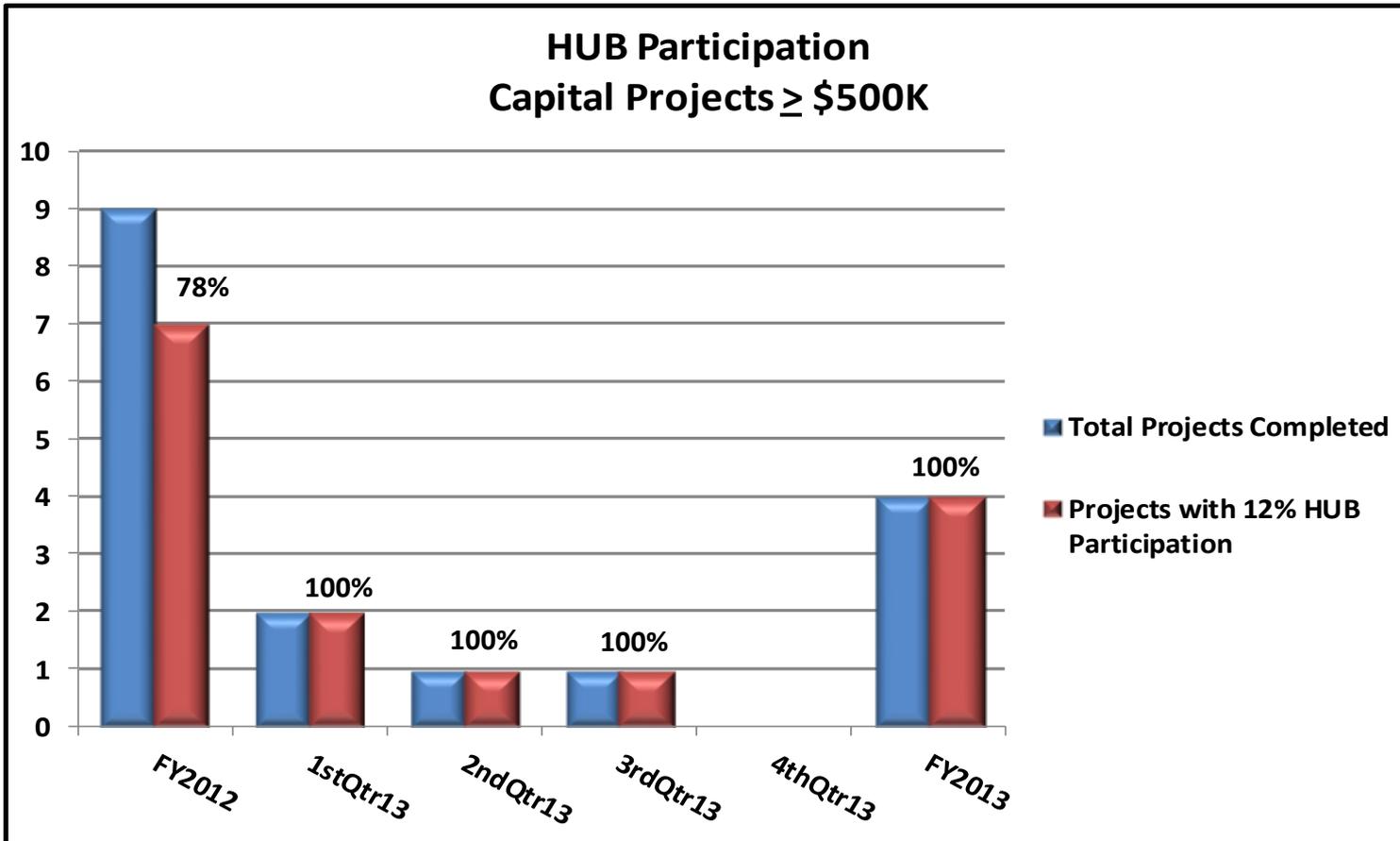
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation

Objective 6.5.1 12% HUB participation on 80% of Capital Projects

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

Balanced Scorecard Category: Financial Perspective



4thQtr STATUS
Nothing to report

FY2013 STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY2013

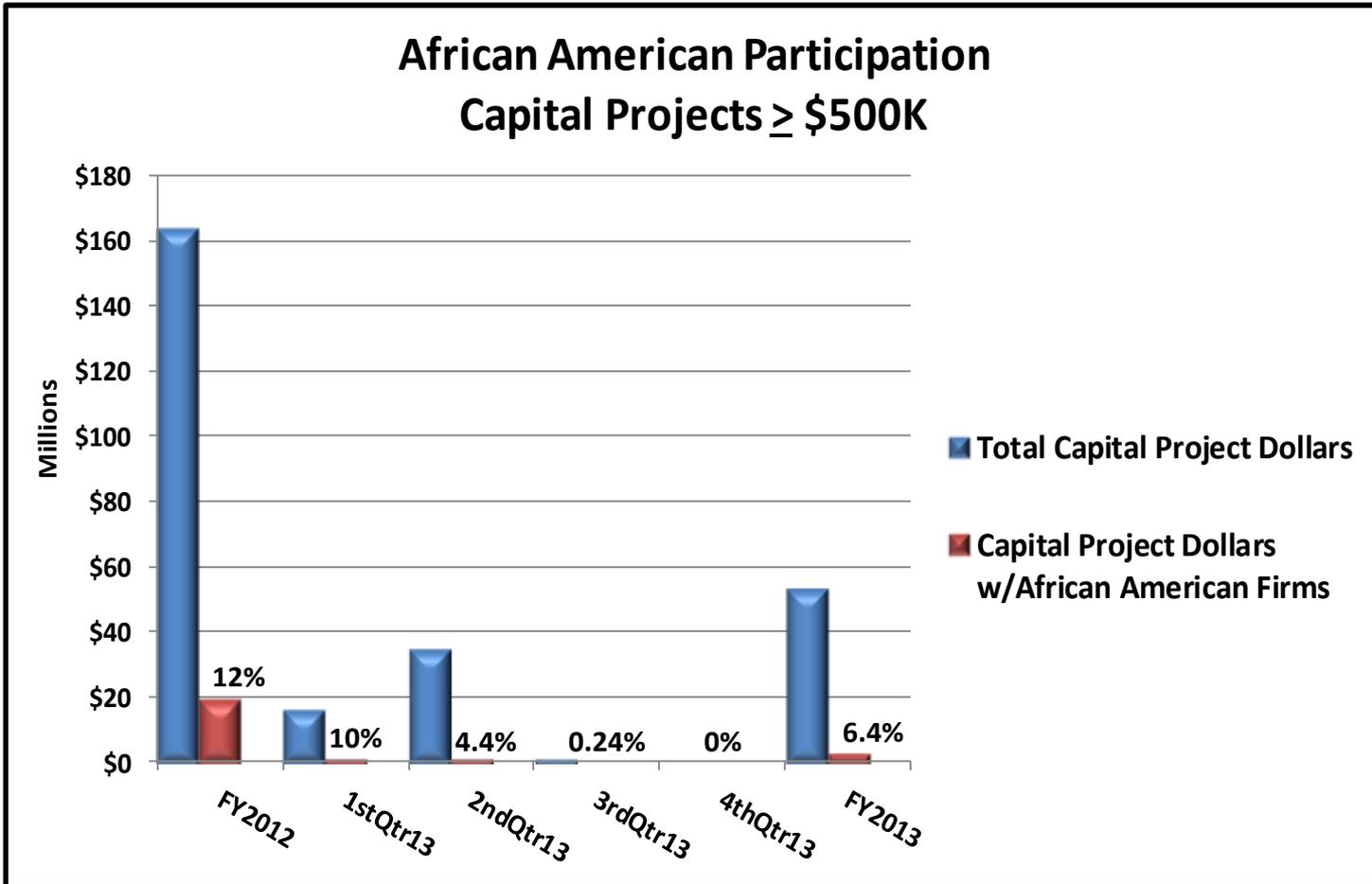
**Lead
Capital**

GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
Objective 6.5.2 3% overall African American Participation on Capital Projects \$500K and above

Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars

Balanced Scorecard Category: Financial Perspective



**4thQtr
STATUS**
Nothing to report

**FY2013
STATUS**

ACTION PLANS FOR IMPROVEMENT

Objective 6.5.3 – Encourage Purchasing to establish a goal for African American participation

Continue –

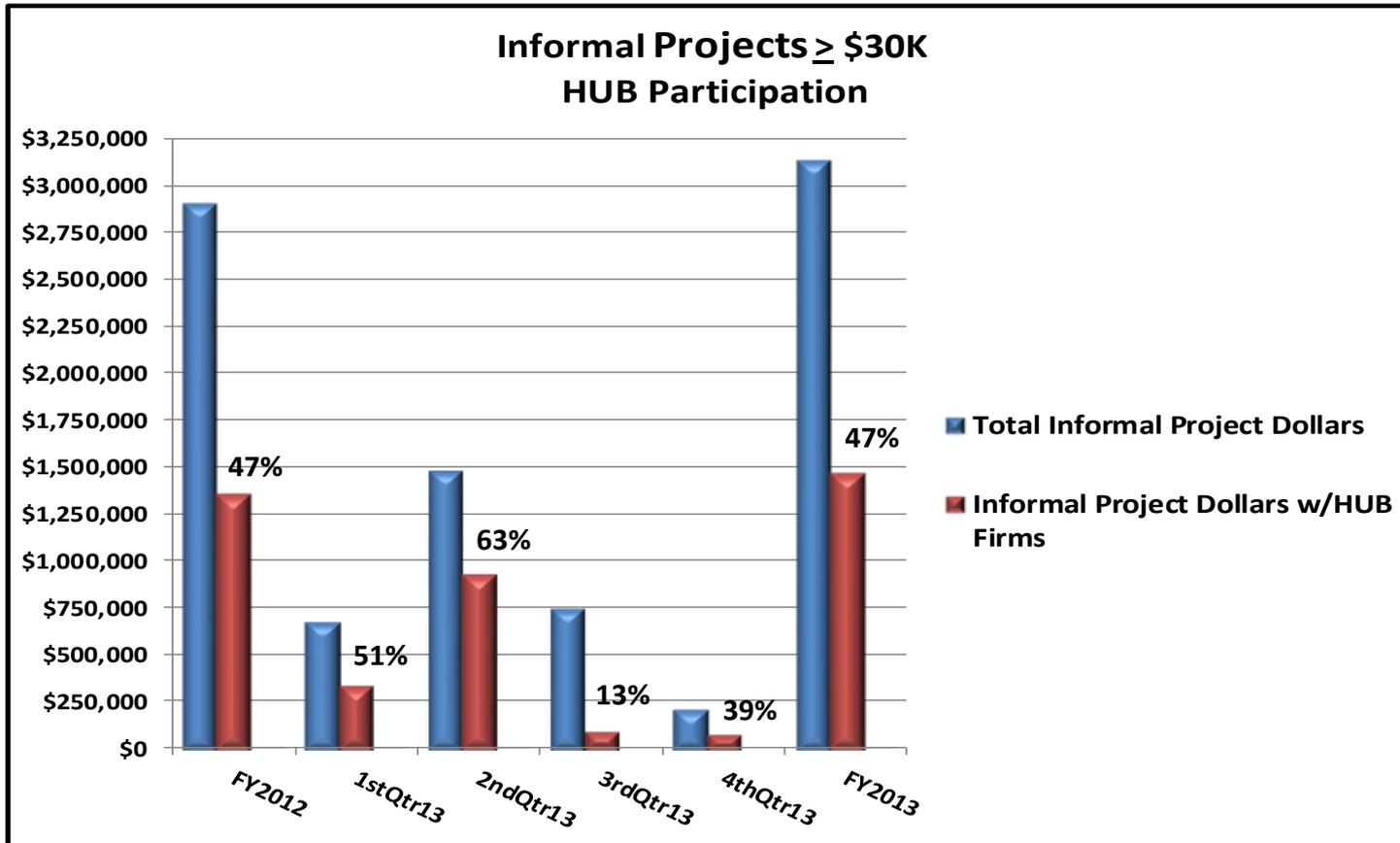
- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms
- Encourage participation in all ethnic segments
- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and “*Good Faith Effort*” documentation to ensure compliance. Hold CM firms accountable!
- Program Compliance
- Education & Outreach

GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.3 13% overall HUB participation on Informal contracts \$30,000 and above

Measure: Total Informal Contract Dollars awarded to HUB Contractors divided by Total Contract Dollars

Balanced Scorecard Category: Financial Perspective



4thQtr
STATUS

FY2013
STATUS

GOAL # 6 – Promote Good Stewardship

Lead
Design
Services

Strategy 6.5 Improve Historically Underutilized Business Participation

Objective 6.5.4 13% overall HUB participation on informal projects below \$30,000 including 3% African American participation.

ACTION PLAN FOR IMPROVEMENT

- Amanda Caudle assigned as Design Service Coordinator to work with Dorothy Vick, Doug Pierce and JOC Contractors in seeking new HUB Contractor opportunities - All Coordinators are encouraged to try new vendors for work on our Under \$30K projects. Amanda advises other Coordinators of new opportunities - **Ongoing.**
- Continue to refine HUB reporting information for Strategic Planning - **Ongoing.**
- Continue to work with FIS on reports for extracting project data from Archibus - **Ongoing.**

GOAL # 6 – Promote Good Stewardship

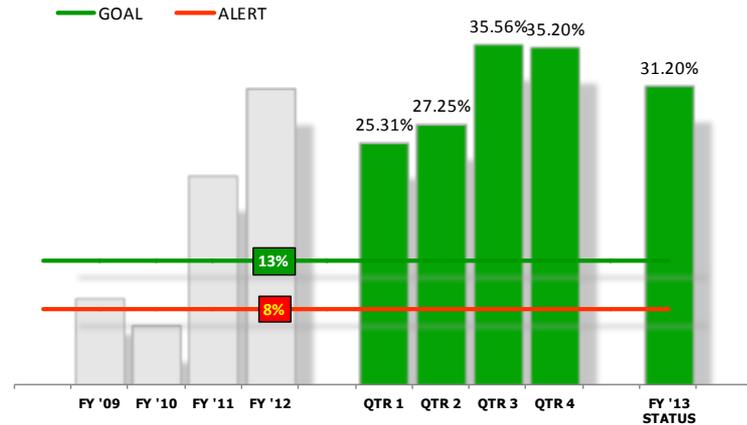
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

Measure: Total % of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

Balanced Scorecard Category: Internal Business Process

13% overall HUB participation on informal projects below \$30,000 - 6.5.4

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%
QTR 1	\$ 711,791	\$ 180,135	25.31%
QTR 2	\$ 604,030	\$ 164,598	27.25%
QTR 3	\$ 787,581	\$ 280,075	35.56%
QTR 4	\$ 787,601	\$ 277,256	35.20%
FY '13 STATUS	\$ 2,891,003	\$ 902,065	31.20%

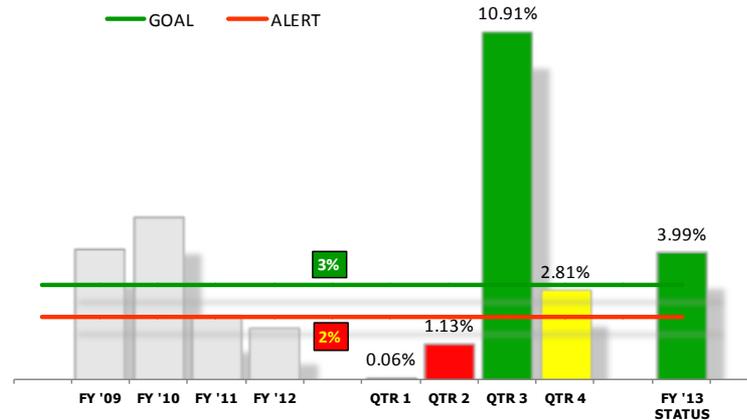


GOAL 13.0%

STATUS 31.2%

3% African Am. participation on informal projects below \$30,000 - 6.5.4

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%
QTR 1	\$ 711,791	\$ 400	0.06%
QTR 2	\$ 604,030	\$ 6,825	1.13%
QTR 3	\$ 787,581	\$ 85,894	10.91%
QTR 4	\$ 787,601	\$ 22,100	2.81%
FY '13 STATUS	\$ 2,891,003	\$ 115,219	3.99%



GOAL 3.0%

STATUS 4.0%



Balance Score Card

DISCUSSION

FINANCIAL PERSPECTIVE

Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	YTD
Manage Budget	6.1.1	Balanced Budget @ End of Year	100%					Annual	
Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%	0%				Annual	
Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5%"	?				Annual	
	6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"	-37%				Annual	
	6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5%"	?				Annual	
	6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"	?				Annual	
	6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	\$530,398.33					\$454,289.51
Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	68%					85.4%
	6.2.2	C&D Recycling Capital Projects	50%	38%					
	6.2.3	Increase % Solid Waste Recycled (Baseline 2008)	5% (29.4%)	action plan					
	6.2.4	Achieve 60% of STARS credits	60%						
Conserve Natural Resources	6.3.1	Energy Usage by 2015	-30%	25%					
	6.3.2	Water Usage by 2010	-20%	48%					
Improve HUB Participation	6.5.1	12% HUB participation on 80% of Capital Projects	80%	no data					100%
	6.5.2	3% African American Participation on Capital Projects	3%	no data					10.4%
	6.5.3	13% HUB participation on Informal Proj \$30K and above	13%	39%					47%
	6.5.4	13% HUB for Informal Proj below \$30,000 inc. 3% AA	13%/3%	35.2%/2.81%					31.2%/3.99%



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

**Labor Availability, Logistics Efficiency, Optimize Supply Chain,
Improve Process Reliability, Manage Technical Resources,
Master/Project Planning Process, Capital Project Administration,
Develop High-Quality Staff**

GOAL #1 – Improve Facilities Operations

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase “Wrench Time” to over 80%

Lead
F. O.

ACTION PLAN

- Actions Planned
 - 1 – Continue to stress reporting and recording of employee’s time.
 - a) Meet with shop supervisor and PA’s to review
 - b) Stress importance with all employees.
 - c) Get supervisors to spot check employees and review white sheets in detail
 - 2 - Get employees out of the shop
 - 3 - Adjust goal to 70% (more realistic).
 - 4 - Evaluate EDA’s for future use. Do they increase our efficiency?

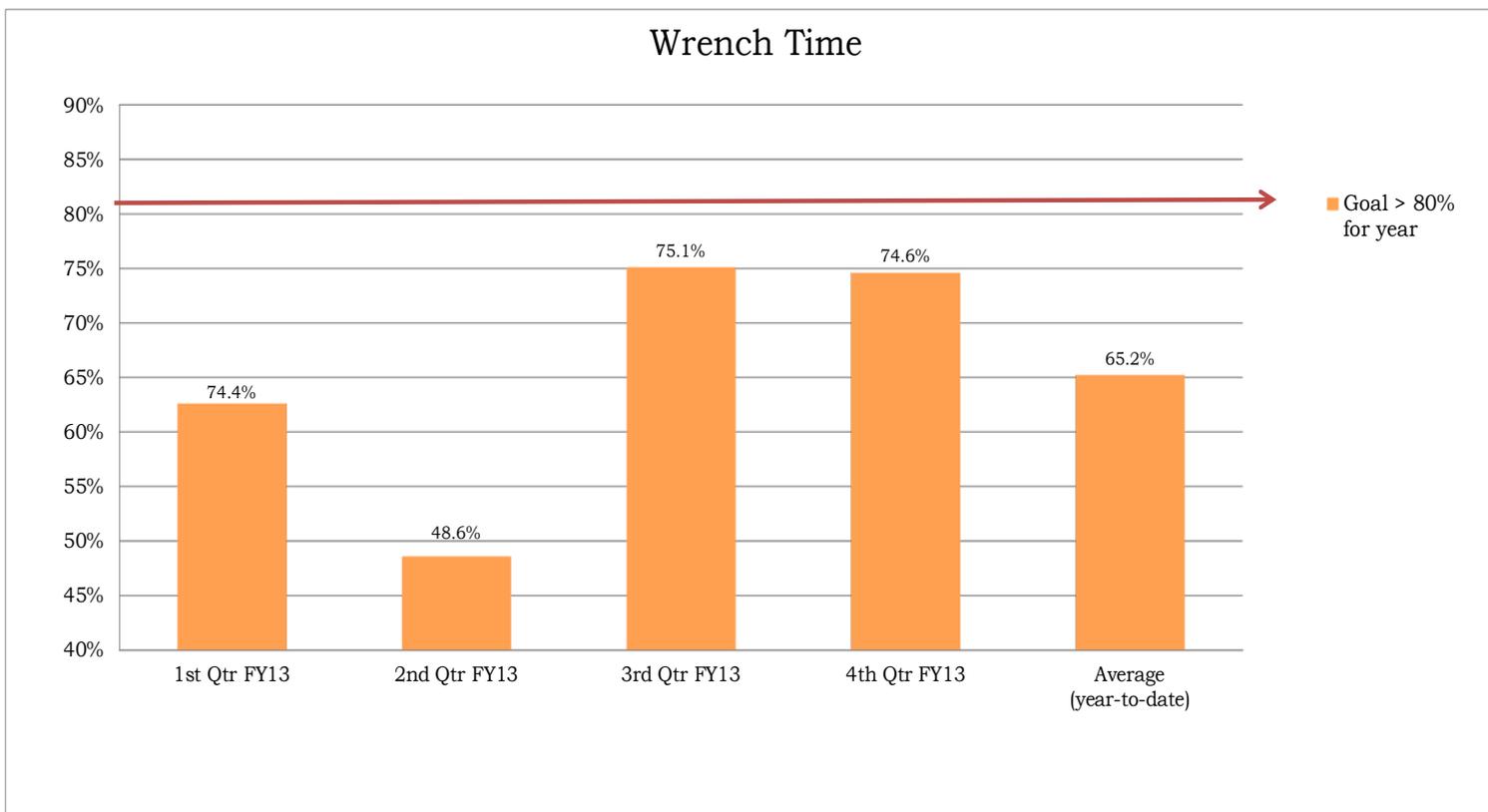
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase "Wrench Time" to over 80%

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

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Strategy:	1.2	Improve Logistics Efficiency
Objective:	1.2.1	Improve Stock Fill Rate to over 97%
Objective:	1.2.2	Reduce Average Non-stock Requisition to Receipt Time to 4.0 Days

Lead
F. O.

ACTION PLAN

- Actions Planned
 - 1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
 - 2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).
 - 3 – Continue to monitor and reduce Req to PO processing time; send out daily reminders
 - 4 – Continue to send out daily reminders for approvals.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

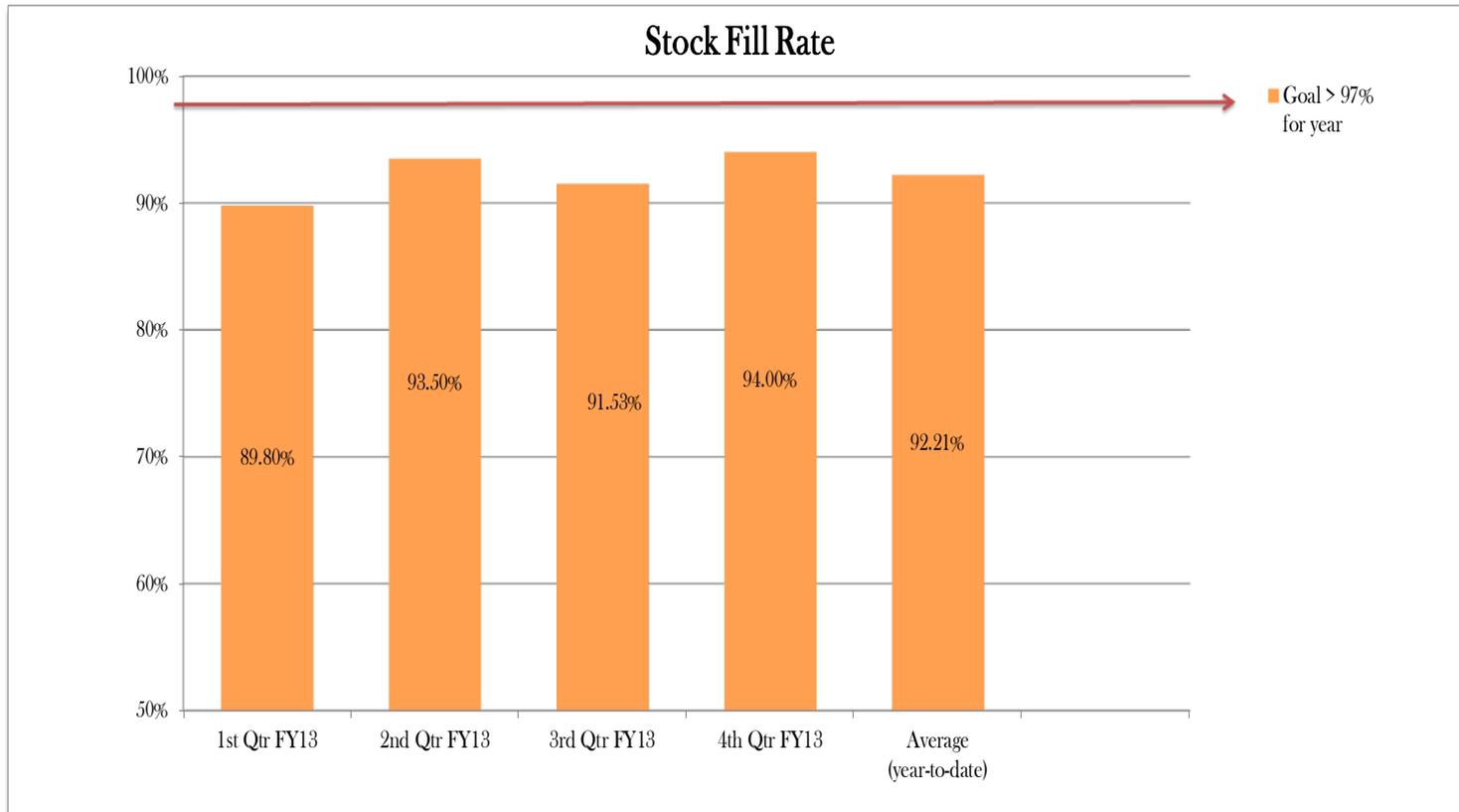
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.2 Improve Logistics Efficiency
Objective: 1.2.1 Improve Stock Fill Rate to over 97%

Measure: Percentage Fill (SDI's Key Performance Indicator {KPI} – Stock Fill Rate)
Calculated on: Lines filled FY-to-date/Lines requested FY-to-date.

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

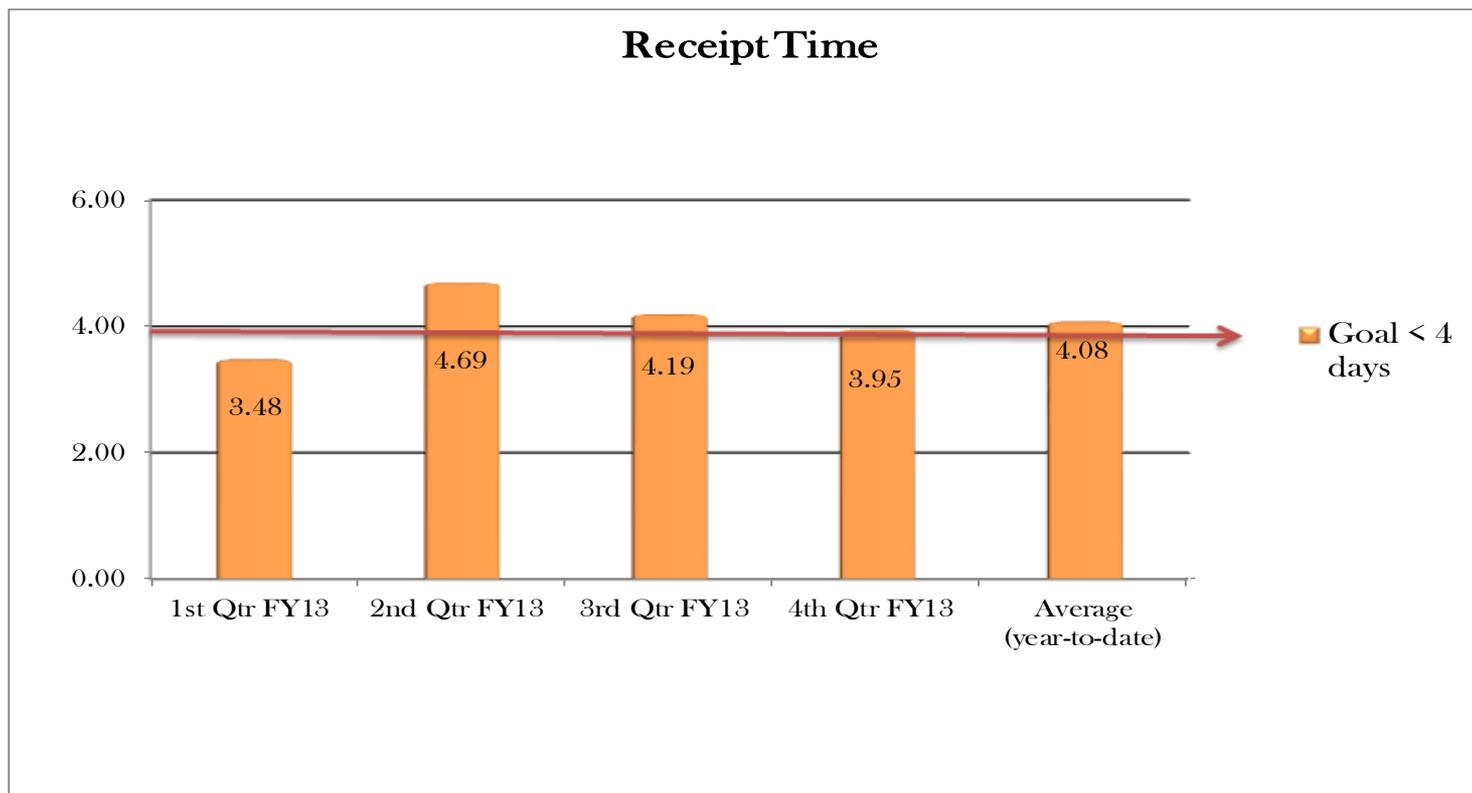
Strategy: 1.2 Improve Logistics Efficiency
Objective: 1.2.2 Reduce Average Non-stock Requisition to Receipt Time to less than 4.0 Days

Measure: Days (SDI's KPI – Non-stock Requisition to Receipt Time)

Calculation on: Weighted average of monthly request-to-receipt times.

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Strategy:	1.5	Improve Reliability
Objective:	1.5.1	Improve Completion of Preventative Maintenance Work Requests to over 90%
	1.5.2	Decrease number of Unscheduled Equipment Replacement Projects by 2

Lead
F. O.

ACTION PLAN

- Actions Planned

- 1 – Complete development of PM Program converting from old PM Module to new PM Module.
- 2 – Closer monitoring of PM completions by Supervisors and Managers.
- 3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
- 4 – Prepare program for major equipment repairs and replacement.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

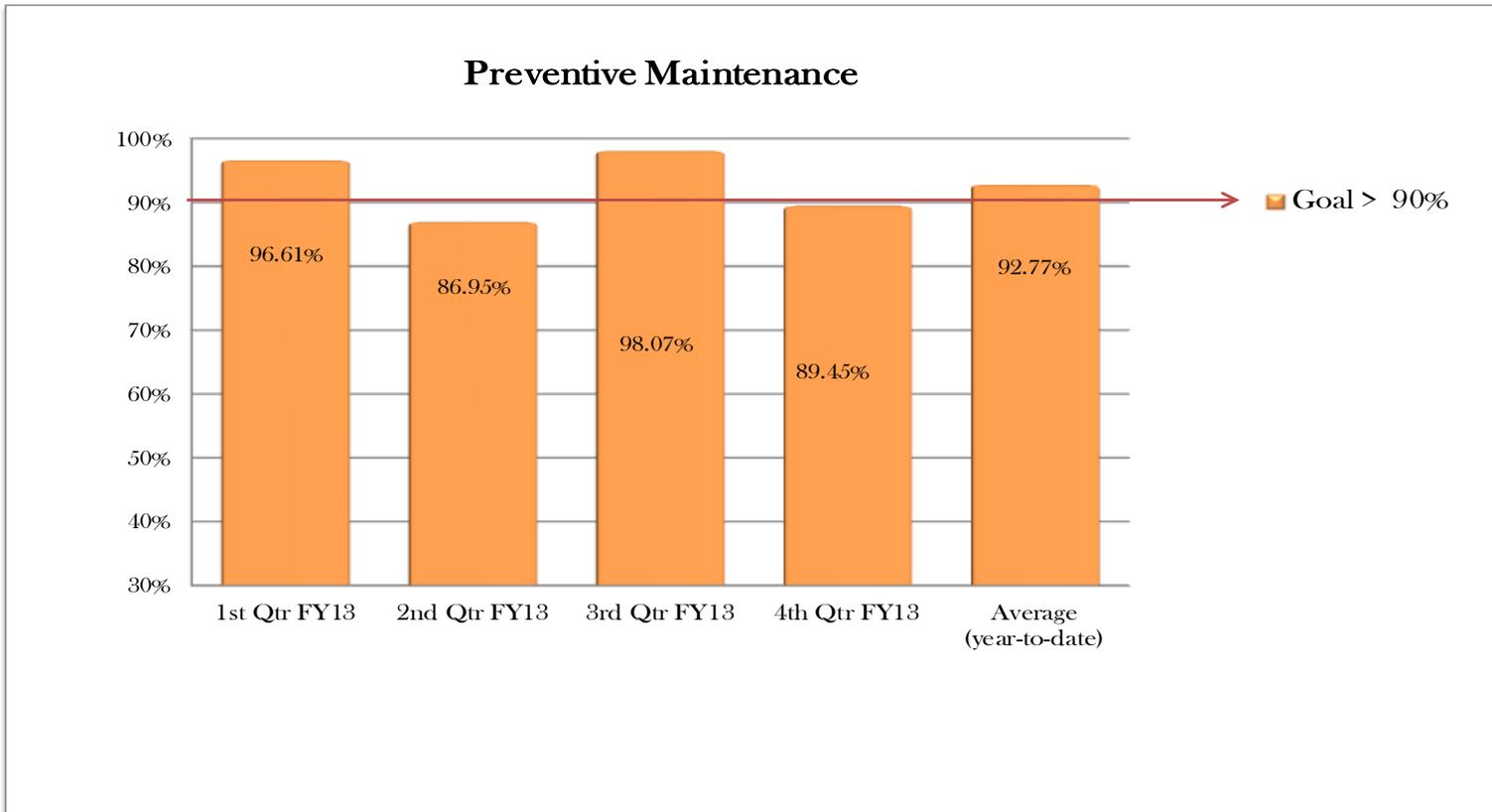
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed vs. (Completed + Cancelled)

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
F. O.

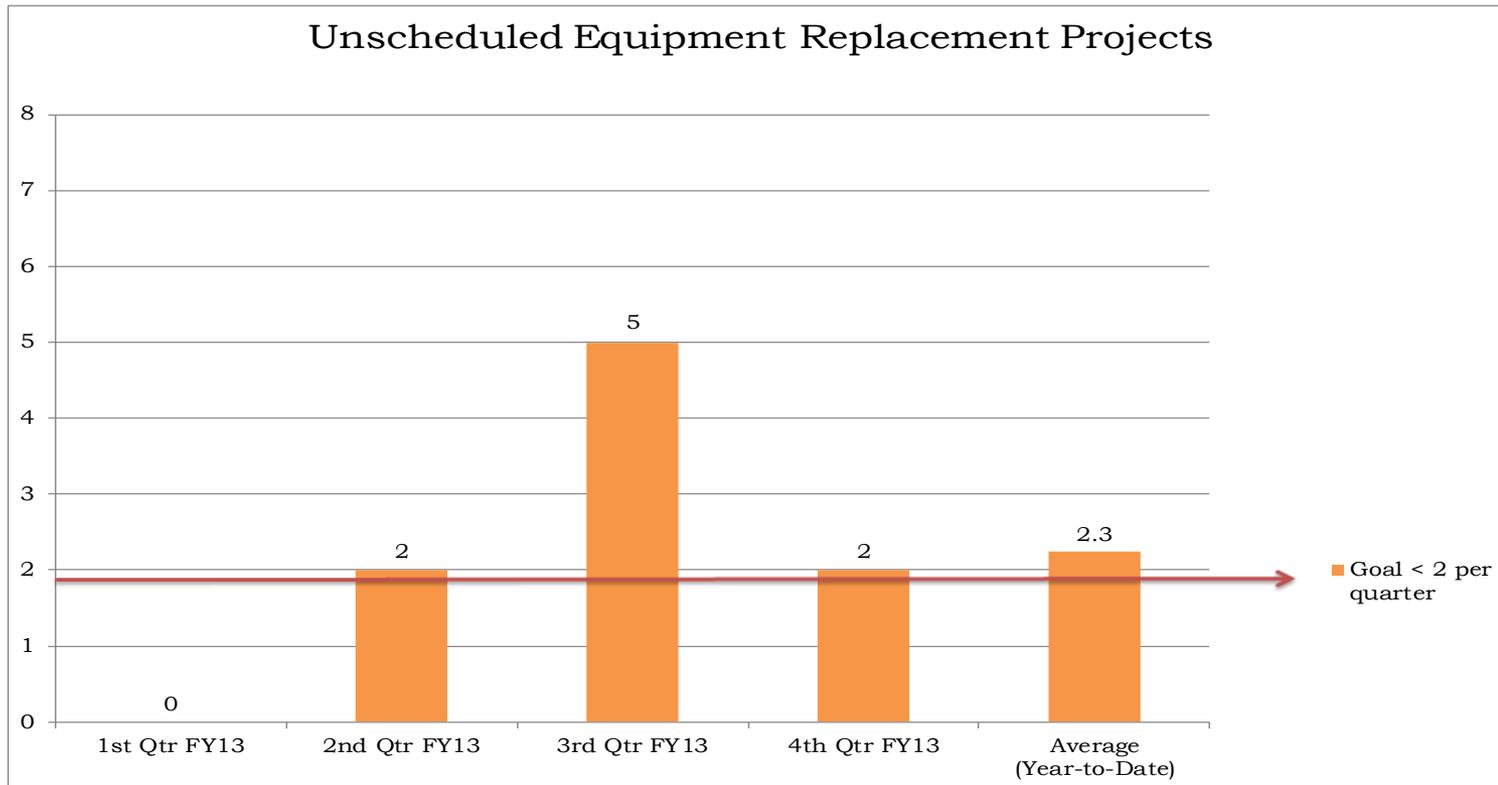
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 2

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: 2.1.1 **Completion of the Facilities Management Five-Year Technology Plan by FY 2015**

Lead
FIS

ACTION PLAN

Actions Completed:

1. Invoicing for FIS FY13 Ordering Completed
2. New Computer and Ricoh Printer replacement roll out completed
3. Capital Improvements Completed by BRG: Tested & Customer Approval
4. Completed Primavera Upgrade via PMOLink, Inc
5. Draft completed by BRG for BIM standards document

Actions Planned:

1. Finalize SDI Development- Complete UAT Meet for Customer Review & Finalize for Production. Complete SOP updates & user documentation
2. Meet for FY14 FIS Project Prioritization & Approval
3. ARCHIBUS Key Management Phase Two – Customer Reports
4. BIM – Complete/Approve final draft of Standards; Implement into Design Manual
5. Complete Internal / External Testing for ARCHIBUS 21.1 upgrade: Final Production roll out Scheduled for Sept 2013

FM 5YP Prioritized Projects – FY13 - 14

1. Enterprise Data Assistant (EDA) FO-WR Project Zone Shops – Zones 2-4 EDA Issuing completed, Zone 1 - complete, Zone 5-6 – **On Hold**
2. Enterprise Data Assistant (EDA) FO-WR Project Core Shops- **On Hold**
3. Enterprise Data Assistant (EDA) Housekeeping Project - **On Hold**
4. ARCHIBUS - Equipment and PM Management – Development Completed Nov 2012
5. BAS R2 Upgrades- Hardware installed; Graphics and Punch list still to be finalized
6. ARCHIBUS Key Management – Phase Two – Development & Bug Resolution Completed Aug 2012
7. Key Management Reports – **On Hold**
8. Facilities Condition Assessment Program (FCAP2) – Pilot Pending (**On Hold**)
9. Asset Management – Working with AUX and COE - Upgrade
10. SDI Punch In Implementation – In Process: Review, finalization & Training to be Completed
11. Building Information Modeling (BIM) – Phase 1 (Standards) – In Process
12. Capital Improvements – Completed & Bug Resolution in process
13. Primavera Upgrade – Completed
14. ARCHIBUS Upgrade – In Process: Scheduled for Sept 2013

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
FIS

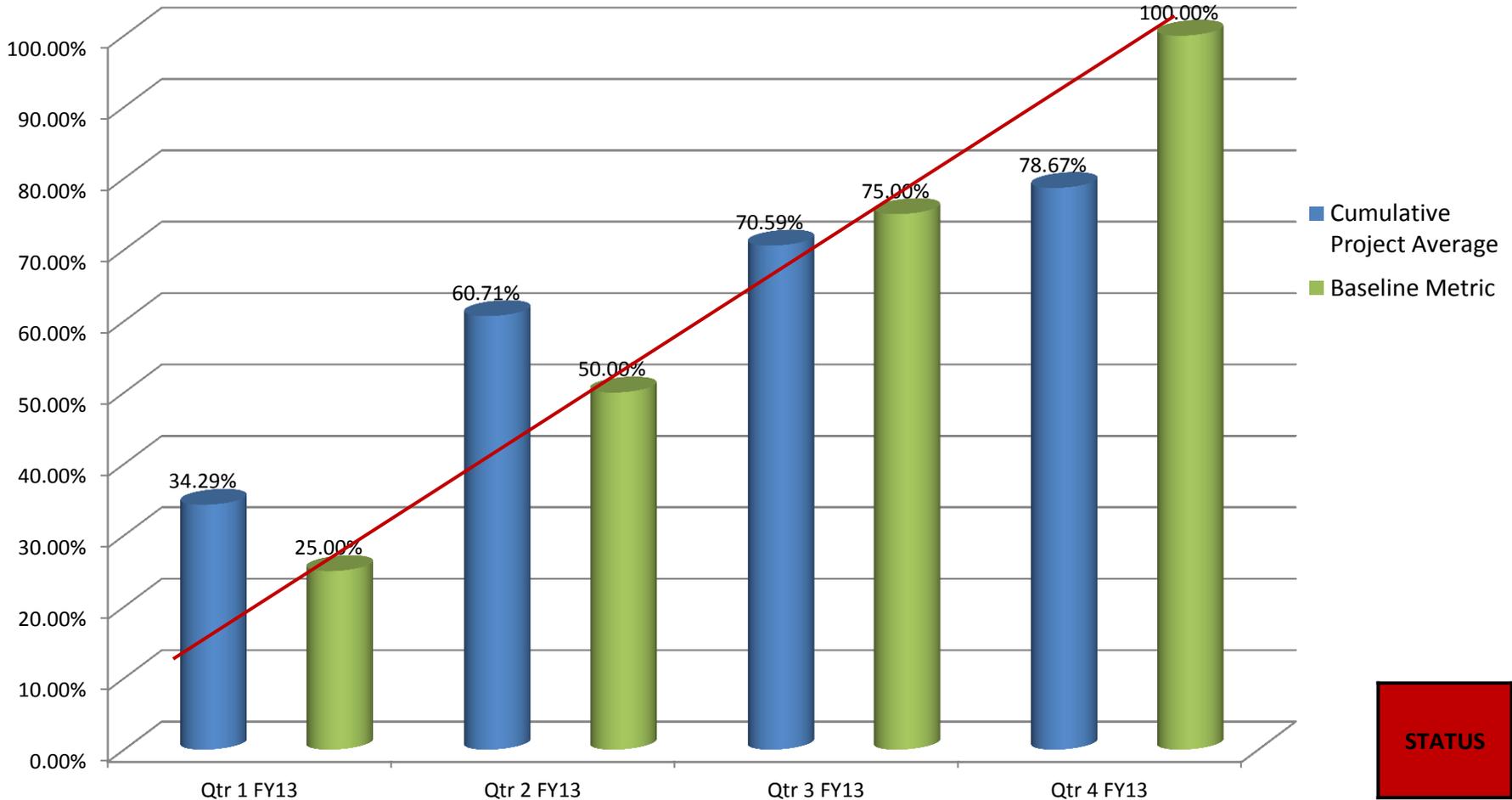
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Objective: 2.1.1 Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015

Measure: Completion of Five-Year Technology Milestones
Task Completion Milestones Percentage (FY10 – FY15)

Balanced Scorecard Category: Internal Processes



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

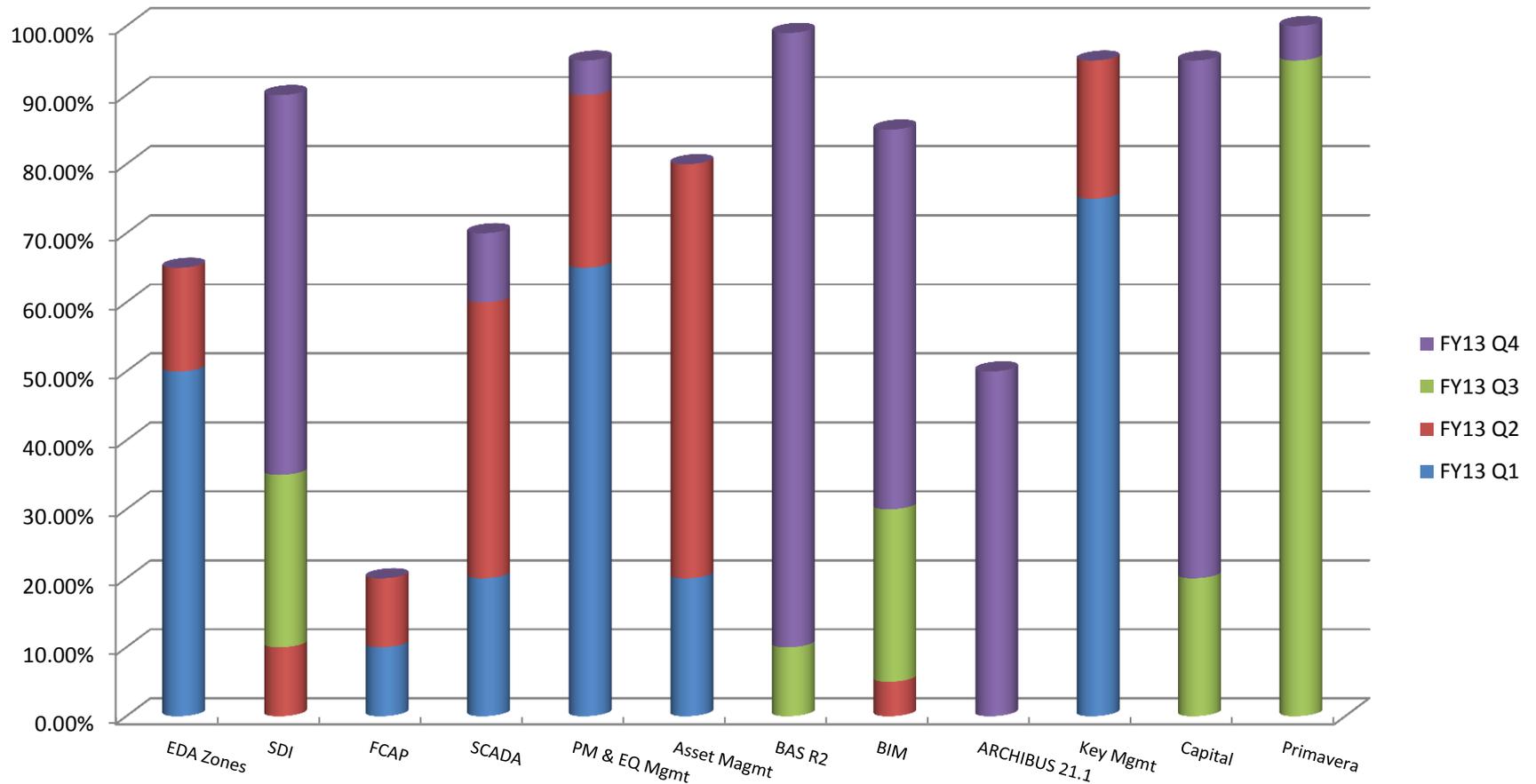
**Lead
FIS**

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Objective: 2.1.1 **Completion of the Facilities Management Five-Year Technology Plan by Fiscal 2015**

Measure: Completion of Five-Year Technology Milestones
Task Completion Milestones Percentage (FY10 – FY15)

Balanced Scorecard Category: Internal Processes



GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements**Strategy 2.3:** Improve capital renewal/ deferred maintenance planning, prioritization, estimation, and funding process**Objective 2.3.1.** 80% of existing projects documented and input into the CRDM system.**Tactic:**

- Engage Facilities and Operations on Inspections
- Work with Facilities & Operations and Facilities Information Systems on Process
- Work with Facilities Information Systems on Technical Issues and Training

ACTION PLAN

- **Actions Planned:**
 - **Amend the objective above to reflect phase 2**
 - **Work with other sections in FM on the process.**
 - **Work with FIS on the dashboard (incl. accuracy)**

This objective will be replaced by new Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5%.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

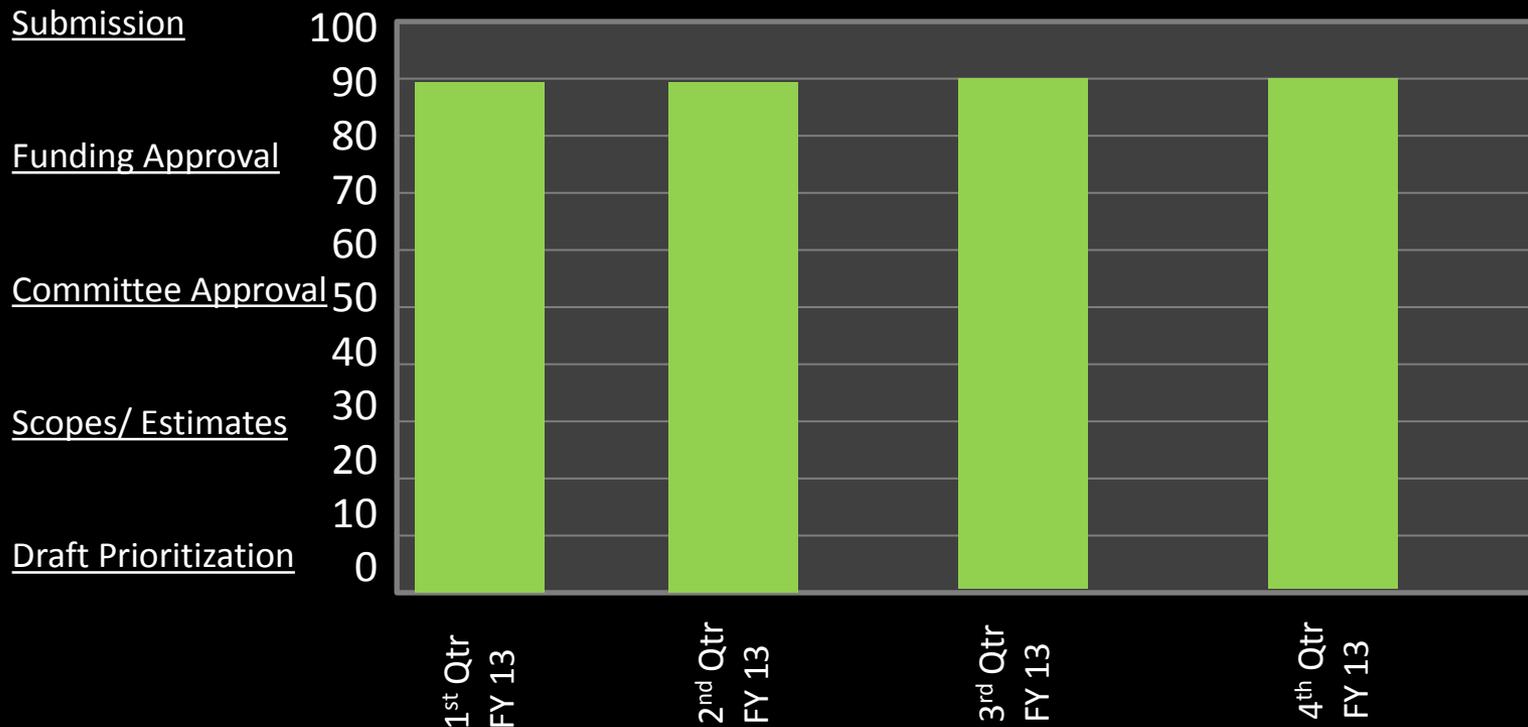
Strategy 2.3: Improve capital renewal/ deferred maintenance planning; prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system.

Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

Percentage of Completion – 90%



Status

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013

ACTION PLAN

Continued walk through and documentation of existing condition.

This objective will be replaced by new Tactic 2.4.1: 80% of Departments/Colleges with +/- 5% of System-wide space standards.

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

GOAL #3 – Deliver New Facilities that Support the University’s Mission

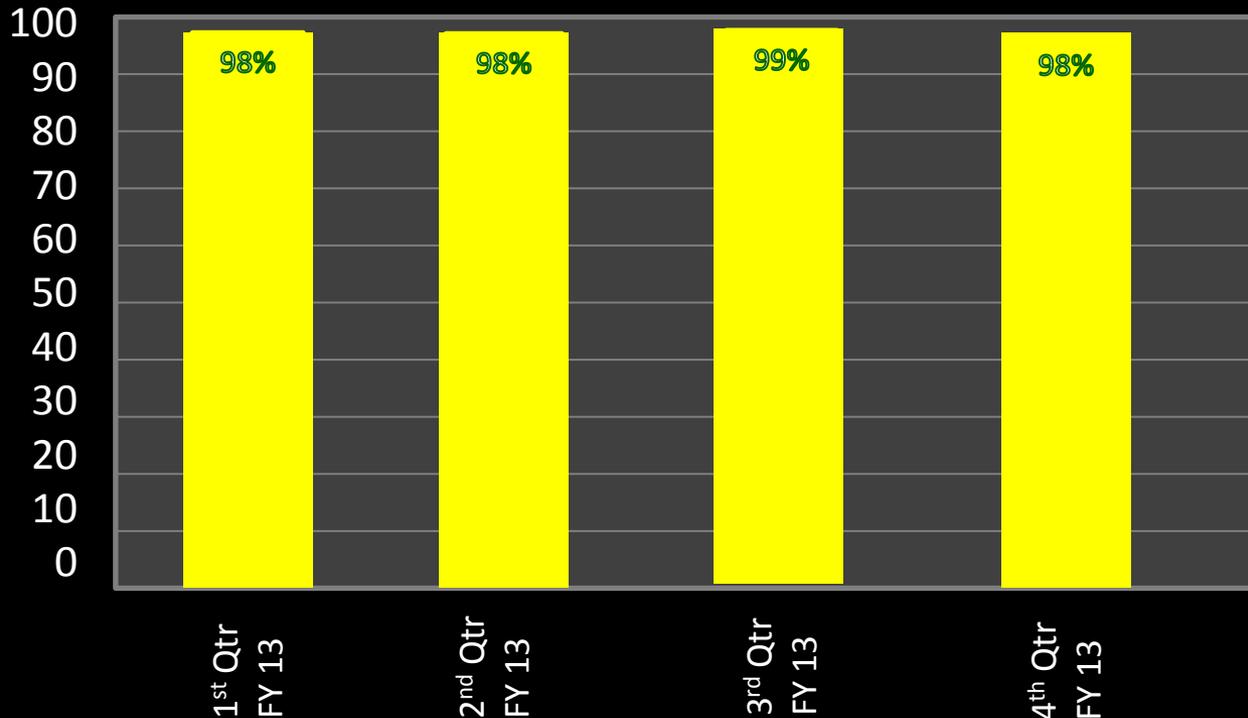
Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT June 2013.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2012

Appropriated Projects

- Science Building *
- Burson Building Modernization and Expansion *
- Arts and Humanities Building
- Physical Plant Complex
- Student Health and Wellness Center
- Student Academic Success and Retention Center *
- Atkins Library Modernization *
- Belk Gym Modernization *
- Reese
- Storrs
- Colvard
- Friday
- Land Acquisition
- Smith and Cameron
- Center City II

* Pending AA review , changes, and approval

ACTION PLAN

- **Actions Planned:**
 - **Obtain guidance on direction of CID Phase II in order to determine next set of needs.**
 - **Continue work on CID projects for hand-off to Capital.**

This objective will be deleted.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

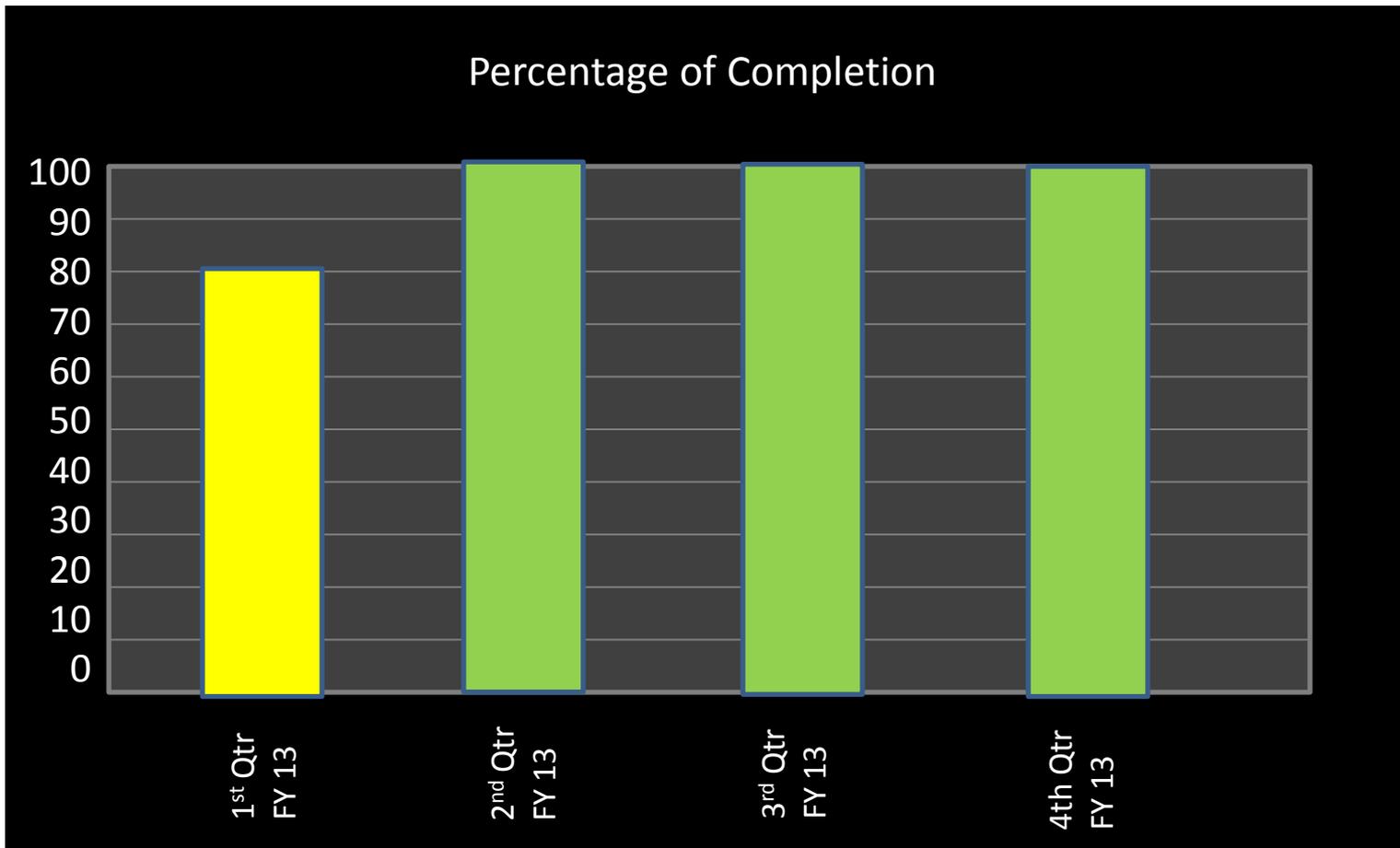
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by end of FY 12.

Measure: % of projects with completed (pre-programs,OC25s, and Approvals).

Balanced Scorecard Category: Internal Business Process



Status **

** Non-appropriated

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Lead
Capital

Strategy	3.3	Improve the Capital Design Process
Objective	3.3.1	90% of designers under contract within 120 days of Project posting in CAPSTAT
Objective	3.3.2	90% of designs complete by the scheduled completion date
Objective	3.3.3	90% of designs complete within design budgeted fee

ACTION PLAN

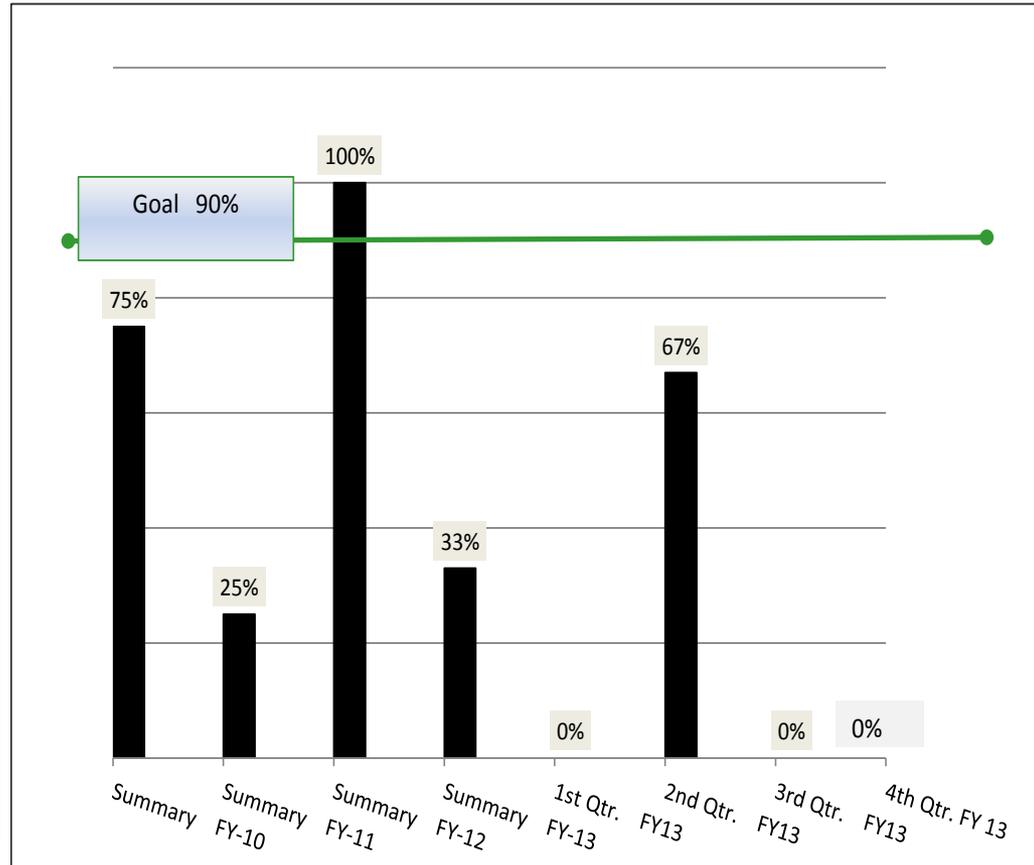
- Actions Planned – 3.3.1
 1. Baseline Schedules – Accurate
 2. Baseline Schedules – Refer to them
 3. Push Designers to stay on schedule.
- Actions Planned – 3.3.2
 1. Baseline Schedules – Accurate
 - a) Sherry, John & Jeanine to check
 - b) Sherry to help PMs setup properly & maintain
 2. Keep end users up to date on overall schedule
 - a) Update team at all scheduled design meetings
 - b) Hold designer accountable
 3. Add milestones
 - a) DD & CD Shops presentations & feedback
 - b) Chancellor approvals (colors, exteriors, etc.)
- Actions Planned – 3.3.3
 1. Print project budget / financial sheets & share with end users
 2. Monitor scope creep.
 3. Protect contingency
 4. Know project authorization

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.1 90% of designers under contract within 120 days of the project advertisement being posted on the web
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 within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-10	10	9	3	75%
Summary FY-11	11	2	6	25%
Summary FY-12	6	2	0	100%
Summary FY-13	14	3	6	33%
1st Qtr. FY-13	6	1	1	0%
2nd Qtr. FY-13	3	2	1	67%
3rd Qtr. FY-13	3	0	2	0%
4th Qtr. FY-13	2	0	3	0%



Objective for 4th Quarter is 0%
 Year to date is 33%

Status

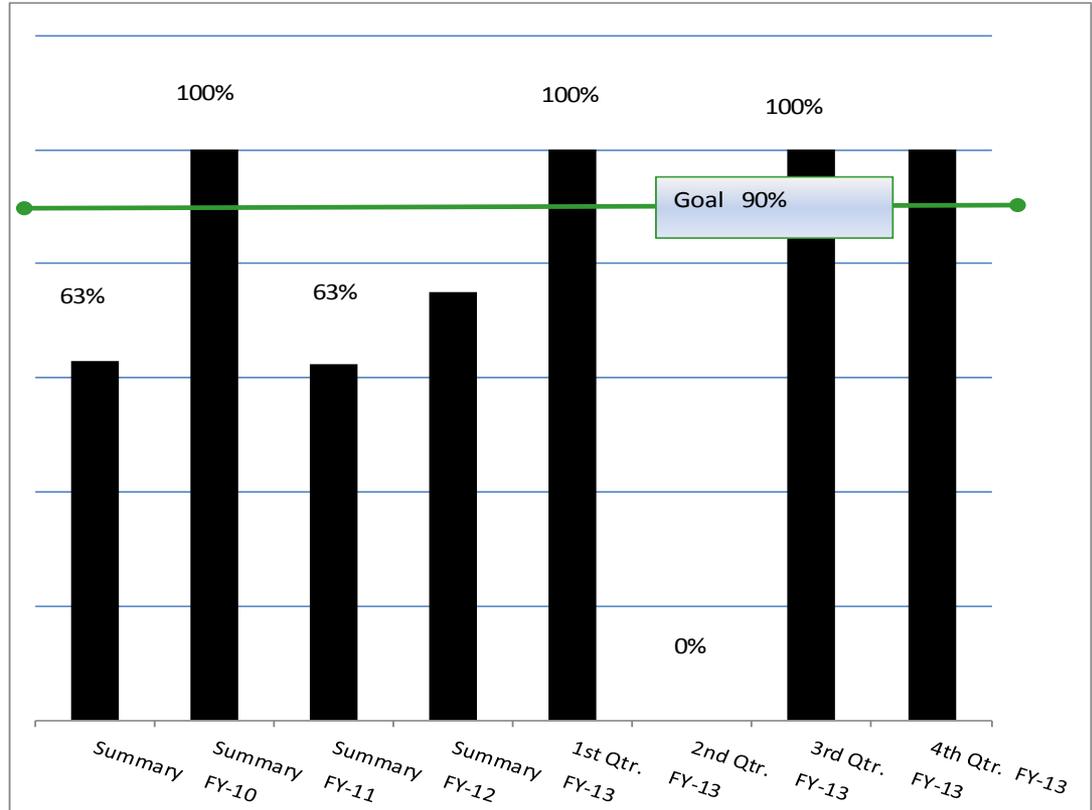
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.2 90% of designs complete by the scheduled completion time

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-10	9	5	63%
Summary FY-11	6	0	100%
Summary FY-12	5	3	63%
Summary FY-13	3	1	75%
1st Qtr. FY-13	1	0	100%
2nd Qtr. FY-13	0	1	0%
3rd Qtr. FY-13	1	0	100.0%
4th Qtr. FY-13	1	0	100.0%



Objective for 4th Quarter is 100%
 Year to date is 75%

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013



GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.3 90% of designs complete within design budgeted fee

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

Balanced Scorecard Category: Internal Business Process

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 & Initial Contract	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
Parking Deck J	\$2,211,057	\$946,200	\$946,200	-57.2%	0.0%	1
PORTAL	\$2,466,950	\$2,200,000	\$2,200,000	-10.8%	0.0%	1
RDH Renovation	\$1,742,048	\$1,981,410	\$1,987,410	13.7%	0.3%	0
Res. Hall Ph. X	\$2,809,632	\$2,147,890	\$2,147,890	-23.6%	0.0%	1
Res. Hall Ph. XI	\$3,695,657	\$2,078,598	\$2,078,598	-43.8%	0.0%	1
Res. Hall Ph XII	\$3,400,667	\$2,733,245	\$2,778,245	-19.6%	1.6%	0
RUP IV		\$385,000	\$385,000	0.0%	0.0%	1
Oak Hall Renovation	\$591,176	\$531,000	\$531,000	-10.2%	0.0%	1
Holshouser Hall Reno.	\$1,039,730	\$1,165,000	\$1,165,000			
Res. Hall Ph. XIII	\$3,081,868	\$2,188,800	\$2,188,800	-29.0%	0.0%	1
Cone Plaza	\$144,768	\$152,000	\$152,000	5.0%	0.0%	1
					Percentage of Projects within Design	73%

Objective is 90%

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.



GOAL #3 – Deliver New Facilities that Support the University’s Mission

Lead
Capital

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% (contingency)

ACTION PLAN

- Actions Planned
 1. Maintain & Print project budgets & account reports monthly
 2. Share budgets with AVC and end users.
 3. Hold contingency for unforeseen conditions & project requirements.
 4. Manage scope creep.
 5. Continue After Action Reviews to increase Customer Satisfaction
 6. Work with new CRI/FM liaison Chip Yensan to further improve Capital Construction Process.

This objective will be replaced by new Tactic 2.5.1: Develop lifecycle cost analysis and funding process for capital projects.

Lead: Facilities Planning

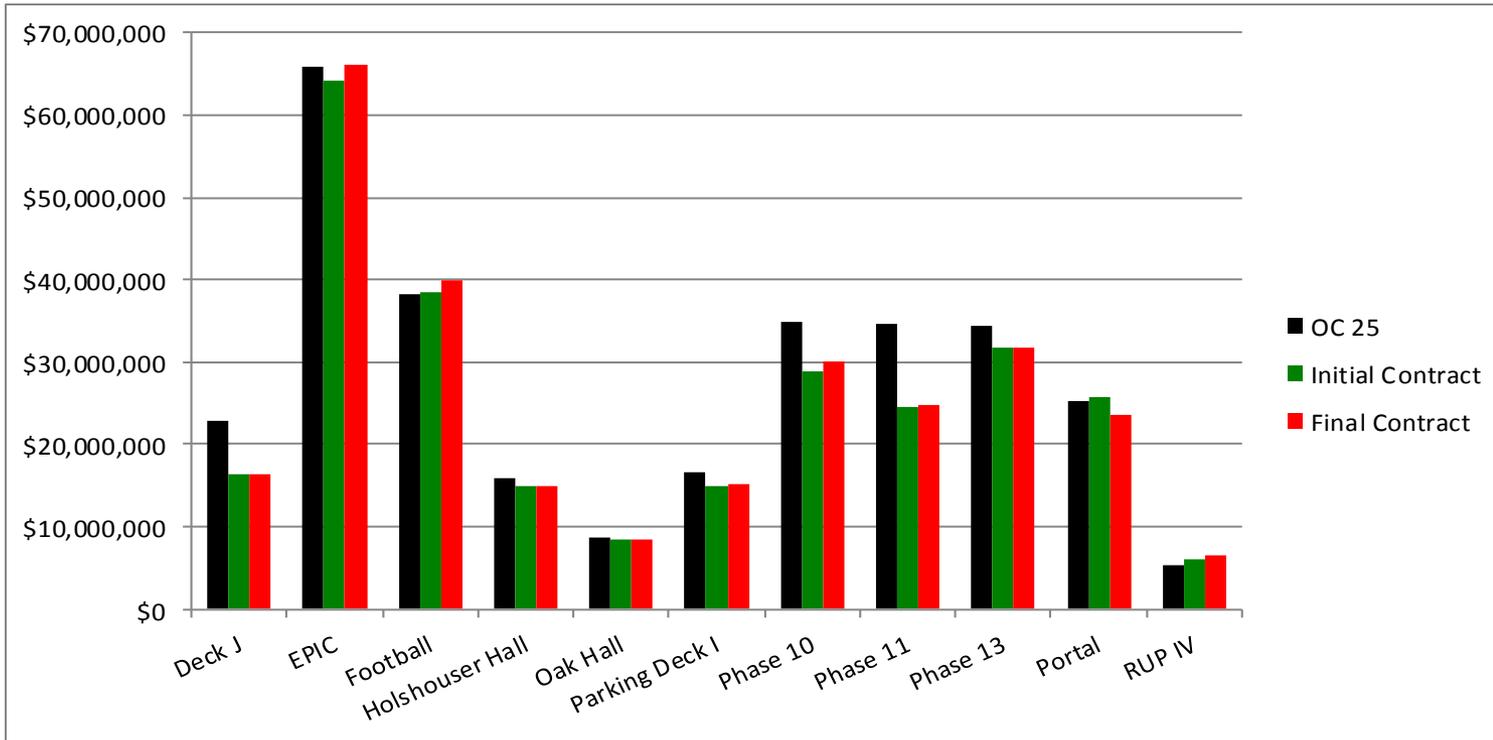
Balanced Scorecard Category: Internal Business Process

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.2 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



Objective is currently at 90%. Goal is 95%

*Factors in contract \$\$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.

GOAL #3 – Deliver New Facilities that Support the University’s Mission

Lead
Facilities
Planning

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. 80% of infrastructure projects integrated into Capital Construction Project Scopes

ACTION PLAN

- **Actions Planned:**
 - **Ensure projects in CRDM are appropriately listed – Parent/ Child relationships**
 - **Update and review projects based on updated information.**
 - **Integrate CID information – above and below the line. Move projects as applicable.**
 - **Incorporate CRDM process with Customers**
 - **Assist in initiating program into CRDM**

This objective will be deleted.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

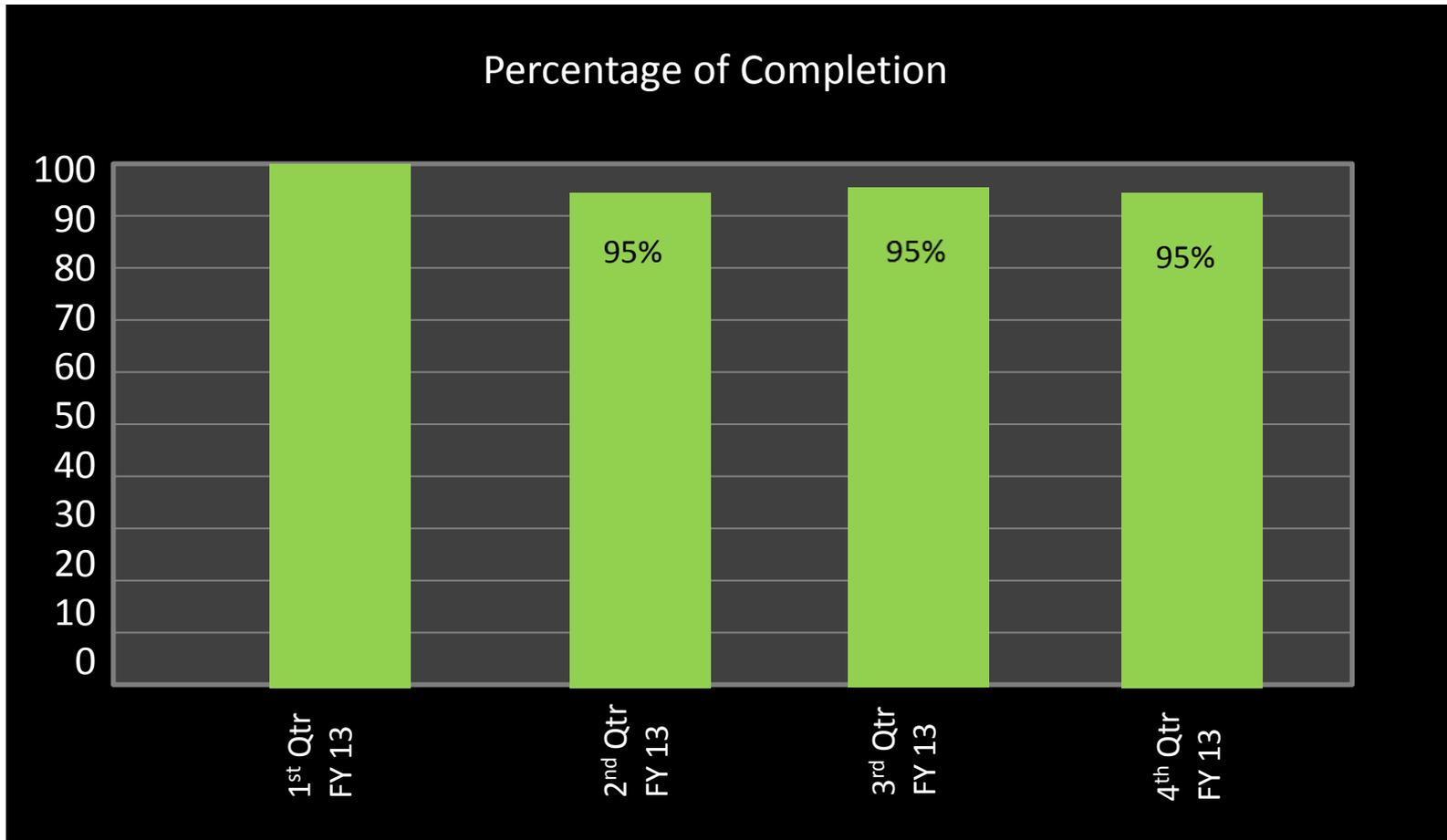
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. 80% of infrastructure projects integrated into Capital Construction Project Scopes

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)

Balanced Scorecard Category: Internal Business Process



GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications

Objective 3.6.1. 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

ACTION PLAN

- **Actions Planned:**
 - **Receive input from the Departments**
 - **Compile changes**
 - **Conduct next committee meeting and updates**

This objective will be deleted.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

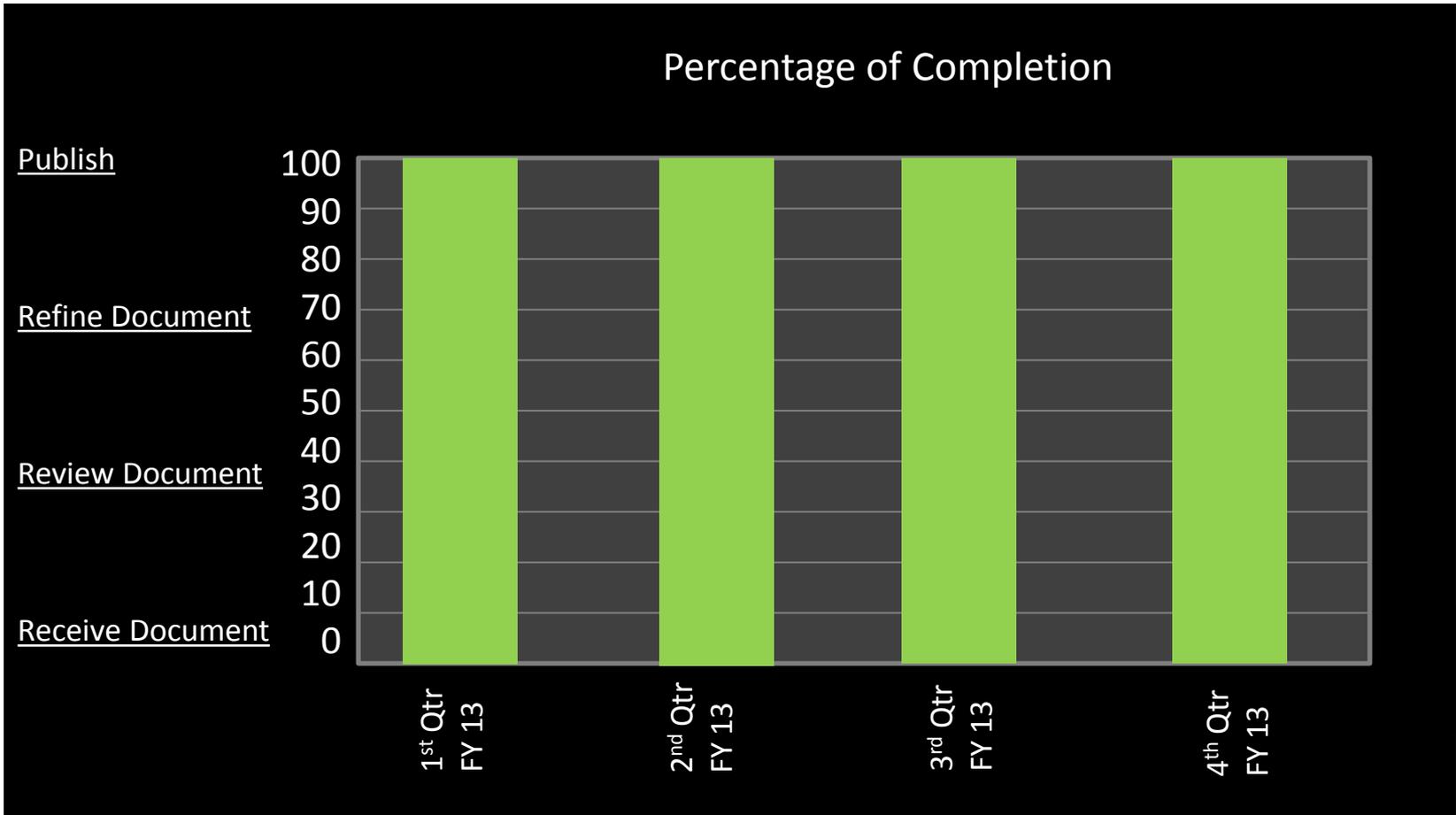
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.6: Improve and Manage Campus Design Guidelines, Standards and Specifications

Objective 3.6.1. 80% of revisions integrated into the Design and Construction Manual based upon periodic review and updates.

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process





Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	YTD
Labor Availability	1.1.1	Increase Wrench Time	>80%	74.6%					65.2%
Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	94%					92.21%
Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	3.95					4.08
Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	89.45%					92.77%
	1.5.2	Reduce Unscheduled equipment repl projects by 15%	<2	2					2.3
Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	78.67%				Annual	
Master/Project Planning Process	2.3.1	80% of Existing Projects Documented and Input into the CRDM by July 2011	80%	90%					
	3.1.1	100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.	100%	98%					
	3.2.1	100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by end of FY12	100%	100%					
Capital Project Administration	3.3.1	Designers Under Contract w/in 120 days of Posting in CAPSTAT	90% w/in 120	0%					33%
	3.3.2	90% of Designs Complete by Scheduled Comp. Date	90%	100%					75%
	3.3.3	90% of Designs w/in Design Budgeted Fee	90%	73%					
	3.4.2	95% of Cap Prof completed w/in orig contract or GMP	90%	90%					
	3.5.1	80% of Infrastructure Projects Integrated into Capital Construction Project Scopes	80%	95%					
	3.6.1	80% of Revisions Integrated into the Design and Construction Manual.	80%	100%					



UNC CHARLOTTE

Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

- Develop high quality staff**
- Retain high quality staff**
- Develop positive culture**
- Improve Employee Safety**

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion

Objective 5.1.1

Benchmark vacancy time of no longer than 80 calendar days – Nonexempt

Benchmark vacancy time of no longer than 120 calendar days - Exempt

Objective 5.1.2

100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

- Time-to-fill for both exempt and non-exempt positions are in the red.
- New vacancy reports have been established.
- The reports will be distributed to the appropriate FM units on a monthly basis.
- We will request a recruitment activity update for all vacancies from each FM unit.

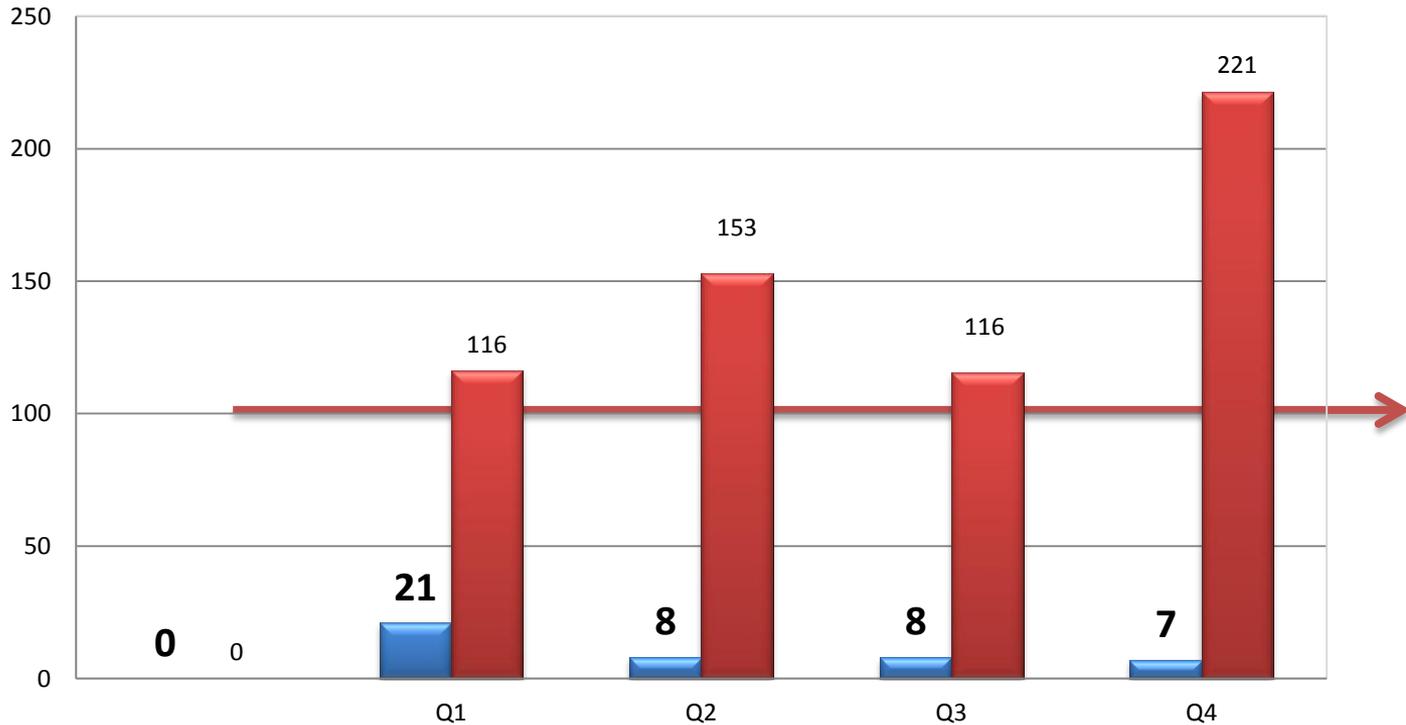
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.1 Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
Benchmark vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant position

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Average Number of Days to Fill Nonexempt (Hourly) Vacancies



STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

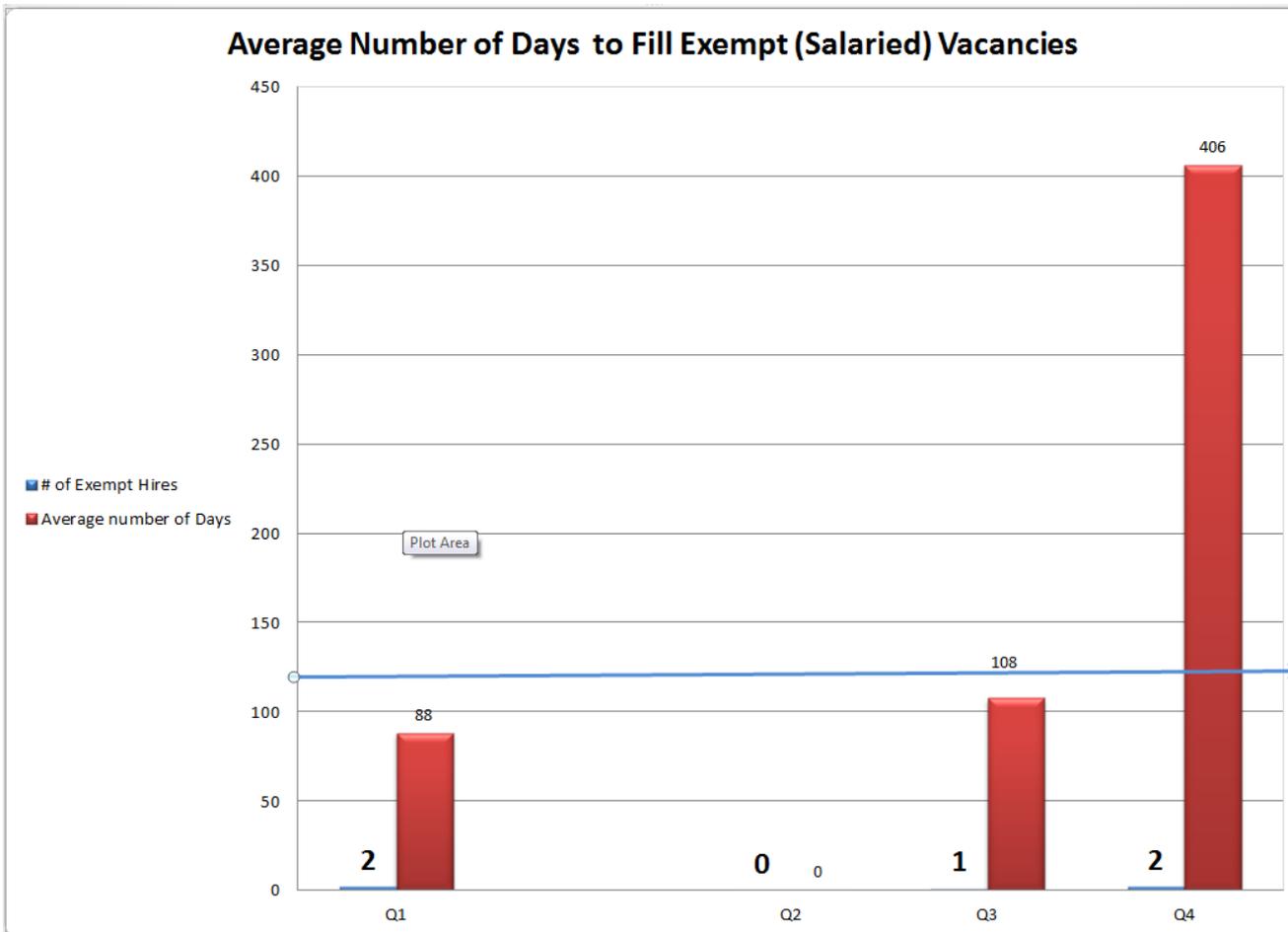
Lead
FBO

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.1 Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
Benchmark vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant position

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth



Goal:
120 days

STATUS

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

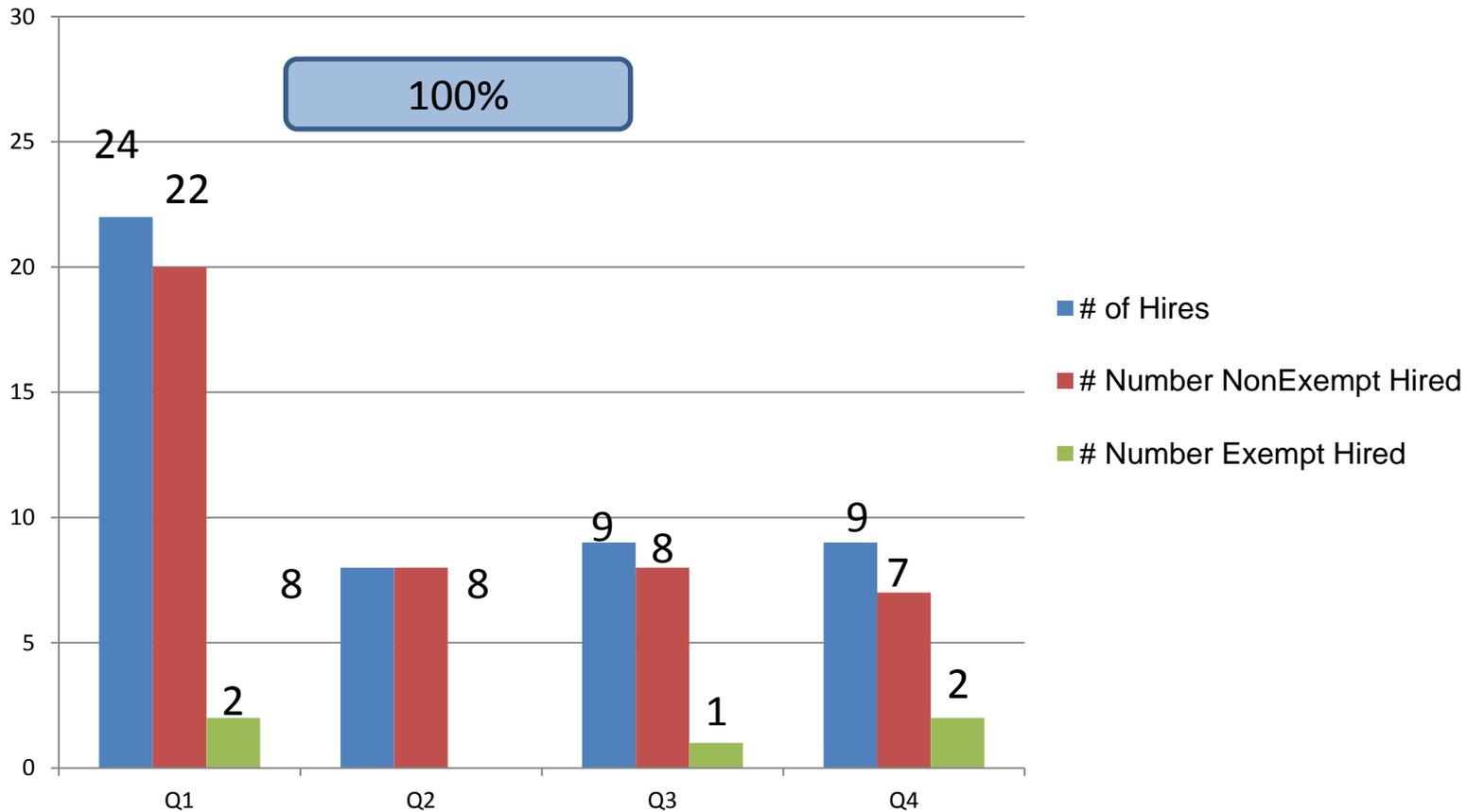
(22%)

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% of positions filled through targeted selection process by FY 201

Measure: **Completion of hiring checklist by hiring manager (including on-boarding)**

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Positions Filled Using Targeted Selection



STATUS

Strategy 5.2 Implement training system to enhance employee performance and provide career growth

Objective 5.2.1 Increase Supervisor/Manager training to 40 Hours of per year.

Objective 5.2.2 Increase Employee training to 20 Hours per year.

ACTION PLAN

- ❑ Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas. Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best “bang for the buck” in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.
 - An example of current efforts includes the use of American Trainco, Inc. to provide on-site training for Facilities Operations staff.

- ❑ W.I.G.– Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan; To date, have met with UNC Chapel Hill regarding their formula.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

Lead
FBO

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

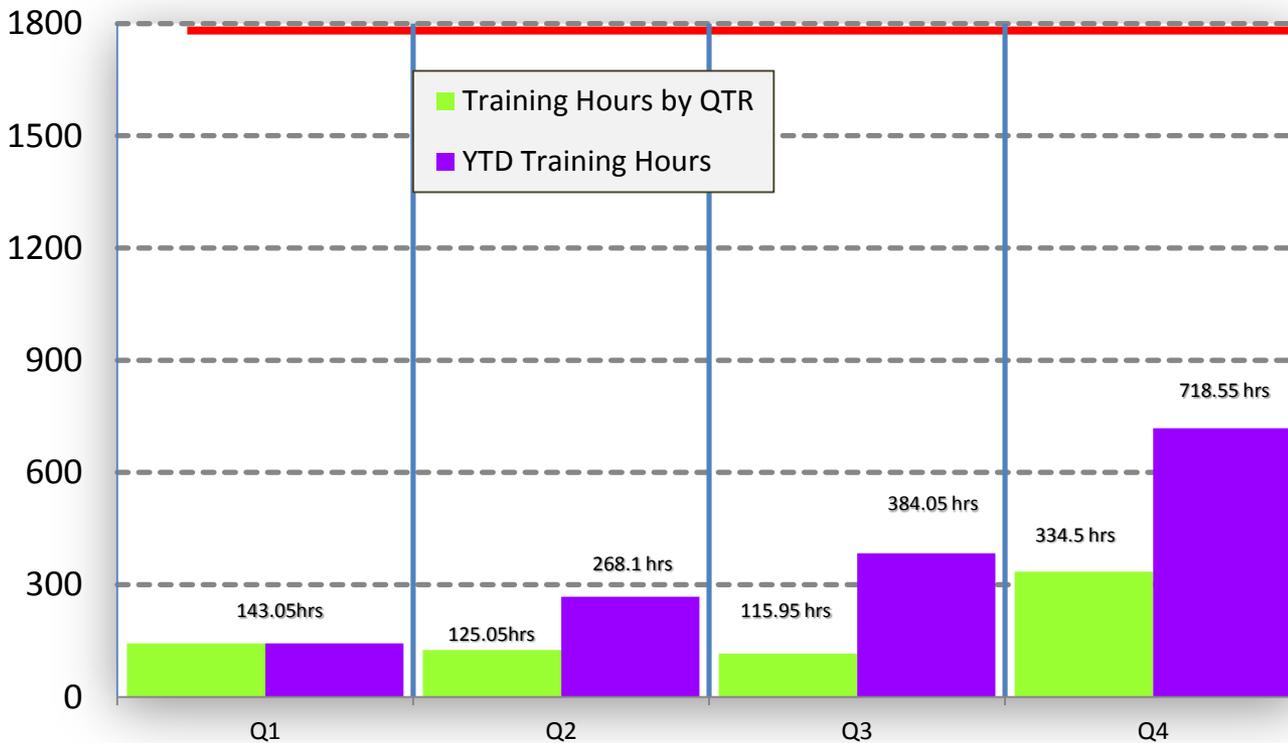
Measure: Average Hours of Training provided to or Obtained by Supervisors and Managers

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

FY 13

Training Hours for Supervisors & Managers by Quarter

Training Hours



Annual Target = 40 hrs ea
(45 X 40 hrs ea = 1,800 hrs)

Fiscal 2013 Results:
 Goal
 1800 hrs
 Actual YTD
 718.55hrs (40%)

STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2013

**Lead
FBO**

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.2 Increase employees training to **20 Hours** per year.

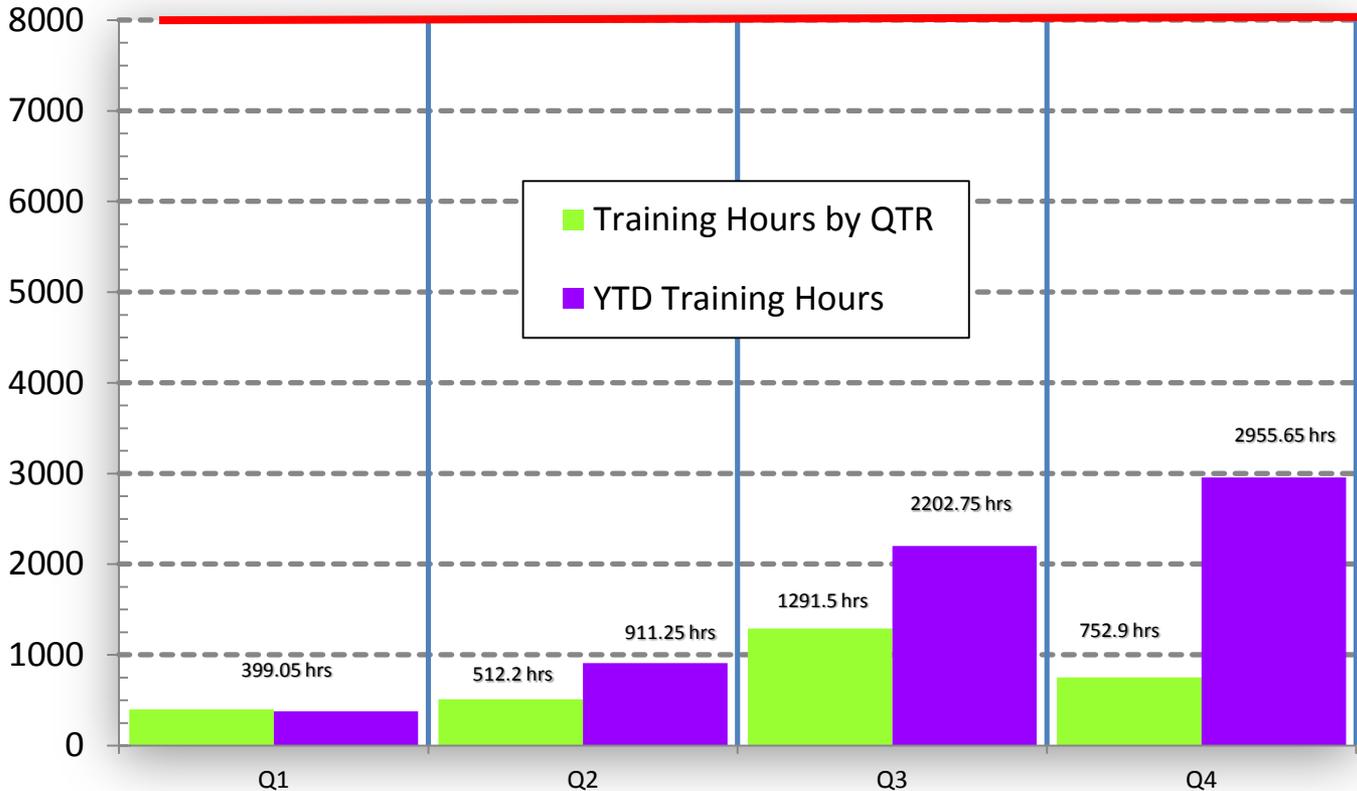
Measure: Average hours of training provided to or obtained by front line employees

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Training
Hours

FY 13

Training Hours by Quarter (non-management)



Annual Target - 20 hrs ea
 (400 employees x 20 hrs ea
 = 8,000 hrs total)

Fiscal 2013 Results:
 Goal
 8,000 hrs
 Actual YTD
 2955.65 hrs (37%)

STATUS

Strategy 5.3 Retain a Quality Workforce

Objective 5.3.1

Maintain the Annual Employee Turn-over Rate to <14%

Objective 5.3.2

Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

CONTINUOUS IMPROVEMENT ACTION PLAN

- Working with CPCC/Rowan Community College to determine feasibility of a Co-op program within FM (Trades). Met in September to review program requirements. Will meet with Rowan in February and continue initiative.
- Development of a FM Learning Library which can house “quick hit” training resources for employees. *In progress...*
- Investigate another “tier” in the Leadership Academy to keep “sharpening the saw”. As referenced by Clyde in the previous training information.
- Production of NEO video. *In development...*

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

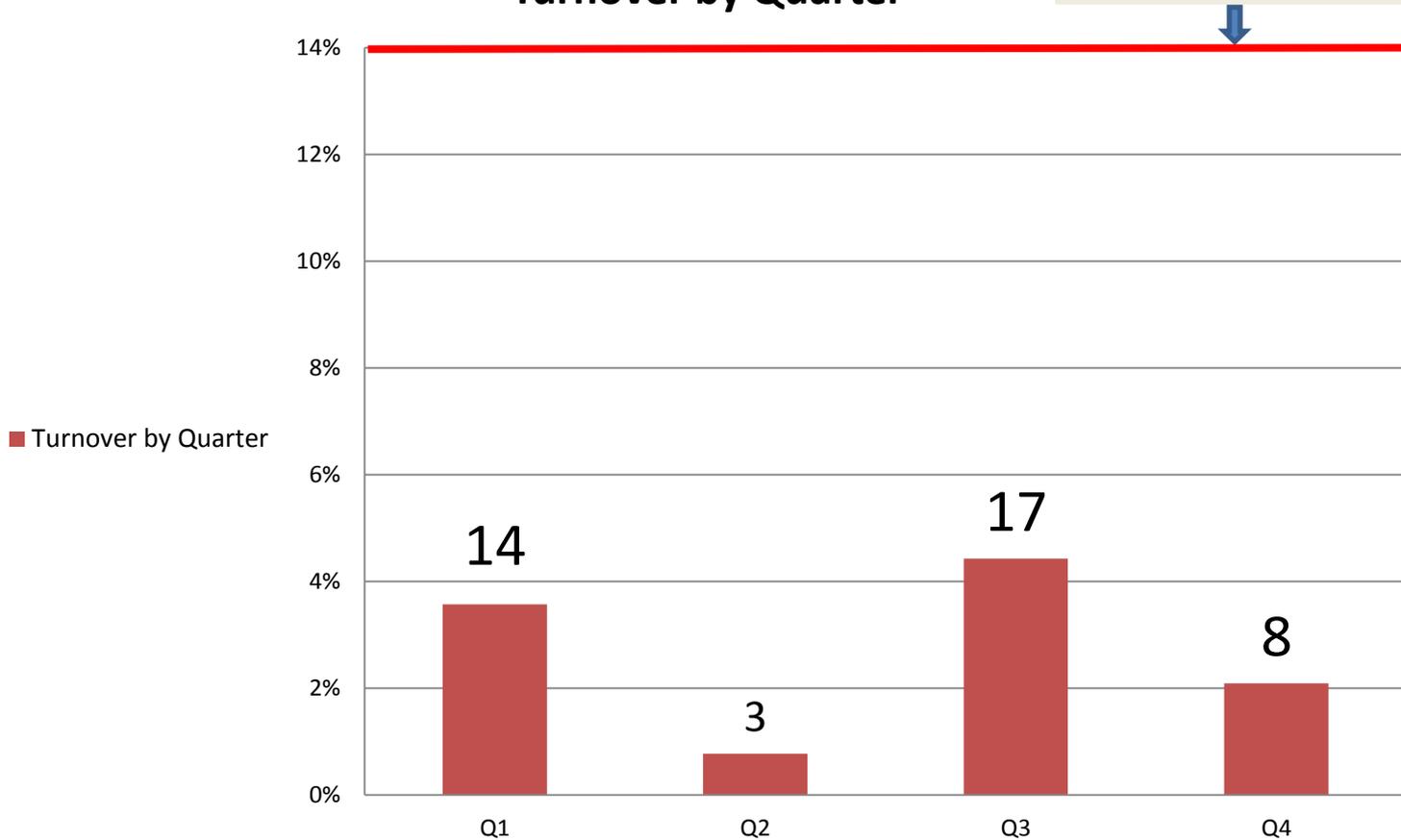
Strategy 5.3 Retain a Quality Workforce
Objective 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

Turnover by Quarter

Annual Target < 14%



STATUS

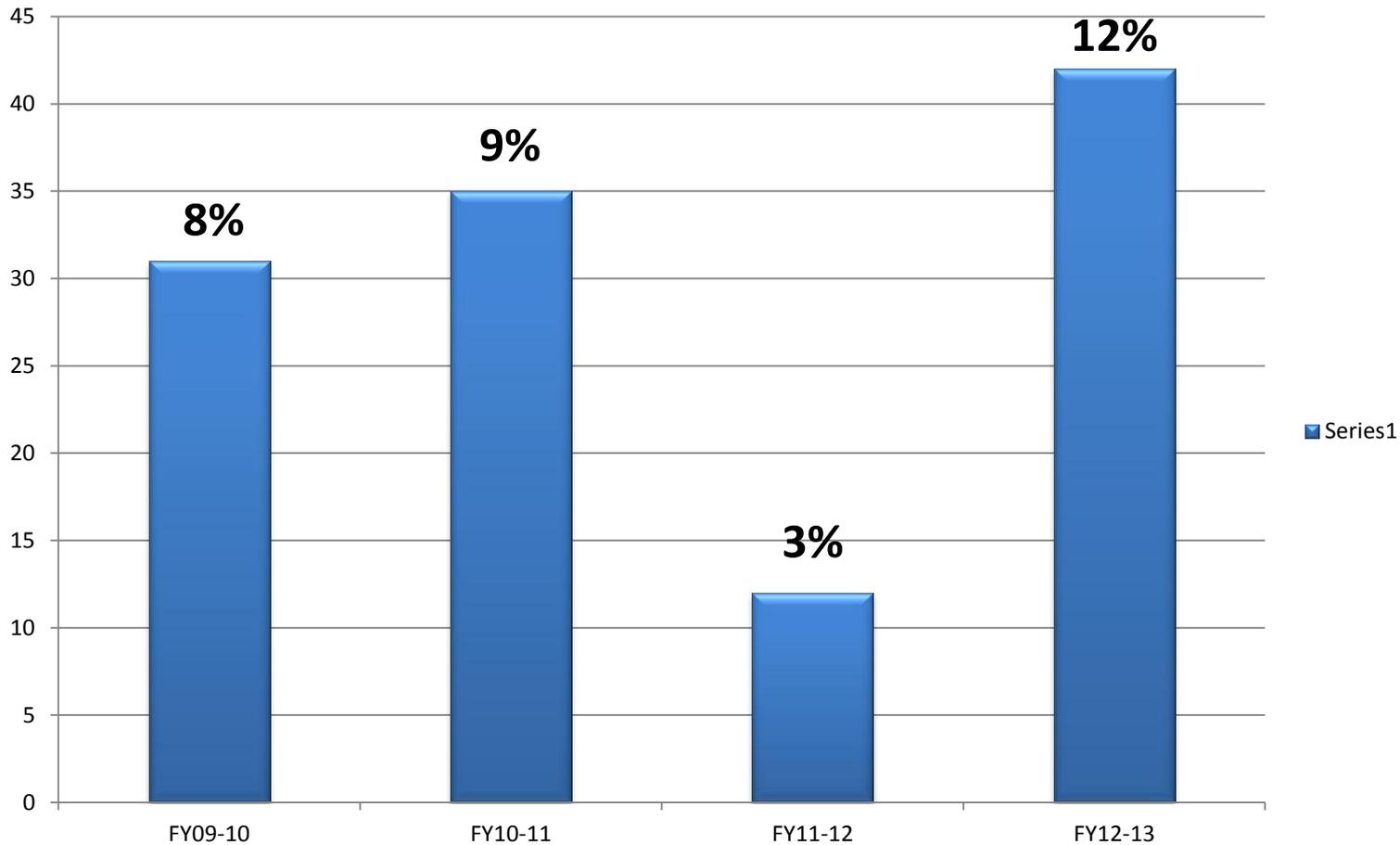
Lead
FBO

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.3 Retain a Quality Workforce
Objective 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth



STATUS

GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

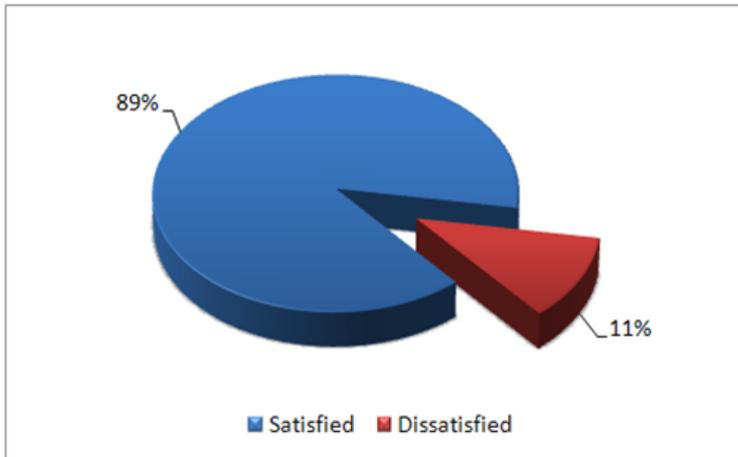
Strategy 5.3 Improve Employee Satisfaction
Objective 5.3.2 Achieve 85% Overall Employee Job Satisfaction on the Annual Employee Satisfaction Survey

Measure: Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

Balanced Scorecard Category: Innovation and Learning Perspective/Learning and Growth

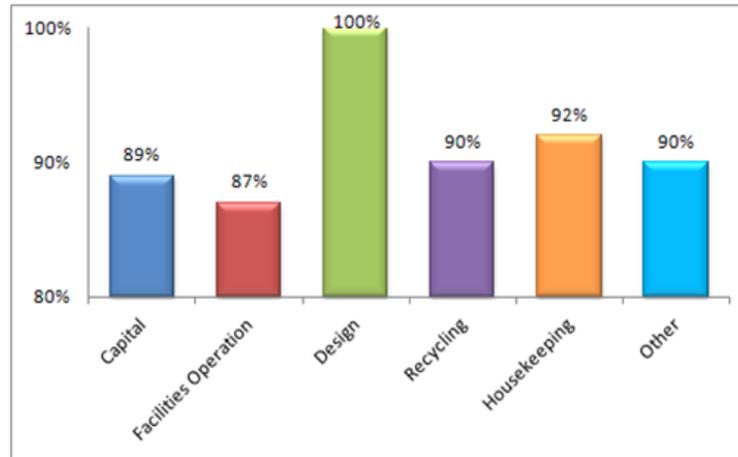
Overall Satisfaction

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



Average = 4.48

By Department (2011)

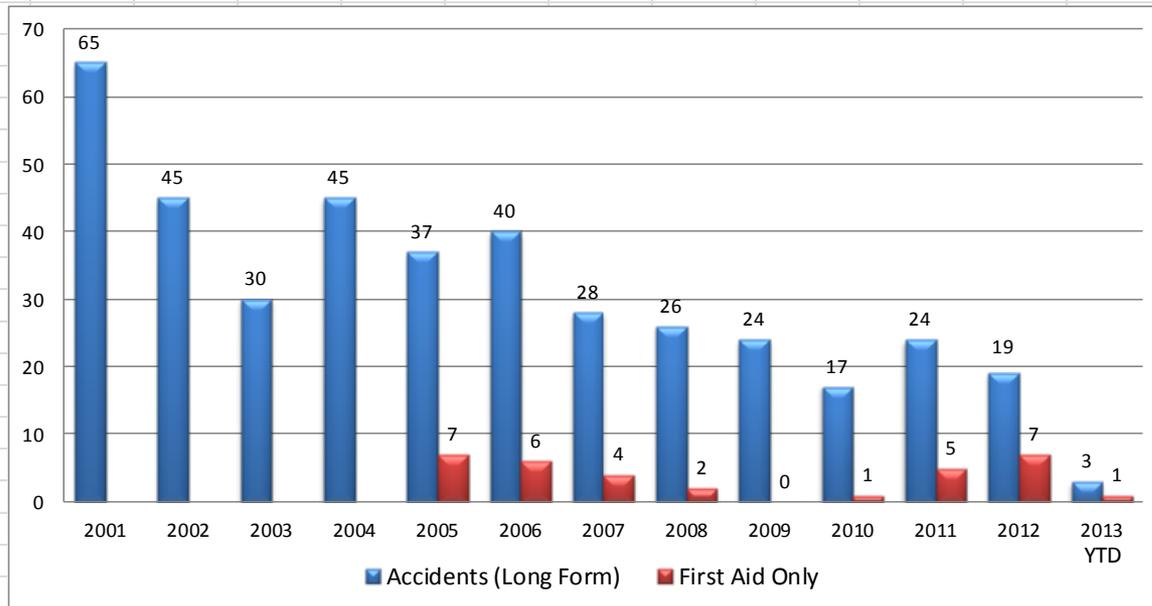


89% of all respondents expressed satisfaction with working in Facilities Management, matching the total from the 2009 survey. When examining the current data by department, the lowest levels of satisfaction come from Facilities Operations (87%) and Capital Projects (89%)

SAFETY TRENDS

Accident Reports
January – December 2013

“STAKE YOUR CLAIM, MAKE SAFETY YOUR AIM”



Group Discussion

