



Strategic Planning Session

**First Quarter – Fiscal Year 2014
July – September 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

Continuously Improve
Operations of Campus



UNC CHARLOTTE

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

-- Earl Nightingale,
Motivational Speaker

GOAL #2

Create a Reliable and Sustainable
Physical Infrastructure





UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

GOAL #3

Foster a Customer Focused Organization





UNC CHARLOTTE

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

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

GOAL #4

Recruit, Develop, and Retain
Quality Employees





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

Objectives:

**Work Request Process, Building Environmental Services Process,
Facility Systems Reliability, Improve Design & Construction Process,
Capital Construction Process, Supporting Facilities,
Improve Customer Service, Quality Work Environment**

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%

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.



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS





GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS



GOAL #1 – Continuously Improve Operations of Campus Facilities

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

Lead
BES

ACTION PLAN

- Actions Complete
 - Solomon Franklin attended Janitor University, “ManageMen” in Salt Lake City, Utah from October 7 – 11, 2013
 - BES Re-Org Study underway
 - All buildings not in renovation audited (self audit)
 - Changed chart to reflect summary data for last four quarters

- Actions Planned
 - Continue quarterly self audits
 - Investigate CIMS/OS1 Certification (feasibility review)
 - Survey In-state peers on Organizational Structure and shift schedule
 - Conference call with In-state peers

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead
BES

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.4: Improve BES Processes

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

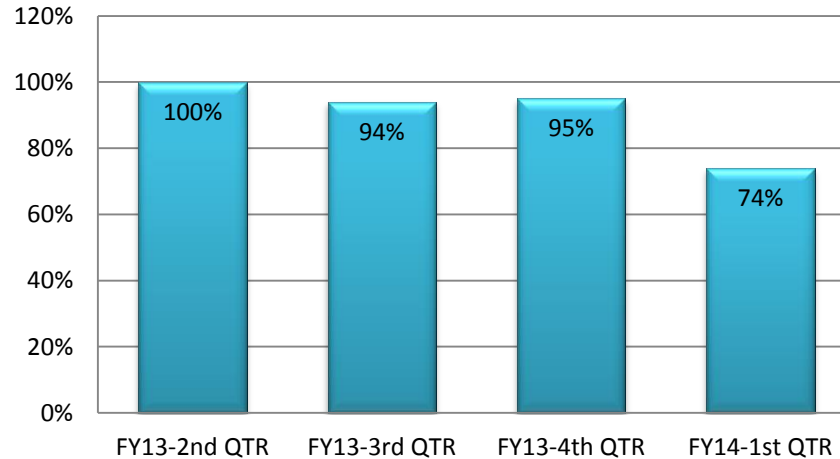
Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Lead: Building Environmental Services

Balanced Scorecard Category: Internal Business Process

APPA LEVELS

Percentage = 74%



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

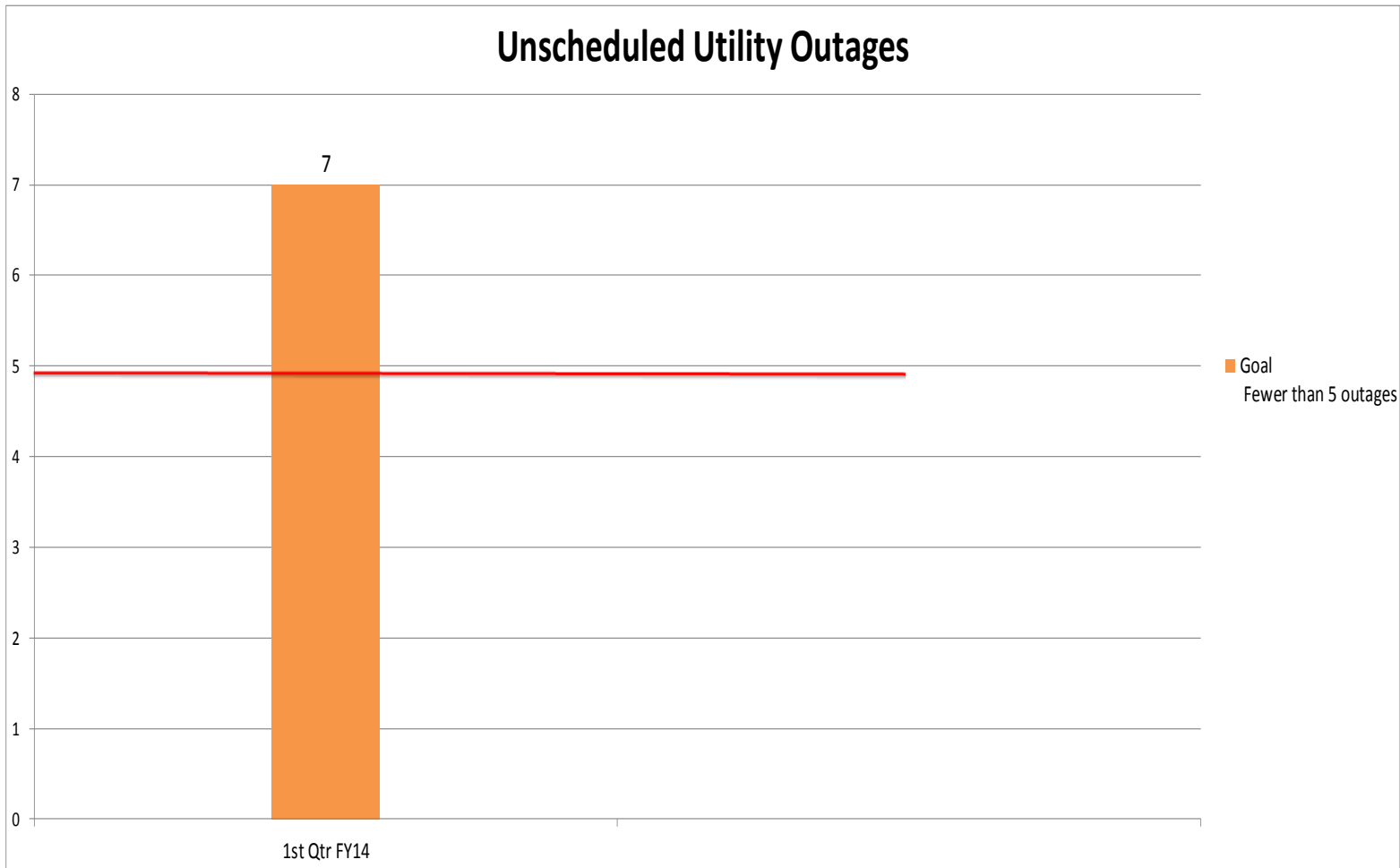
Objective: 1.5: Improve Facility Systems Reliability

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Measure: Number of Occurrences (Electric, Water, Sewer, HVAC, Roofs, Roads measured separately)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Archibus
Report
In error
Working w/FIS



GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

Ongoing Improvements

- **Implement process updates based on four committee recommendations identified during 1st Quarter FY-2013:**
 1. Streamline Processes
 2. Under \$30K Contracts
 3. Develop new Customer Survey
 4. Increase African American HUB usage
- **Continue ongoing efforts to assign Classroom Capacity and providing egress information per individual buildings: Driven by building and project needs.**

IMPLEMENTED ACTIONS AND PLANS

- Establish proven steps to beneficial occupancy via Customer and departmental meetings. **Ongoing.**
- Customer involvement with project Punch List process. **Ongoing**

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '09	115	100	15	87.0%
FY '10	182	168	14	92.3%
FY '11	224	200	24	89.3%
FY '12	240	231	9	96.3%
FY '13	139	134	5	96.4%
QTR 1	31	30	1	96.8%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '14 STATUS	<i>31</i>	<i>30</i>	<i>1</i>	96.8%

**GOAL
95.0%**

**STATUS
96.8%**

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Tactic 2.2.2: Increase Project Capacity by 10 projects per year

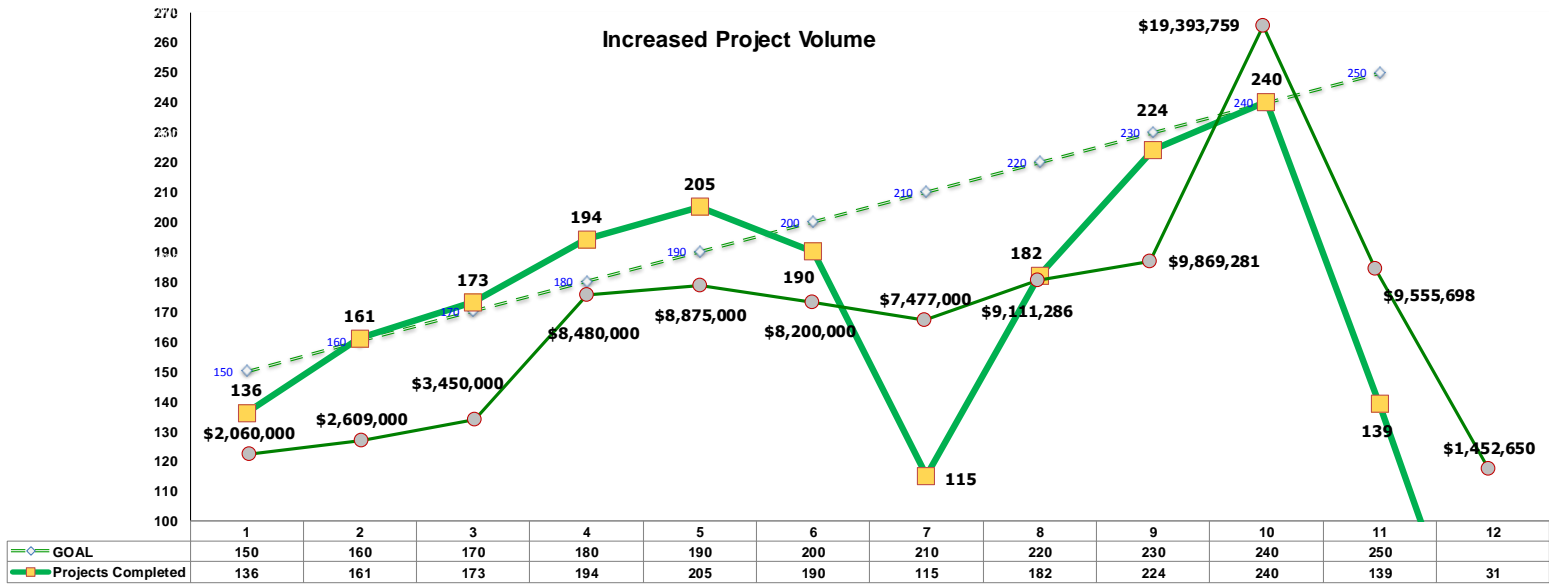
Measure: Number of Projects Completed

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Increase Project Volume by 10 Projects per year

GOAL	1	2	3	4	5	6	7	8	9	10	11	12
	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	Goal FY 2014
Projects Completed	150	160	170	180	190	200	210	220	230	240	250	250
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	\$9,555,698	\$1,452,650
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$44,059	\$80,807	\$68,746	\$46,860



ANNUAL

GOAL 100%

STATUS 12.4%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

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

ACTION PLAN

- Actions Complete
 - On time*--Parking Deck J, SV High Rise Road, Hunt Village Demo, Residence Hall Phase 10
 - Not on time*—Emergency Power/Telcom (+1,322 days), Residence Hall Phase 11 (+34 days), SV RUP IV (+71 days)
- 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 – First Quarter FY 2014

**Lead
Capital**

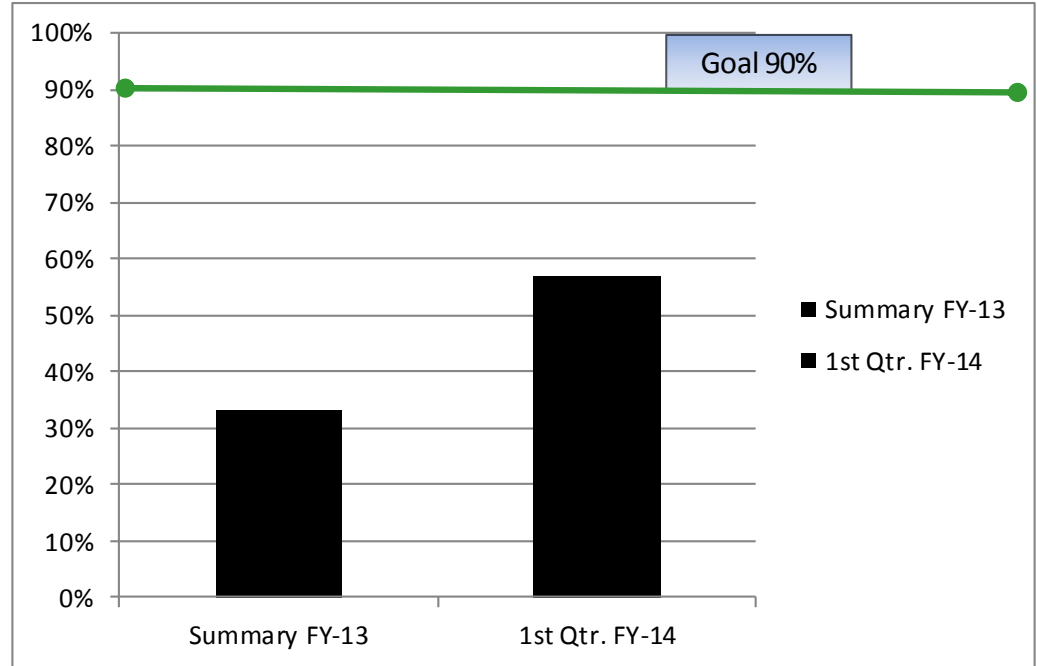
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-13	1	2	33%
1st Qtr. FY-14	4	3	57%



Tactic Measurement for 1st Quarter is 57%
 Year to date is 57%

Status

GOAL #3 Foster a Customer Focused Organization

Objective 3.1:

Continuously improve customer service/satisfaction

Tactic 3.1.1:

Achieve overall FM customer satisfaction of 90%

ACTION PLAN

- Preliminary discussions with the Urban Institute are underway to begin working on the Customer Satisfaction Survey for FY 13-14.
- APPA will be contacted to obtain a copy of their customer survey standard for possible incorporation into FM's survey.



GOAL #3 Foster a Customer Focused Organization

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

Tactic 3.1.1: Achieve overall FM customer satisfaction of 90%

Measure: Annual Customer Survey results: Percentage of customers agreeing or strongly agreeing with the statement: "Overall I am satisfied with the service I received from Facilities Management"

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ON HOLD



GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.3: 90% of Informal Project Customers are satisfied or very satisfied

Measure: Results from Project Customer Questionnaire

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

ACTION PLANS FOR IMPROVEMENT

HIDE

IMPLEMENTED ACTIONS AND PLANS

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.3: 90% of Informal Project Customers are satisfied or very satisfied

Measure: Results from Project Customer Questionnaire

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

GRAPHIC SLIDE INFORMATION

HIDE

STATUS

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

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

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.

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

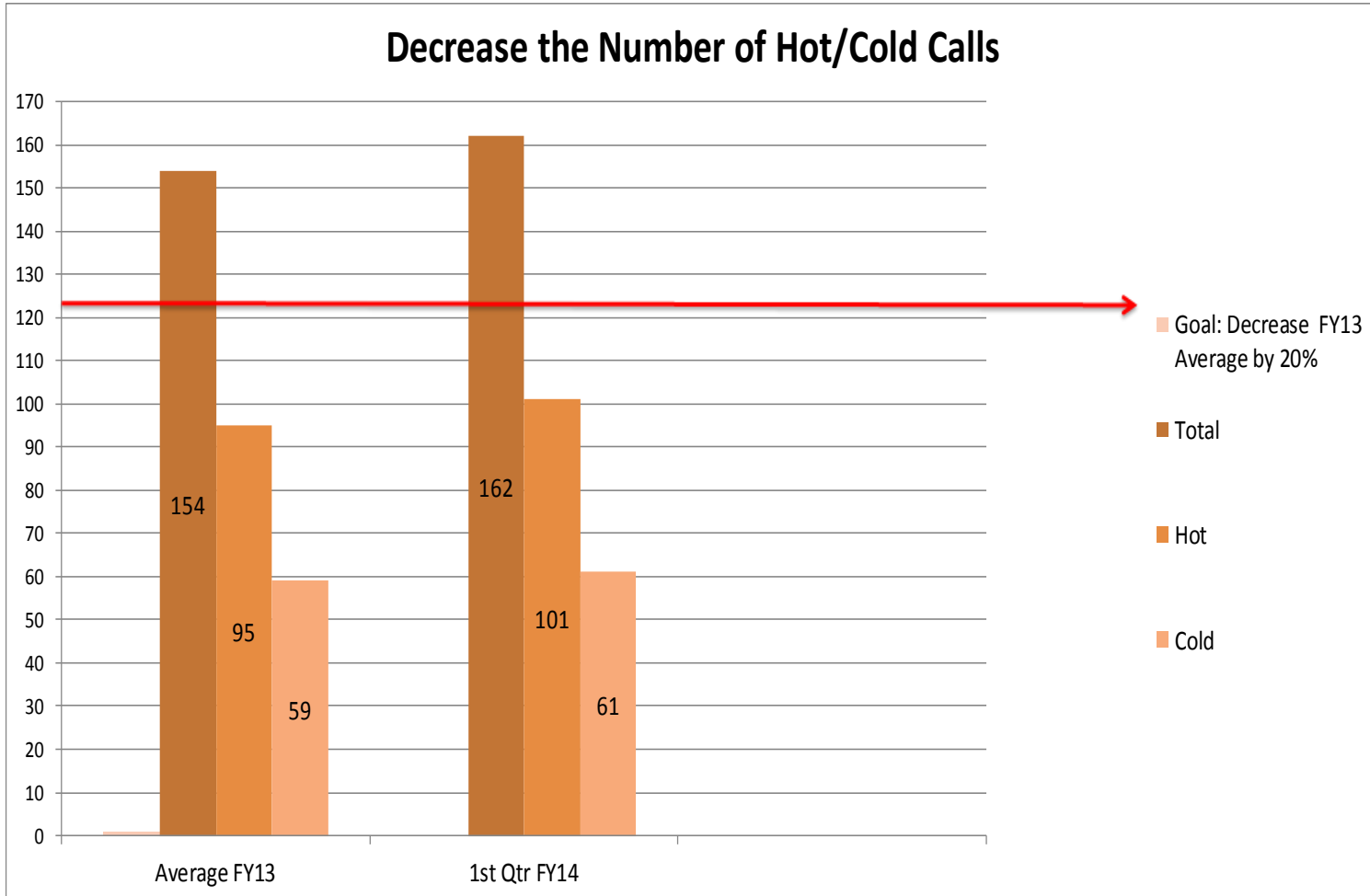
Objective: 3.1: Continuously improve customer service/satisfaction

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

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2014

**Lead
F. O.**

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

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

Measure: Percent satisfied or very satisfied on Archibus email Work Order Survey Results (to be updated)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Archibus
Report
In error
Working w/FIS

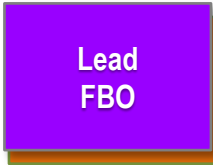
STATUS

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

ACTION PLAN

- Survey has been adapted to include questions from the APPA Work Climate Survey for FY 13-14. Several questions will continue to provide trend data however; many questions are new to the survey. Draft to be reviewed and approved by the AVC-FM.
- Survey will be administered through Survey Monkey program. Testing of the survey will be conducted one week prior to the “go-live” date.
- Meetings with the Urban Institute are underway. Administration of the survey is anticipated for end of October through the week prior to Thanksgiving. Sessions will be held at the UI’s computer lab for those with limited access. Jonathan Kozar will also prepare a “Kick-off” presentation at the October AEM to jump start the survey and explain the process and confidentiality.
- Survey results and report will tentatively be available in the Winter (February/March 2014).



GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ON HOLD

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead
FM
Operational
Units

GOAL #4 Recruit, Develop and Retain Quality Employees

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

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

ON HOLD

STATUS



Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Objective	Tactic	Lag Measures/Lead Measures	Target	Actual	1st Quarter
Improve Work Request Process	1.3.1	Decrease Number of Work Orders Over 14 Days Old	15%	Report error	
	1.3.2	Decrease Work Request Cycle Time	10%	Report error	
Improve BES Process	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	74%	
Facility Systems Reliability	1.5.3	Fewer Than 5 Unscheduled Outages per Quarter	<5	7	
	1.5.4	Improve Ratio of Preventive/Predictive Work Requests to Reactive Request	50%	Report error	
Improve Design & Construc Process	2.2.1	95% of Construction Projects Meet Scheduled BOD	95%	96.8%	
	2.2.2	Increase Project Capacity by 10 Projects per Year	10	12.4%	
Capital Construction Process	2.6.1	90% of Capital Construction Projects Completed On Time	90%	57%	
Supporting Facilities	2.10	Develop plan for supporting research facilities	Action Plan Only	no slide	
Improve Customer Service	3.1.1	Achieve Overall FM Customer Satisfaction of 90%	90%	on hold	
	3.1.2	Decrease number of Hot and Cold Calls by 20%	20%	?	
	3.1.3	90% of Informal Project Customers Satisfied or Very Satisfied	90%	Survey unavailable	
	3.1.4	90% of Reactive Work Request Customers Satisfied or Very Satisfied	90%	Report error	
Quality Work Environment	4.3.1	90% Employees Satisfied or Very Satisfied Working in FM	90%	on hold	
	4.3.2	87% Employees Satisfied or Very Satisfied in Each Unit	87%	on hold	



UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Objectives:

Promote Fiscal Responsibility

Conserve Natural Resources

Improve HUB Participation

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:

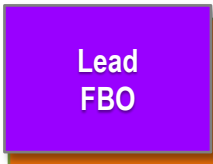
Increase Supplemental Funding to the Department by 10% annually

Tactic 5.1.3:

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

ACTION PLAN

- To improve our ability to seek out and secure grants, FM's Grants Management Specialist has recently completed the first round (Grant Writing and Research)of national certification. The second component, Program Development and Proposal Writing) will begin later this FY.
- Additionally, our specialist has also been accepted into UNC Charlotte's Grants Certification program. Anticipated completion is Spring 2014, March.
- Research is underway regarding the following potential submissions:
 - AFV – 2014
 - NCAPPA Award for FM's Recognition Program
- FY 2013 APPA Facilities Performance Indicators Survey is currently underway with a deadline of December 2013.



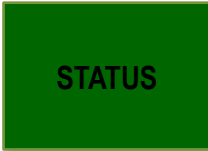
GOAL #5 Promote Good Stewardship

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

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS: SEPTEMBER 2013 (Preliminary)

ACCOUNT DESCRIPTION	2012-13 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES
OVERTIME AND PREMIUM PAY	\$ 310,000	8%	\$ -	\$ 310,000	\$ 310,000
STUDENT AND TEMPORARY WAGES	\$ 131,500	3%	\$ 31,732	\$ -	\$ 31,732
PERSONAL SERVICE CONTRACTS	\$ 100,750	3%	\$ 2,717	\$ 45,000	\$ 47,717
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 941,006	24%	\$ 150,790	\$ 401,740	\$ 552,530
OTHER ADMINISTRATIVE EXPENSES	\$ 81,500	2%	\$ 2,101	\$ -	\$ 2,101
DOMESTIC TRAVEL/TRAINING	\$ 80,000	2%	\$ 5,484	\$ -	\$ 5,484
FIXED PURCHASED SERVICES (Maint Agr)	\$ 265,746	7%	\$ 34,087	\$ 143,298	\$ 177,385
OTHER PURCHASED SERVICES	\$ 277,950	7%	\$ 18,282	\$ 32,788	\$ 51,070
SUPPLIES	\$ 1,448,296	36%	\$ 26,315	\$ 3,067	\$ 29,383
EQUIPMENT/IT	\$ 270,554	7%	\$ 33,500	\$ -	\$ 33,500
CAPITAL OUTLAY	\$ 5,000	0%	\$ -	\$ -	\$ -
FIXED CHARGES	\$ 23,347	1%	\$ 799	\$ 853	\$ 1,652
RECYCLING	\$ 37,515	1%	\$ -	\$ -	\$ -



GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

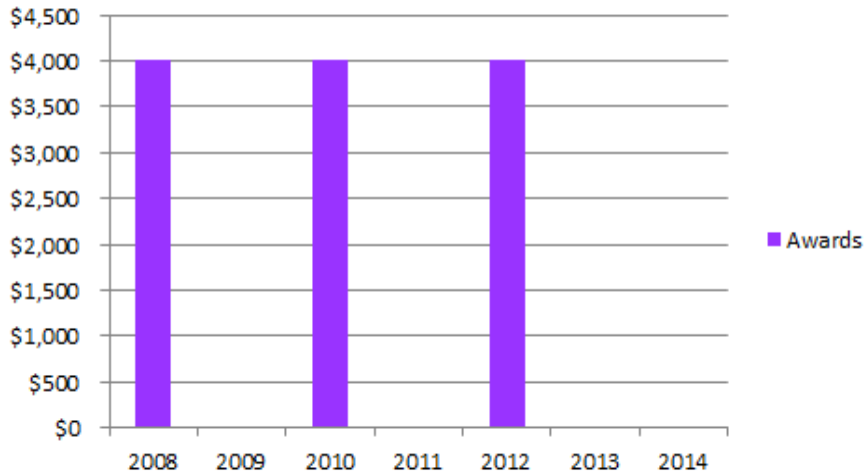
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually

Measure: Percent increase in supplemental funding

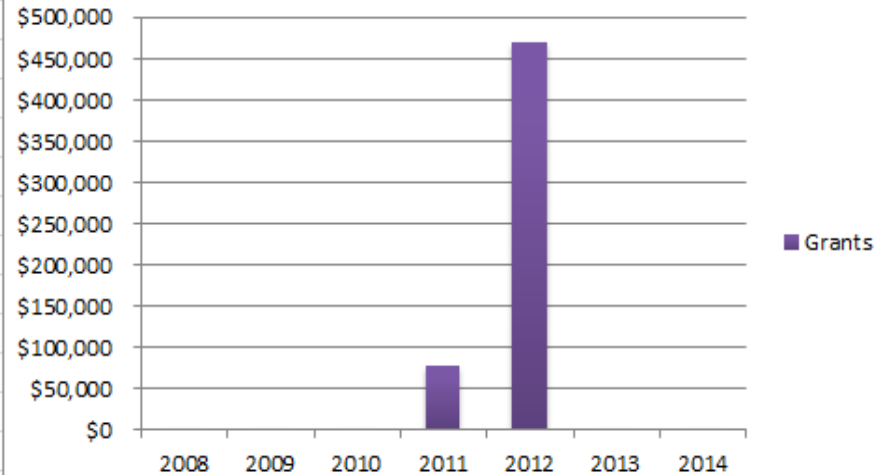
Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

Awards



Grants



GOAL #5 Promote Good Stewardship

Objective 5.1:

Promote Fiscal Responsibility

Tactic 5.1.3:

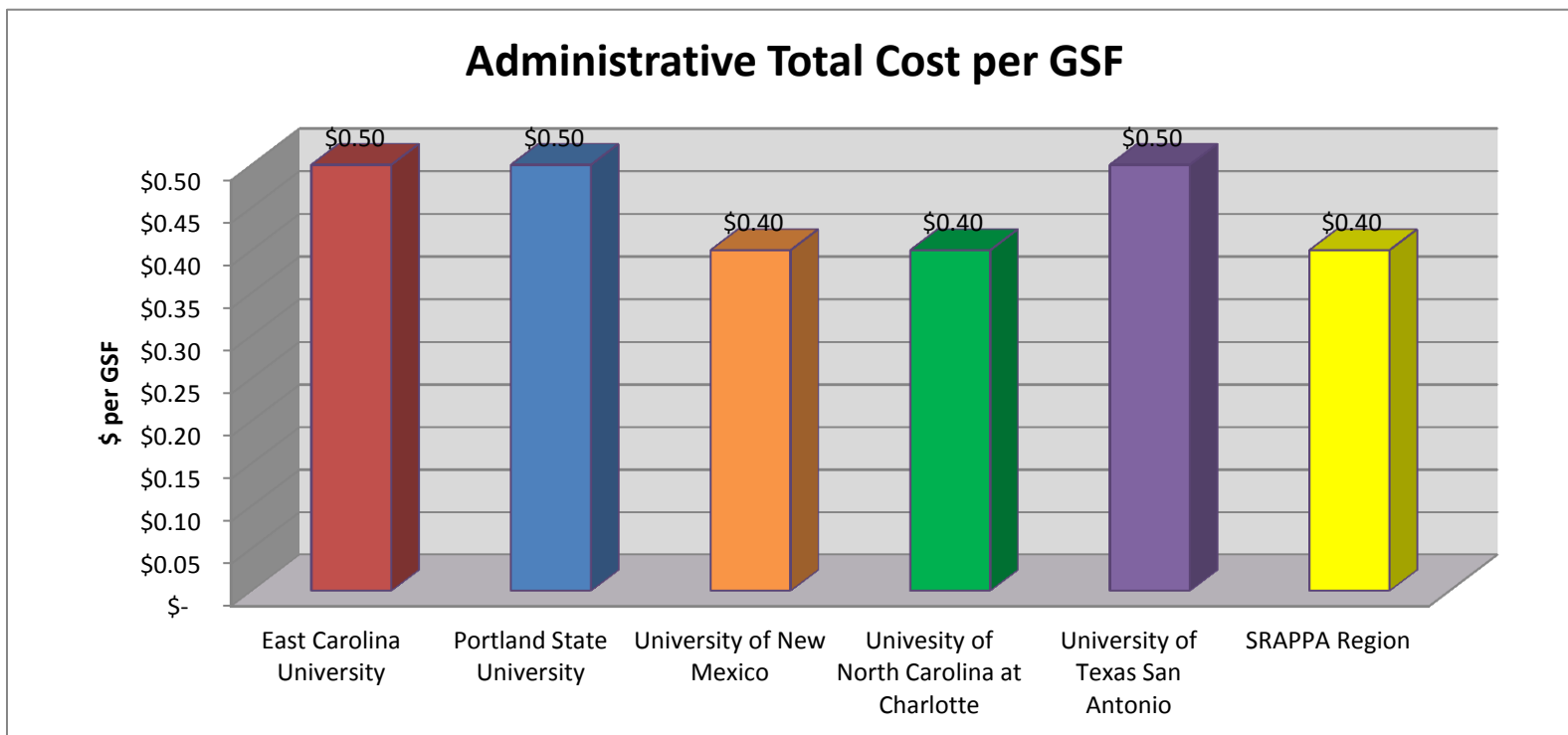
Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Measure:

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

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective



GOAL #5 –Promote Good Stewardship

Objective: 5.1:

Promote Fiscal Responsibility

Tactic 5.1.4:

Achieve Custodial Costs/Student FTE \pm 5% of APPA Average for Peer Institutions

Lead
BES

ACTION PLAN

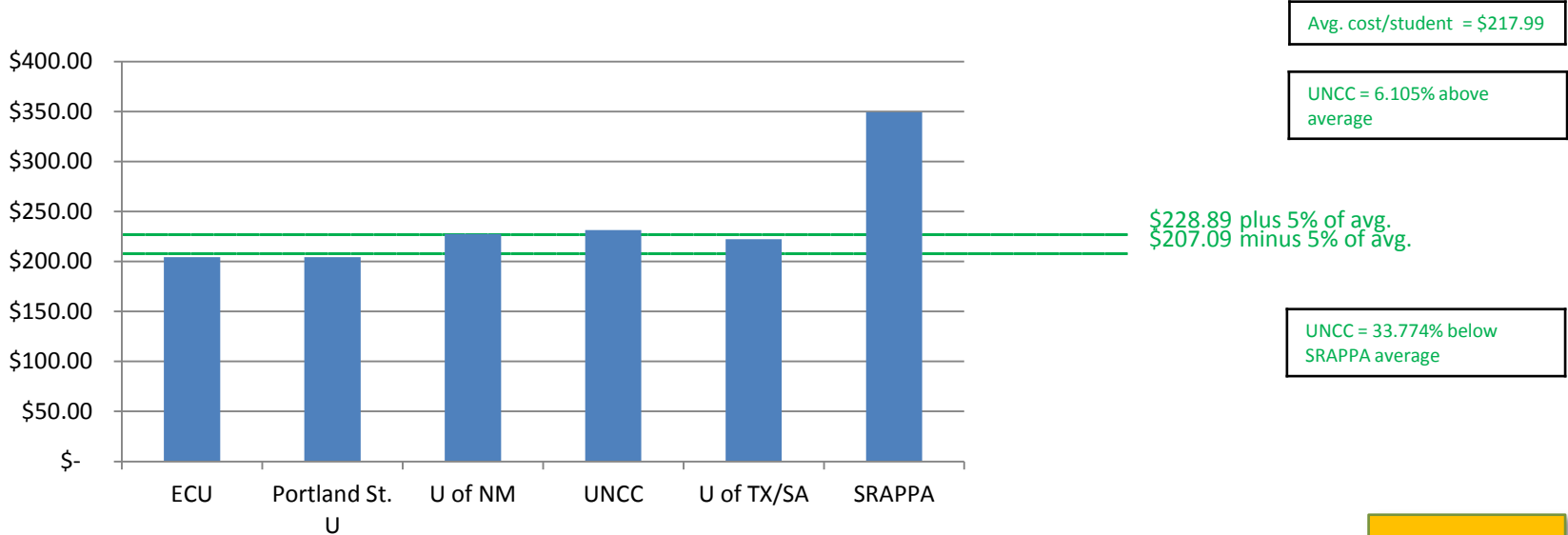
- Actions Complete
 - Submitted square footage cleaned by BES to FBO for inclusion in the annual APPA survey
 - Requested one-time funds for supply chain management project
 - Installed hand dryers in Fretwell for pilot study
- Actions Planned
 - Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey
 - Supply chain management improvements (funding requested)

Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility
Tactic 5.1.4: Achieve Custodial Costs/Student FTE ± 5% of APPA Average for Peer Institutions
Measure: Administrative cost/GSF from annual APPA Facilities Performance Indicators Report.
Measure: Custodial Costs/Student FTE from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Balanced Scorecard Category: Financial Perspective



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 – 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.

GOAL #5 – Promote Good Stewardship

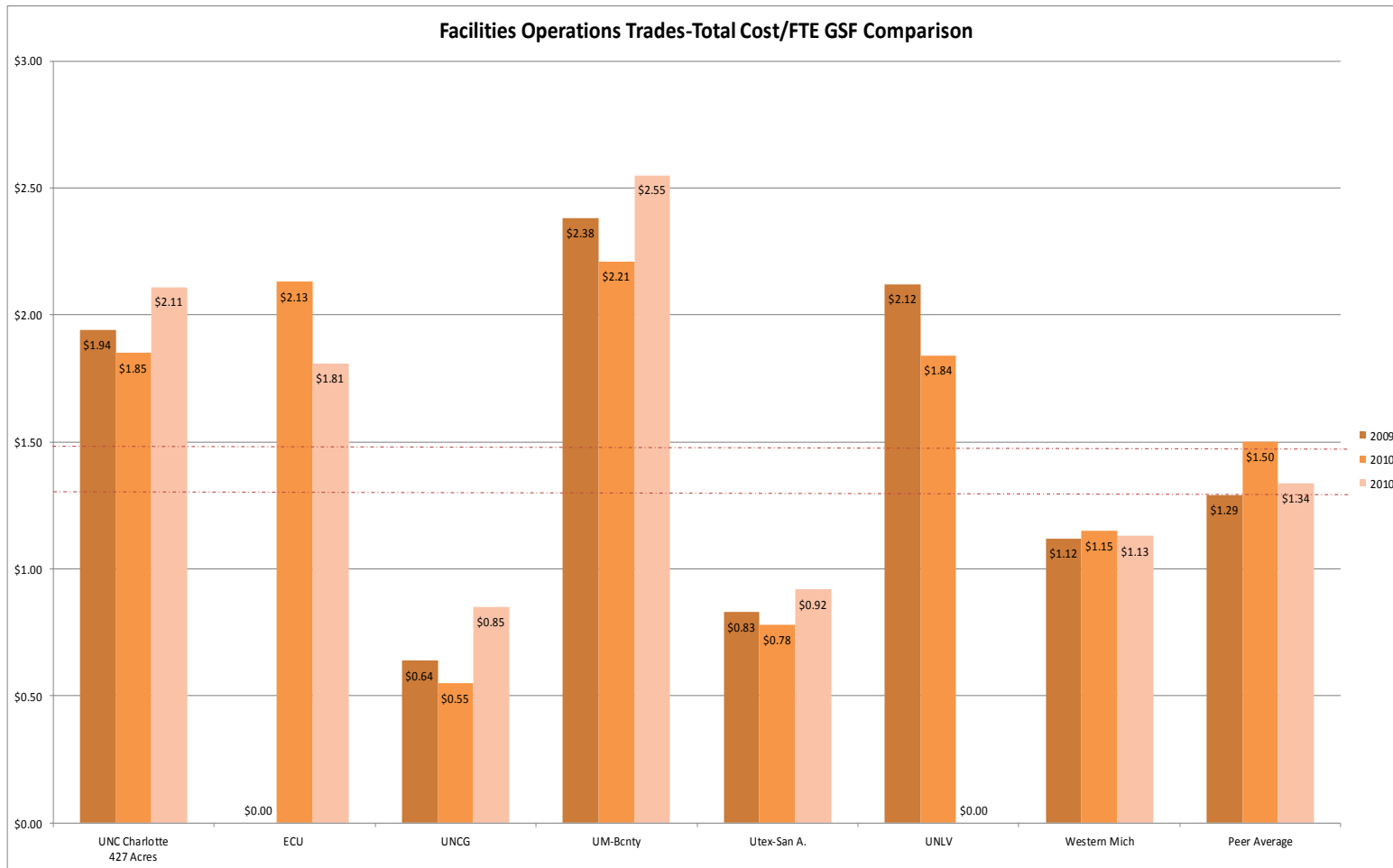
Objective: 5.1: Promote Fiscal Responsibility

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

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective



GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

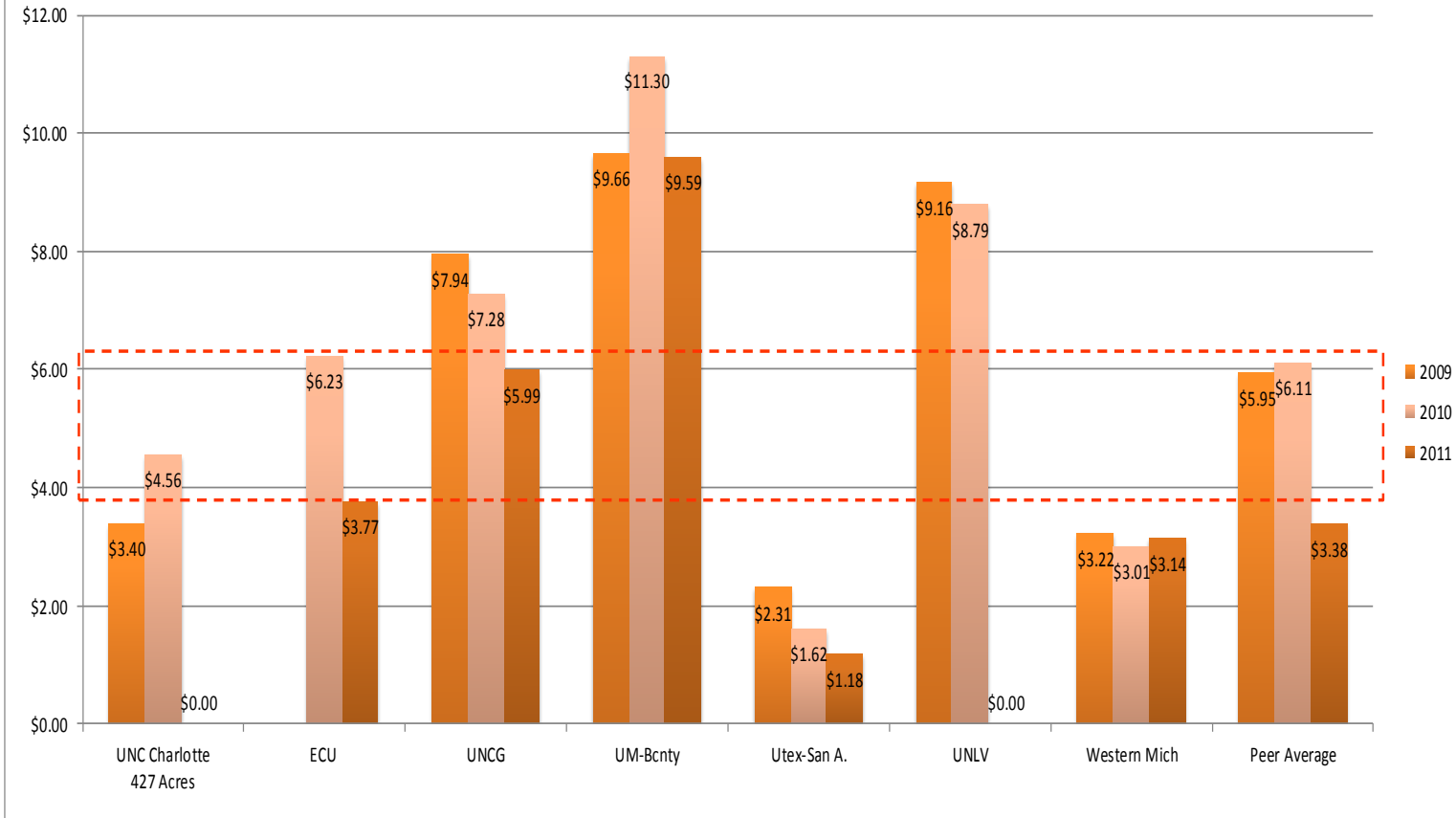
Tactic: 5.1.6: Achieve total Landscape cost/acre \pm 5% of APPA Average for Peer Institutions

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

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Grounds - Total Cost/Acre Comparison



Lead
F. O.

GOAL #5 – Promote Good Stewardship

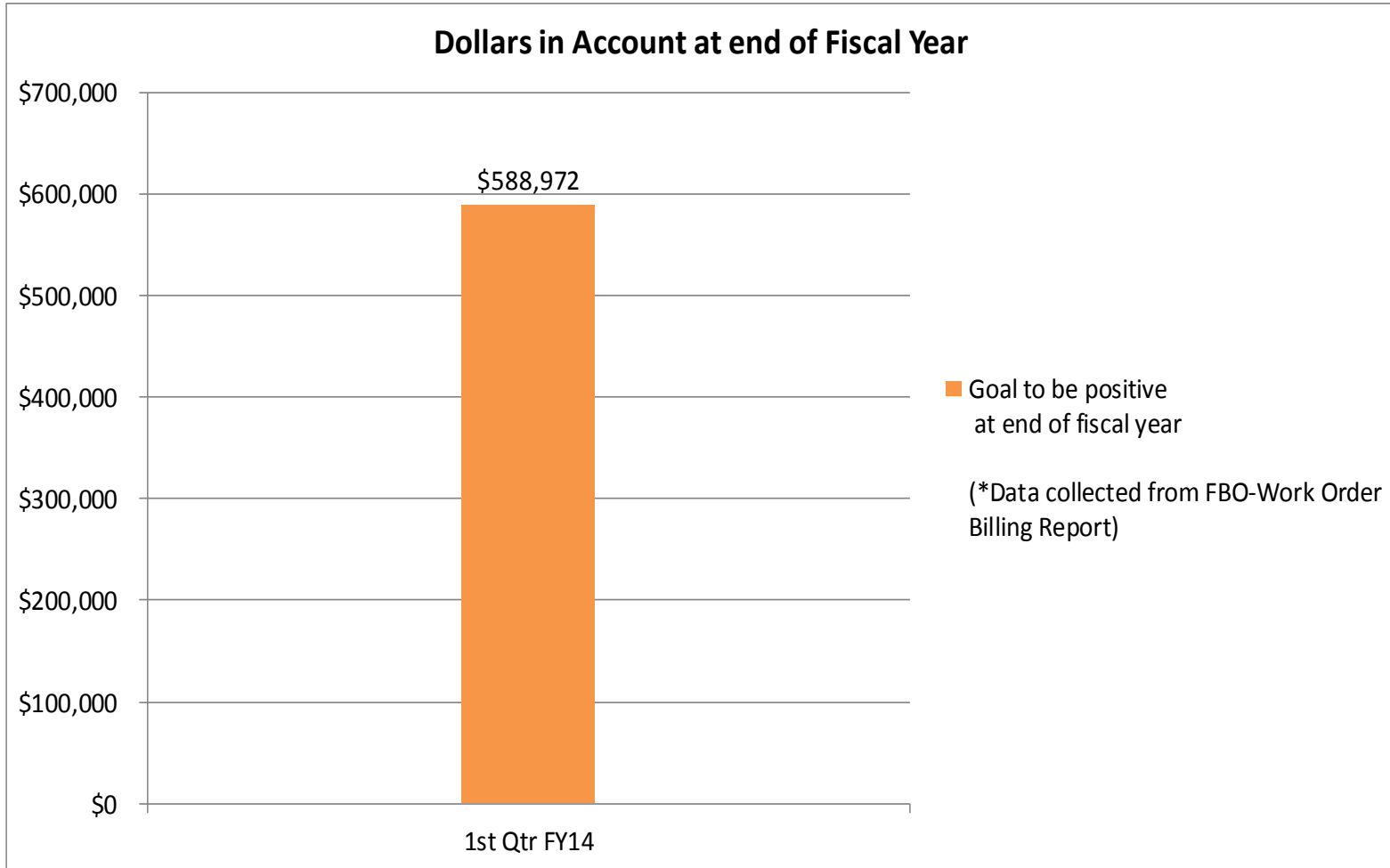
Objective: 5.1: Promote Fiscal Responsibility

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

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

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

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Performance Contract in construction
 - Will reduce campus consumption by another 5 KBTU/GSF
- System Wide Lighting Performance Contract
- SAC Energy Upgrade
- Continue retro-commissioning program
- Energy efficient equipment upgrades
- Exterior Lighting upgrades to LED

Lead
Capital

GOAL #5 – Promote Good Stewardship

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

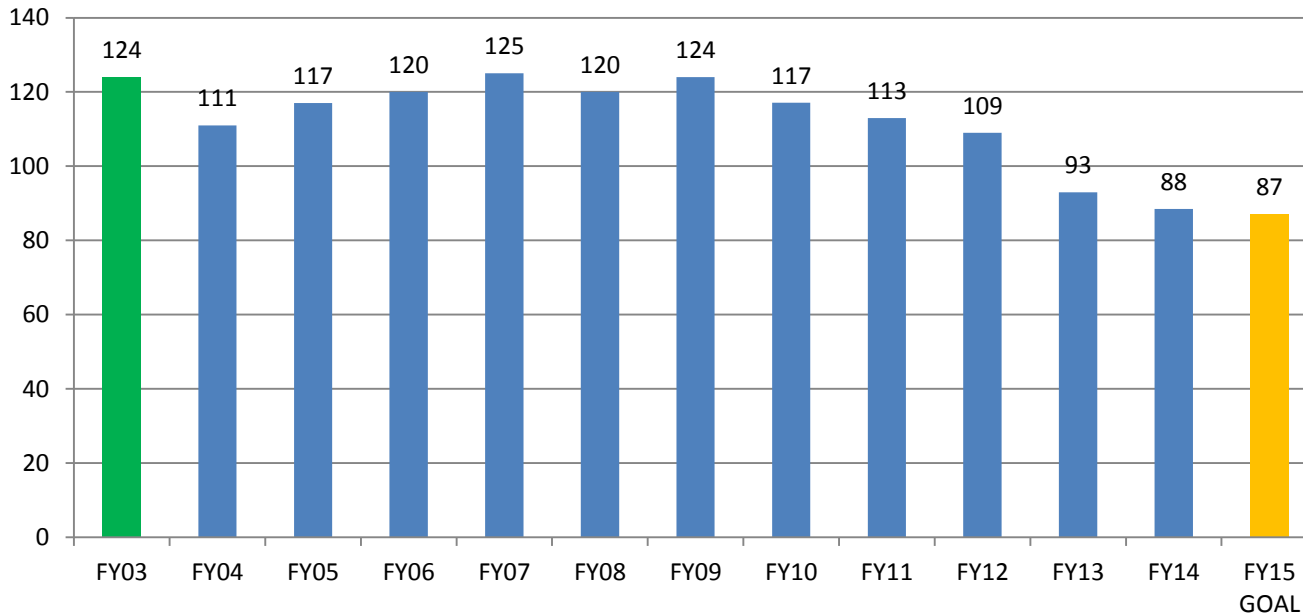
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Base Year FY 2003
Current Reduction 29%
Mandated Reduction 30%
BY FY 15

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



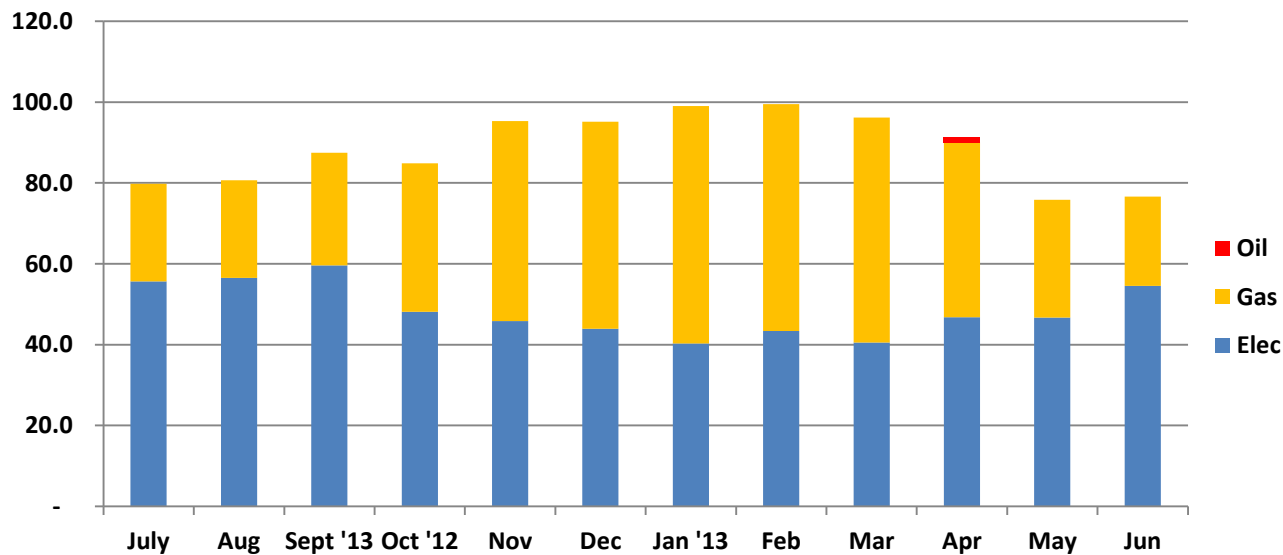
GOAL #5 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

CAMPUS MONTHLY ENERGY USAGE
Kbtu/GSF

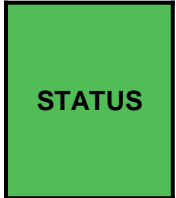


GOAL #5 – Promote Good Stewardship

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

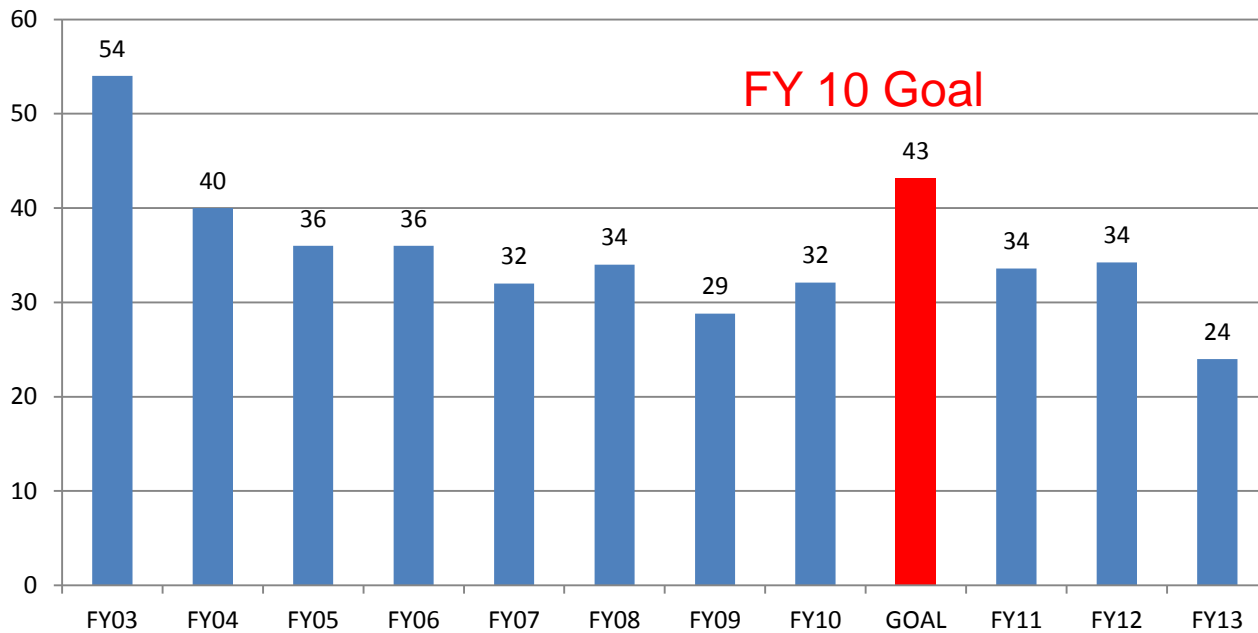
Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective



Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 24 Gal/GSF



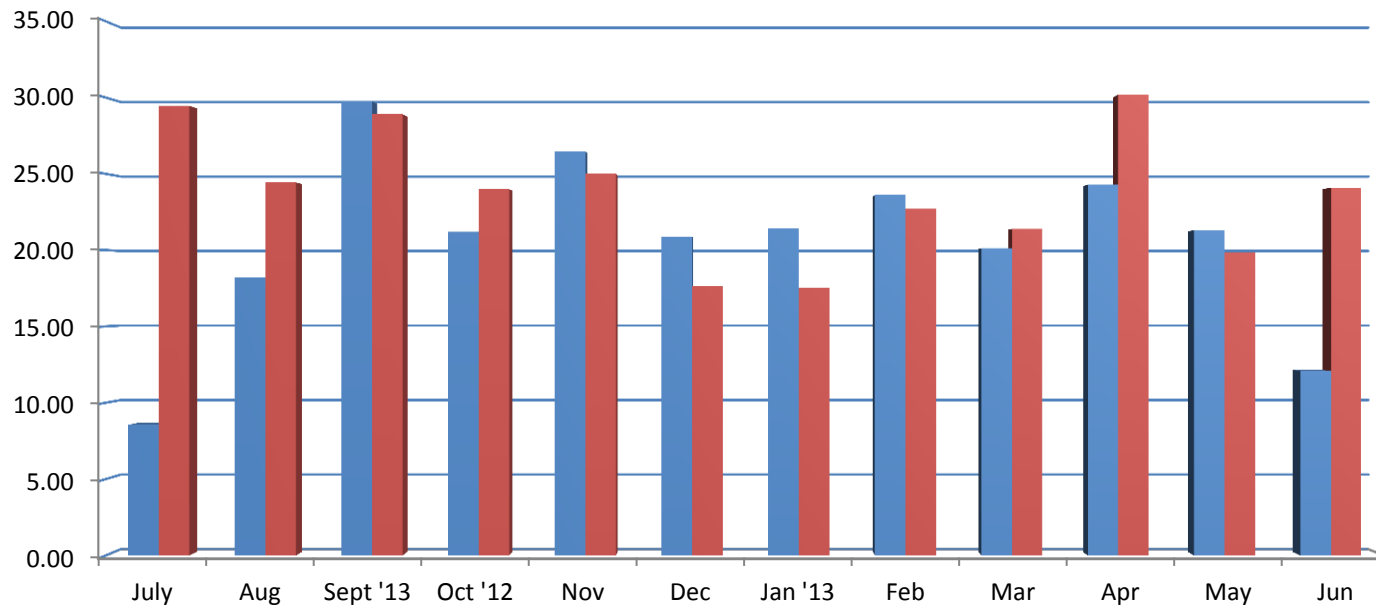
GOAL #5 – Promote Good Stewardship

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

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Monthly Water Usage Comparison



ACTION PLANS FOR IMPROVEMENT

Continue –

- Work with University staff/GCs/organizations, etc. to promote the utilization of HUB firms
- Identify HUB firms to participate in the process
- Encourage participation within all HUB designations
- Assist CM firms review 1st tier subcontractor *Good Faith Effort* documentation
- Ensure Program Compliance
- Education & Outreach

GOAL #5 – Promote Good Stewardship

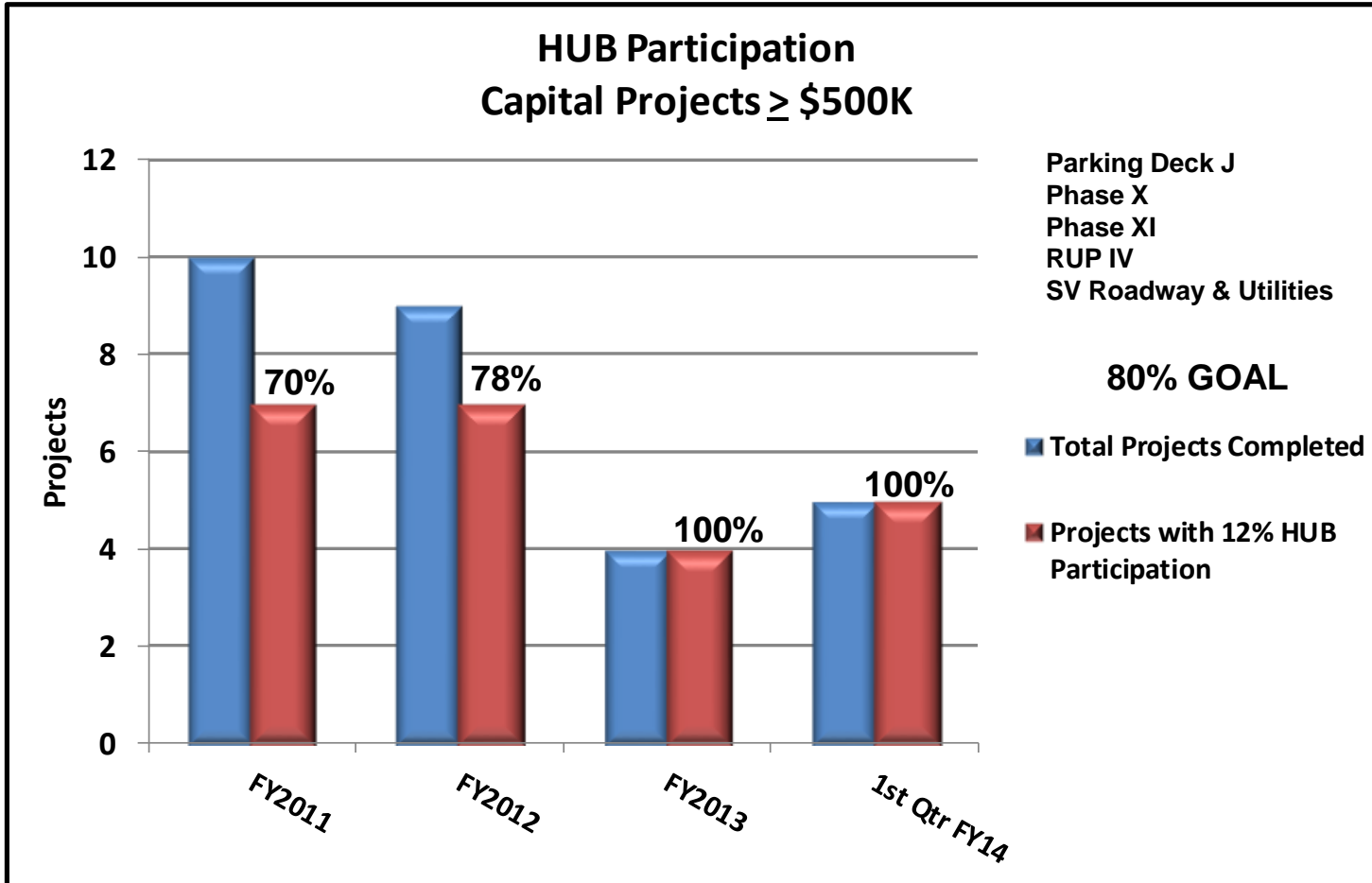
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

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



STATUS

GOAL #5 – Promote Good Stewardship

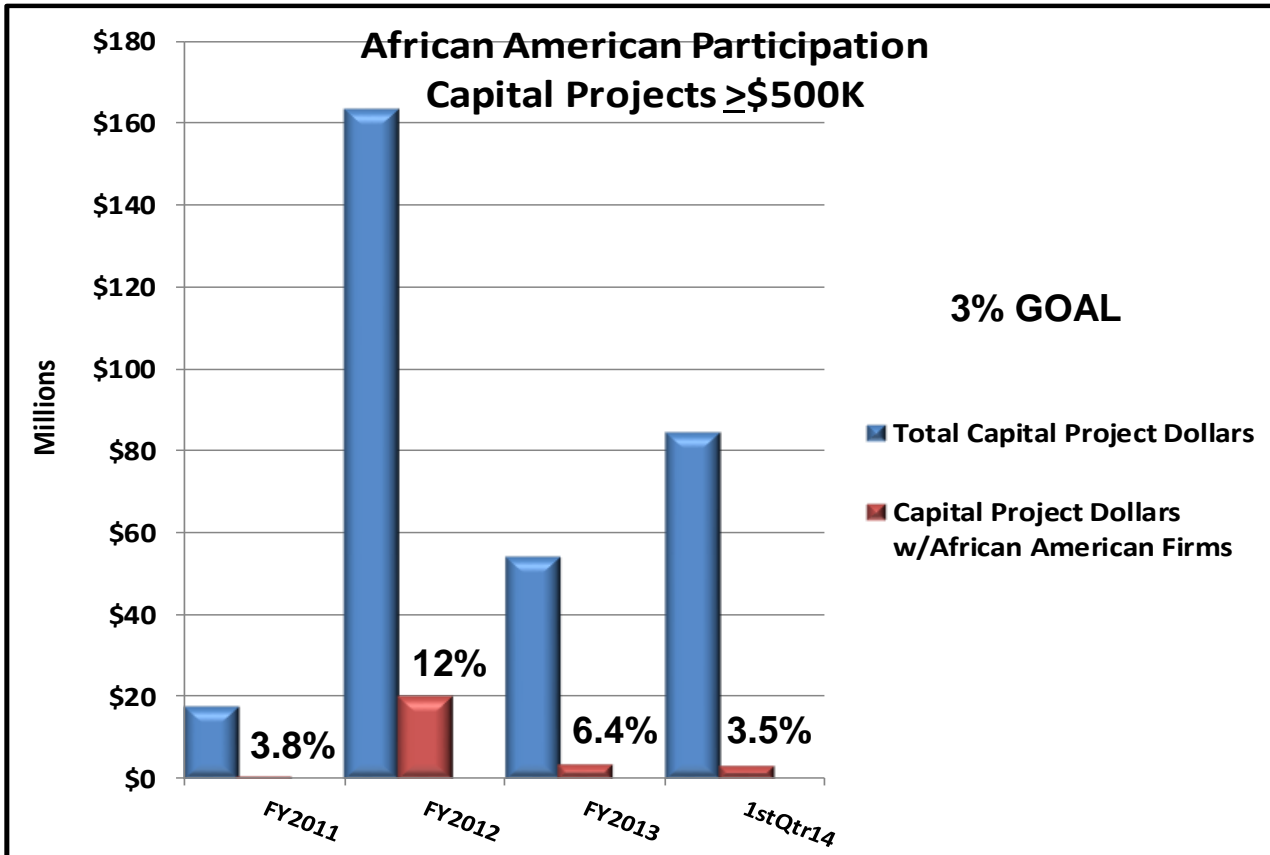
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 3% 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



STATUS

GOAL #5 – Promote Good Stewardship

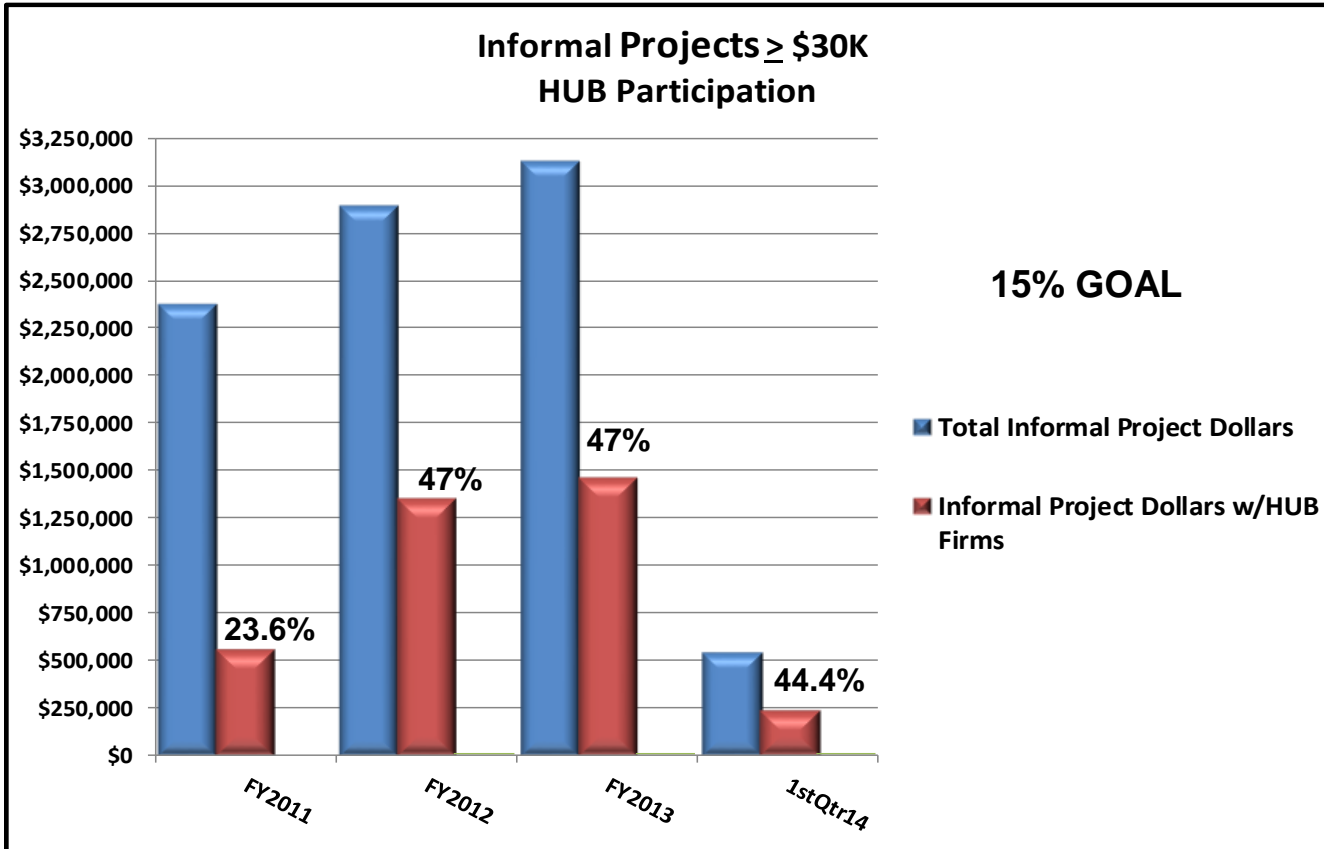
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.3: 15% overall HUB participation on Informal contracts \$30,000 and above

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #5 – Promote Good Stewardship

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

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

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

ACTION PLANS FOR IMPROVEMENT

• **Design Services' HUB participation improvement emphasizing African American contractors & vendors:**

Process Improvement: 4. Increase African American HUB usage

IMPLEMENTED ACTIONS AND PLANS

- Amanda Caudle is Design Services' contact and coordinator working 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. This is a coordinated effort and is regularly reviewed and discussed at our Design Services Tuesday morning meetings. 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 #5 – Promote Good Stewardship

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

Tactic 5.4.4: 13% overall HUB participation on informal projects below \$30,000 including 3% African American

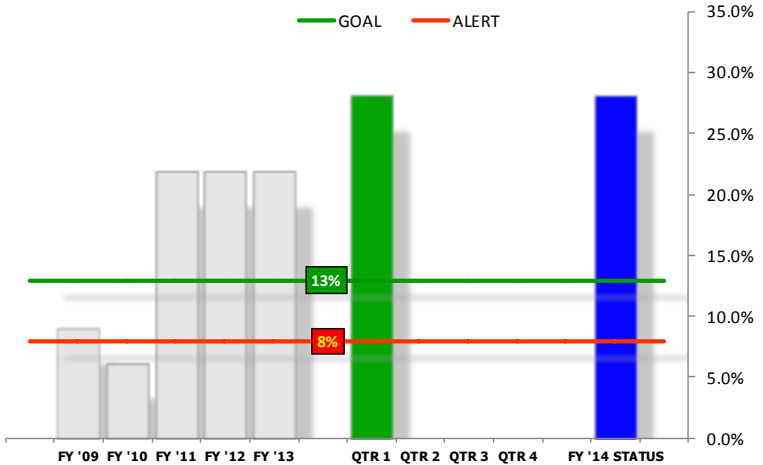
Measure: Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

Lead: Design Services

Balanced Scorecard Category: Financial Perspective

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '09	\$ 996,756	\$ 89,479	9.0%
FY '10	\$ 1,452,202	\$ 88,703	6.1%
FY '11	\$ 3,924,102	\$ 857,125	21.8%
FY '12	\$ 2,878,027	\$ 891,793	31.0%
FY '13	\$ 2,891,003	\$ 902,065	31.2%
QTR 1	\$ 724,890	\$ 203,778	28.1%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '14 STATUS	\$ 724,890	\$ 203,778	28.1%



**GOAL
13.0%**

**STATUS
28.1%**

GOAL #5 – Promote Good Stewardship

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

Tactic 5.4.5: 3% African American participation on Informal projects below \$30,000

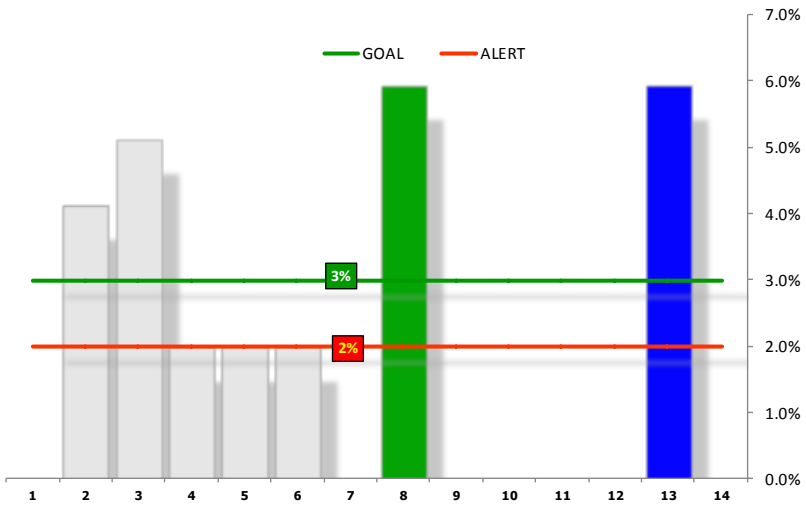
Measure: Total African American contract dollars divided by Total Contract Dollars

Lead: Design Services

Balanced Scorecard Category: Financial Perspective

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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	\$ 996,756	\$ 40,894	4.1%
FY '10	\$ 1,452,202	\$ 73,987	5.1%
FY '11	\$ 3,924,102	\$ 77,377	2.0%
FY '12	\$ 2,878,027	\$ 46,475	1.6%
FY '13	\$ 2,891,003	\$ 115,219	4.0%
QTR 1	\$ 724,890	\$42,900.00	5.9%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '14 STATUS	\$ 724,890	\$ 42,900	5.9%



**GOAL
3.0%**

**STATUS
5.9%**



Balance Score Card

DISCUSSION

FINANCIAL PERSPECTIVE

Objective	Tactic	Lag Measures/Lead Measures	Target	Actual	1st Quarter
Promote Fiscal Responsibility	5.1.1	100% of Financial Accounts within Budget	100%	?	
	5.1.2	Increase Supplemental Funding to Dept by 10% Annually	10%	0%	
	5.1.3	Admin Cost/GSF \pm 5% APPA Avg for Peer Institutions	+/-5%	?	Annual
	5.1.4	Custodial Costs/Student \pm 5% APPA Avg for Peer Institutions	+/-5%	6.1%	Annual
	5.1.5	Maint Cost/GSF \pm 5% APPA Avg for Peer Institutions	+/-5%	?	Annual
	5.1.6	Landscape Cost/Acre \pm 5% APPA Avg for Peer Institutions	+/-5%	?	Annual
	5.1.7	All Receipt Supported Funds Accounts Have Positive Balance	+	\$588,972.00	Annual
Conserve Natural Resources	5.3.1	Decrease Energy Usage by 30% by FY15	30%	29%	
	5.3.2	Decrease Water Usage by 10% (goal 43 gal/GSF met for FY	10%	48%	
Improve HUB Participation	5.4.1	12% HUB participation on 80% of Capital Projects	12% on 80%	100%	
	5.4.2	3% African American Participation on Capital Projects	3%	3.5%	
	5.4.3	15% HUB Participation on Informal Contracts \geq \$30K	15%	44%	
	5.4.4	13% HUB Participation on Informal Projects $<$ \$30K	13%	28.1%	
	5.4.5	3% African American Participation on Informal Projects $<$ \$30K	3%	5.9%	



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Objectives:

**Labor Availability, Logistics Efficiency,
Facility Systems Reliability, Facilities Management Effectiveness,
Capital Renewal, Space Planning & Utilization, Capital Planning & Design
Master/Project Planning Process, Real Estate**

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Increase “Wrench” Time to 70%

ACTION PLAN

- 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

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

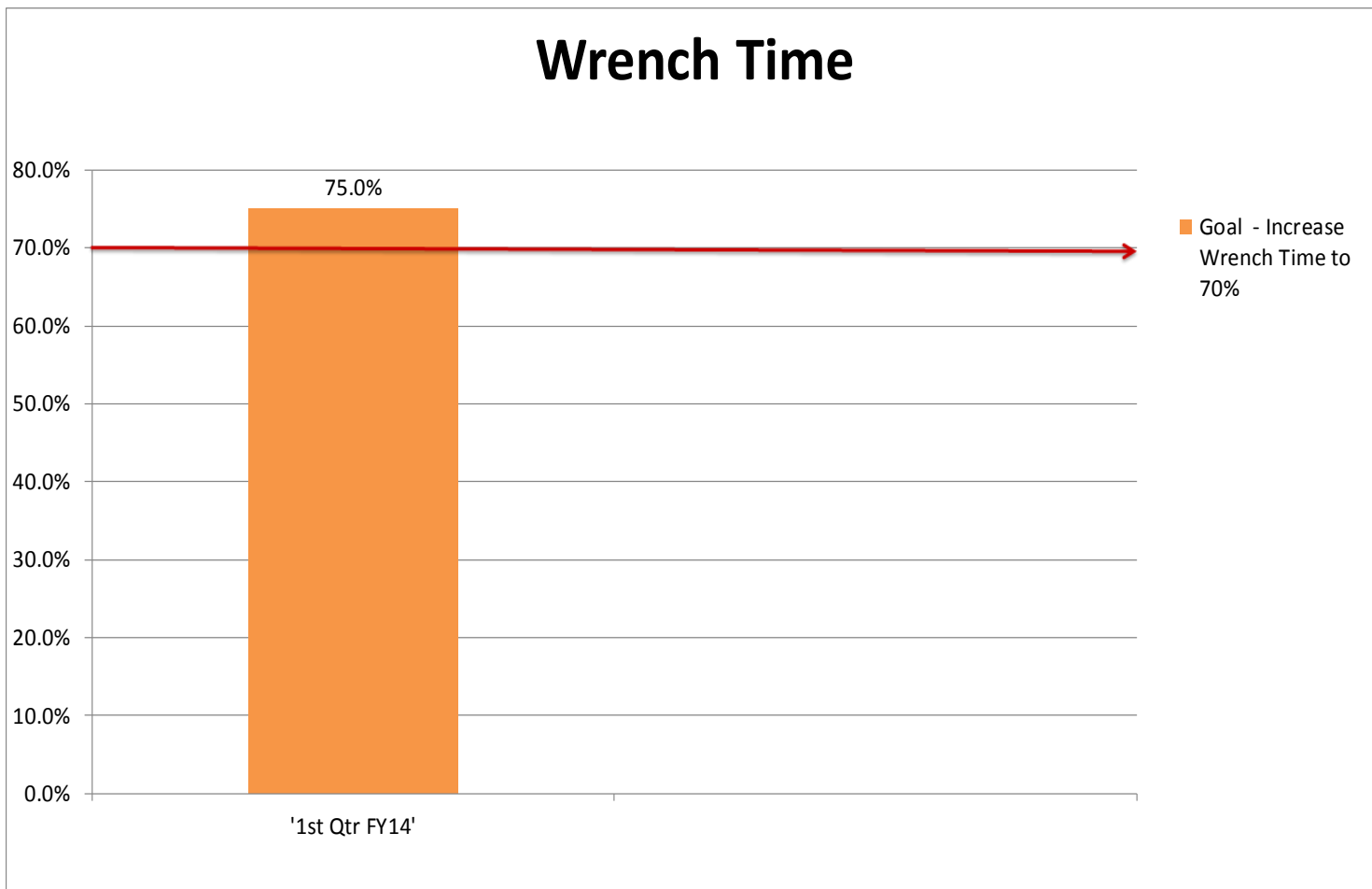
Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Increase “Wrench” Time to 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

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

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

ACTION PLAN

- 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.
- 5 – Implement SDI Punch-out, train staff and aggressively push it’s use.

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

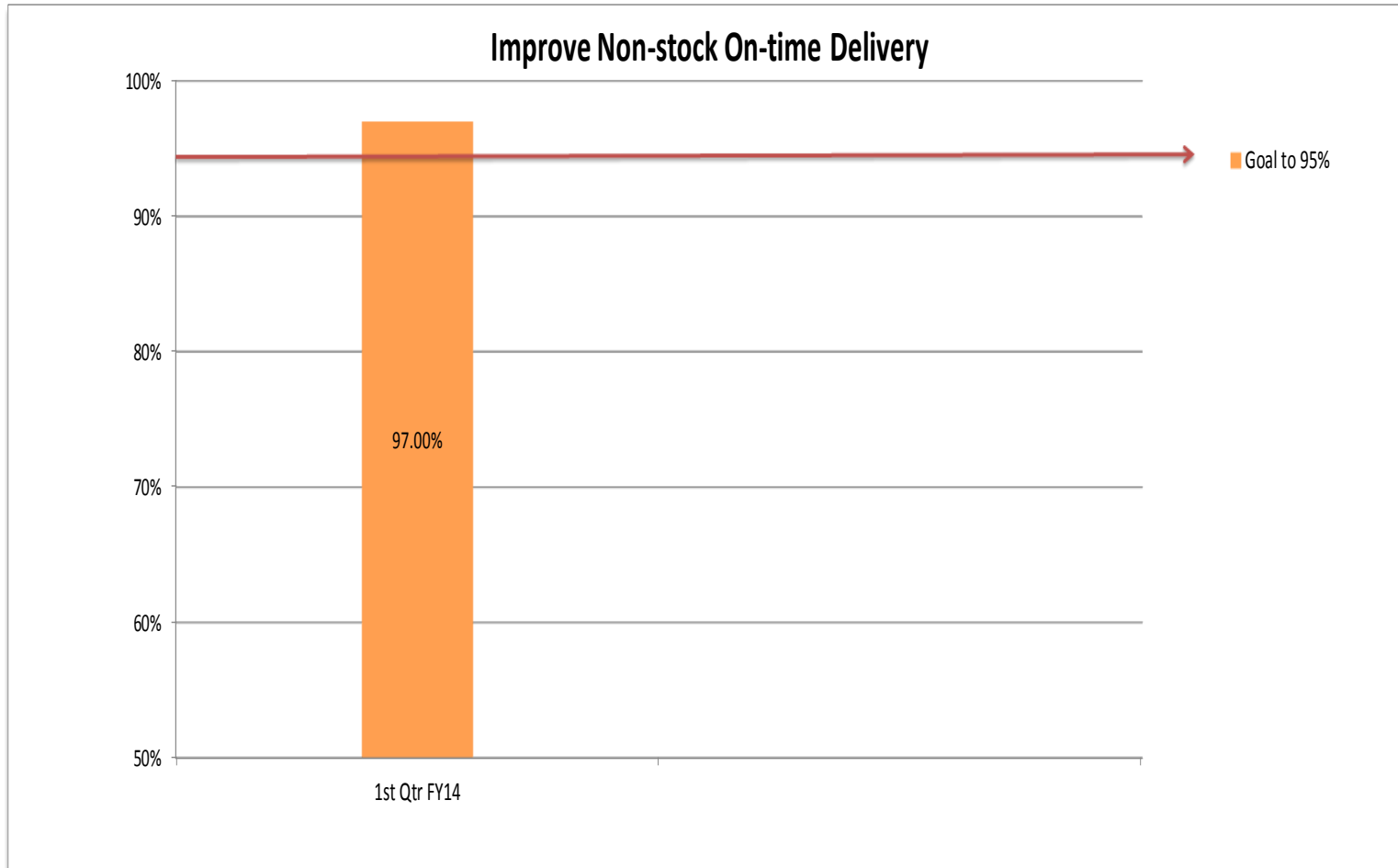
Objective: 1.2: Improve Logistics Efficiency

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

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process



STATUS

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

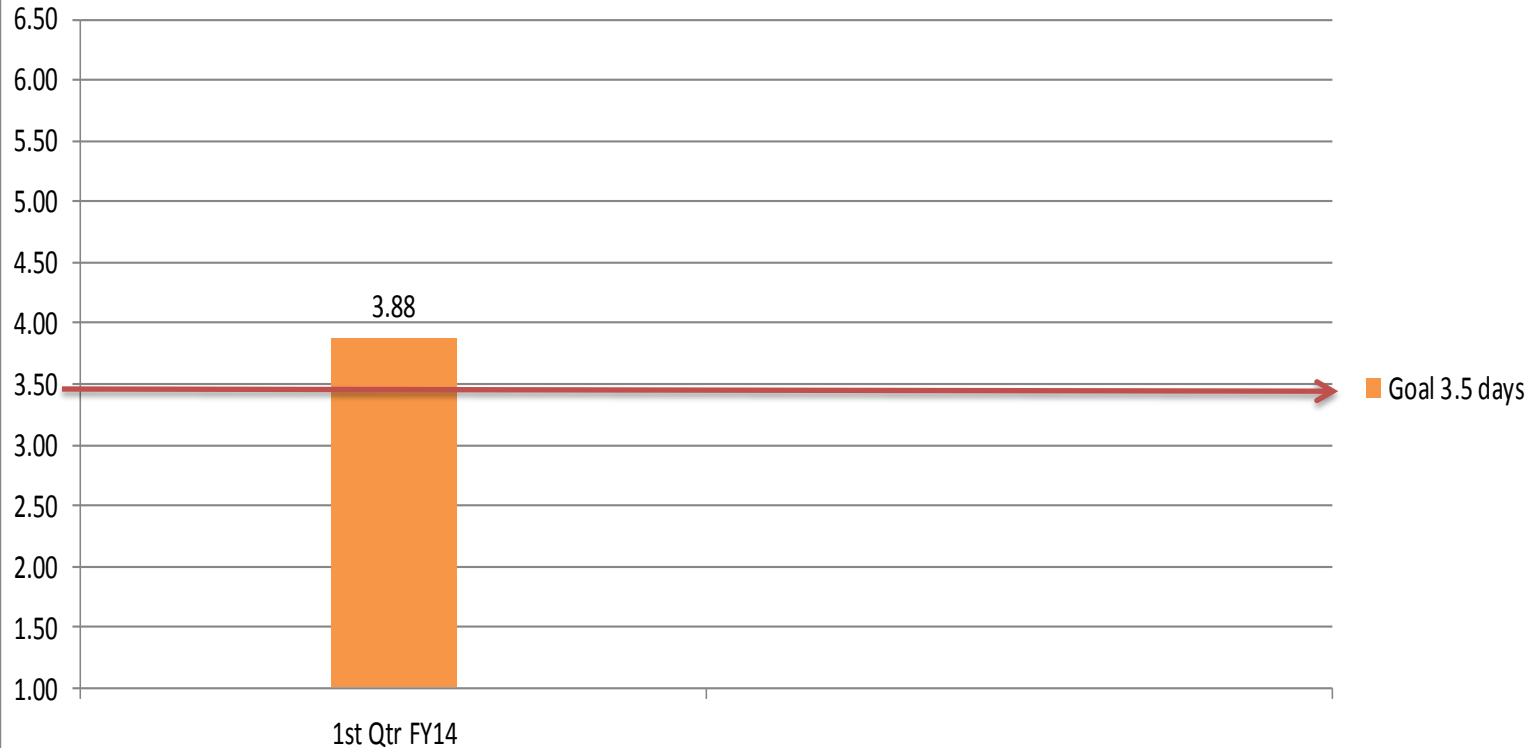
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

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

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Receipt Time



STATUS

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

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

ACTION PLAN

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



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

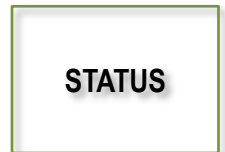
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed (Completed divided by Total Completed + Cancelled + Rejected)

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Archibus
Report
In error
Working w/FIS



Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

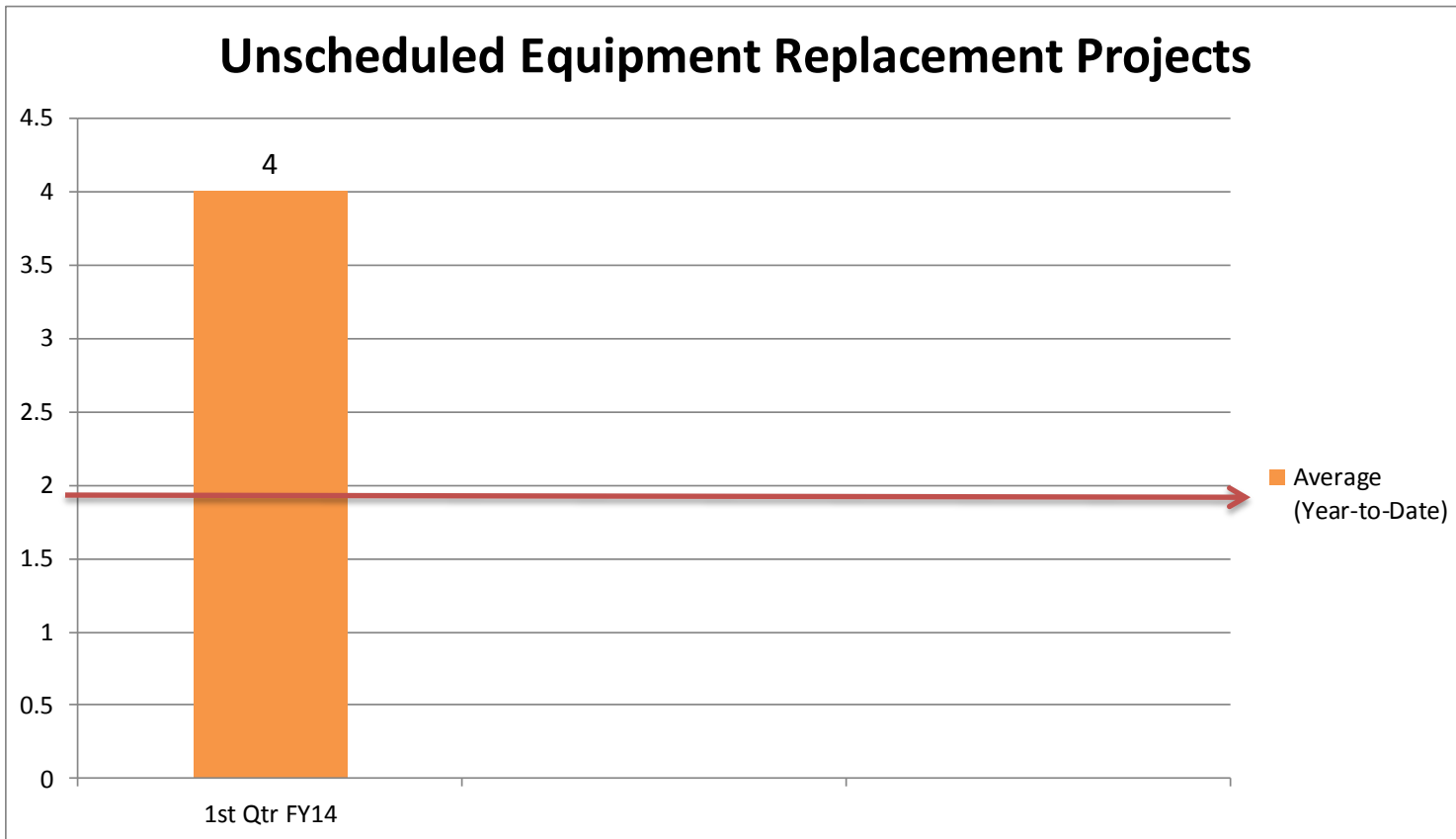
Objective: 1.5: Improve Facility Systems Reliability

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

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process



STATUS

FM Prioritized Projects – FY14

1. ARCHIBUS Upgrade – **Initial System Updates Completed**; **User Views/Reports Fixes In Process**
2. Space GA Reports – **In Process**
3. Space Data Clean Up – **Not Started**
4. Design & FBO Enhancements – **Not Started**
5. FM Surveys – **Not Started**
6. ImageNOW Document Management – **Pre-Requirements for FM Depts Completed**
7. Real Estate Module – **Initial Meeting**
8. Facilities Condition Assessment Program (FCAP) – **Funding Approved**
9. CRDM Enhancements – **In Process**
10. FBO Accounting Upgrades – **Not Started**
11. Lock Shop Enterprise Data Assistant (EDA) – **In Process**
12. BES Enterprise Data Assistant (EDA) Asset Management - **In Process**
13. BAS LDAP Upgrade & Security Enhancements – **Waiting on Funding Approval**
14. ARCHIBUS Key Management – **Not Started**
15. WO Hot Work Permit Form/Utility – **Not Started**
16. Campus Map Portal – **Not Started**

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. FY14 FIS Project Prioritization & Approval Completed w/ Directors
2. ARCHIBUS 21.1 User and Internal Testing, System Upgrade & Many Major Issue Resolution Completed
3. Initial Kick off meetings conducted for CRDM, Real Estate and Space Enhancements
4. Initial EDA distribution for BES and Lock Shop. Large amount of BES Equipment Barcoded.

Actions Planned:

1. Complete CRDM Enhancements for Architectural Planning
2. Complete Space GA Reports
3. Complete ARCHIBUS Report Upgrades and additional reported upgrade issues
4. Continue working with ITS to Resolve Wireless Transmission Issues for Lock Shop EDA use.
5. Complete Real Estate requirements gathering.

Lead
FIS

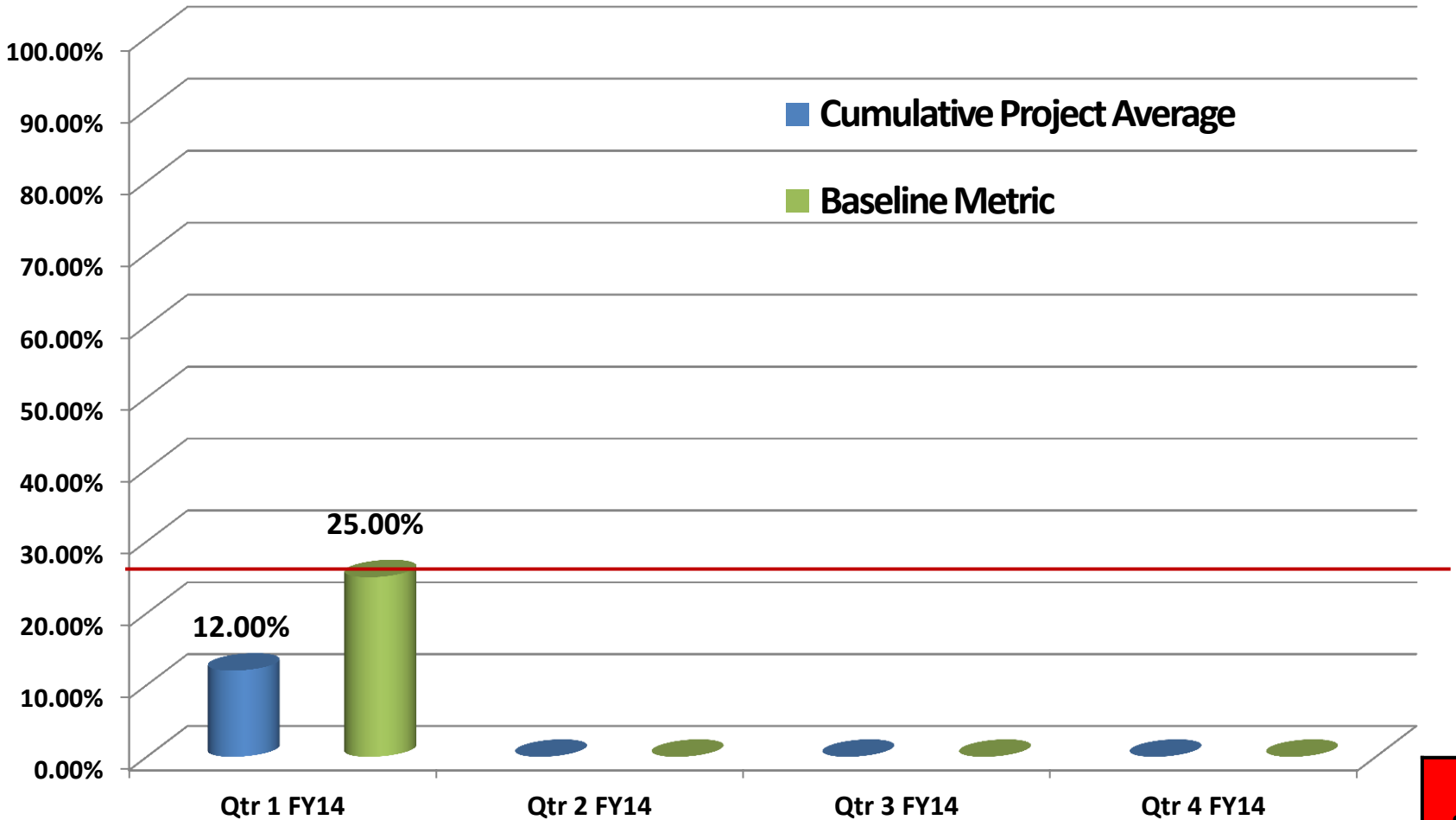
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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



STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead
FIS

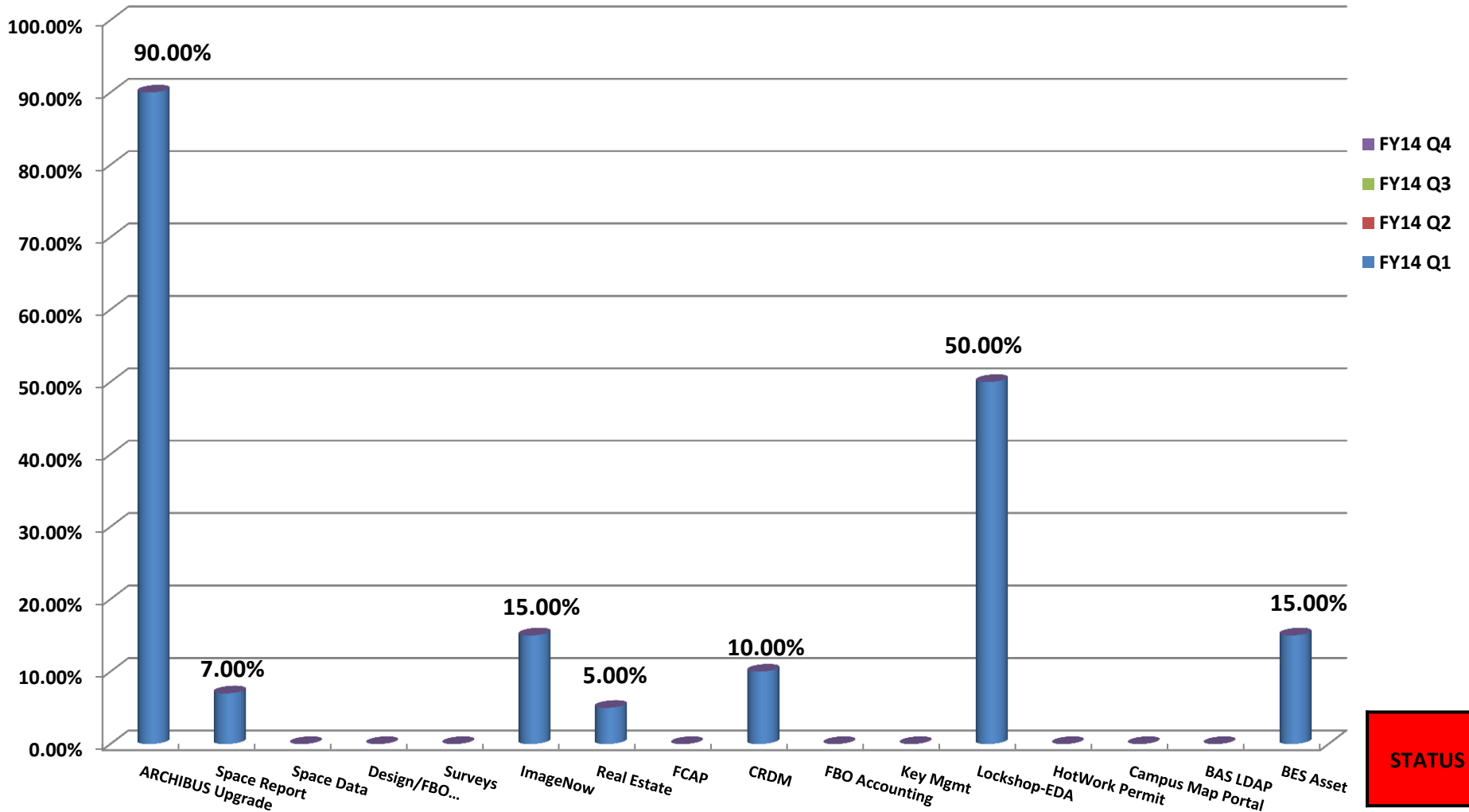
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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



STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% **NLT end of FY 15.**

Measure: Average Building FCI for campus

ACTION PLAN

- **Actions Planned:**
 - **Complete CRDM update**
 - **Complete Phase 2, CRDM, for FCI capability (FIS)**
 - **Determine O/A FCI of buildings**
 - **Recommend a plan/ prioritize projects to improve FCI by 5% by end of FY 2015.**

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

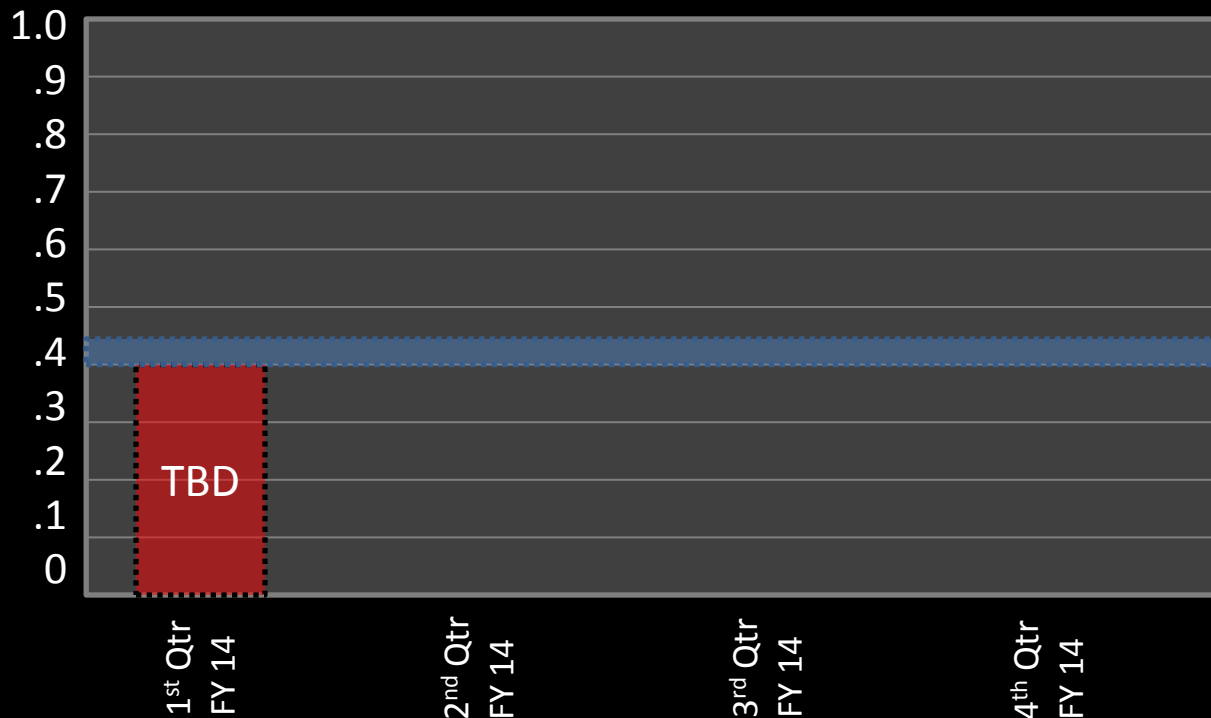
Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% **NLT end of FY 15.**

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

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

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **To educate the campus that there is not a “System Wide Standard” so users need to “Reference UNC Charlotte Approved Standard.”**
 - **Complete space allocations/ inventory by room category in Archibus**
 - **Compare inventory to standard and report % difference.**
 - **Recommend a plan/ prioritize projects to improve allocations to within 5% of the standard by end of FY 2015.**

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

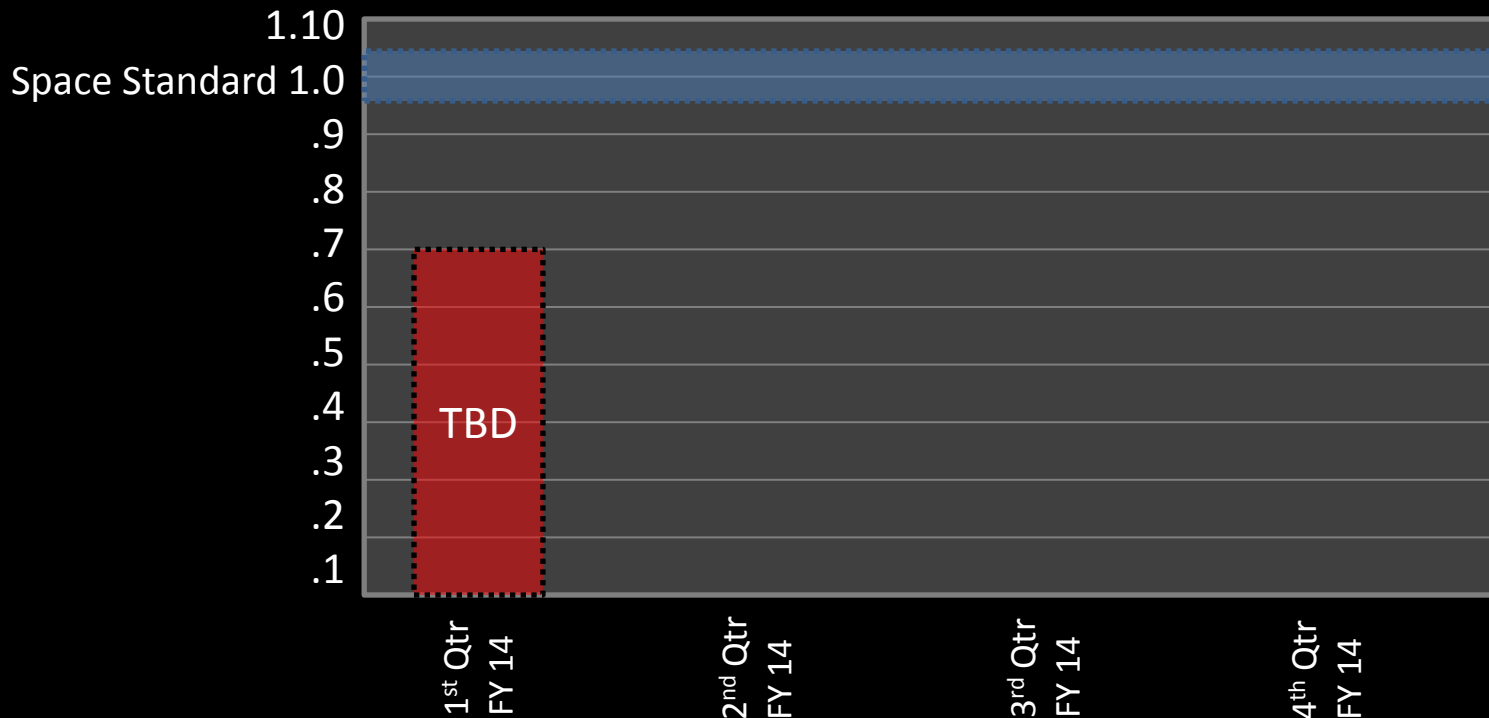
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards **NLT end of FY 15.**

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

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

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Sustain current process of completing Operating Budget sheets for new projects**
 - **Support Capital, when required, with further study related to funding (e.g. Football, South Village, etc. work)**

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - Modular Office (94 days).
 - Residence Hall Phase XIV (133 days).
- Actions Planned
 1. Baseline Schedules – Accurate
 2. Baseline Schedules – Refer to them
 3. Push Designers to stay on schedule.

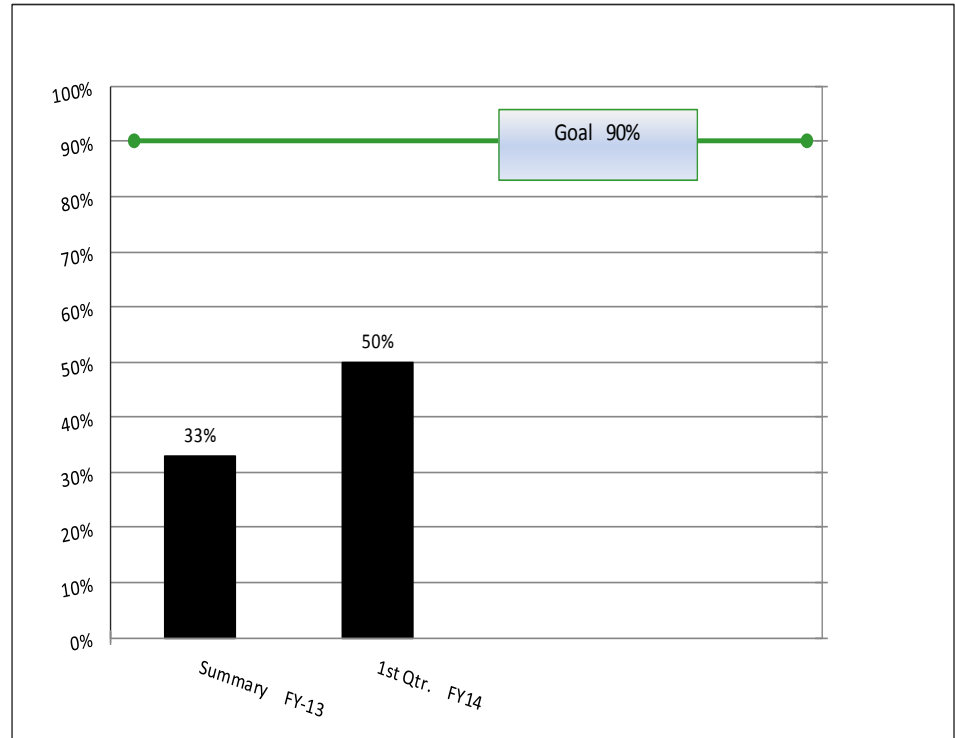
Facilities Management Strategic Planning Session – First Quarter FY 2014

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

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-13	14	3	6	33%
1st Qtr. FY-14	1	1	1	50%



Tactic Measurement for 1st Quarter is 50%
 Year to date is 50%

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - RUP 1 Backup Generator
- Actions Planned
 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.)

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead Capital

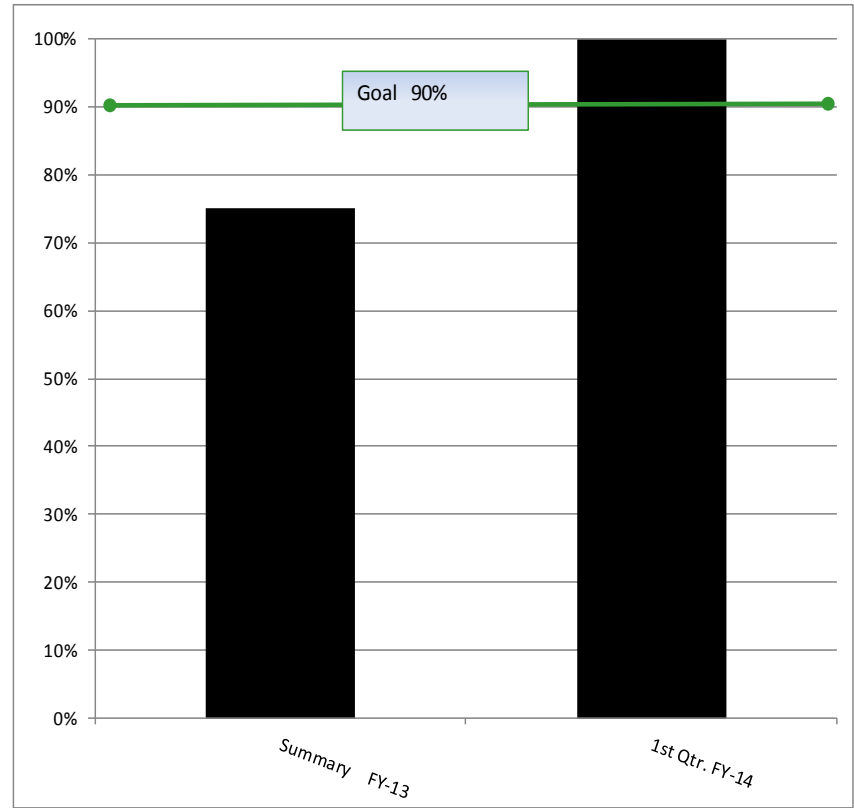
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	#not completed by scheduled time	%Designs complete by completion time
Summary FY-13	3	1	75%
1st Qtr. FY-14	1	0	100%



Tactic Measurement for 1st Quarter is 100%
 Year to date is 100%

Status

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - RUP 1 Backup Generator
- Actions Planned
 1. Print project budget / financial sheets & share with end users
 2. Monitor scope creep.
 3. Protect contingency
 4. Know project authorization

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead
Capital

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

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)
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 XII	\$3,400,667	\$2,733,245	\$2,778,245	-19.6%	1.6%	0
Res. Hall Ph XIII	\$3,081,868	\$2,188,800	\$2,188,800	-29.0%	0.0%	1
Res. Hall Ph XIV	\$2,641,144					
RUP IV		\$385,000	\$495,998	0.0%	28.8%	1
Modular Office Bldg	\$60,440	\$72,620	\$72,620	20.2%	0.0%	
Oak Hall Renovation	\$591,176	\$531,000	\$531,000	-10.2%	0.0%	1
Elm, Pine & Maple Renov	\$908,068					
Holshouser Hall Renov	\$1,039,730	\$1,165,000	\$1,165,000			
Sanford Hall Renov	\$3,081,868	\$2,188,800	\$2,188,800	-29.0%	0.0%	1
Colvard Renov	\$153,117	\$243,070	\$243,070	58.7%	0.0%	1
Kennedy 2nd fl Renov		\$104,127	\$104,127	0.0%	0.0%	1

Tactic Measurement is 77%

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

Status

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

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)

ACTION PLAN

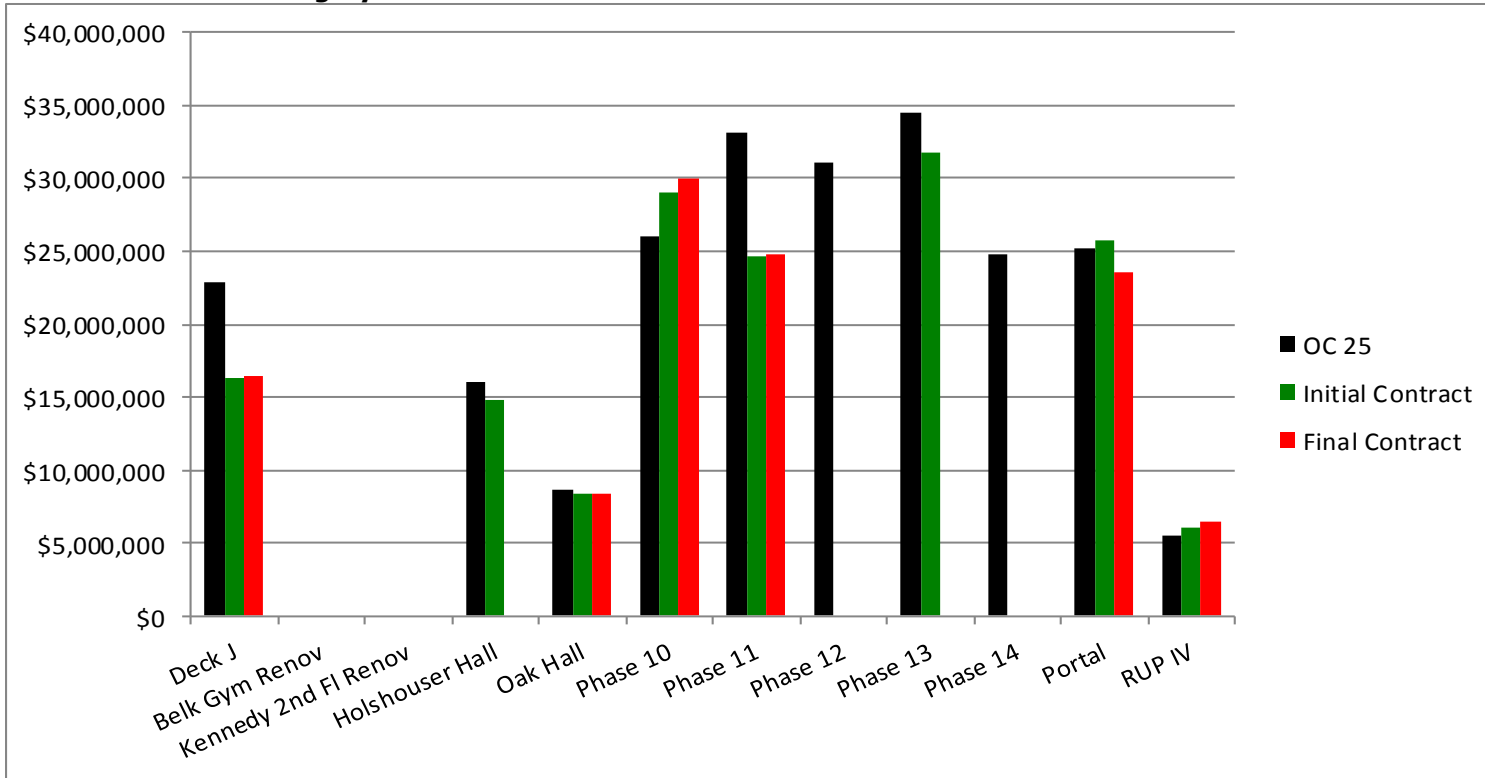
- Actions Complete
 - Completed projects--Hunt Village Demo, Emergency Power Telecom, Phase 10 & 11, Deck J, SV High Rise Rd.
- Actions Planned
 1. Maintain & Print project budgets & account reports monthly
 2. Share budgets with AVC and end users.
 3. Hold contingency for unforeseen conditions & project requirements.
 4. Manage scope creep.

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



Tactic is currently at 83%. Goal is 95%

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

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

(Purchase) ACTION PLAN

- Continue to work with Business Affairs and the Cabinet to establish Funds to acquire real estate
- Activate Strategic Acquisition Subcommittee within the Property Review Committee (PRC)
- Determine strategic acquisitions

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

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

Balanced Scorecard Category: Internal Business Process

(Lease) ACTION PLAN

- **Develop Lease Policy**
- **Incorporate Leasing Policy with Space Management Advisory Committee (SMAC)**
- **Revise request for Delegated Authority**
- **Work with the Chancellor's office to formalize the appointment of the Property Review Committee**
- **Modify Lease Request form**
- **Update Real Estate Procedures Manual**
- **Utilize the Property Review Committee to Govern Leasing requests**

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.9: Develop a plan for 102 acres on Mallard Creek Church Road

Balanced Scorecard Category: Internal Business Process

Lead
REAL
ESTATE

ACTION PLAN

- **Too Early to report:**

STATUS



Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

Improve Labor Availability	1.1.1	Increase "Wrench" Time	70%	75%	
Improve Logistics Efficiency	1.2.1	Improve Non-stock on-time delivery	95%	97%	
	1.2.2	Reduce Average Non-Stock Requisition to Receipt Time	3.5 days	3.88	
Facility Systems Reliability	1.5.1	Improve Completion of PM Work Requests	90%	Report Error	
	1.5.2	Decrease Unscheduled Equipment Replacement Projects	<2	4	
Maximize FM Effectiveness	2.1.1	Complete 40% of FM Five Year Technology Plan	40%	12%	
Develop CRDM Program	2.3.1	Improve Facilities Condition Index by 5%	5%	TBD	
Space Planning & Utilization	2.4.1	80% of Dept/Colleges within +/- 5% of System-wide Standards	80%	TBD	
Capital Planning & Design	2.5.1	Develop Lifecycle cost analysis & funding process for capital projects	Action Plan Only	<input checked="" type="checkbox"/>	
	2.5.2	90% of Designers Under Contract w/n 120 days of	90%	50%	
	2.5.3	Date	90%	100%	
	2.5.4	90% of Designs Complete w/n Design Budgeted Fee	90%	77%	
Capital Construction Process	2.6.2	95% Completed w/n Original Construction Amt or CMP plus 3% new or 5% renovation	95%	83%	
Execute Master Plan Phase I	2.7.1	80% of Capital Projects detailed in Phase I of MP	80%	In progress	
Strategic Real Estate	2.8	Develop Comprehensive Plan for Strategic RE	Action Plan Only	<input checked="" type="checkbox"/>	
Plan for Mallard Creek Ch. Rd	2.9	Develop Plan for 102 acres on Mallard Creek Ch Rd	Action Plan Only	N/A	

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: Internal Business Process

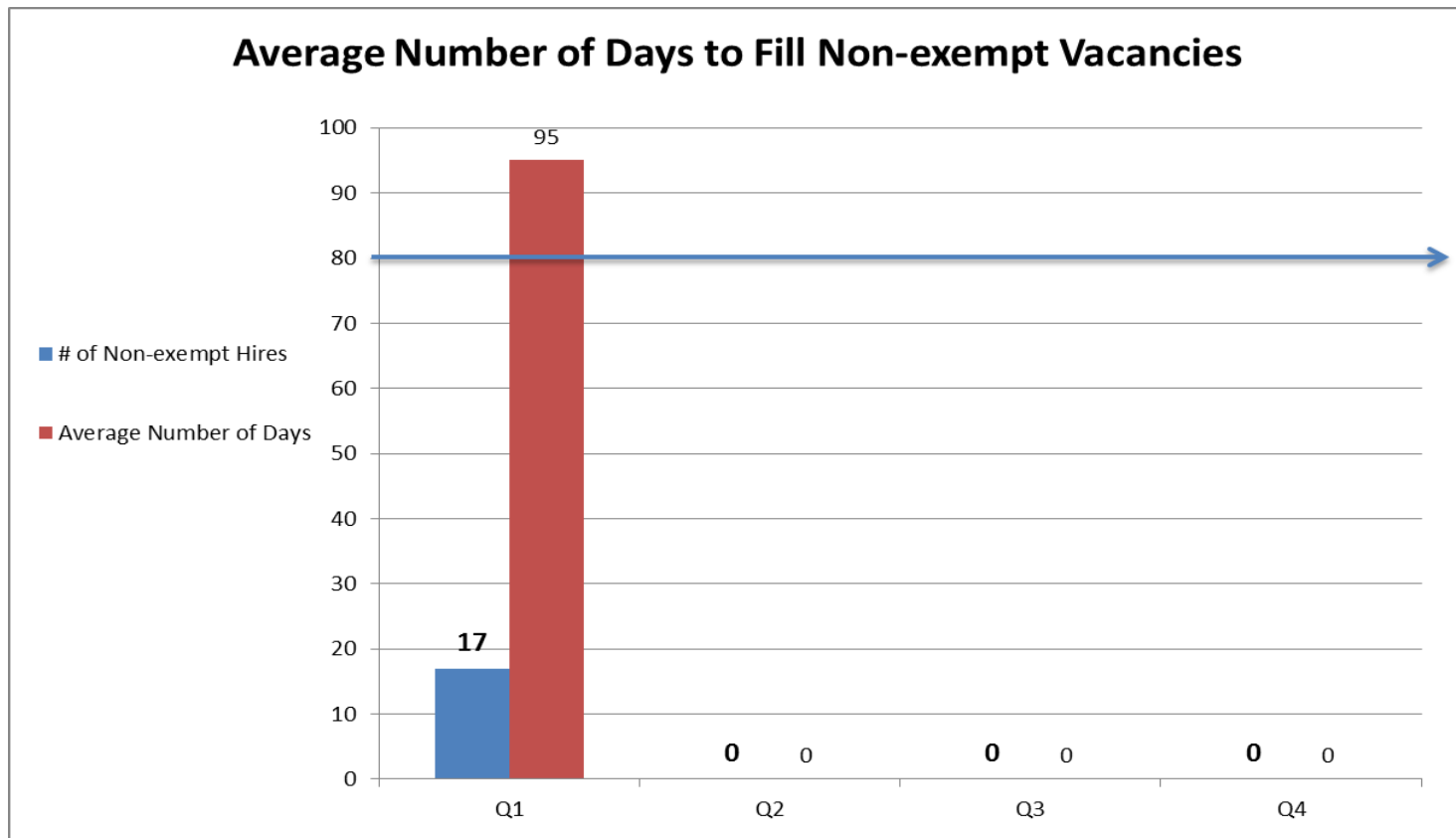
ACTION PLAN

- Continue to review vacancy report and monitor process to ensure positions do not reach the 6 months abolishment threshold.
- Increase applicant pool by expanding advertisement mediums.
- Monitor timeframe from referral of applicants to hiring managers to ensure review and interview within a timely manner.
- Ensure every hiring manager uses the targeted selection method.
- Establish baseline data for 4.1.2 regarding terminations during probationary period.

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

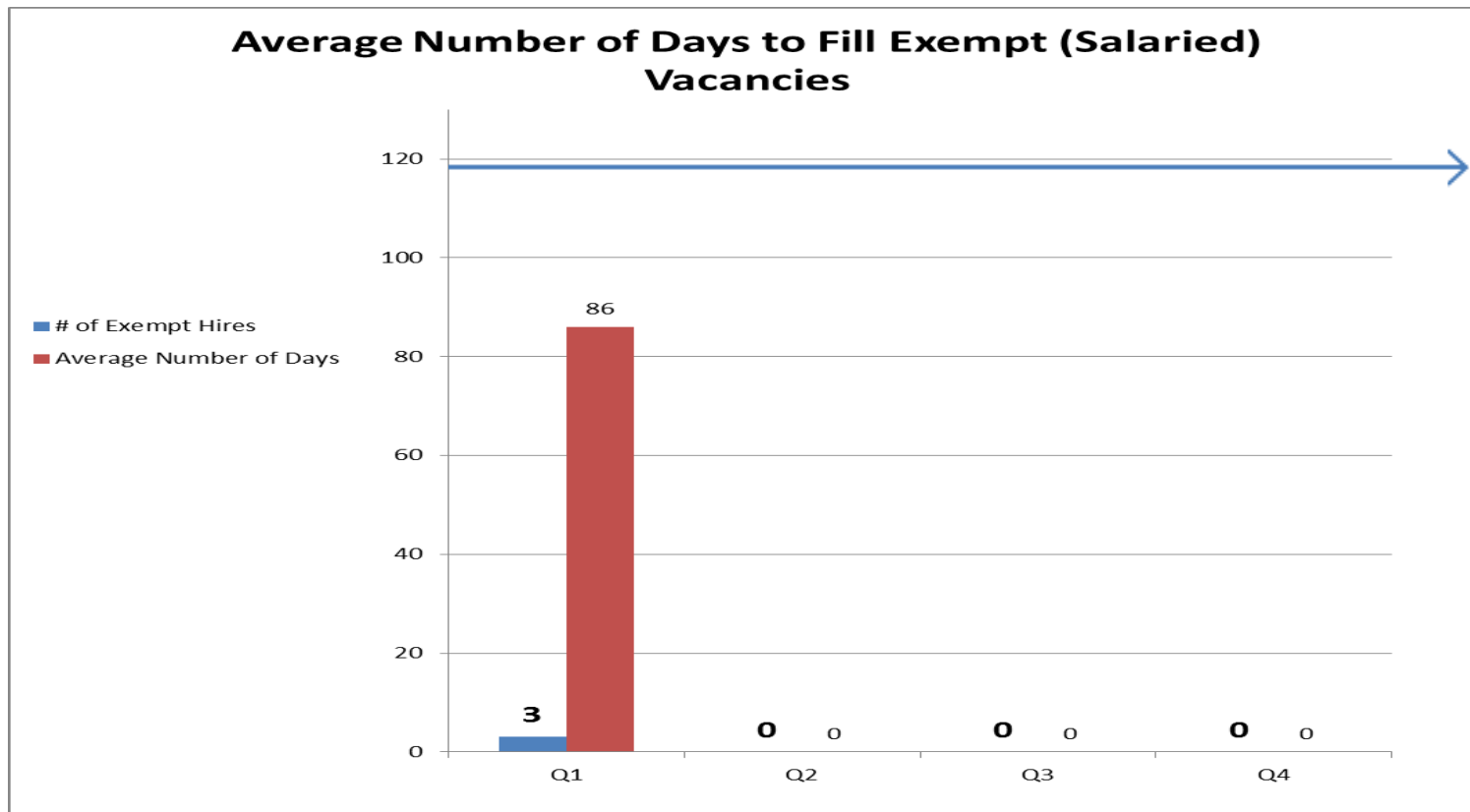
Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process



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: Internal Business Process



GOAL #4 Recruit, Develop and Retain Quality Employees

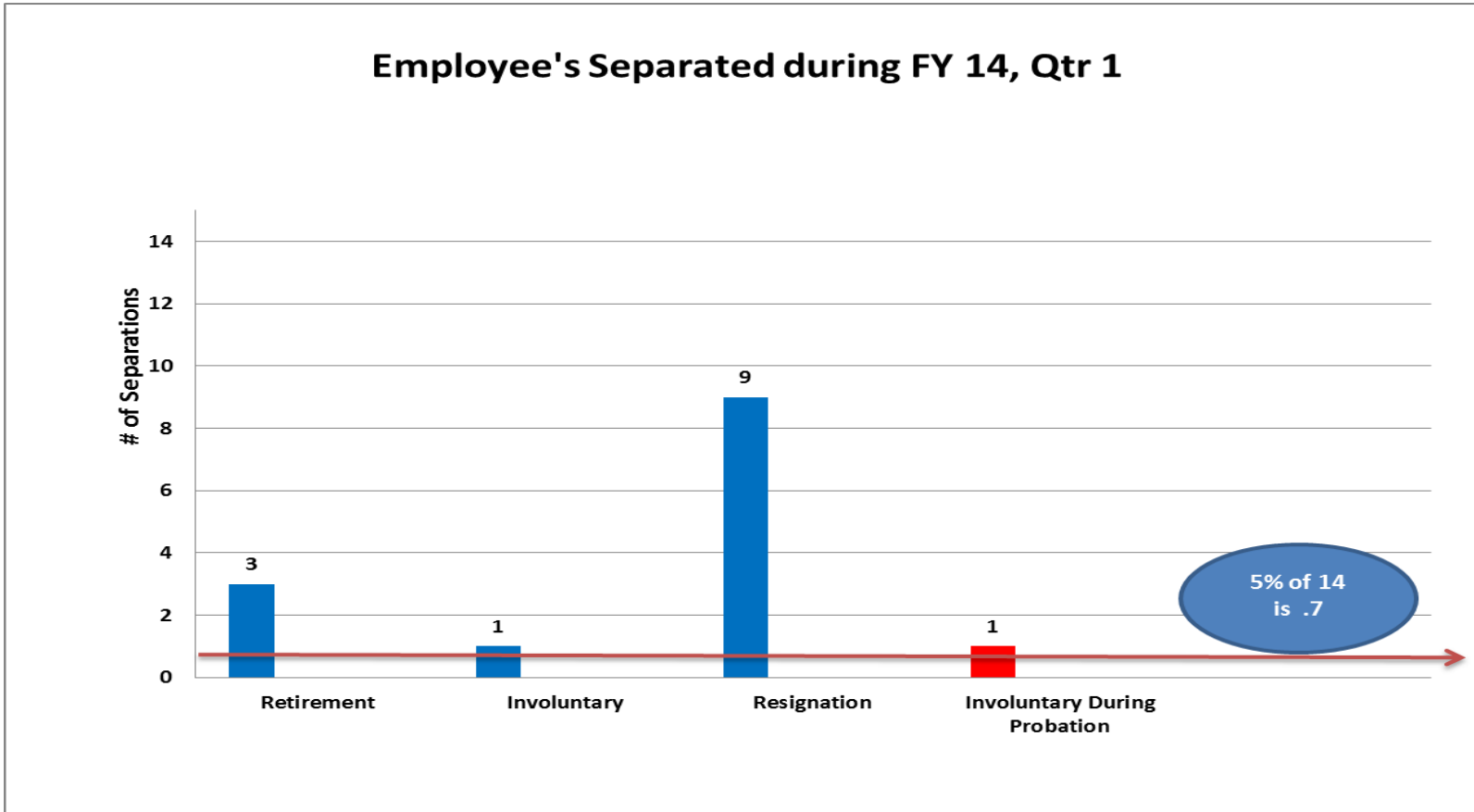
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

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: Internal Business Process



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

ACTION PLAN

- Increased communication efforts to capture all training activities (i.e., mandatory, elective, compliance, on/off site)
- Second “on-site” technical training scheduled in December 2013 with a third session planned for January/February 2014.
 - Workshop Topics → *Pump Repair & Maintenance* and *PLCs for Non-programmers*
- *New* – Training Mini-Series partnering with Laurie McDermott (Grainger)
 - Session Topics → *LED lighting* and *FIRE STOP*
- Hosting our second SRAPPA Supervisor Toolkit workshop in March 2014
- Supervisor Safety Talks – ongoing, one topic per month

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

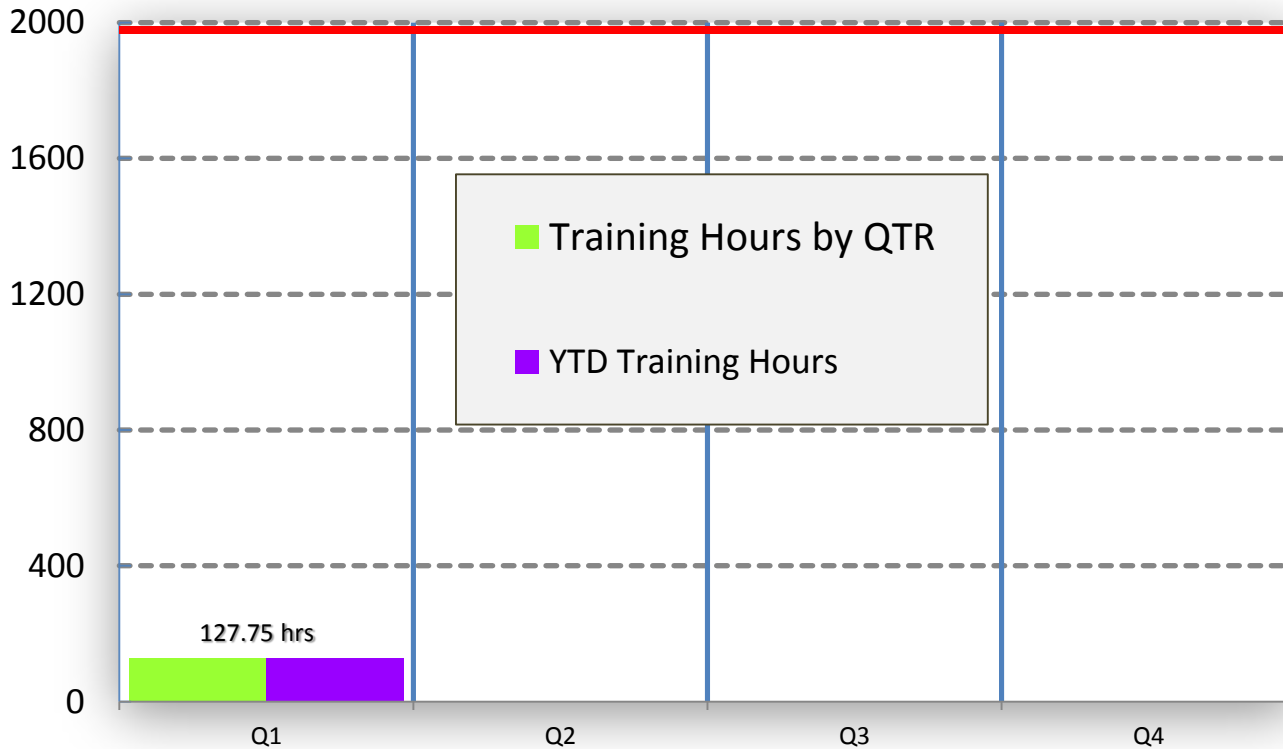
Objective 4.2: Improve Workforce Development
Tactic 4.2.1: Increase Supervisor/Manager Training to 40 hours/year
Measure: Average Hours of Training completed by Supervisors and Managers

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

Training
Hours

FY 14

Training Hours for Supervisors & Managers by Quarter



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

Fiscal 2014 Results:
 Target - 1,960 hrs
 Actual YTD
 127.75 hrs (6.5%)

STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2014

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

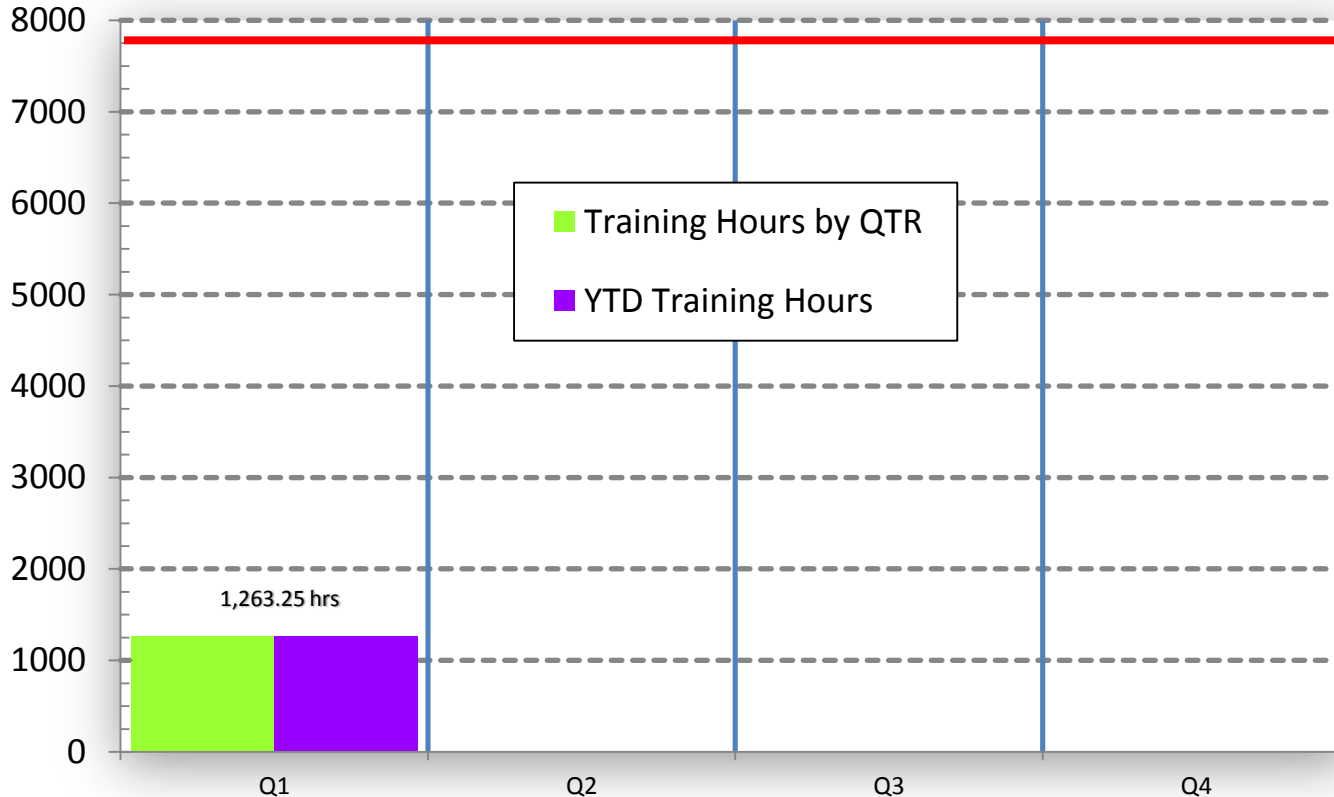
Objective 4.2: Improve Workforce Development
Tactic 4.2.2: Increase Employee Training to **20 hours/year**
Measure: Average Hours of Training completed by front line employees

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

Training
Hours

FY 14

Training Hours for front line employees by Quarter



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

Fiscal 2014 Results:
Target- 7,760 hrs

Actual YTD
1263.25 hrs (16.3%)

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

ACTION PLAN

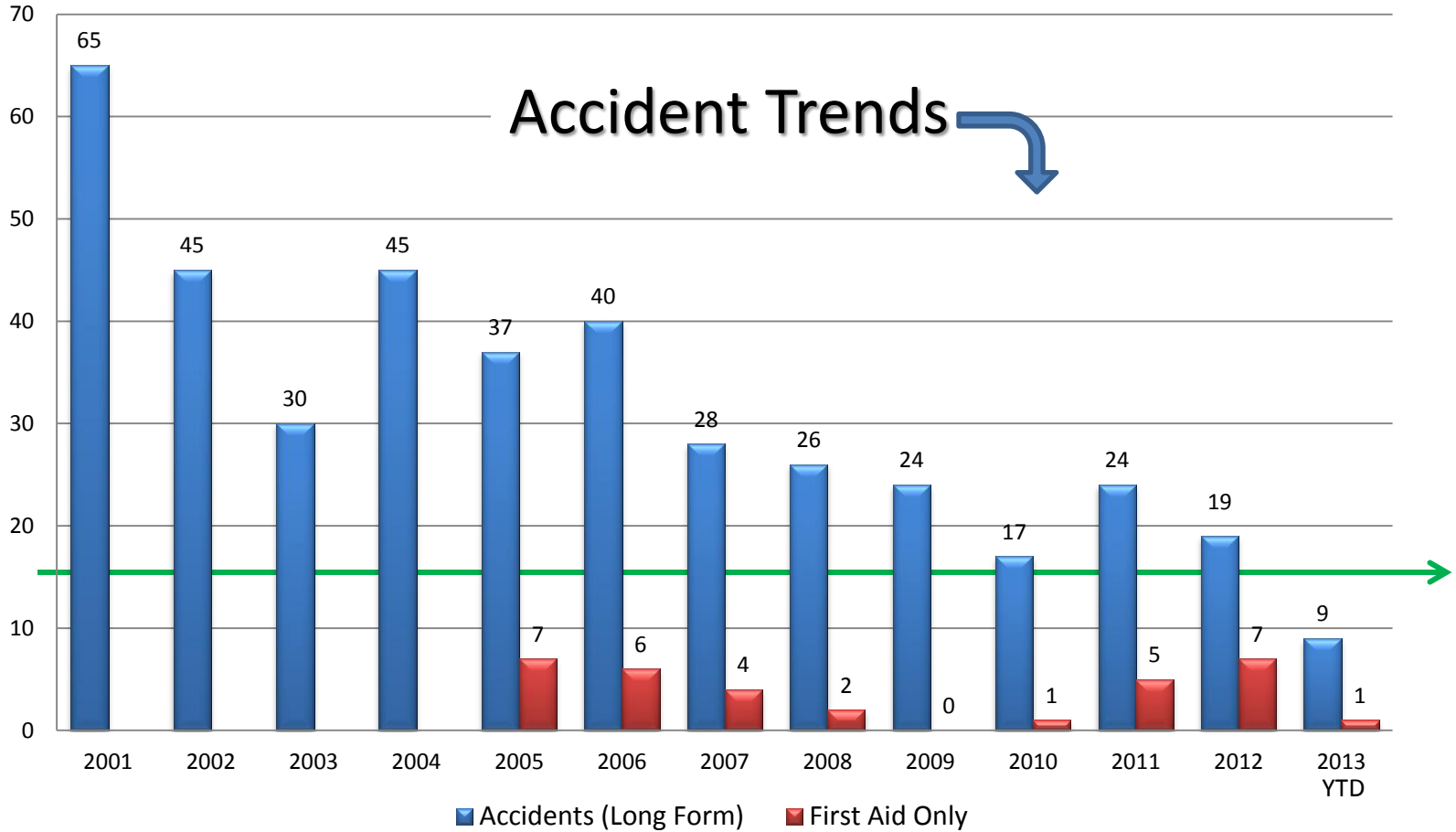
- Ongoing safety oriented activities to maintain continuous awareness
 - Supervisor Safety Talks
 - FM Safety Fair
 - Safety Slogan Contest
- Accident/Incident status as of Oct 24, 2013
 - Accidents down 47% YTD from 2012
 - Minor incidents down 75% YTD from 2012

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety
Tactic 4.4.1: Reduce the number of reportable accidents by 20%
Measure: Number of Reportable Accidents (Measured by Calendar Year)

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



Target
≤15

STATUS

Facilities Management Strategic Planning Session – First Quarter FY 2014

**Lead
FM Wide**

GOAL #4 Recruit, Develop and Retain Quality Employees

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

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

UNDER REVIEW

STATUS

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

- Further development of FM Academy
 - Marketing Strategy
 - Content Development
 - Vendor Selection and Delivery
- HVAC Matrix Development – meet with FO Leadership on Tuesday, October 29 to discuss buy-in and plan “development kickoff” for this next phase.

GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus

Lead
Recycling

ACTION PLAN

- **Waste Reduction and Recycling**

- **Actions Complete -**

TOTAL recycling for quarter 24% (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
- Coordinated recycling at MOVE IN and I Fest, provided tours and presentations across campus, conducted waste audits for campus to determine amount of recyclables in waste stream, designed Zero Waste Options for FOOTBALL,
- After 5 home football games, Zero Waste program is a success: overall diversion rate is 83.5%. Percentage has increased each game – October 12 game had a 93.9% diversion rate.

- **2nd Quarter Actions Planned**

- October 31st Fall Campus Clean UP and Tree Planting and week of events
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
- Continue zero waste efforts at final football game; begin working on changes and adjustments for next season.

- **C & D**

- **Actions Complete -**

- Overall C&D recycling rate for Capital Projects is 90%; recycling rate for informal projects is 52%.

- **2nd Quarter Actions Planned**

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



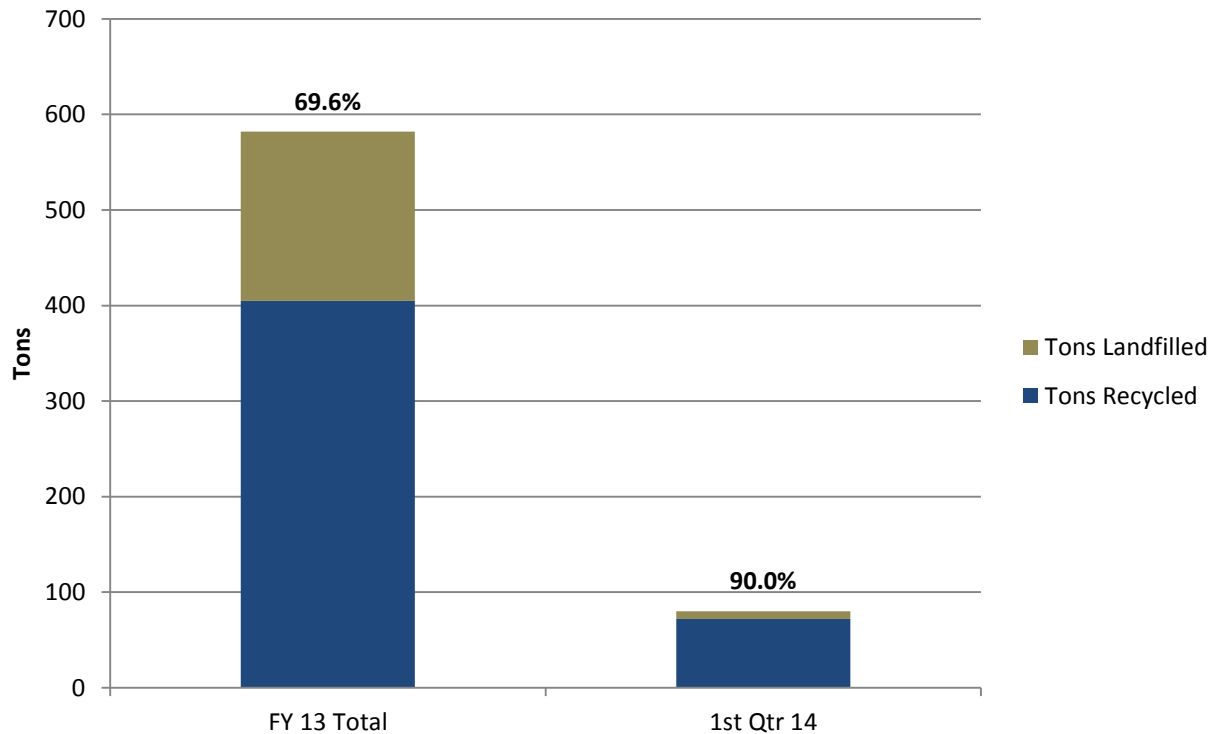
GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Tactic 5.2.1 Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste

Measure: Pounds of C & D waste recycled divided by total pounds of C & D waste

Balanced Scorecard Category: Innovation and Learning Perspective

Construction & Demolition Debris Diversion Capital Projects



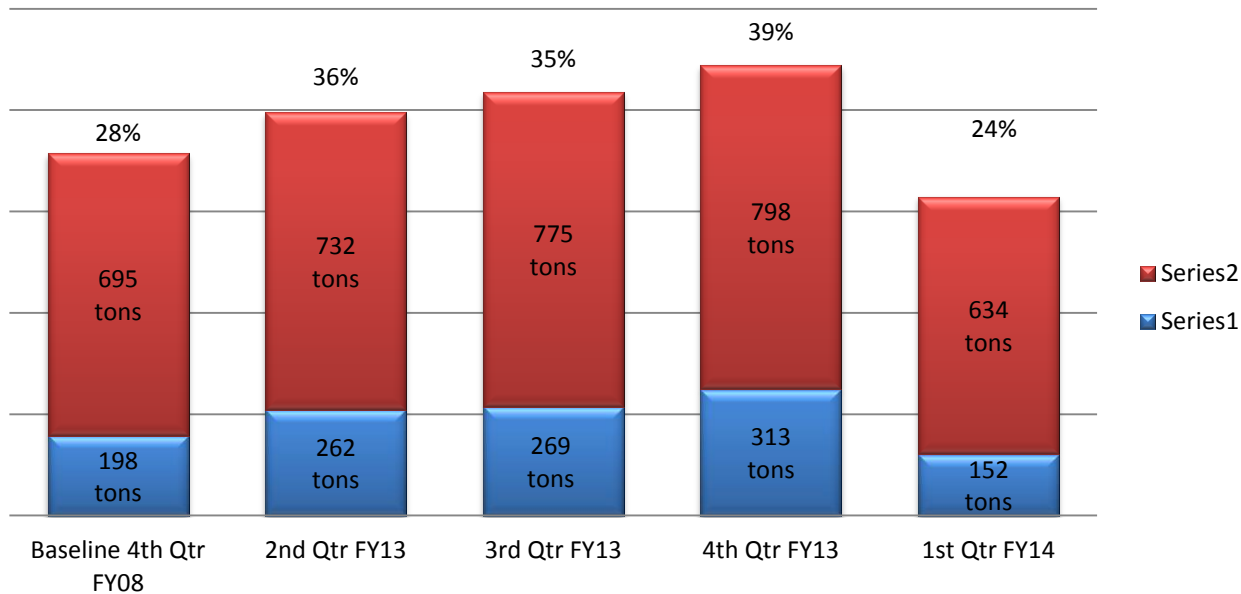


GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Tactic 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% 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 #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Inventory STARS points and determine current #.**
 - **Determine areas in which we can obtain further credits.**
 - **Draft an implementation plan intended to gather further credits based; most feasible first, with estimates.**
 - **Achieve bronze rating by end of FY 15.**

STATUS

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

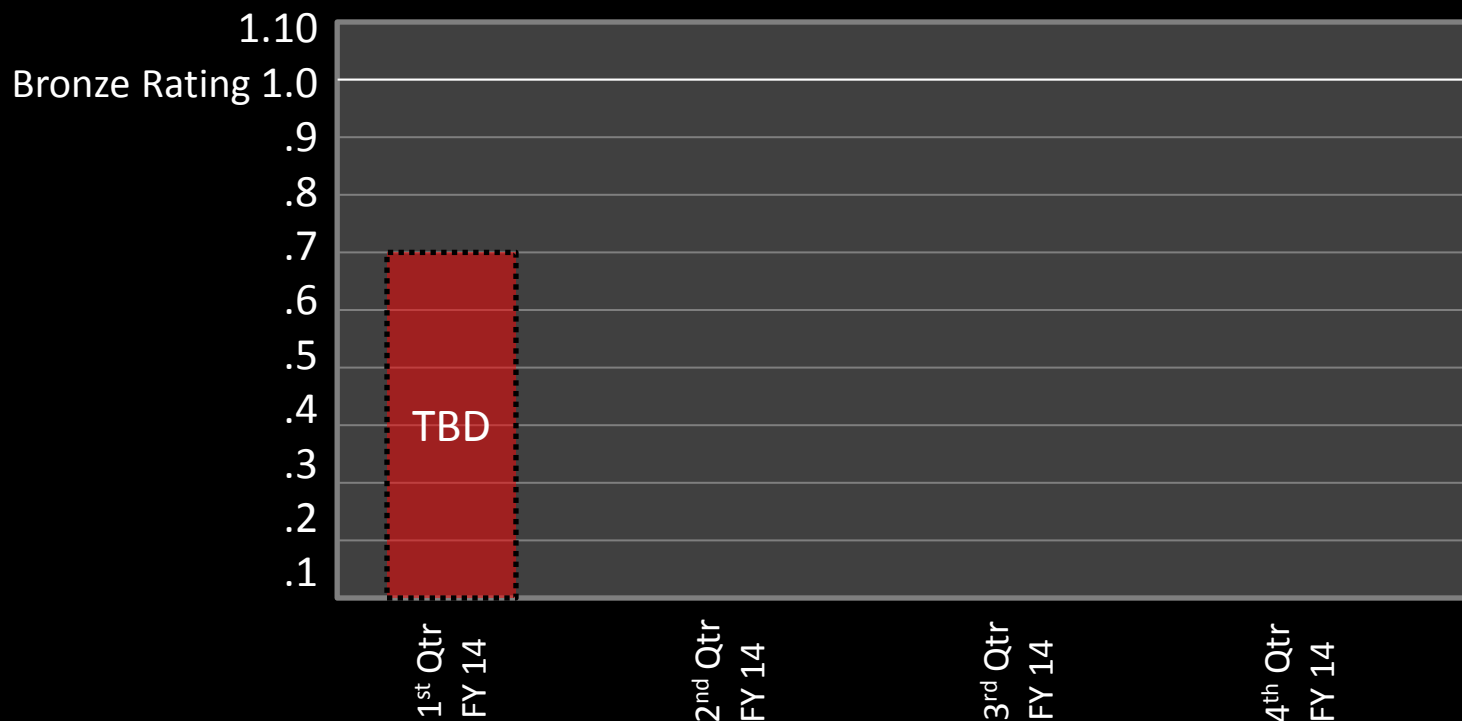
Tactic 5.2.3: Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) **NLT end of FY 15.**

Measure: STARS points to achieve bronze rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

Percentage of Completion



Status

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

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

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Actions Planned:**
 - **Review Climate Action and Sustainability Plans with recommendations for amendments/ revisions as required.**
 - **Generate list of best practices and identify milestones for implementation.**
 - **Draft an implementation plan proposing short term (</= 5 yr.); most feasible first, with estimates.**
 - **Propose plan and estimate of probable costs to implement 60% of best practices.**

STATUS

GOAL #5 – Promote Good Stewardship

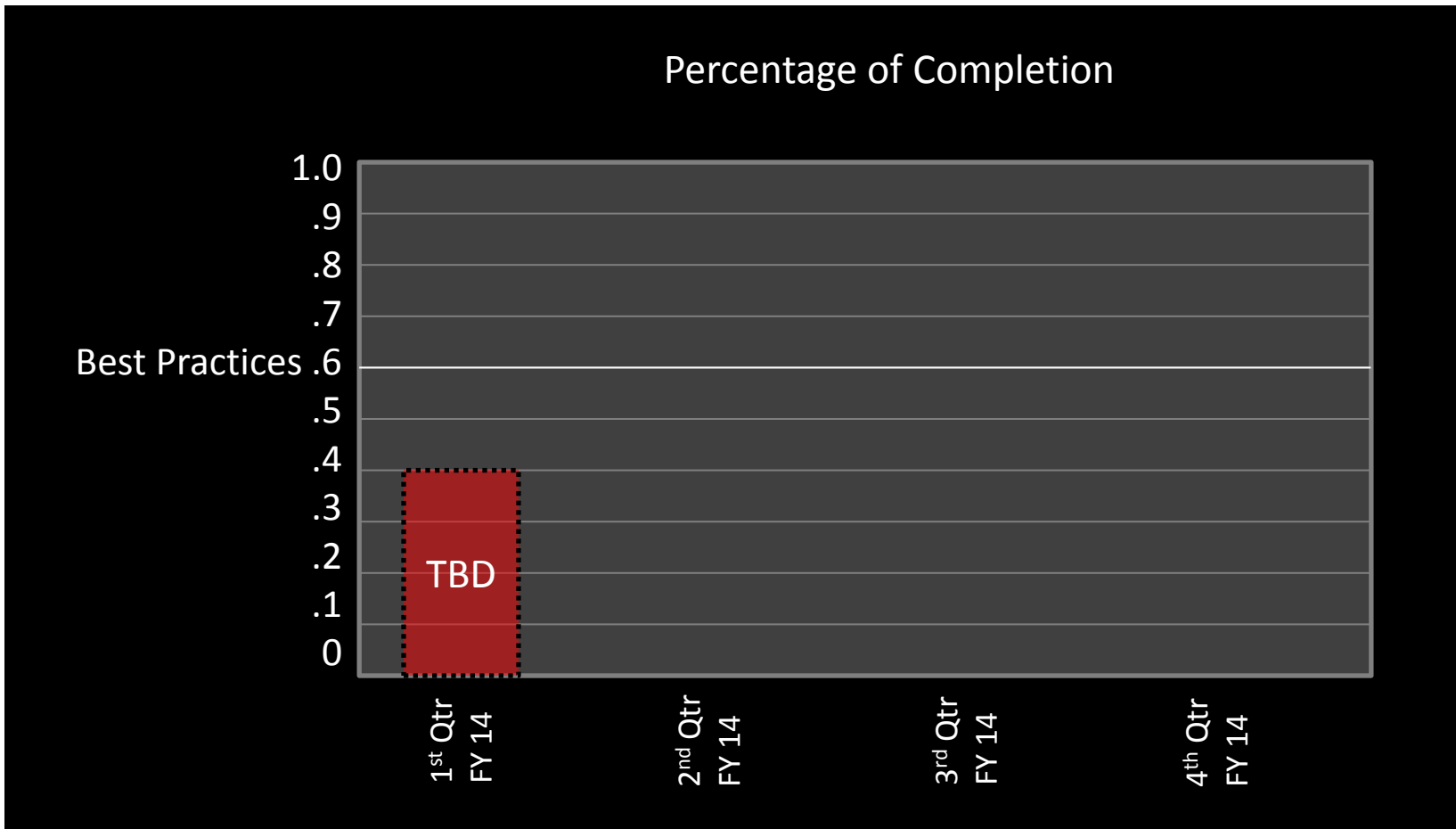
Objective: 5.2: Develop a Sustainable Campus

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

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



Status



Balance Score Card

DISCUSSION

INNOVATION & LEARNING PERSPECTIVE

Recruit Qualified Workforce	4.1.1	Vacancy Time <=80 days (nonexempt); <=120 (exempt)	80 days/120 days	95/86	Red	Green
	4.1.2	Reduce Number of Employees Terminated During Probation Period	<5%		Yellow	
Improve Workforce Development	4.2.1	Increase Supervisor/Mgr Training to 40 Hour per Year	1960 hours	127.75	Red	Annual
	4.2.2	Increase Employees Training to 20 Hours per Year	7760 hours	1263.25	Red	Annual
Improve Employee Safety	4.4.1	Reduce Number of Reportable Accidents by 20% Annually	15	9	Green	
	4.4.2	98% Mandatory Compliance Training Completed Annually	98%	Under review		
Improve Workforce Performance	4.5	Improve Workforce Performance	Action Plan Only	<input checked="" type="checkbox"/>		
Develop a Sustainable Campus	5.2.1	Increase Recycling of Construction & Demo Materials 80	80%	90%	Green	
	5.2.2	Increase Percent of Solid Waste Diversion to 45%	45%	24%	Yellow	
	5.2.3	Achieve Bronze Rating on S.T.A.R.S.	?	TBD	Red	
	5.2.4	Implement 60% of Campus Sustainability Plan Best Practices	60%	40%	Red	