



UNC CHARLOTTE

Facilities Management

Strategic Planning Session





UNC CHARLOTTE

Facilities Management



...Creating a Campus of Distinction



UNC CHARLOTTE

"It's the little things that make the big things possible. Only close attention to the fine details of any operation makes the operation first class."

-- J. Willard Marriot

GOAL # 1

Improve Maintenance and
Operation on the Campus

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

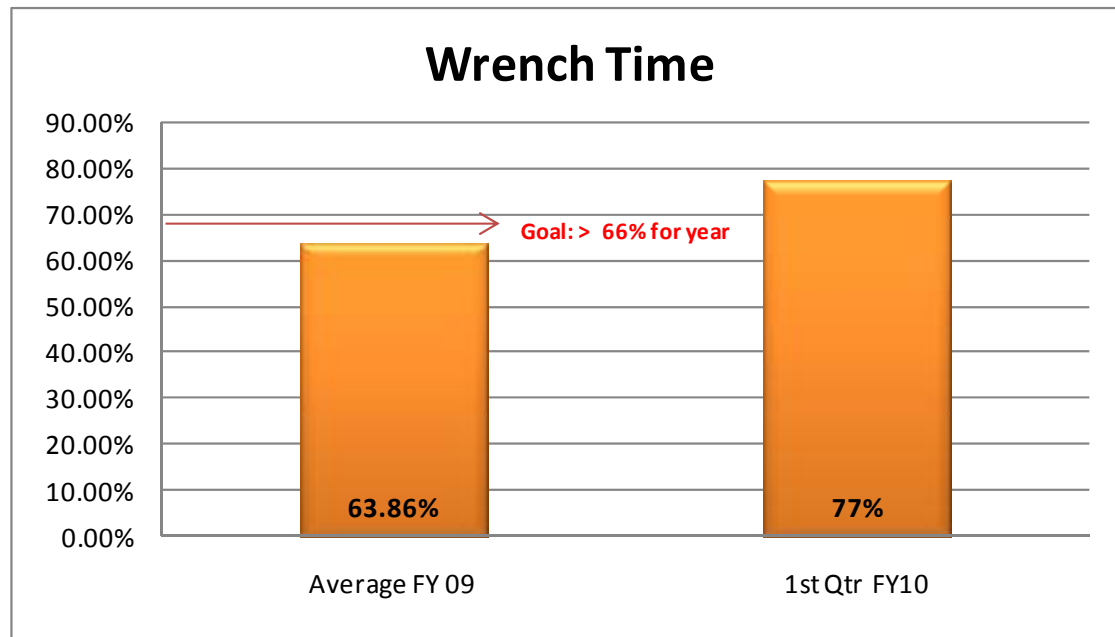
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase “Wrench Time” by 3%

Measure: Hours (total hours charged to work requests divided by available hours recorded)
Available hours recorded was 75% of calendar hours available.

Goal: Greater than 66% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase “Wrench Time” by 3%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 - Redistributed manpower to address workload
- Actions Planned
 - 1 – Continue development of a more extensive PM program
 - 2 – Continue improvement of accounting practices for time applied to WR’s
 - a) Meet with shop supervisors and PA’s to review
 - b) Stress importance with all employees

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

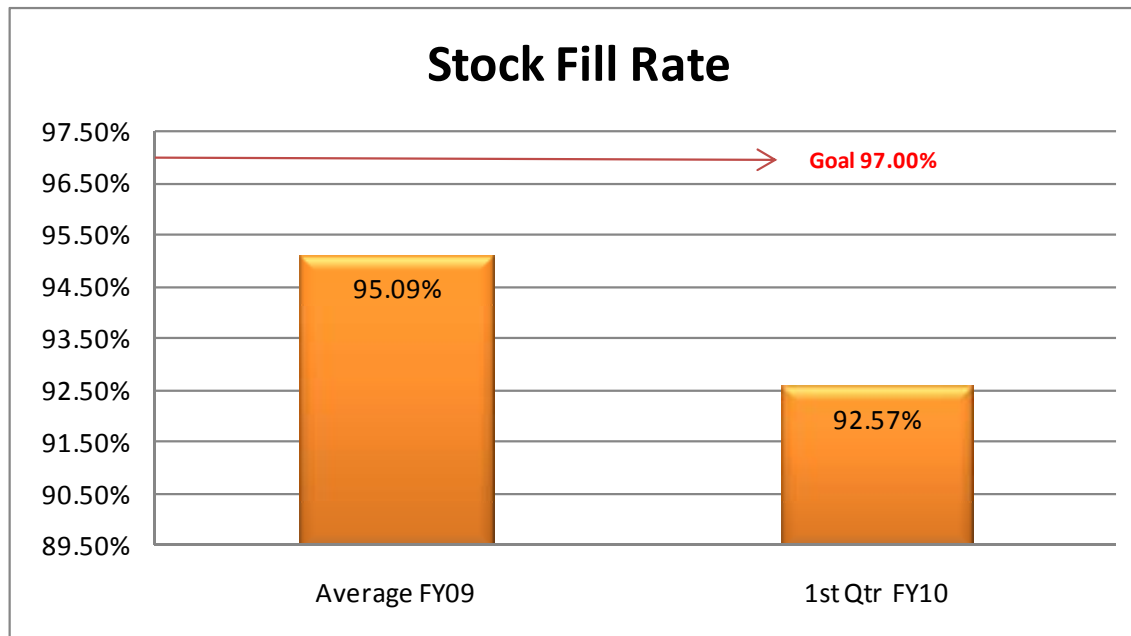
GOAL #1 – Improve Maintenance and Operations of the Campus

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

Measure: Percentage Fill (SDI's Key Performance Indicator {KPI} – Stock Fill Rate)

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – SDI has turned on their automated inventory management system which automatically computes stocking levels and reorder points based on usage and replenishment time
- Actions Planned
 - 1 – Let automated system control and see how it works
 - 2 – Ensure all items which have backorders placed against them are turned on for replenishment. *

*Note: This was a contributing factor to late deliveries and fill rates last period.

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

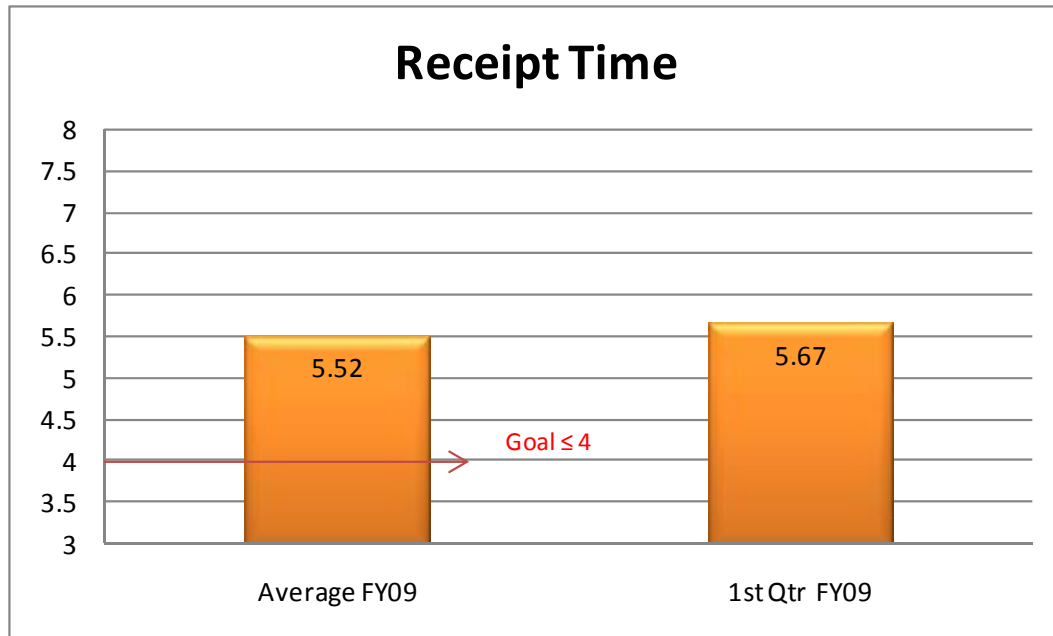
GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

Goal: Less than 4 days.

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Encouraged supervisors to act more promptly on approvals.
 - 2 – Provided better information to buyers at SDI. The quarterly average for requests needing more information was 1.8% for FY09. The average for 1st Qtr FY10 was 1.4%
- Actions Planned
 - 1 – Review non-stock orders to determine items that should be stocked. Monthly non-stock orders averaged 292 for all of FY09.

Note: Average request to receipt time peaked at 7.45 days in May on the lowest monthly volume (62) of orders for the year. This demonstrates how the state funding restrictions played havoc with orders! By contrast, average requisition to receipt time dropped to 4.54 days in September '09 on monthly order volume of 465; fifty percent and above average.

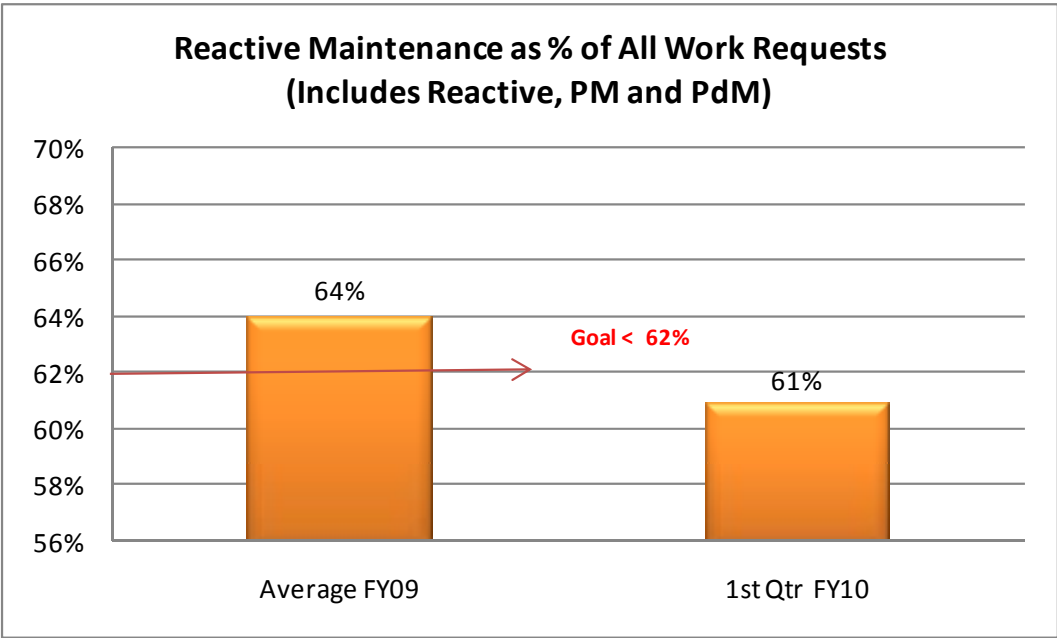
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.1 Decrease Percentage of Reactive Work Requests by 2%

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 average < 62% for year.

Balanced Scorecard Category: Internal Business Process



GOAL #1 – Improve Maintenance and Operations

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.1 Decrease Percentage of Reactive Work Requests by 2%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Initiated review of PM's – advised Shops & Zones of PM templates that were in use in other Shops & Zones not being employed by their shop or zone
 - 2 – Added vibration sensors to boiler #3
- Actions Planned
 - 1 – Continue to build PM program to cover all equipment
 - 2 – Continue increasing predictive maintenance measures as funds permit
 - 3 – Continue review of problem type applications for routine services that may be misclassified and remove from the computation e.g. routine vehicle cleaning vs. reactive.

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

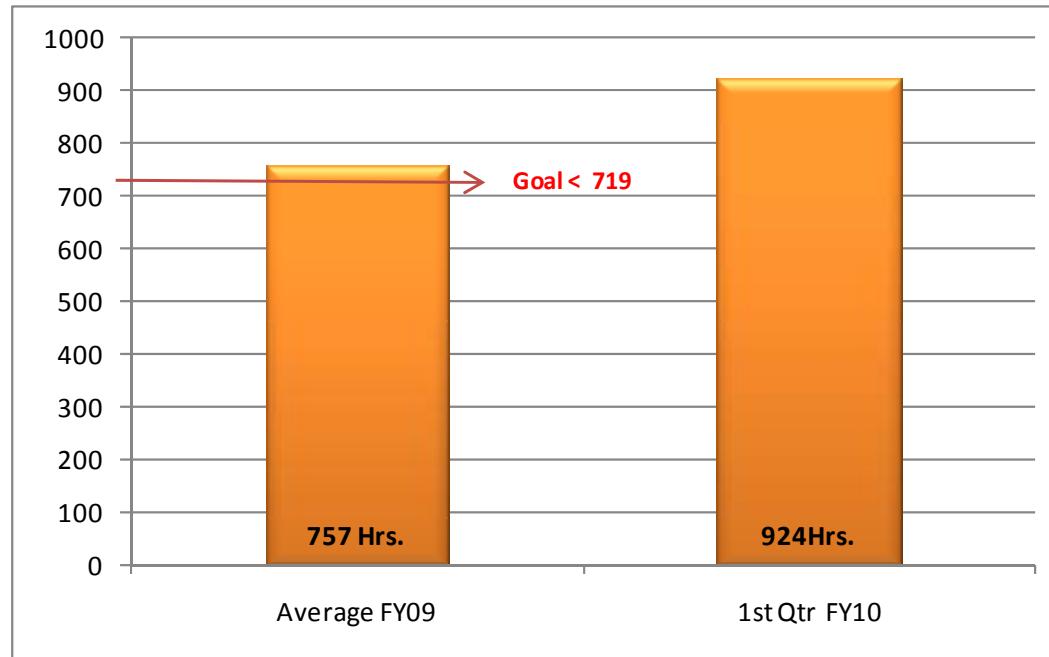
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Work Request Cycle Time by 5%

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

Goal: Less than 719 quarterly average for the year.

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Non-emergency Work Request Cycle Time by 5%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – FIS completed an events designation so that individual requests are made for specific dates. A calendar feature for Grounds and the Customers can be created to show all scheduled events for which support has been arranged throughout the year.

Actions Planned

- 1 - Continued emphasis on over 14 day and 30 day reports by supervisors and managers
- 2 - Continued review of unassigned WR's by supervisors and managers
- 3 – Continued review of PM and other work assignments and completions with technicians

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

GOAL #1 – Improve Maintenance and Operations of the Campus

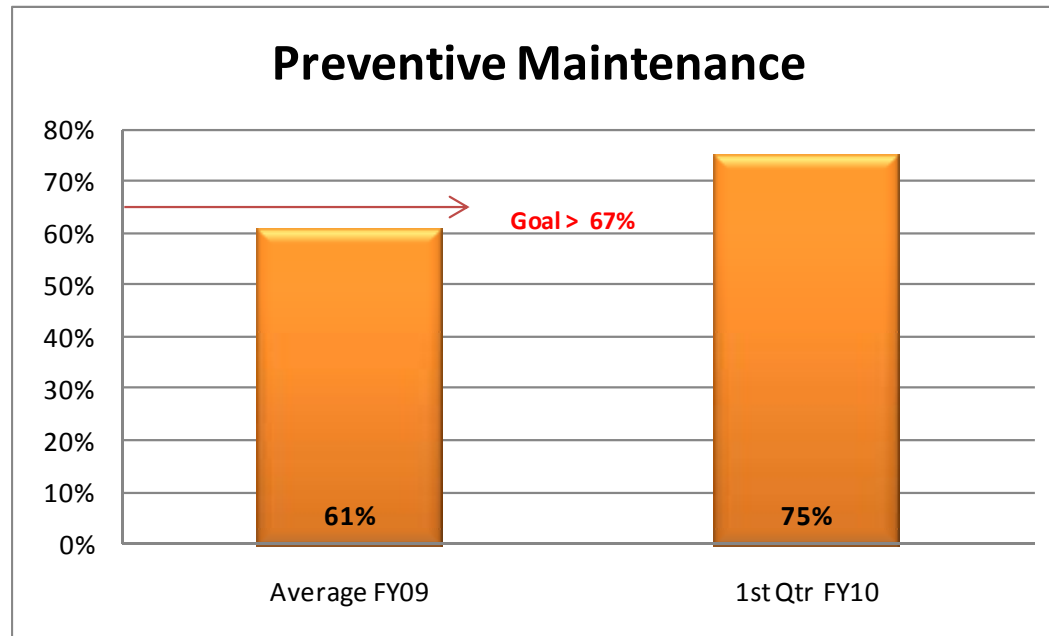
Strategy: 1.5 Improve Reliability

Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

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

Goal: Greater than 67%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.5 Improve Reliability

Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Discussed impact of lagging PM template approvals with Auxiliary Services
- Actions Planned
 - 1 – Continue to stress importance of completing PMs on time
 - 2 – Continue to stress importance of PM template approvals with customers

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

GOAL #1 – Improve Maintenance and Operations of the Campus

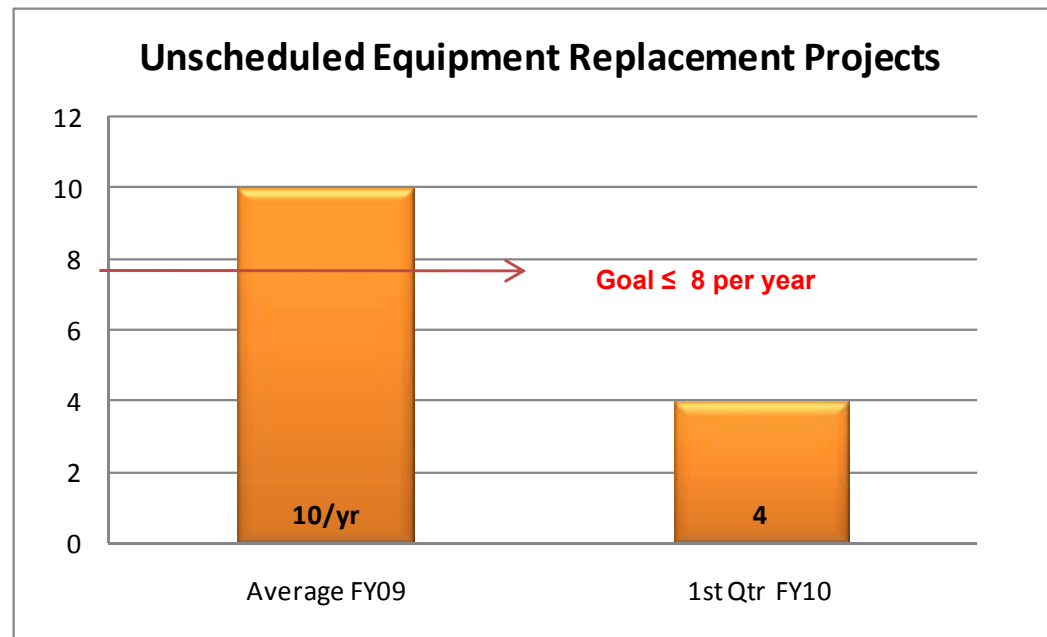
Strategy: 1.5 Improve Reliability

Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Balanced Scorecard Category: Internal Business Process

Goal: Less than 8 per year



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Added additional equipment to Archibus
 - 2 – Added equipment to PM program
 - 3 – Vibration sensors added to boiler #3
 - 4 - A replacement measure, “out of service time” that is manageable through Archibus was created.
- Actions Planned
 - 1 – Continue expansion of PM Program
 - 2 – Continued expansion of predictive maintenance program
 - 3 – Initiation of an “Out of Service” measure

Note: Failures included - McEniry AHU’s effecting third and fourth floors, Quad building (Denny) AHU’s, Fretwell third floor, and CARC AHU

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
M. & O.

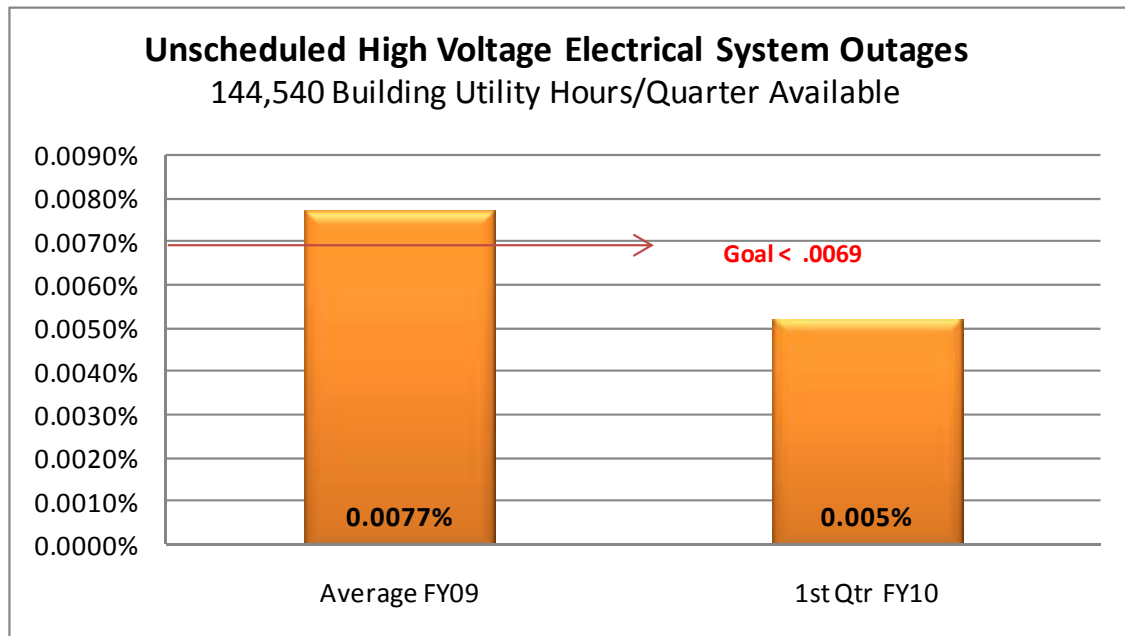
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by 10%

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

Goal: Less than .0069 for year.

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by 10%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 - Completed PM's as scheduled
 - 2 - Worked closely with PM's and contractors performing work on-site to preclude accidental interruptions by properly identifying location of underground utilities.
- Actions Planned
 - 1 – Continue PM's
 - 2 – Prepare program for major equipment repairs and replacement

Facilities Management Strategic Planning Session – First Quarter FY 2010

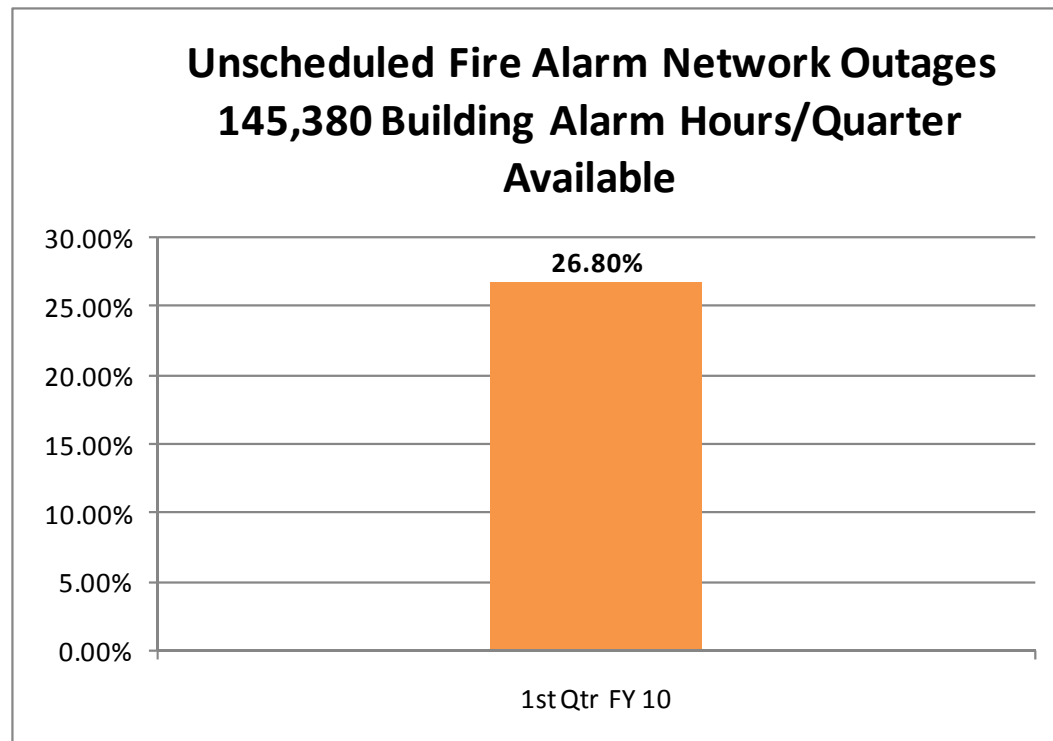
Lead
M. & O.

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)

Balanced Scorecard Category: Internal Business Process



GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

Actions Complete

- 1 - Completed Installation of TruSite Monitoring System
- 2 - Worked closely with Simplex-Grinnell performing work on-site to alleviate accidental interruptions .

Actions Planned

- 1 – Continue working with Simplex to bring the last buildings online with the network.
- 2 – Prepare data monitoring program for quarterly reporting.

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
Housekeeping

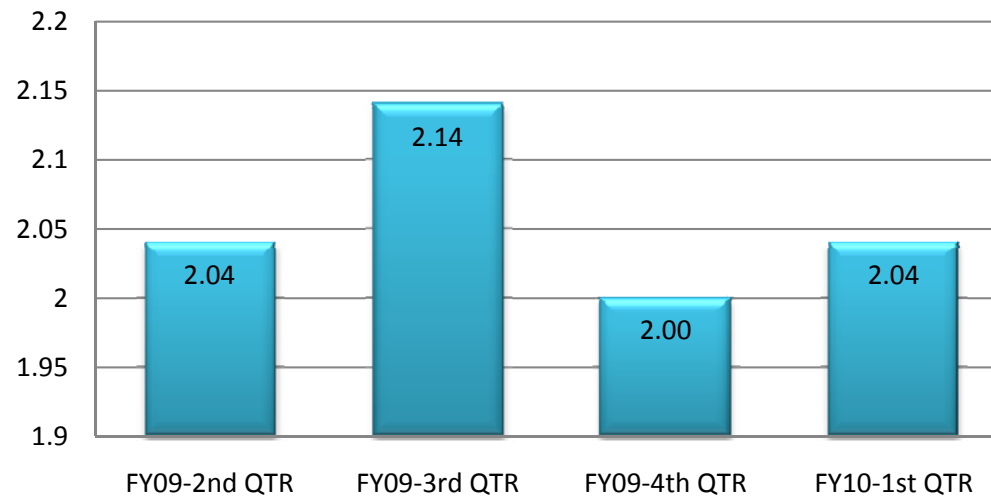
GOAL #1 – Improve Maintenance and Operations of the Campus

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



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
- Actions Planned
 - Continue quarterly self audits
 - Write RFP for external benchmark analysis
 - Establish subject matter expert training position for housekeeping



UNC CHARLOTTE

"If you would hit the mark,
you must aim a little above
it; every arrow that flies
feels the attraction of
earth."

-- Henry Wadsworth
Longfellow, author

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements

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

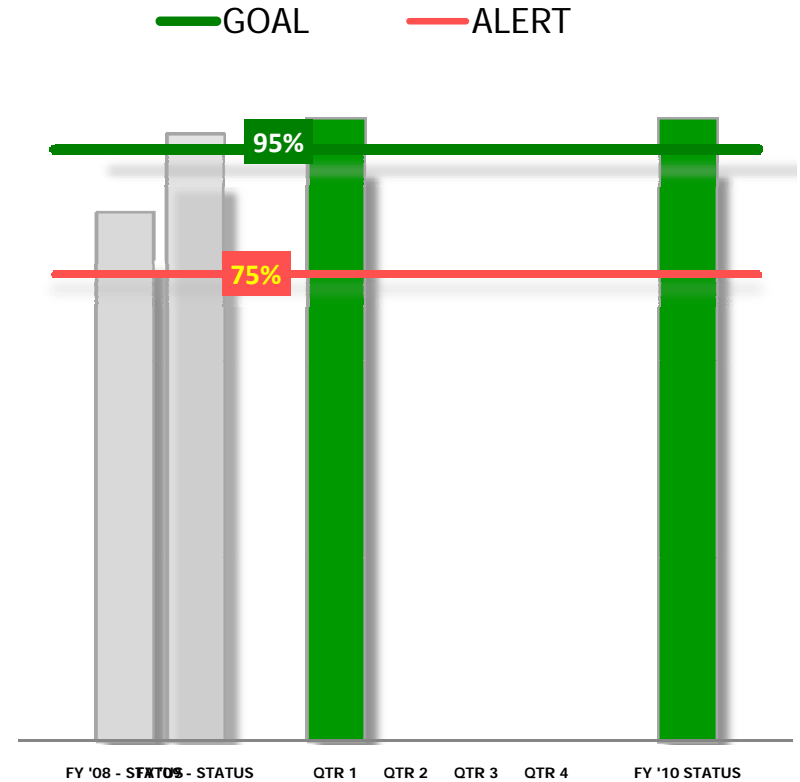
Strategy Objective 2.2 Improve Informal Project Design and Construction Process
 2.2.1 **95% of Projects Designed on Time**

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

Balanced Scorecard Category: Internal Business Process

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 '08	65	55	10	84.6%
FY '09	115	112	3	97.4%
QTR 1	23	23	0	100.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '10 STATUS	23	23	0	100.0%



GOAL 95.0%	STATUS 100.0%
----------------------	-------------------------

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

Lead
Design
Services

ACTION PLAN

2.2.3 - Actions Completed:

2.2.3 - Actions Planned:

- Continue refining reports from Archibus used to collect information for Strategic Planning.
- Complete Classroom Capacity info and egress data by developing Building Capacity
- Embrace new SCO procedural steps and secure project approvals and inspections.
- Enhance “Campus Priority” and Project “Status Block” features.

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

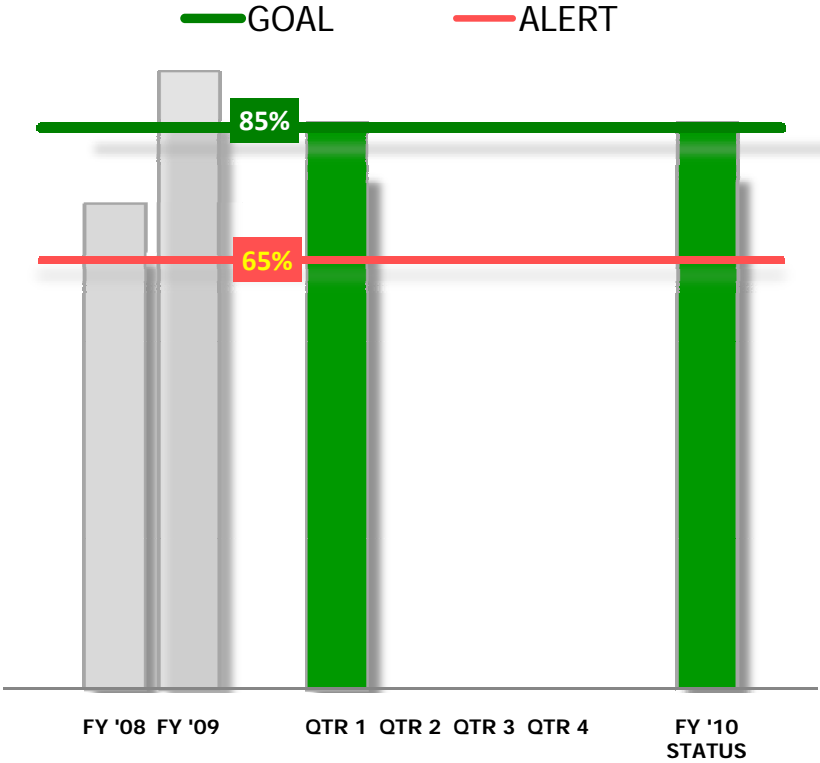
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 **85% of Estimates for In-house Construction within +/- 10% of Actual.**

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

Balanced Scorecard Category: Internal Business Process

85% of Estimates for In-house Construction within 10% - 2.2.2

QUARTERLY REVIEW	No. Of Projects Estimated	In-House Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '08	30	22	8	73.3%
FY '09	31	29	2	93.5%
QTR 1	7	6	1	85.7%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '10 STATUS	7	6	1	85.7%



GOAL 85.0%	STATUS 85.7%
----------------------	------------------------

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 in house construction within +/- 10% of Actual.

Lead
Design
Services

ACTION PLAN

2.2.2 - Actions Completed:

- Completed Scope and Budget upgrades to provide more accurate estimates.

2.2.2 - Actions Planned:

- Continue assigning staff review process for internal team analysis (Mac's #2 WIG).
- Continue Project Coordinator's tracking of expended project costs

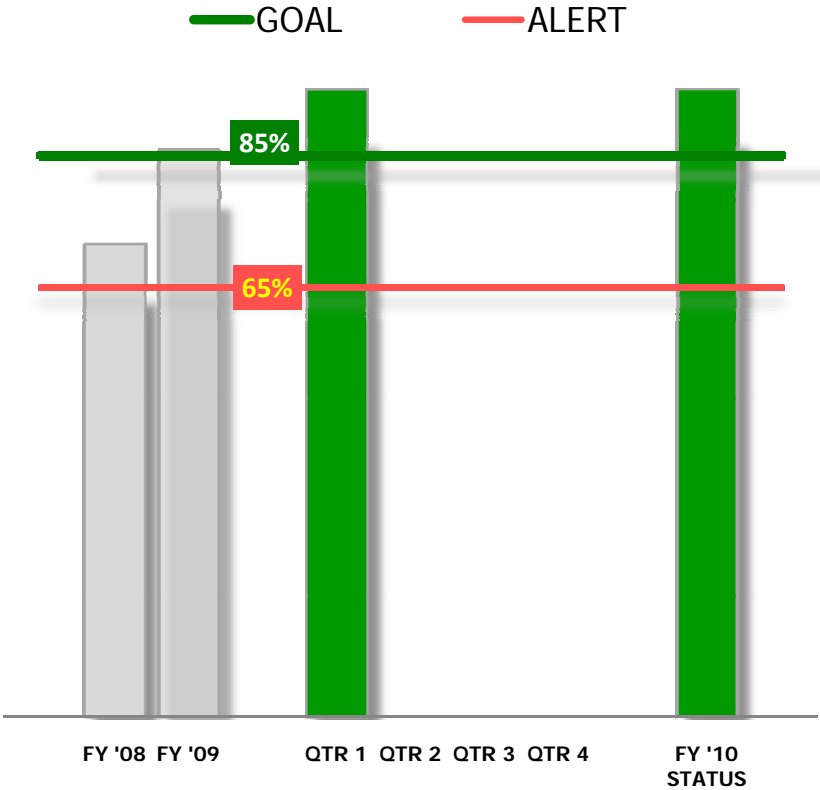
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.3 **85% of Estimates for Contractor Construction within +/- 10%**

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

85% of Estimates for Contractor Construction within 10% - 2.2.3

QUARTERLY REVIEW	Number Of Projects Estimated	Number of Projects within 10% of Estimate	Number Projects not within 10% of Estimate	Estimates within +/- 10%
FY '08	35	25	10	71.4%
FY '09	84	72	12	85.7%
QTR 1	20	19	1	95.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '10 STATUS	20	19	1	95.0%



GOAL 85.0%	STATUS 95.0%
----------------------	------------------------

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

Strategy	2.2	Improve Informal Project Design and Construction Process
Objective	2.2.3	80% of Estimates for Contractor Construction within 10%

Lead
Design
Services

ACTION PLAN

2.2.3 - Actions Completed:

2.2.3 - Actions Planned:

- Continue implementing projects that are suitable to the JOC process.
- Provide earlier compilation of design costs (during Scope & Budget phase).
- Continue Review of projects that need only limited design documentation to be used for
- Removed road blocks or “gaps” in achieving successful projects using JOC process.
- Document JOC successful projects to share with of fellow Project Managers.

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

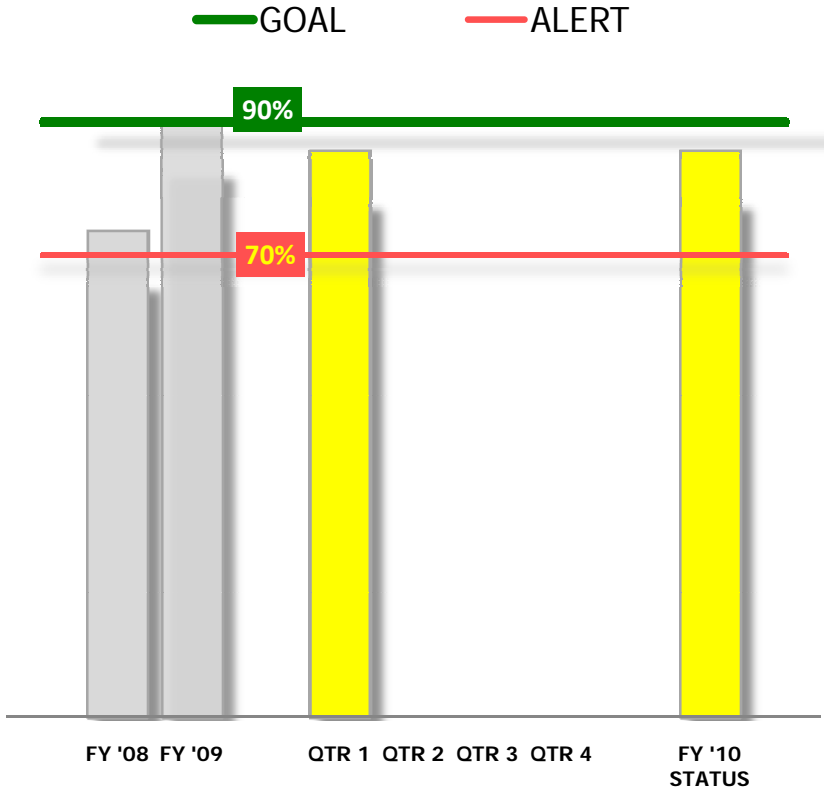
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 **90% of In-house Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

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

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. of In-house Projects	No. of In-house met Beneficial Occupancy	No. of In-house did not meet Delivery Date	Completed On Time
FY '08	30	22	8	73.3%
FY '09	31	28	3	90.3%
QTR 1	7	6	1	85.7%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '10 STATUS	7	6	1	85.7%



GOAL 90.0%	STATUS 85.7%
----------------------	------------------------

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 In-house Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

Lead
Design
Services

ACTION PLAN

2.2.4 - Actions Completed:

2.2.4 - Actions Planned:

- Continue to establish proven steps to beneficial occupancy via departmental meetings.
- Expand inner-department communications and support for projects.
- Continue Project Coordinator's tracking of expended project costs
- Post construction schedules on website to increase awareness of project timeliness.

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

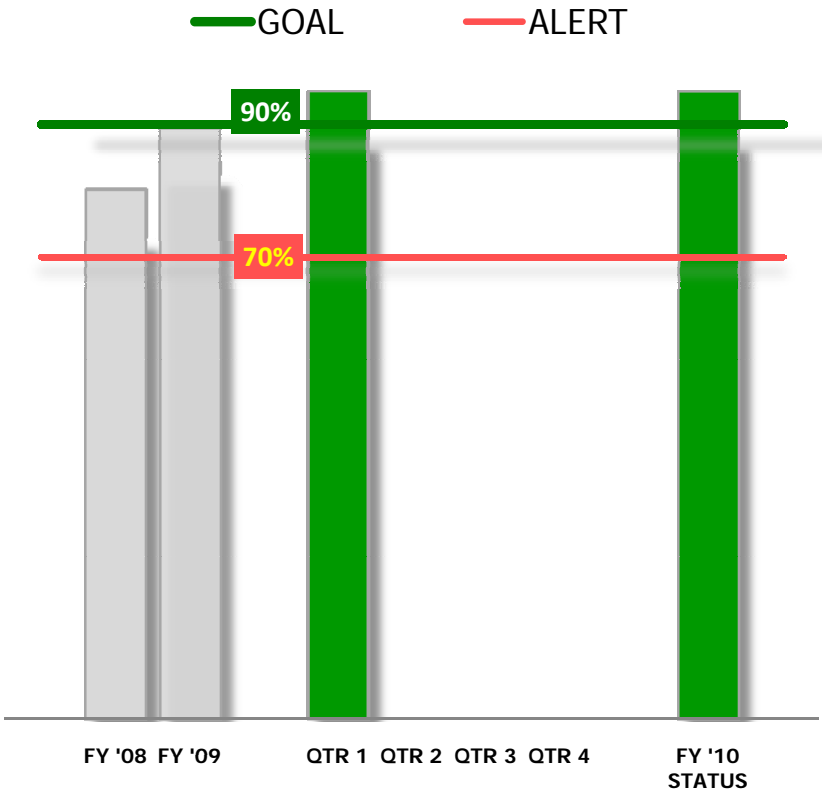
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.5 **90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

Measure: Percentage (Number of Contractor Construction Projects completed on or before delivery date divided by number of projects completed)

Balanced Scorecard Category: Internal Business Process

90% of Contractor Projects Meet Scheduled Beneficial Occupancy Date (BOD) - 2.2.5

QUARTERLY REVIEW	No. of Contractor Projects	No. of Contractor met Beneficial Occupancy	No. of Contractor did not meet Delivery Date	Completed On Time
FY '08	35	28	7	80.0%
FY '09	85	76	9	89.4%
QTR 1	20	19	1	95.0%
QTR 2	0	0	0	0.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '10 STATUS	20	19	1	95.0%



GOAL 90.0%	STATUS 95.0%
----------------------	------------------------

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

Strategy	2.2	Improve Informal Project Design and Construction Process
Objective	2.2.5	90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

Lead
Design
Services

ACTION PLAN

2.2.5 - Actions Completed:

2.2.5 - Actions Planned:

- Document all change order information at the earliest possible stage of the project.
- Develop better and more appropriate SCO submittal documents.
- Increase Project Coordinators attention to contractor's construction schedule throughout the c

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead Design Services

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

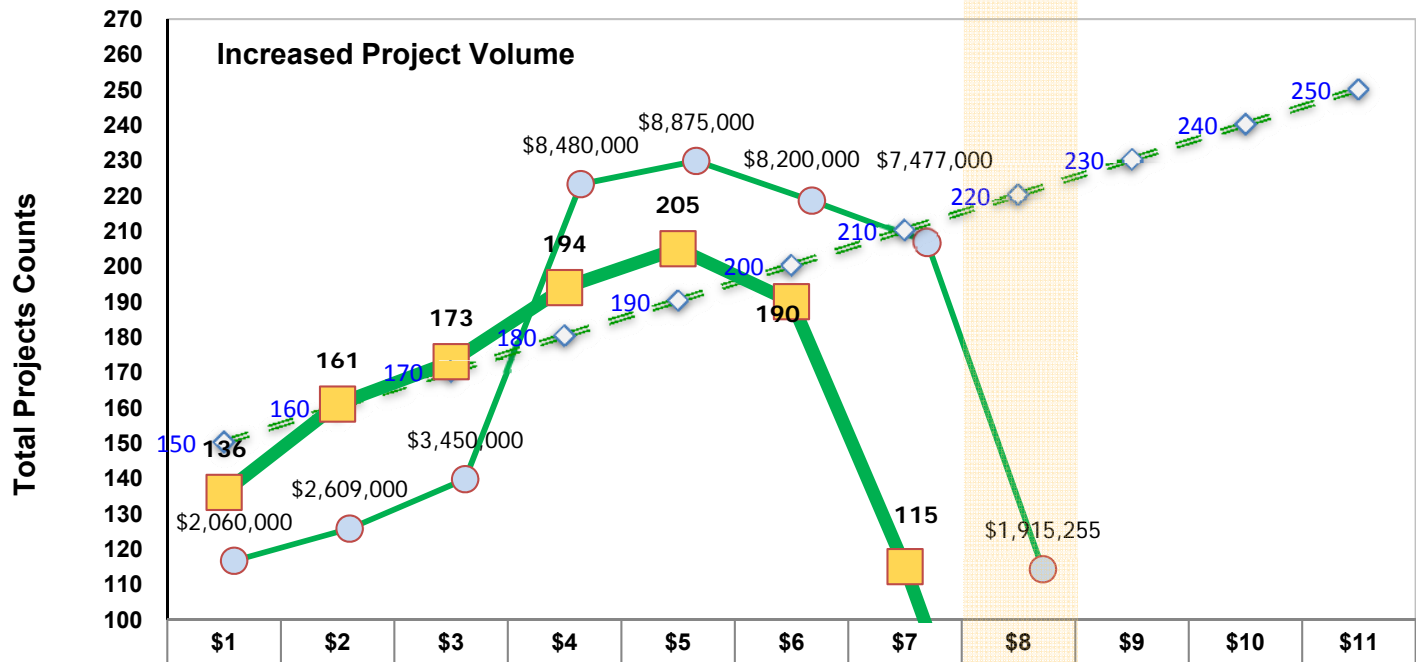
Strategy 2.2 Improve Informal Project Design and Construction Process
 Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Internal Business Process

Increase Project Volume by 10 Projects per year - Project Counts by Phase

	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	26			
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$1,915,255			



	\$1	\$2	\$3	\$4	\$5	\$6	\$7	\$8	\$9	\$10	\$11
GOAL	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	136	161	173	194	205	190	115	26			

GOAL
100%

STATUS
11.8%

GOAL #4 – Perfect a Customer Focused Organization

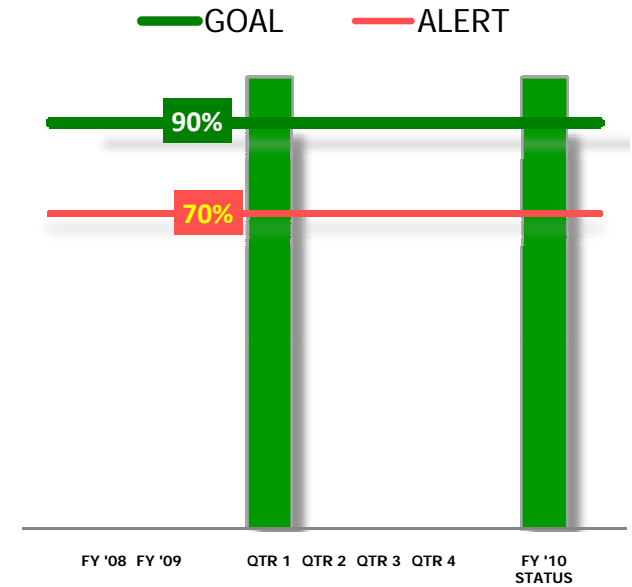
Strategy 4.1 Continually improve customer service/satisfaction
Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

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	Number of Surveys Completed	Surveyed Satisfied Customers	Surveyed Very Satisfied Customer	Total Satisfied Customers	Total Unsatisfied Customers	Percent Unsatisfied	Percent Satisfied
FY'08	0	0	0	0	0	0	0.0%	0.0%
FY'09	0	0	0	0	0	0	0.0%	0.0%
QTR 1	4	1	0	1	1	0	0.0%	100.0%
QTR 2	0	0	0	0	0	0	0.0%	0.0%
QTR 3	0	0	0	0	0	0	0.0%	0.0%
QTR 4	0	0	0	0	0	0	0.0%	0.0%
FY '09 STATUS	4	1	0	1	1	0	0.0%	100.0%



GOAL 90.0%	STATUS 100.0%
----------------------	-------------------------

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

ACTION PLAN

4.1.1 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys
-
-
-

4.1.1 - Actions Planned:

- Review Customer Satisfaction Survey responses and implement appropriate actions.
-
-
-
-



UNC CHARLOTTE

“When you discover your mission, you will feel its demand. It will fill you with enthusiasm and a burning desire to get to work on it.”

- *W. Clement Stone*

GOAL #3

Deliver New Facilities that
Support the University’s Mission

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

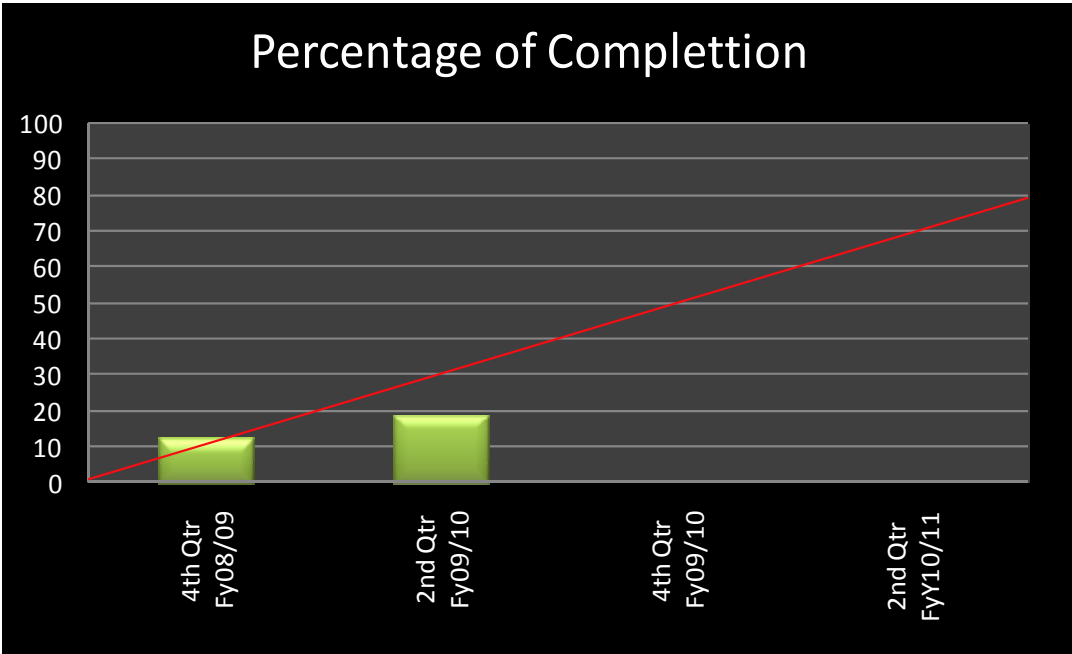
Objective 3.2.1 80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd quarter FY 2011

Measure: % of Projects with completed Pre-Programs

Balanced Scorecard Category: Internal Business Process

1. Energy Production Infrastructure Center (EPIC)
2. Science Building*
3. Burson Building Modernization and Expansion*
4. Student Academic Success and Retention Center
5. Atkins Library Expansion and Modernization*
6. Arts and Humanities Building
7. Physical Plant Complex
8. Student Health and Wellness Center *
9. Belk Gym Modernization & Expansion*
10. Reese Building Modernization
11. Storrs College of Architecture Expansion
12. Colvard Building Modernization
13. Friday Building Modernization
14. Smith and Cameron applied Research Building Modernizations
15. Kennedy Building Modernization*
16. Center City Classroom II

* Denotes completion



Status

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

Lead
Planning

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd quarter FY 2011

ACTION PLAN

- **Actions Complete**

Met with Academic Affairs to establish pre-programming schedule

Actions Planned

Revisit pre-program of following buildings:

Science Building: Needs to be revised due to possibility of Math Department move

Burson: Needs to be revised due to ADA parking and Infrastructure CID \$20 M

Atkins Library: Needs to be reviewed with new University Librarian

Student Health and Wellness – revisit program done by Recreational Services

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
Planning

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

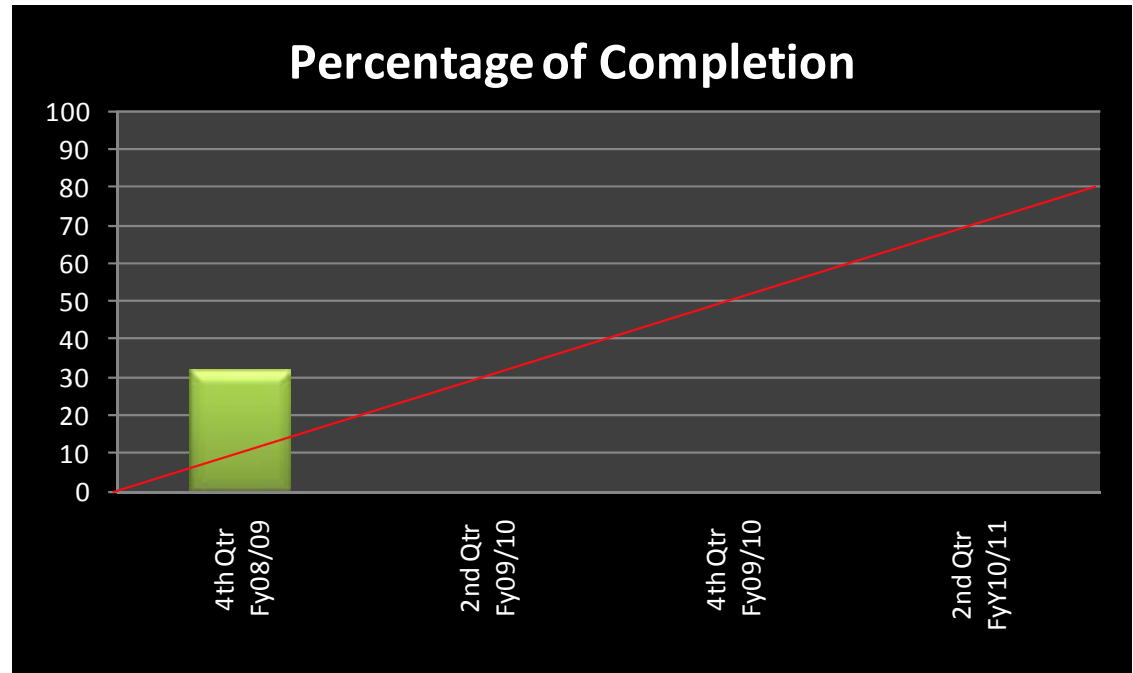
Strategy 3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements

Objective 3.2.2 80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd Quarter FY 2010

Measure: % of projects with completed pre-programs.

Balanced Scorecard Category: Internal Business Process

1. Parking Deck H*
2. Center City Building CAFÉ and Bookstore Build Out*
3. Softball Stadium Seating Improvements*
4. New Outdoor Recreation Facility - Phase II*
5. Motorsports Building II*
6. Alumni Center Parking*
7. Prospector Hall Renovation - Phase II*
8. Residence Hall's Fire Sprinkler Installation
9. Intercollegiate Tennis Facility*
10. Partnership, Outreach, and Research for Accelerated Learning (PORTAL) Building
11. Sports Complex
12. Student Activities Center - Office Renovation
13. Football Stadium
14. New Residence Hall Phase X (400 beds)
15. Hunt Village Demolition*
16. Development Center*
17. Parking Deck I*
18. Hall of Champions Renovation
19. Residence Dining Hall Renovation/Replacement
20. Cafeteria Activities Building Renovation
21. New Residence Hall Phase XI (300 beds)
22. Phase III Apartments - Demolition
23. Central Quadrangle Improvements*
24. Martin Village Apartments Demolition
25. New Residence Hall Phase XII (608 beds)
26. Scott Hall Renovation
27. Cedar/Hickory/Sycamore (Phase IV-A) Renovation
28. Parking Deck J
29. Hayes Baseball Stadium Improvements - Phase 2
30. Sanford Hall Renovation
31. Hawthorn (Phase IV-B) Renovation
32. Moore Hall Renovation
33. Elm/Maple/Pine (Phase V) Renovation
34. Holshouser Hall Renovation
35. Oak (Phase V) Renovation
36. Witherspoon (Phase VI) Renovation
37. Recreation Fields 14 & 15
38. New Housing/Facilities Offices



Status

* Denotes Completion

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

Lead
Planning

Strategy 3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements

Objective 3.2.2 80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd Quarter FY 2010

ACTION PLAN

- **Actions Complete**
33% of projects complete
Discussed beginning of advanced planning for projects listed as actions planned.
- **Actions Planned**
Student Health and Wellness Center– Pre-program
Residence Dining Hall Renovation / Replacement – Pre-program

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

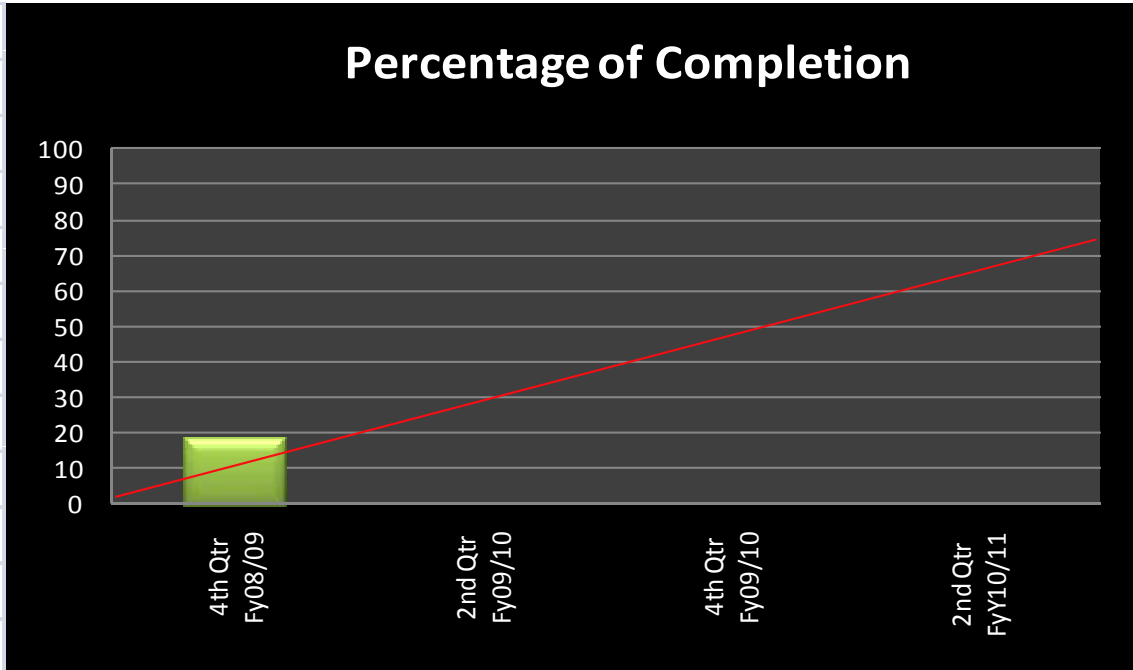
Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements with approved OC-25's

Objective 3.2.3 75% of OC-25's for projects on the Appropriated Six Year Capital Improvements Plan completed by end of 2nd Quarter FY 10/11

Measure: % of total projects with completed OC-25's.

Balanced Scorecard Category: Internal Business Process

1. Energy Production Infrastructure Center (EPIC)*
2. Science Building*
3. Burson Building Modernization and Expansion
4. Student Academic Success and Retention Center
5. Atkins Library Expansion and Modernization
6. Arts and Humanities Building
7. Physical Plant Complex
8. Student Health and Wellness Center
9. Belk Gym Modernization & Expansion
10. Reese Building Modernization
11. Storrs College of Architecture Expansion
12. Colvard Building Modernization
13. Friday Building Modernization
14. Smith and Cameron applied Research Building Modernizations
15. Kennedy Building Modernization
16. Center City Classroom II



Status

* Denotes Completion

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

Lead
Planning

Strategy **3.2 Improve the Six Year Plan for Appropriated Capital Improvements with approved OC-25's**

Objective **3.2.3 75% of OC-25's for projects on the Appropriated Six Year Capital Improvements Plan completed by end of 2nd Quarter FY 10/11**

ACTION PLAN

- **Actions Complete**

- **Actions Planned**
 Determine funding availability to continue pre-programming

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
Planning

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

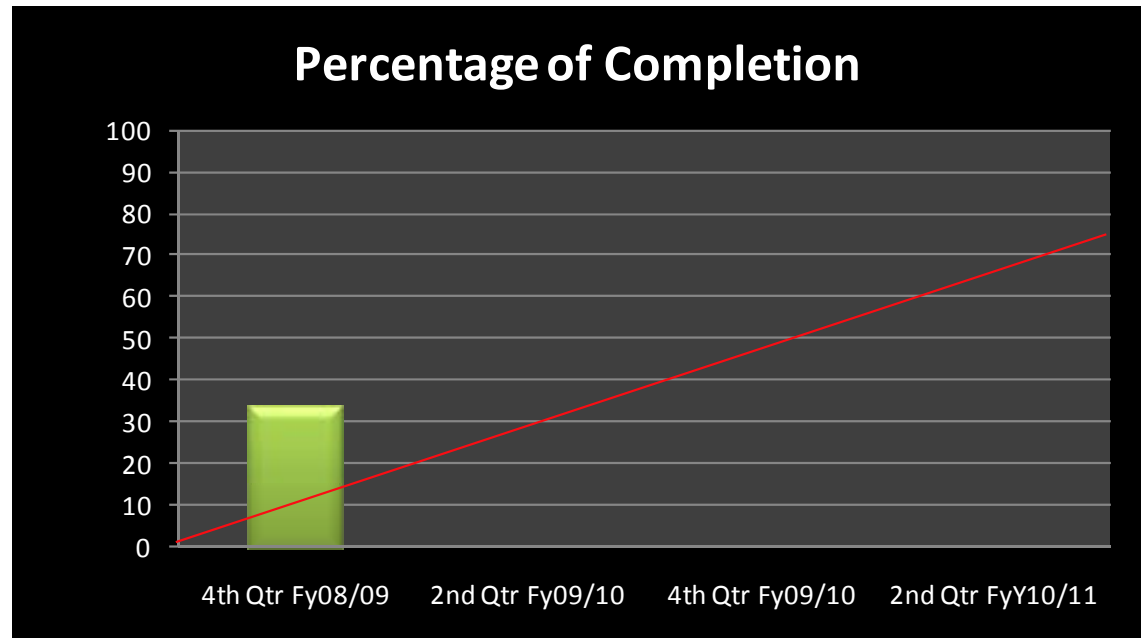
Strategy 3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements with approved OC-25's

Objective 3.2.4 75% of OC-25's for projects on the Non-Appropriated Six Year Capital Improvements Plan completed by end of 2nd Quarter FY 10/11

Measure: % of total projects with completed OC-25's

Balanced Scorecard Category: Internal Business Process

1. Parking Deck H*
2. Center City Building CAFÉ and Bookstore Build Out*
3. Softball Stadium Seating Improvements*
4. New Outdoor Recreation Facility - Phase II*
5. Motorsports Building II*
6. Alumni Center Parking*
7. Prospector Hall Renovation - Phase II*
8. Residence Hall's Fire Sprinkler Installation
9. Intercollegiate Tennis Facility*
10. Partnership, Outreach, and Research for Accelerated Learning (PORTAL) Bui
11. Sports Complex
12. Student Activities Center - Office Renovation
13. Football Stadium
14. New Residence Hall Phase X (400 beds)
15. Hunt Village Demolition*
16. Development Center*
17. Parking Deck I*
18. Hall of Champions Renovation
19. Residence Dining Hall Renovation/Replacement
20. Cafeteria Activities Building Renovation
21. New Residence Hall Phase XI (300 beds)
22. Phase III Apartments - Demolition
23. Central Quadrangle Improvements*
24. Martin Village Apartments Demolition
25. New Residence Hall Phase XII (608 beds)
26. Scott Hall Renovation
27. Cedar/Hickory/Sycamore (Phase IV-A) Renovation
28. Parking Deck J
29. Hayes Baseball Stadium Improvements - Phase 2
30. Sanford Hall Renovation
31. Hawthorn (Phase IV-B) Renovation
32. Moore Hall Renovation
33. Elm/Maple/Pine (Phase V) Renovation
34. Holshouser Hall Renovation
35. Oak (Phase V) Renovation
36. Witherspoon (Phase VI) Renovation
37. Recreation Fields 14 & 15
38. New Housing/Facilities Offices



Status

*Denotes
Completion

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

Lead
Planning

Strategy **3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements with approved OC-25's**

Objective **3.2.4 75% of OC-25's for projects on the Non-Appropriated Six Year Capital Improvements Plan completed by end of 2nd Quarter FY 10/11**

ACTION PLAN

- Actions Complete

- Actions Planned
 - Determine funding availability for pre-programming

Facilities Management Strategic Planning Session – First Quarter FY 2010

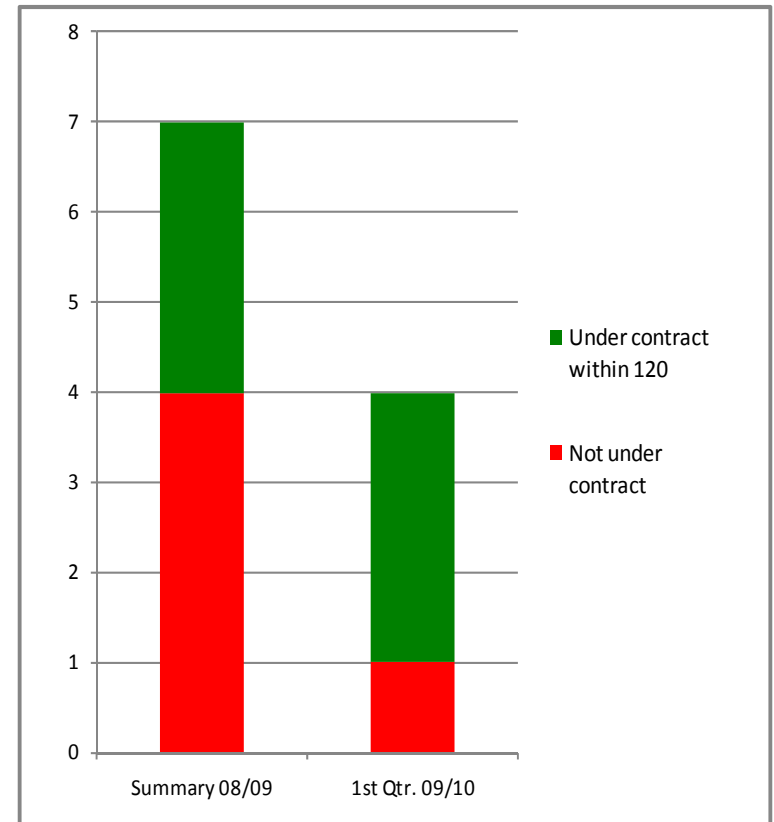
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy 3.3 Improve the Capital Design Process
Objective 3.3.1 90% of Designers under contract within 120 days of 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	Status
Summary 08/09	9	3	4	
1st Qtr. 09/10	5	3	1	



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

ACTION PLAN

- Actions Completed
 1. Selected designer for Motor Sports Expansion, (released hold) fee negotiation in process
 2. Selected designer for Football/Sports Complex, Fire Sprinklers, Parking Deck I & Tennis Courts.
 3. Fees negotiated for Tennis & Residence Halls Sprinklers
- Actions Planned
 1. No designer solicitations in process

Facilities Management Strategic Planning Session – First Quarter FY 2010

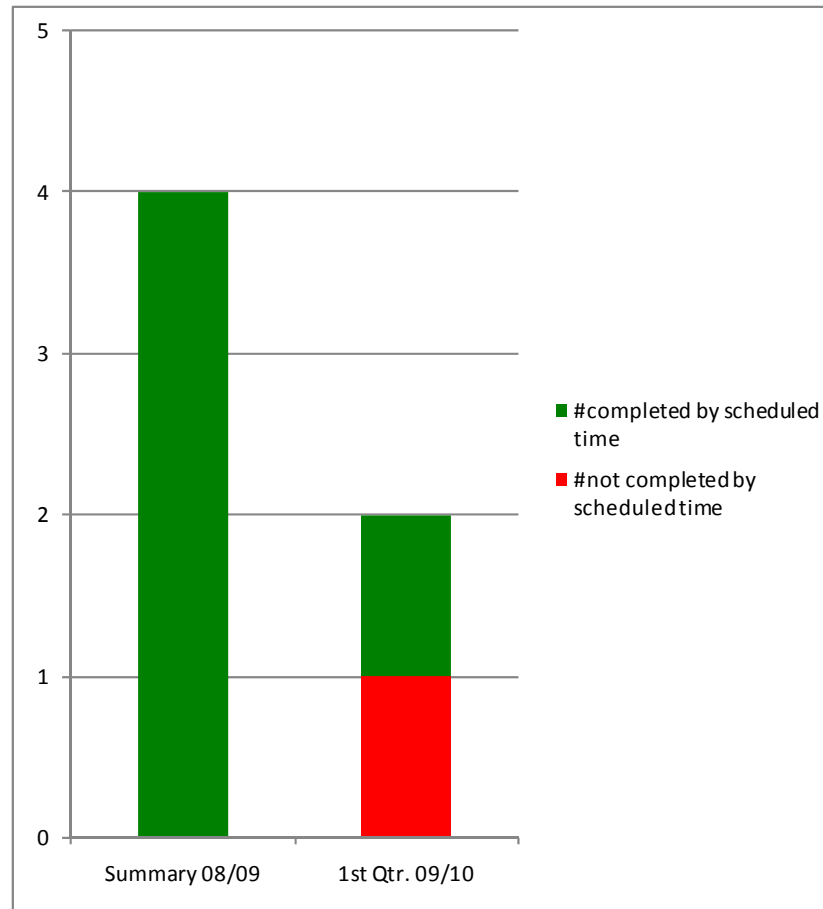
GOAL #3 – Deliver New Facilities that Support the University's Mission

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	Status
Summary 08/09	4	0	
1st Qtr. 09/10	1	1	



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 date

Lead
Capital

ACTION PLAN

- Actions Completed
 1. Designs completed for Residence Hall Sprinklers, FM Paving, High Voltage Duct Bank Replacement
 2. Early site design for Center City Classroom and Residence Halls completed
 3. Trade packages for Center City Classroom complete
- Actions Planned
 1. Push SCO & DOI to be more timely, begin close monitoring
 2. Finalize trade packages for Residence Hall 9
 3. Continue PORTAL & Parking Deck I program refinement
 4. Complete EPIC Early Site and Trade packages
 5. Complete New Outdoor Recreations Fields design
 6. Complete Parking Deck H CD's

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
Capital

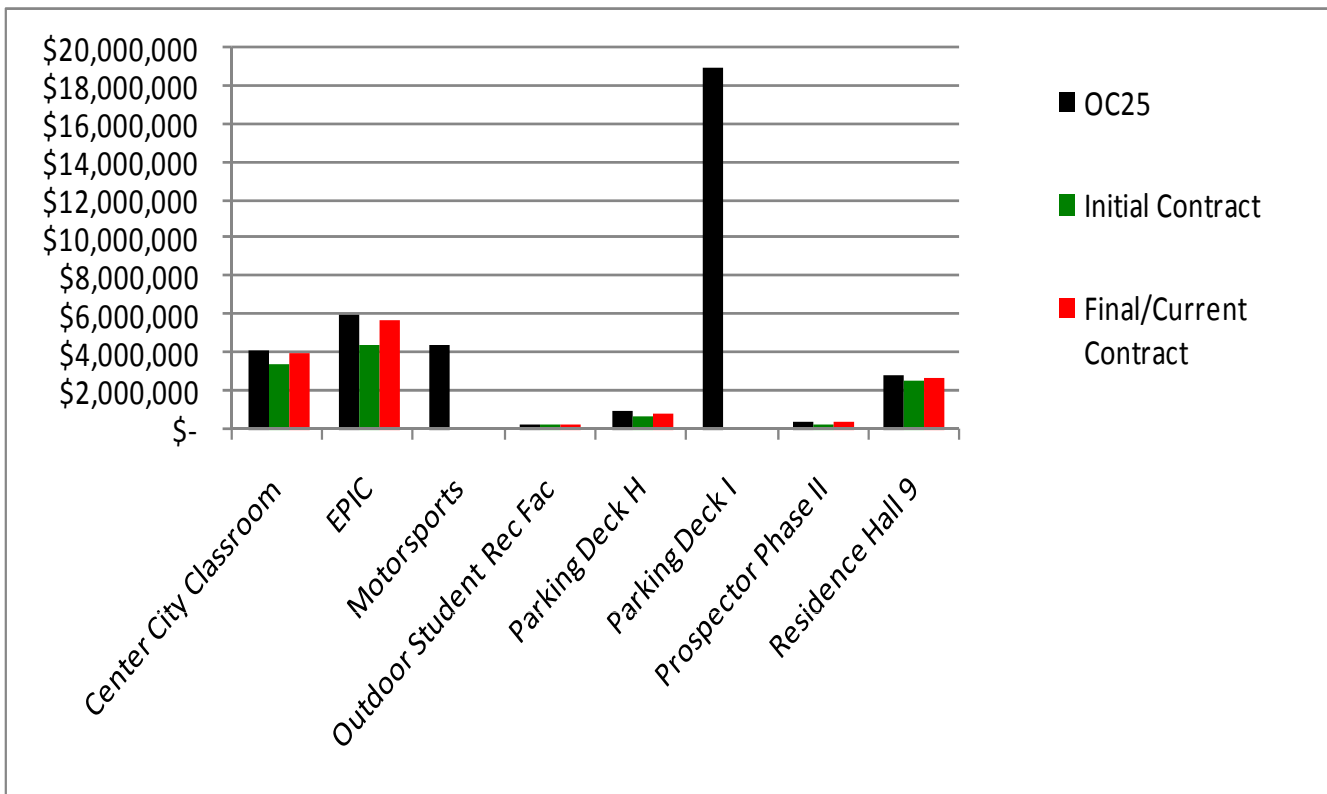
GOAL #3 – Deliver New Facilities that Support the University's Mission

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: Financial Perspective

All completed within design contract amount



- Center City Classroom early site
- Residence Hall Phase IX early site

Status

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. Center City Classroom early plans completed
 - 2. Center City Classroom trade packages complete
 - 3. Residence Hall IX early site complete
- Actions Planned
 - 1. Identified fee ranges for basic services
 - 2. Have a more clearly defined scope, refer to approved project programs
 - 3. Complete Residence Hall IX trade packages, EPIC design and New Outdoor Rec. Fields design

Facilities Management Strategic Planning Session – First Quarter FY 2010

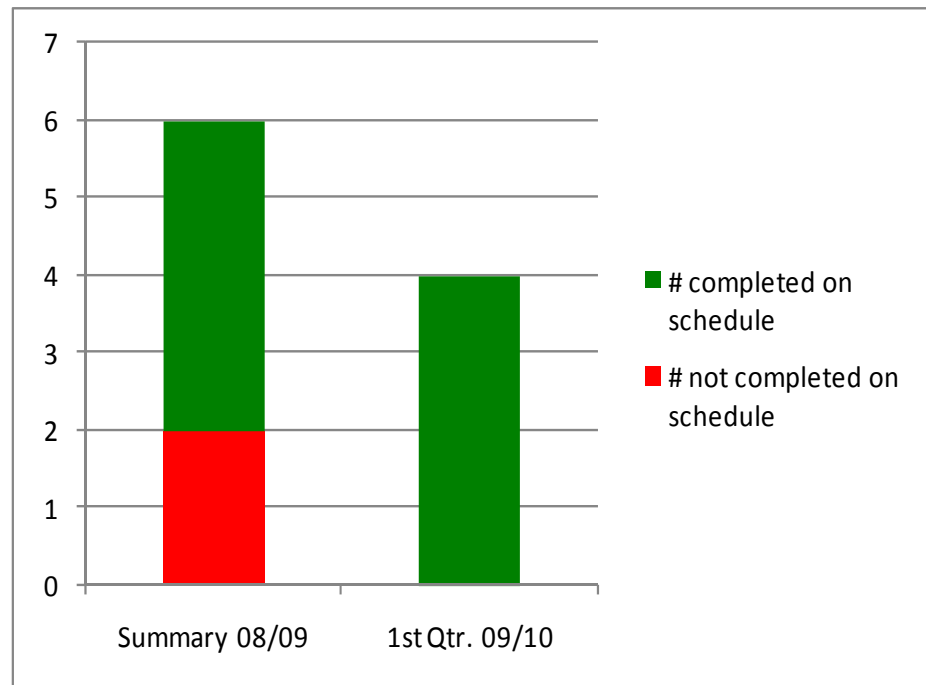
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy Objective 3.4 Improve Administration of the Capital Construction Process
 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: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	Status
Summary 08/09	4	2	Yellow
1st Qtr. 09/10	4	0	Green



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 Schedule

Lead
Capital

ACTION PLAN

- **Actions Complete**
 1. Used Primavera as a tracking tool
 2. Prequalifying all contractors
 3. Use CM@Risk for larger projects
 4. Going to weekly meetings with more PM involvement
 5. Bioinformatics and Student Union accepted
- **Actions Planned**
 1. Control change orders
 2. Limit customer requested change orders
 3. Limit additional scope request at 50% level from customer
 4. Start early site work for EPIC
 5. Start trade packages for Center City Classroom and Residence Hall IX

Facilities Management Strategic Planning Session – First Quarter FY 2010

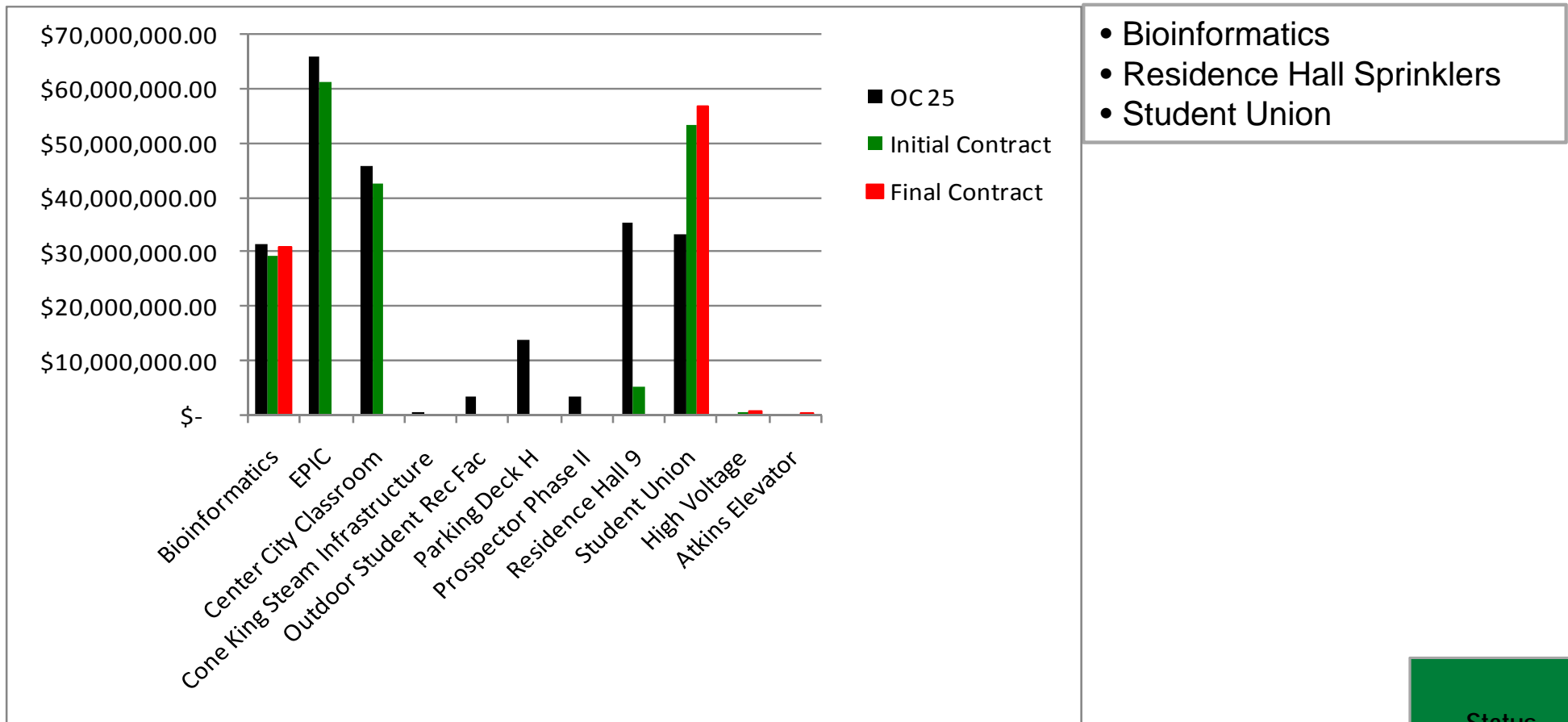
Lead
Capital

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

Strategy Objective 3.4 Improve Administration of the Capital Construction Process
 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



Status

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% (contingency)

Lead
Capital

ACTION PLAN

- Actions Completed
 1. Bioinformatics, Student Union and Residence Hall Sprinklers accepted
- Actions Planned
 1. Insure we engage CM on constructive criticism early in the process
 2. Insure we get delivery of items in the RFP
 3. Engage CM's closer to SD's
 4. Gauge CM's performance on final contingency
 5. Revising the CM@Risk RFP



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



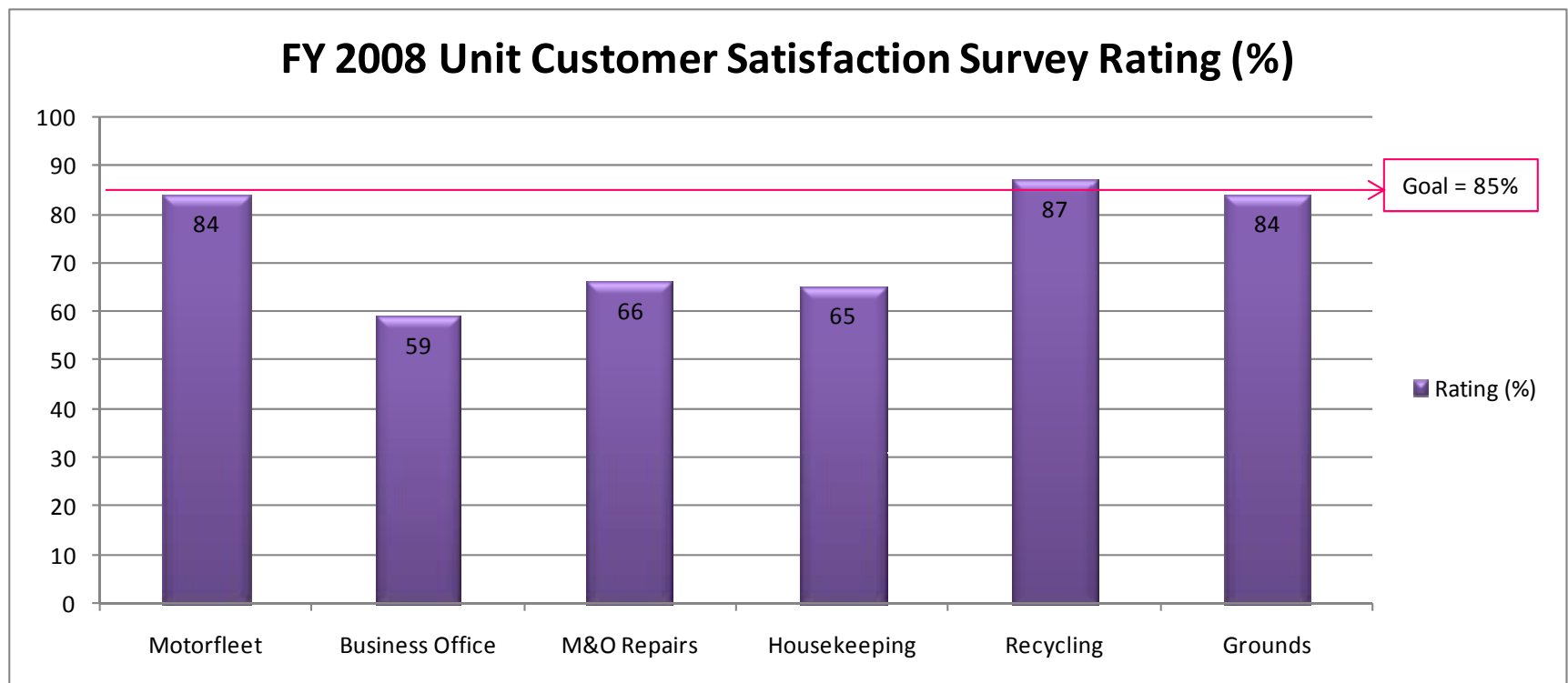
GOAL #4 – Perfect a Customer Focused Organization

Strategy Objective 4.1 Continually Improve Customer Service/Satisfaction
4.1.2 Achieve overall FM Unit Customer Satisfaction of 85%
(Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

Annual objective

Measure: Annual Customer Survey Results

Balanced Scorecard Category: Customer Perspective



In
Progress

GOAL #4 – Perfect a Customer Focused Organization

Lead
FBO

- Strategy Objective** 4.1 Continually Improve Customer Service/Satisfaction
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

- Actions Complete

- Housekeeping

- ✓ Housekeeping partnered with the Student Health Center on a Wellness Promotion; They had designed a mirror cling with a wellness message and needed our help installing them and making sure they stay in place over time; Student Health agreed to add “This restroom proudly cleaned by FM Housekeeping.”



- Facilities Business Office

- ✓ Submitted FBO Policy, Process and Procedure manual to Internal Audit for review August 31, 2009.
 - ✓ Reviewed reports in Archibus for clean-up purposes (determined what should or should not be removed); Recommendations submitted to FIS September 15, 2009.
 - ✓ Completed and published first FBO Annual Report; Reported highlights major accomplishments and areas for continuous improvement.
 - ✓ Developed a Strategic Plan informational brochure to serve as an “at a glance” document for public, internal customers and FM employees; Document is currently in draft form. Estimated completion in the near future.



GOAL #4 – Perfect a Customer Focused Organization

Strategy
Objective

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

Lead
FBO

ACTION PLAN

- Actions Planned
 - Facilities Business Office
 - Conversion of Facilities Services Guide to a web friendly document.

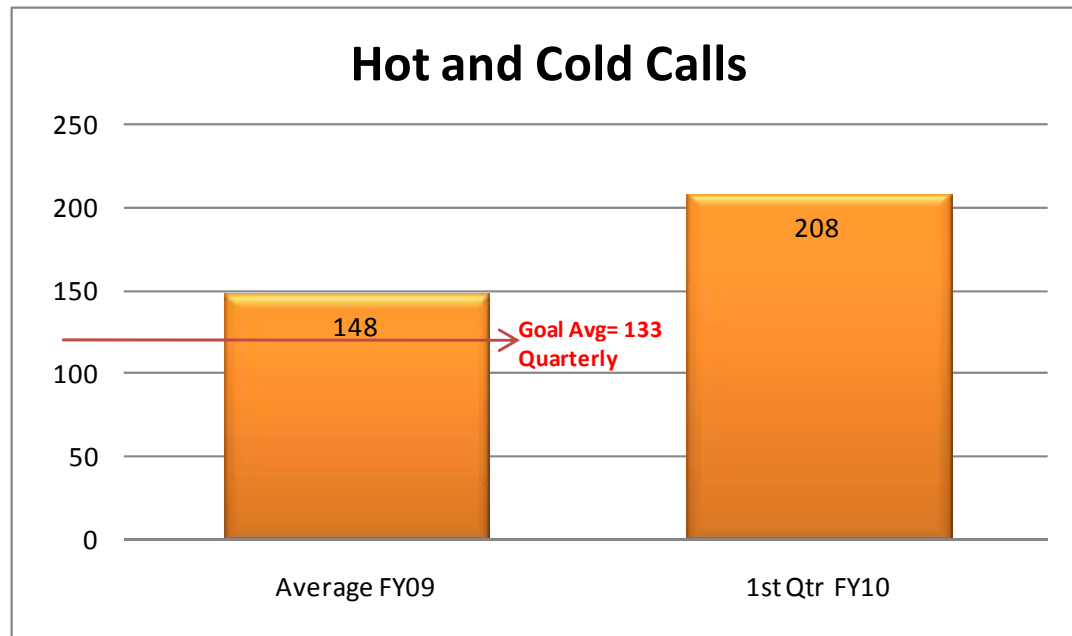
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% from FY09 Average of 148 (ie goal 133)

Measure: Number of hot/cold calls submitted on work requests. 1st Qtr – Too Hot = 134 Too Cold = 74

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective



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
M&O

ACTION PLAN

- Actions Complete
 - 1 – Investigated condition of all HVAC Equipment Zones 4-6
 - 2 - Obtained costs for repairs and upgrades for critical funding in FY09-10 budget.
- Actions Planned
 - 1 - Make repairs and upgrades to systems as funds permit.
 - 2 – Backlog repairs on WRs and RR list when unable to complete with budgeted dollars.

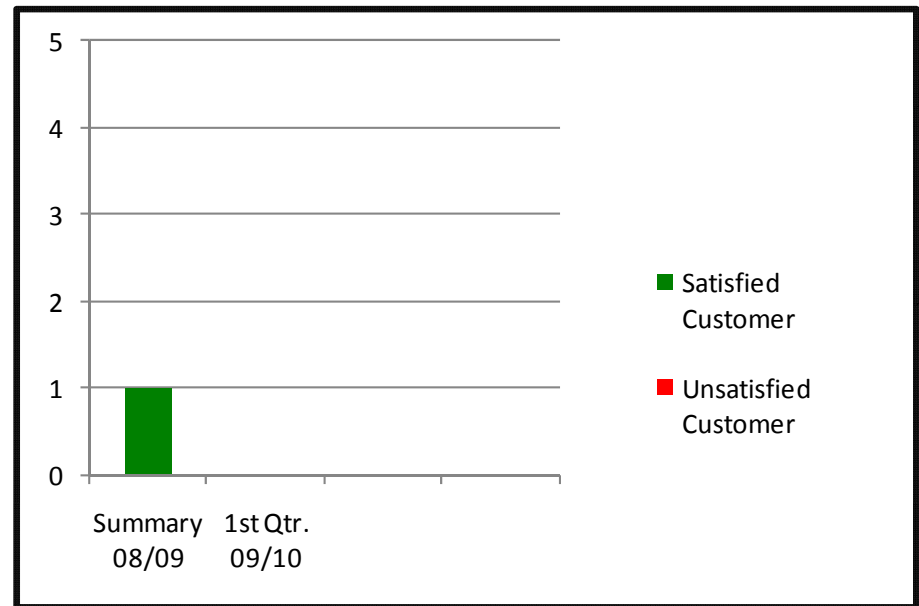
GOAL #4 – Perfect a Customer Focused Organization

Strategy Objective **4.1** Continually Improve Customer Service/Satisfaction
 4.1.5 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary 08/09	2	1	0	100%
1st Qtr. 09/10	2	0	0	No Data



GOAL #4 – Perfect a Customer Focused Organization

Strategy	4.1	Continually Improve Customer Service/Satisfaction
Objective	4.1.5	85% of Capital Project Customers Satisfied or Very Satisfied at the end of the design phase

Lead
Capital

ACTION PLAN

- Actions Complete
 1. Survey administered to Outdoor Student Recreation customers
- Actions Planned
 1. Continue working with FIS to improve survey functionality

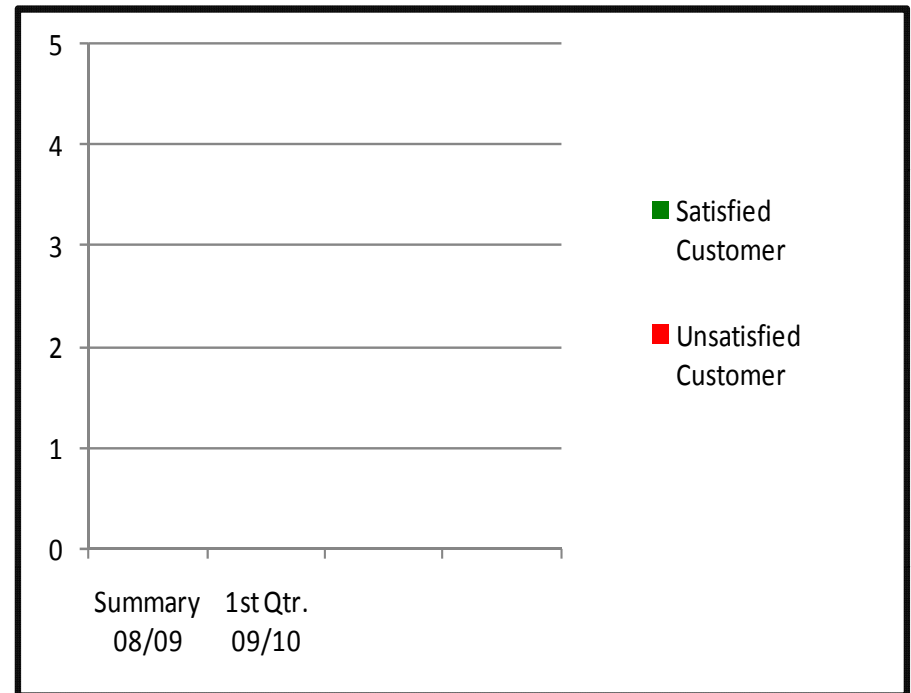
GOAL #4 – Perfect a Customer Focused Organization

Strategy Objective **4.1** Continually Improve Customer Service/Satisfaction
 4.1.6 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the construction phase

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary 08/09	no data			
1st Qtr. 09/10	no data			



GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.6 85% of Capital Project Customers Satisfied or Very Satisfied at the end of the construction phase

Lead
Capital

ACTION PLAN

- Actions Complete
 1. No survey's submitted
- Actions Planned



UNC CHARLOTTE

"We cannot become what we need to be by remaining what we are." - *Max De Pree*

"The quality of our work depends on the quality of our people." - *Unknown*

GOAL #5

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



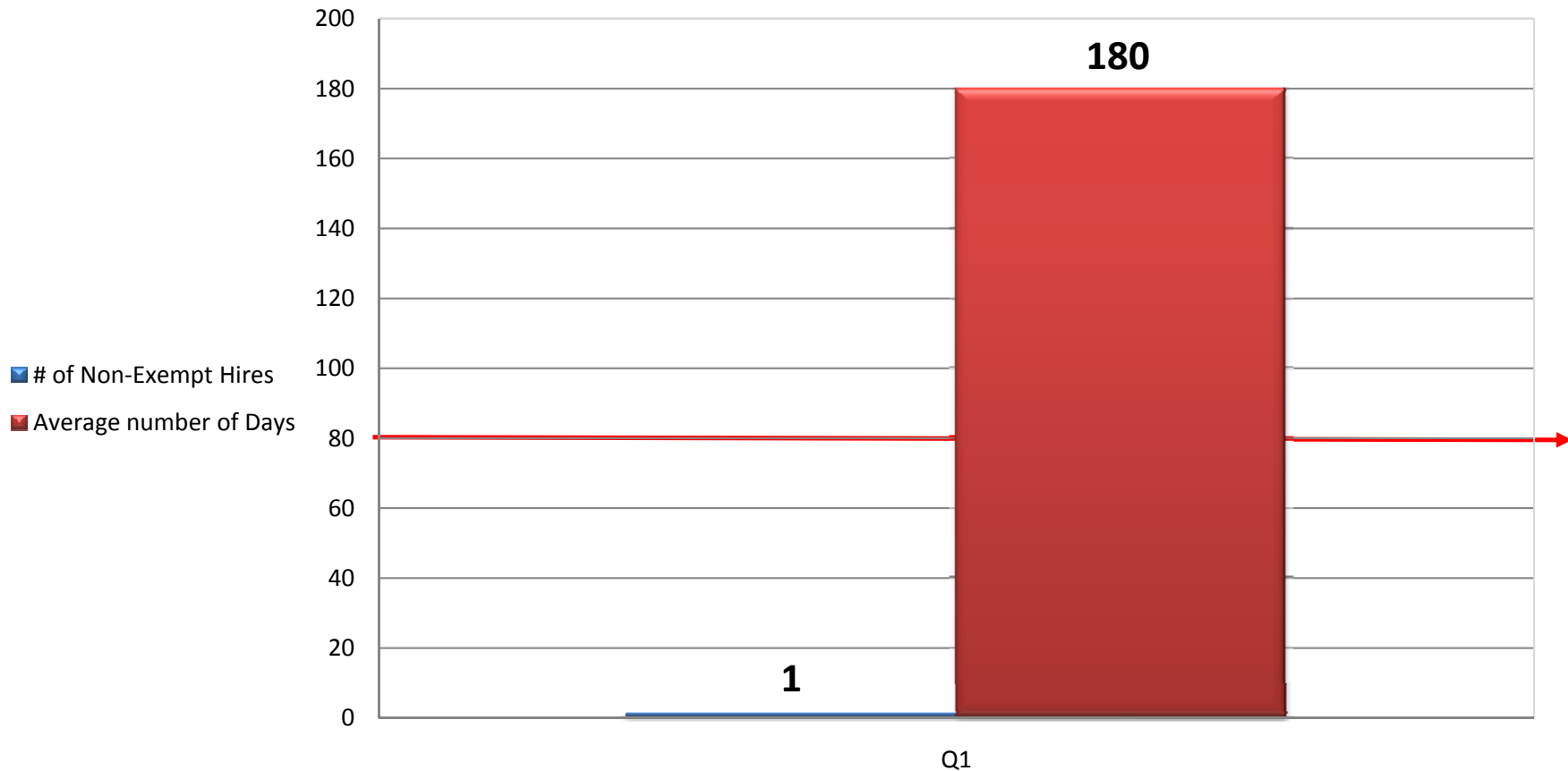
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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



Annual
Average:
80 days

STATUS

Q1
Average:

STATUS

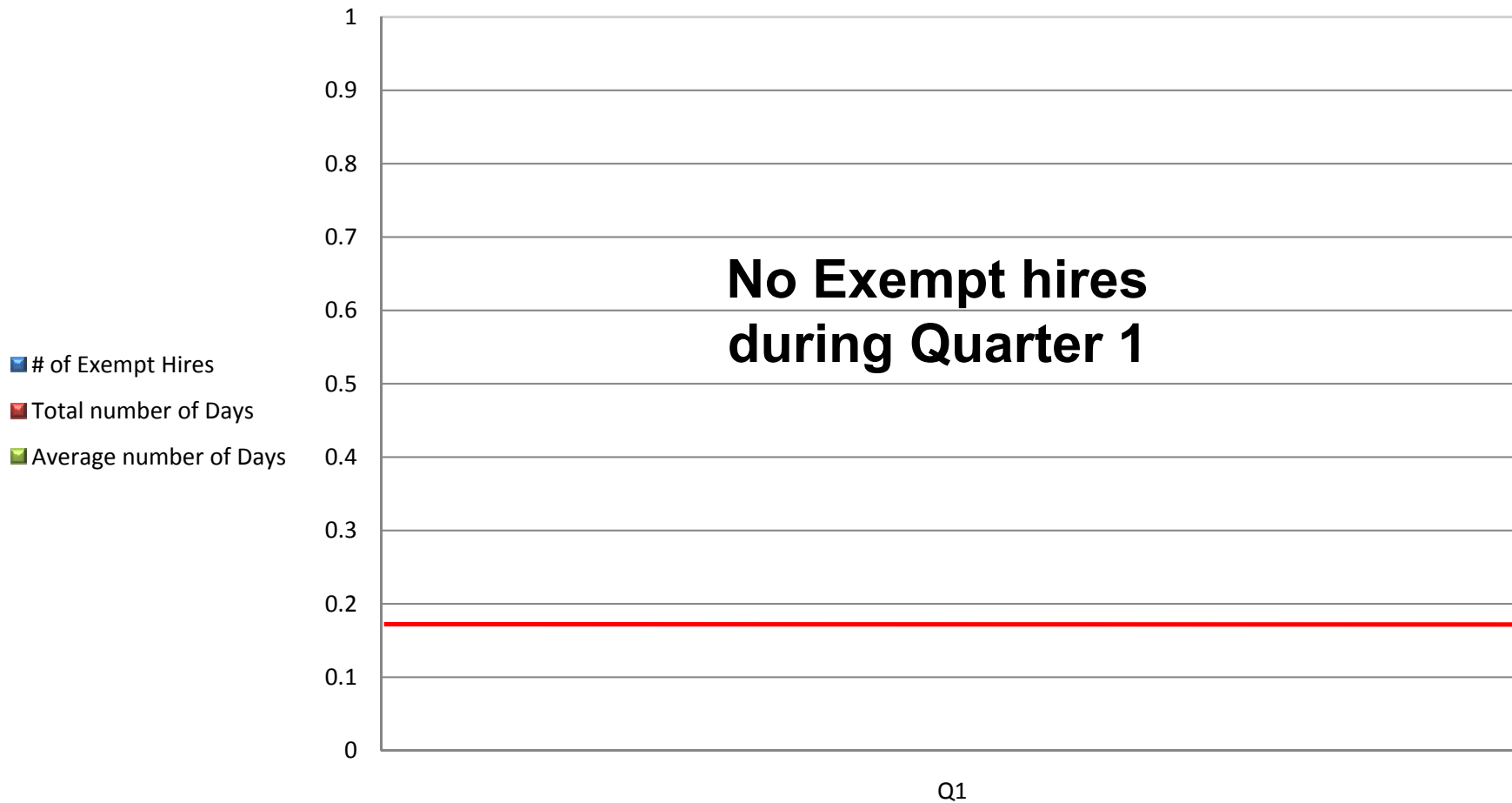
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy Objective **5.1** Recruit a talented and diverse workforce in a timely fashion
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 Exempt (Salaried) Vacancies



STATUS

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

ACTION PLAN

- **Actions Complete**
 - ✓ New hiring process developed
 - ✓ Developed new process documentation
 - ✓ Met with University HR to review changes to People Admin system as it applies to new process
 - ✓ New Hiring Process review by FM Leadership team

- **Actions Planned**
 1. People Admin system program change implementation – Campus HR
 2. FM Pilot of new People Admin system
 3. Develop process communication plan for supervisors
 4. Implement revamped Hiring Process in FY 2010

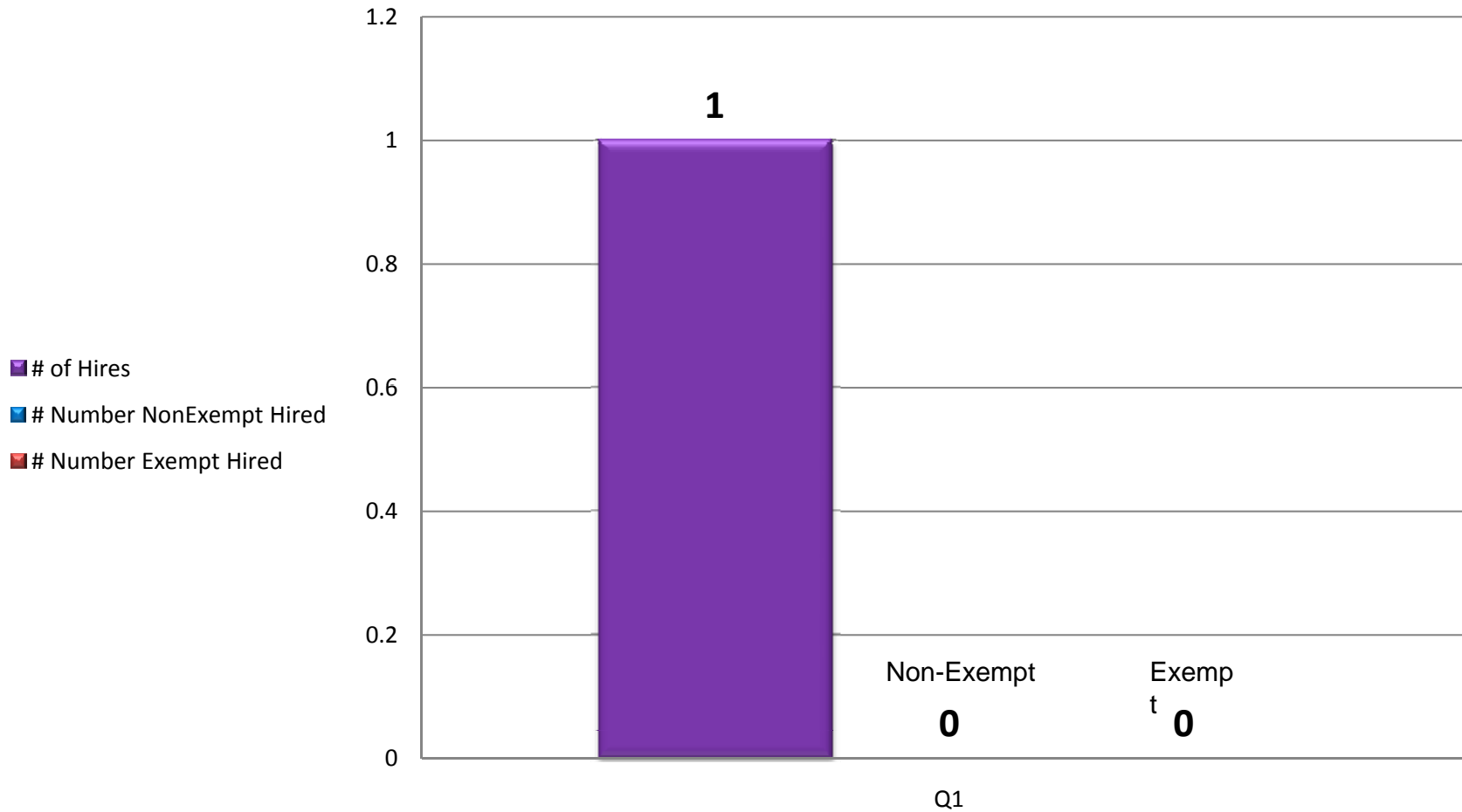
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% of positions filled through targeted selection process by FY 2010

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

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 5.1.2 100% of positions filled through targeted selection process by FY 2010

Measure: **Completion of hiring checklist by hiring manager (including onboarding)**

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

ACTION PLAN

- **Actions Complete**
 - ✓ Obtained FM reservations for University offered training program
 - ✓ Certified to offer DDI Targeted selection training specific to FM

- **Actions Planned**
 1. Behavioral Targeted Selection Training for all FM managers and supervisors Oct '09-Mar '09
 2. Onboarding program document outline 01/31/10
 3. Implementation of full Targeted Selection process with on-boarding process 02/28/10

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
FBO

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

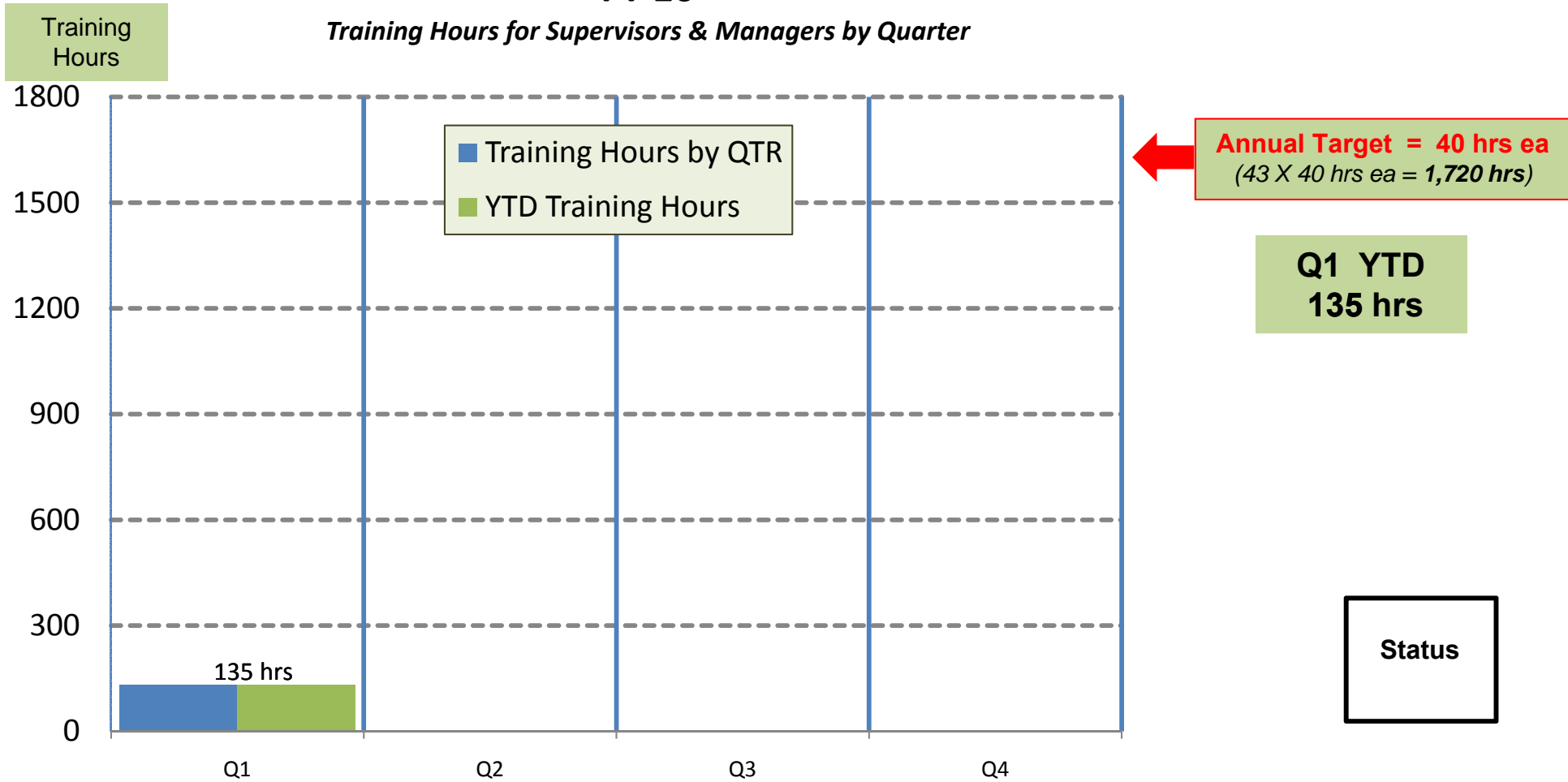
Strategy Objective 5.2 Implement training system to enhance employee performance and provide career growth
 5.2.1 Increase Supervisor/Manager Training to **40 Hours** per Year

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

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

FY 10

Training Hours for Supervisors & Managers by Quarter



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

Lead
FBO

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.

ACTION PLAN

- **Actions Completed**
 - ✓ Leadership Development Matrix developed
 - ✓ Roll-out of Leadership Development Program
 - ✓ Phase 1: Relationships and 7 Habits
 - ✓ Develop Individualized Leadership Development matrices w/ work plans by 6/1/2009

- **Actions Planned**
 1. Continue matrix updates
 2. Leadership Accountability and Decision Making Training

Facilities Management Strategic Planning Session – First Quarter FY 2010

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.

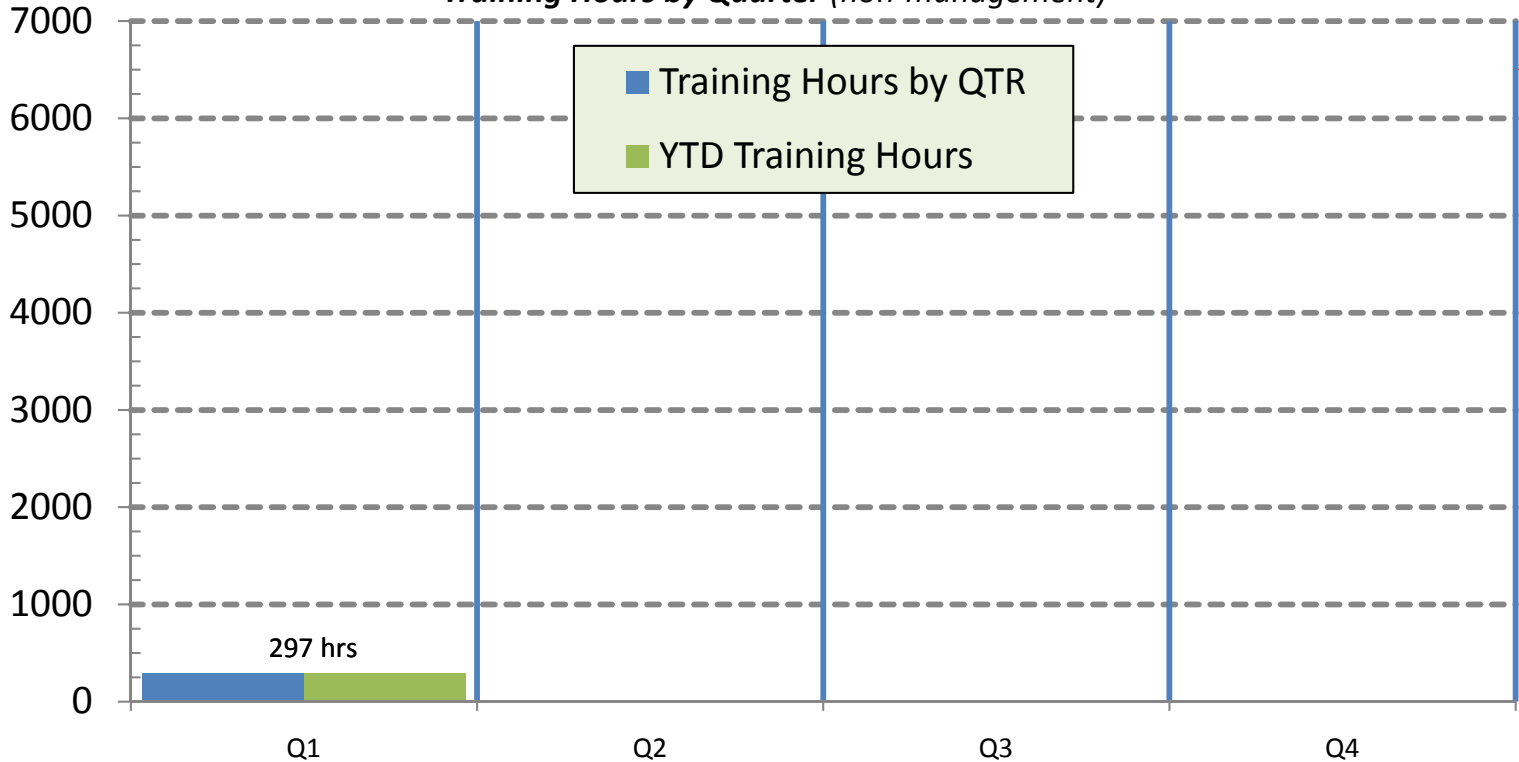
Measure: Average hours of training provided to or obtained by front line employees

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

Training
Hours

FY 10

Training Hours by Quarter (non-management)



Annual Target - 20 hrs ea
(323 employees x 20 hrs ea
= **6,460 hrs total**)

Q1 YTD
297 hrs

Status

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

Lead
FBO

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

ACTION PLAN

- **Actions Complete**
 - ✓ Task force commissioned to provide suggestions on improving training & promotion: 6/30/08
 - ✓ Formulated annual compliance training schedule in conjunction with Environmental Health & Safety Dept.

- **Actions Planned**
 1. Employee focus groups
 2. Develop training matrix proto-type and team development list for M&O positions
 3. Assess current FM employee training tracking system
 4. PC skills training for infrequent users in preparation for Web Time entry
 5. Assess compliance training requirements and expectations

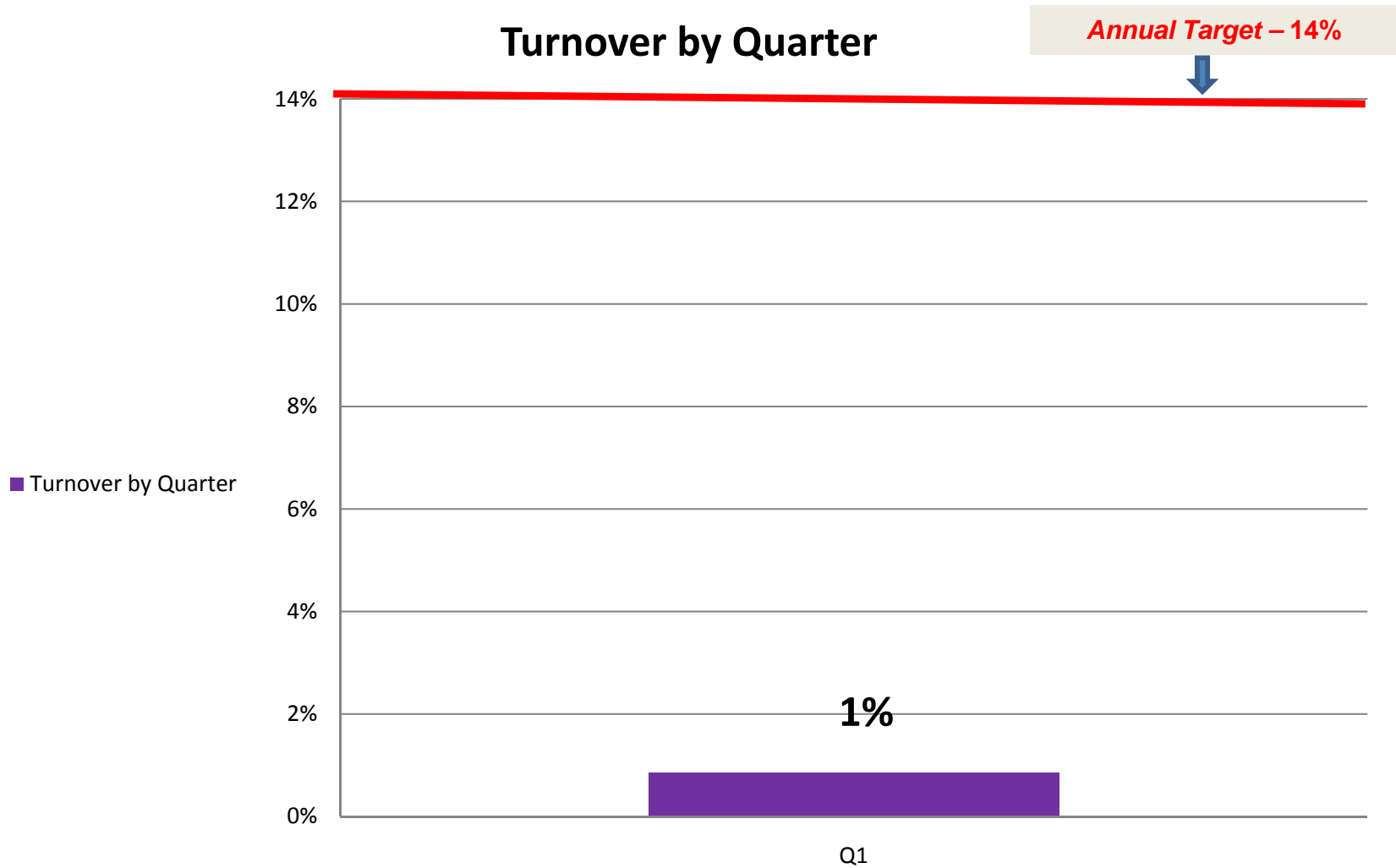
Lead
FBO

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

Lead
FBO

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

ACTION PLAN

- **Actions Complete**
 - ✓ Prioritized and implemented approved Taskforce recommendations
 - ✓ Management Development Program outlined
 - ✓ Introduced Communications Policy

- **Actions Planned**
 1. Revamp employee exit interview process – web-based

Facilities Management Strategic Planning Session –First Quarter FY 2010

**Lead
FBO**

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

**In
Progress**

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

Lead
FBO

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

ACTION PLAN

- **Actions Complete**
 - ✓ Taskforce recommendation implementation;
 - ✓ Met with Urban Institute to discuss services available, timeframe, administration, etc.;
 - ✓ Reviewed current survey; New questions proposed are awaiting approval from AVC-FM;
 - ✓ Survey administration will be done electronically.

- **Actions Planned**
 1. Finalization meeting with UI to be held October 6th;
 2. Anticipated date of survey administration – November through December 2009.



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

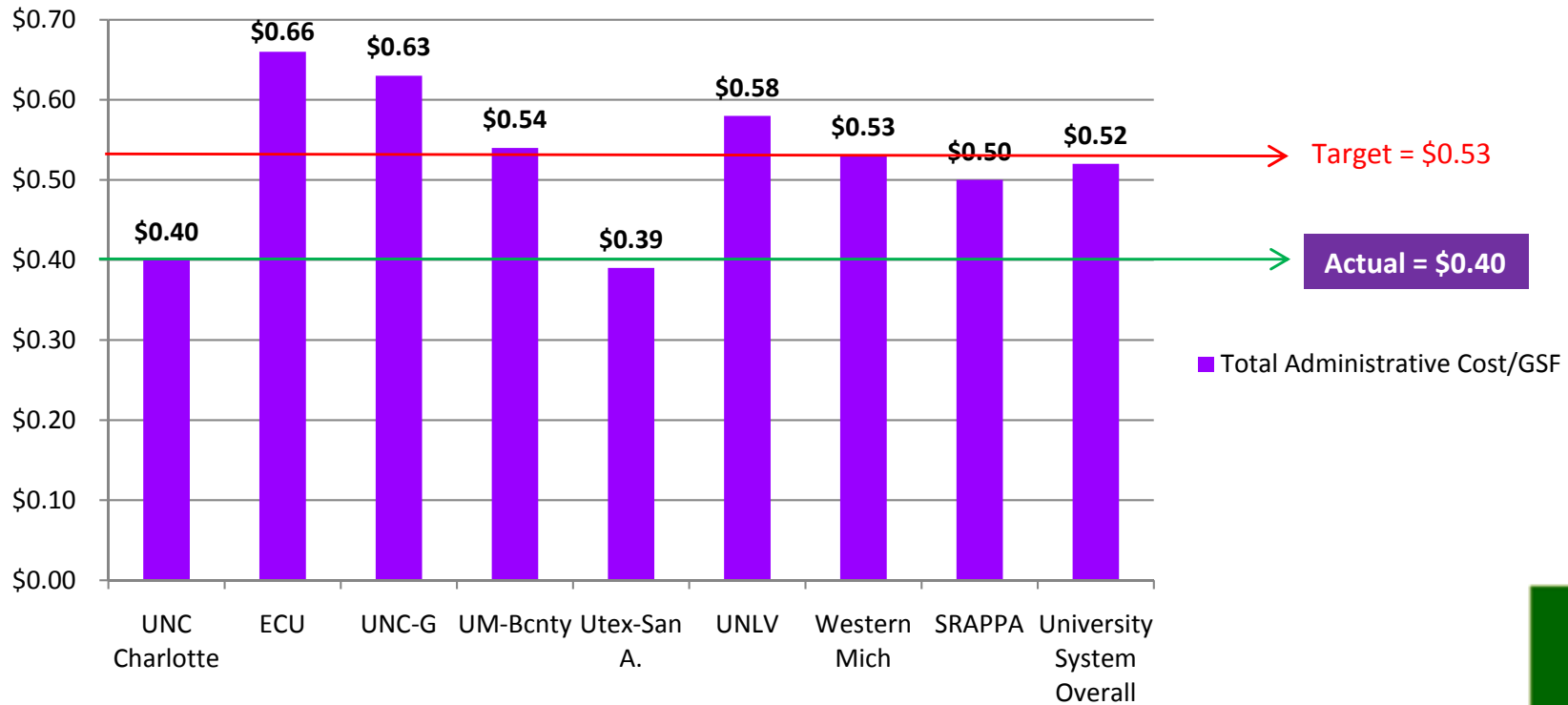
GOAL #6 – Promote Good Stewardship

Strategy Objective **6.1** Promote Fiscal Responsibility
 6.1.1 Lower Administrative Cost/GSF \pm 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

Total Administrative Cost/GSF – FY 08 Comparison



STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.1	Lower Administrative Cost/GSF \pm 5% of the APPA Average for Peer Institutions

Lead
FBO

ACTION PLAN

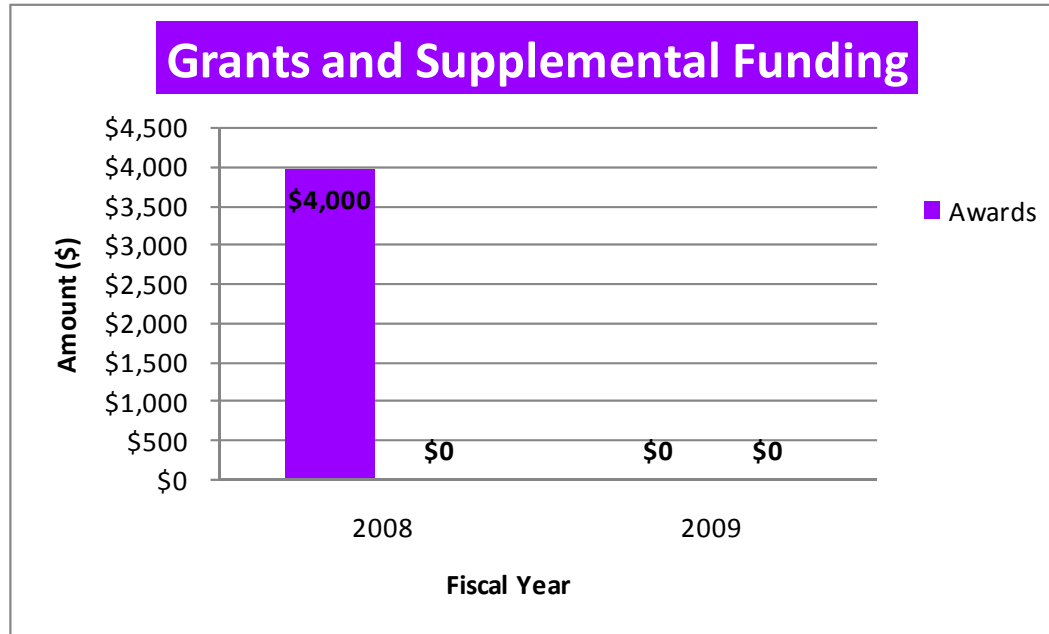
- **Actions Complete**
 - ✓ APPA FPI Survey for FY2009 is underway;
 - ✓ All contributors have been emailed data collection requests. [Contributors include M&O, Planning, Housekeeping, Capital, and FBO]
 - ✓ Requests due date in mid-October.
- **Actions Planned**
 - Requested data is due in mid-October;
 - Submit data for review by AVC-FM in late October/early November;
 - APPA submission deadline = 1st week of December 2009.

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	6.1.2	Increase Grants and Supplemental Funding to the Department by 25%

Lead
FBO

ACTION PLAN

- **Actions Complete**

- ✓ **APPA Grant Application – Take It or Leave It Program**

9/4/09 – Met with Kathy Boutin-Pasterz and Devin Hatley; Obtained information and resource material to develop a grant application to submit to APPA; Follow-up meeting

10/6/09 – follow-up meeting about the Take It or Leave It grant application details. We will also discuss other approaches to APPA grant applications which involve the overall success story of the Office of Recycling and Waste Management. What innovative ideas throughout the years they have implemented, how much they have saved money have they saved the University or tonnage from landfills, what have education efforts yielded on campus and in the community.

- ✓ **APPA Grant Application – Green Demolition**

9/1/09 – Met with Kathy Boutin-Pasterz

Obtain information and resource material to develop a grant application to submit to APPA. After further review, it was noted that Recycling submitted a grant application to APPA in 2007 for the Construction and Demolition Waste Management Program. The Green Demolition Program would have been a duplication of efforts.

- ✓ **Department of Commerce and Economic Opportunity NC**

8/24/09 – Discussed with Kathy Boutin-Pasterz the potential of obtaining funding through the Dept. of Commerce to support to fund a recycling grant program. Emailed the Dept. of Commerce they would like me to call the local office. I would like to meet with David Jones first before calling back.

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%

Lead
FBO

ACTION PLAN

- Actions Complete
 - ✓ **Government Green Fleet Awards**
8/18/08 – Met with David Jones and Larry Lane
After further scrutiny of sponsor guidelines, Larry Lane noted that UNCC Automotive was not an eligible organization, due to not meeting certain criteria.
 - ✓ **Impact Aid Program--American Recovery and Reinvestment Act of 2009--Impact Aid Discretionary Construction Program CFDA 84.401**
8/24/09 – Sent inquiry to funder to see if University was eligible to apply for this grant opportunity. They said we were ineligible.
- Actions Planned
 - Encourage individuals to participate in proposal development;
 - Gain a more committed effort in their helping to find external funding or going after funding opportunities that meets FM’s strategic plan.
 - Provide assistance in developing a strong proposal response to external funding collaboration within FM.

Facilities Management Strategic Planning Session – First Quarter FY 2010

Lead
FBO

GOAL #6 – Promote Good Stewardship

Strategy Objective 6.1 Promote Fiscal Responsibility
6.1.3 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

ACCOUNT DESCRIPTION	2009-10 Budget	% of Total Budget	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 81,000	3%	\$ 7,922	\$ -	\$ 7,922	\$ 73,078	\$ 73,078 F
PERSONAL SERVICE CONTRACTS	\$ 69,500	3%	\$ 24,961	\$ 42,153	\$ 67,113	\$ 2,387	\$ 2,387 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 571,025	22%	\$ 94,215	\$ 260,647	\$ 354,862	\$ 216,163	\$ 216,163 F
OTHER ADMINISTRATIVE EXPENSES	\$ -	0%	\$ 140	\$ 26,754	\$ 26,894	\$ (26,894)	\$ (26,894) F
DOMESTIC TRAVEL/TRAINING	\$ 50,000	2%	\$ 3,440	\$ 600	\$ 4,040	\$ 45,960	\$ 45,960 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 338,500	13%	\$ 70,498	\$ 95,766	\$ 166,264	\$ 172,236	\$ 172,236 F
OTHER PURCHASED SERVICES	\$ 353,900	14%	\$ 88,370	\$ 61,585	\$ 149,955	\$ 203,945	\$ 203,945 F
SUPPLIES	\$ 1,010,572	39%	\$ 183,999	\$ 180,276	\$ 364,275	\$ 646,297	\$ 646,297 F
EQUIPMENT	\$ 37,500	1%	\$ 206	\$ 4,380	\$ 4,586	\$ 32,914	\$ 32,914 F
CAPITAL OUTLAY	\$ 20,000	1%	\$ 1,325	\$ 6,468	\$ 7,793	\$ 12,207	\$ 12,207 F
FIXED CHARGES	\$ 21,000	1%	\$ 2,406	\$ 39	\$ 2,445	\$ 18,555	\$ 18,555 F
RECYCLING	\$ 29,750	1%	\$ 2,149	\$ 10,311	\$ 12,460	\$ 17,290	\$ 17,290 F
FACILITIES MANAGEMENT Main Operating Funds	2,582,747		479,632.09	688,977.09	1,168,609.18	1,414,138.02	\$ 1,414,138

STATUS

GOAL #6 – Promote Good Stewardship

Lead
FBO

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.3	Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.

ACTION PLAN

- **Actions Complete**
 - ✓ Developed updated tools for supervisors to use to track budget and expenditures to date. Tools are located on the s drive under Public/Financial Reports.
 - ✓ Met with NCRC customers to discuss billing and invoicing concerns.
- **Actions Planned**
 - As part of Leadership Development Training Program, create training course - FM Budgeting 101 - which will focus on budget management skills. Anticipated development completion date has been pushed back to July 2010. Road trip to sister university scheduled for October 2009 to collaborate with them on their FM financial training course and plan.
 - Publish articles on budgeting and/or other financial topics within FM Leader. No schedule for these articles has been developed.
 - Develop scope of analysis, identify process gaps , prepare input and output gap analysis and create system map of current FM procurement processes. Mapping will include the DPR, Purchase Order, and Petty Cash processes. [Start October 1, 2009; anticipated completion: August 30, 2010.]
 - Review of NCRC invoicing currently underway in response to concerns from customers.

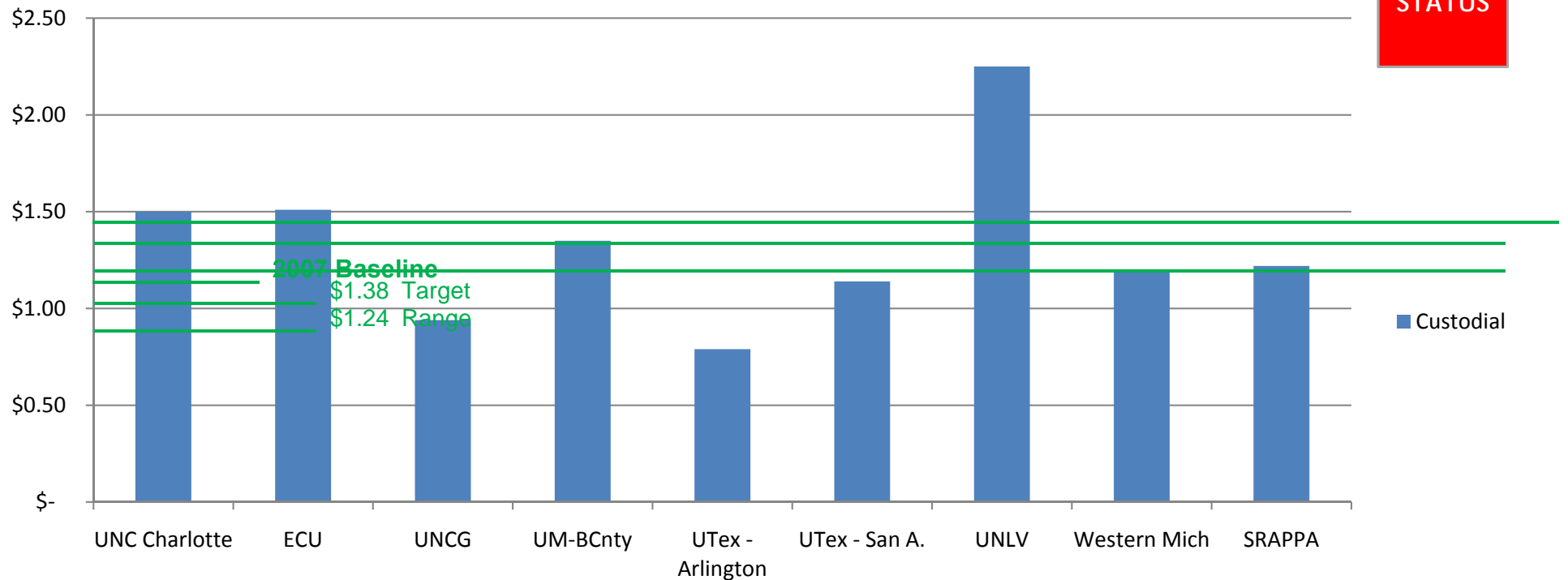
GOAL #6 – Promote Good Stewardship

Strategy Objective 6.1 Promote Fiscal Responsibility
 6.1.4 Achieve Custodial Costs/GSF 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.)

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

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/GSF Comparison



GOAL #6 – Promote Good Stewardship

Lead
Housekeeping

Strategy Objective

6.1 Promote Fiscal Responsibility

6.1.4 Achieve Custodial Costs/GSF \pm 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

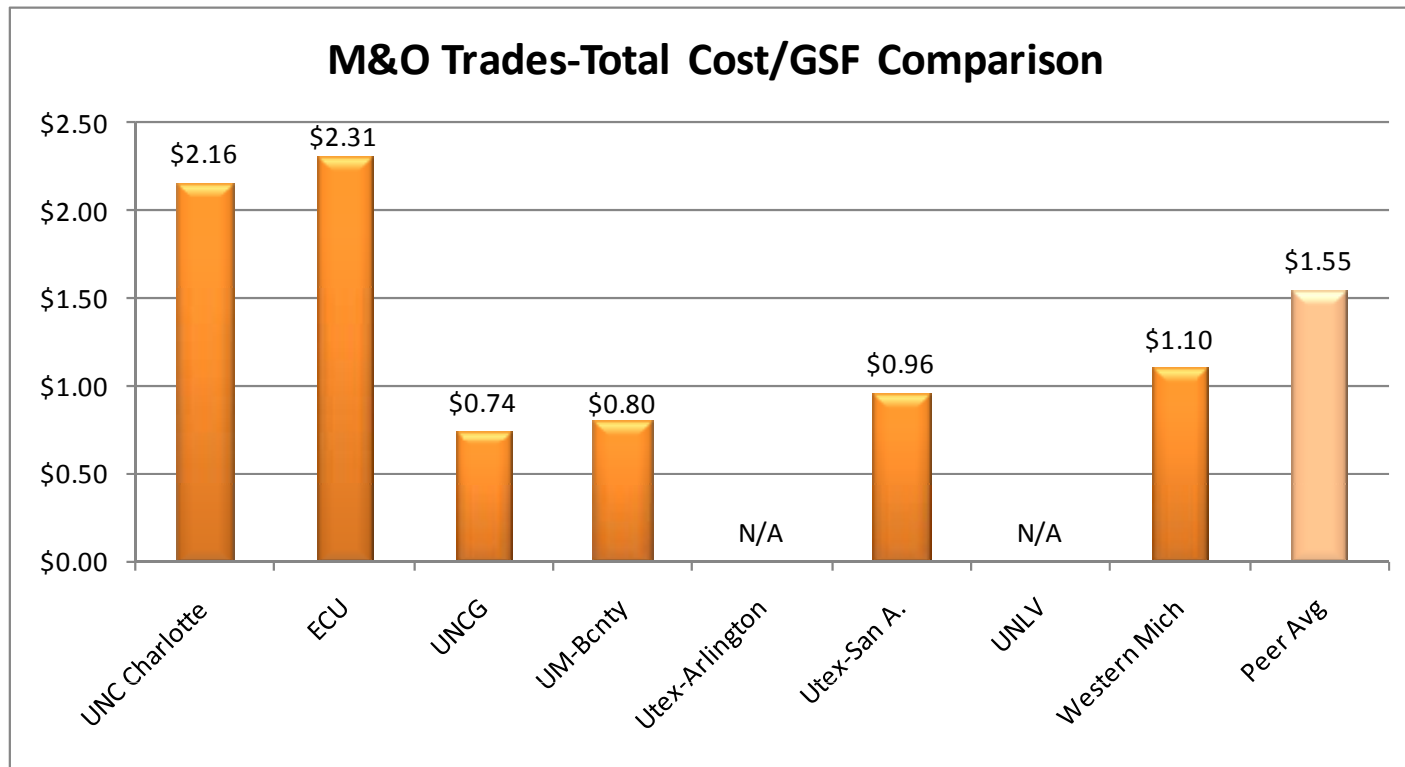
- Actions Complete
 - None
- Actions Planned
 - In depth study of UNCC FM custodial costs/GSF
 - Further investigate why custodial cost per square foot is higher and cost per student lower.
 - Obtain custodial cost/student for our National Peer Institutions
 - Find out if our peers included non-academic spaces in their cost per sq. ft.
 - Begin study to determine possibility of reduction of staff due to budget constraints

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



GOAL #6 – Promote Good Stewardship

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.5	Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average

Lead
M&O

ACTION PLAN

- **Actions Complete**
 - 1 – Pulled data from APPA RPI Report 2007/08

- **Actions Planned**
 - 1 – Review how data was compiled and submitted.
 - 2 – Meet with FBO and Ray to concur on method for compilation.

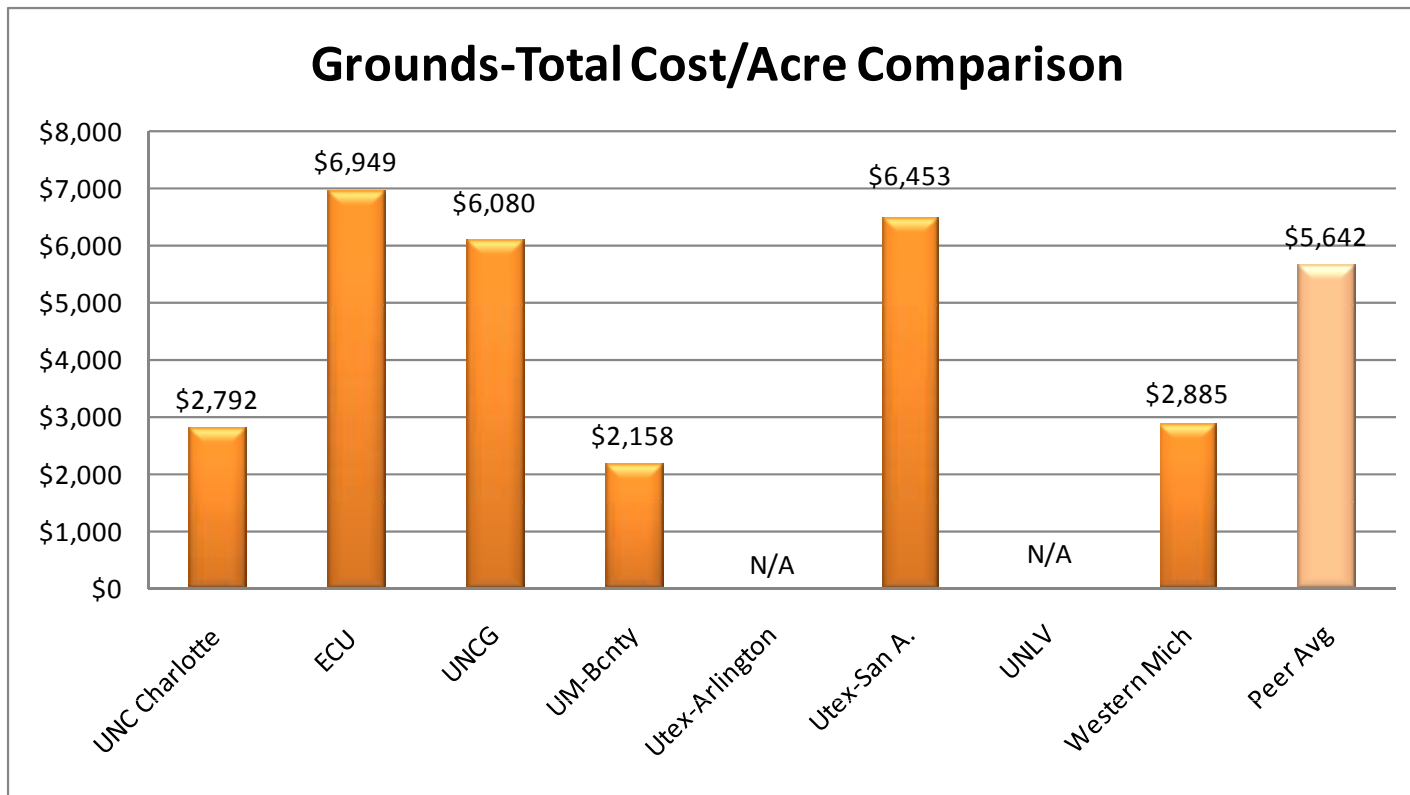
GOAL #6 – Promote Good Stewardship

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

GOAL #6 – Promote Good Stewardship

Strategy	6.1	Promote Fiscal Responsibility
Objective	6.1.6	Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average

Lead
M&O

ACTION PLAN

- Actions Complete
 - 1 – Reviewed APPA 2007-2008 Facilities Performance (FPI) Indicators Report.
 - 2 – Requested additional staffing to raise level of maintenance. No staff provided due to budget constraints.
 - 3 – Noted level of maintenance rated below peers as well as expenses.
- Actions Planned
 - 1 – Review the manner in which data was collected and provided for the FPI Report.

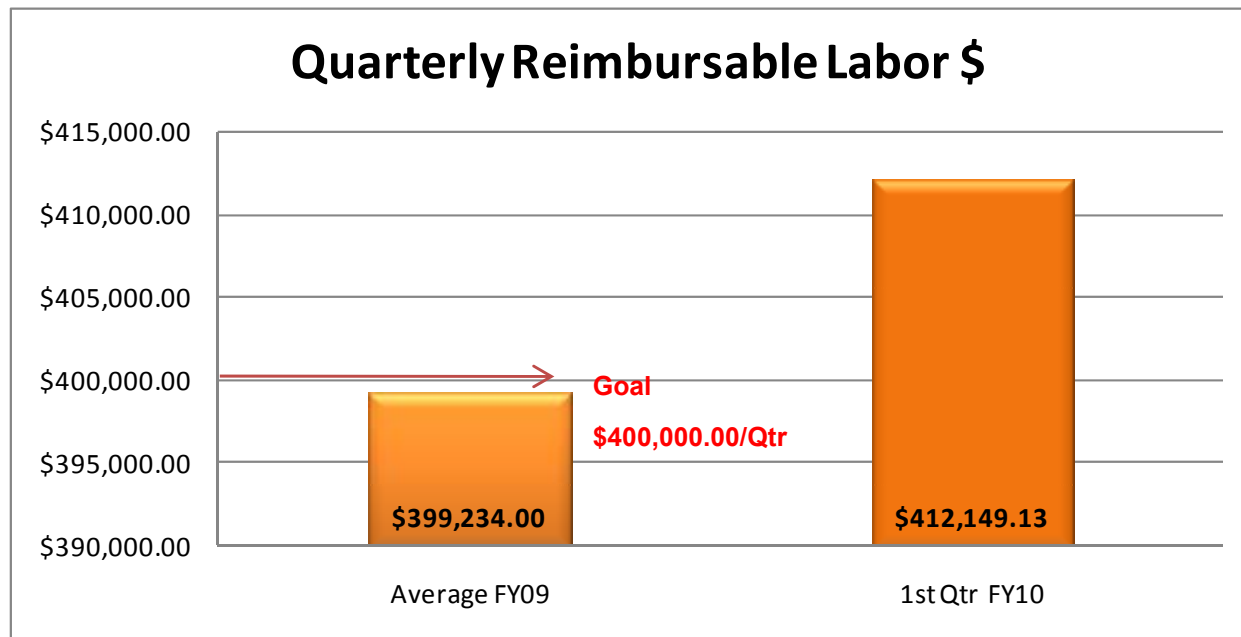
GOAL #6 – Promote Good Stewardship

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: Recover \$1.6 million for all of FY10.

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship

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

Lead
M&O

ACTION PLAN

- Actions Complete
 - 1 – Utilized in-house staffing from other areas of M&O before going to outside resources
 - 2 – Froze vacant Labor Services positions
 - 3 – Did not use Labor Services positions on overtime for general funded work
- Actions Planned
 - 1 – Continue to look for opportunities to expand reimbursable work
 - 2 – Continue to look within our M&O Labor pool before going outside for additional staff support



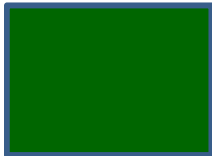
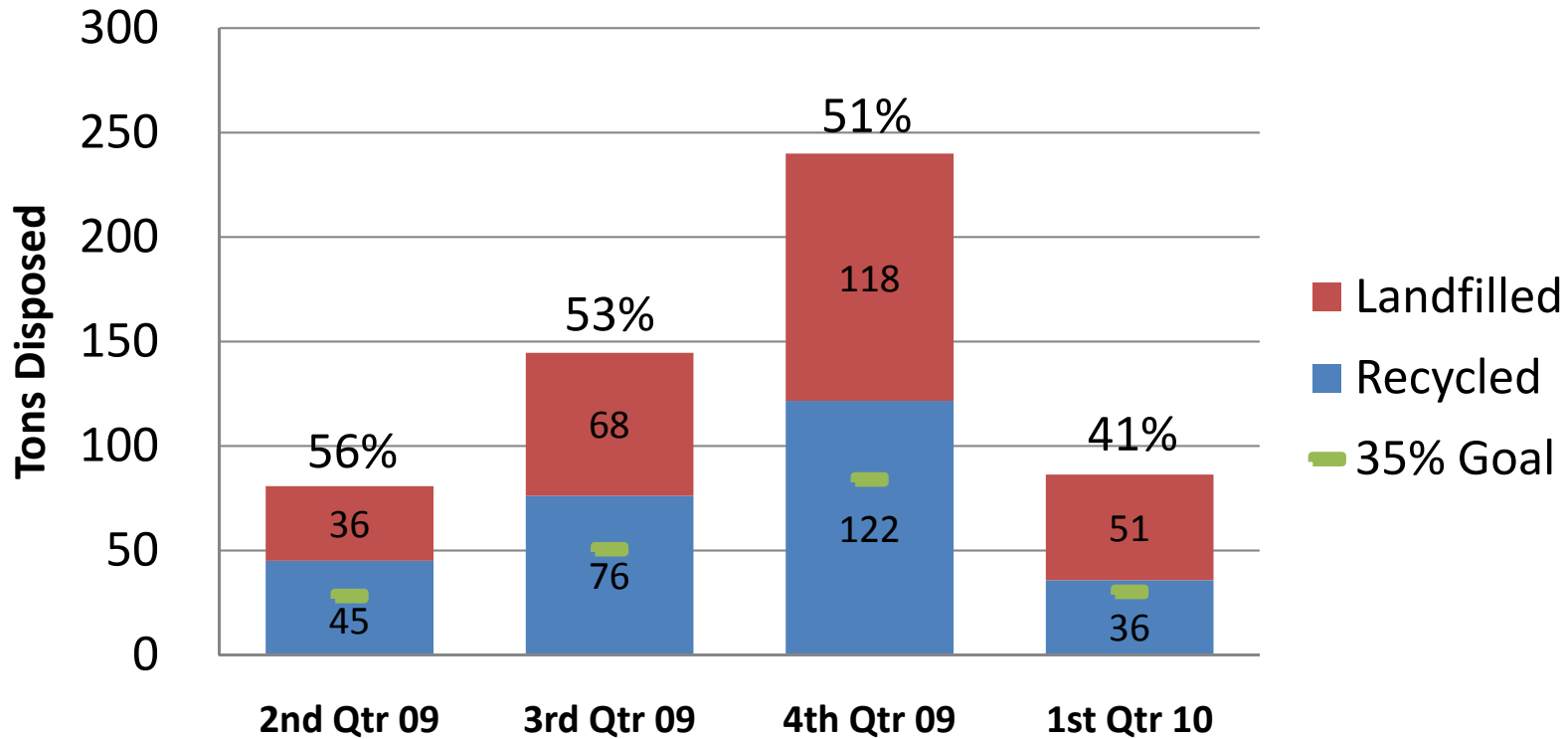
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 Increase Recycling of Construction and Demolition Materials on Renovations to 35% 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

**Informal Projects – Disposal Methods
1st Quarter FY 2010**



GOAL #6 – Promote Good Stewardship



Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 Increase Recycling of Construction and Demolition Materials on Informal Projects and Renovations to 35% of Total C&D Waste

ACTION PLAN

- Actions Complete
 - Diversion rate for informal projects is 41% for first quarter FY10 – savings of:
 - \$1,576 in tipping fees
 - \$1,080 in pull charges.
- Actions Planned
 - Continue working with Residence Life, FM Shops, Surplus, and other groups to help with reuse and recycling efforts. Currently working with Safety and FM on USTs, transformers and exit signs.
 - Continue looking for alternatives to disposal for air filters and other materials that are currently non-recyclable.



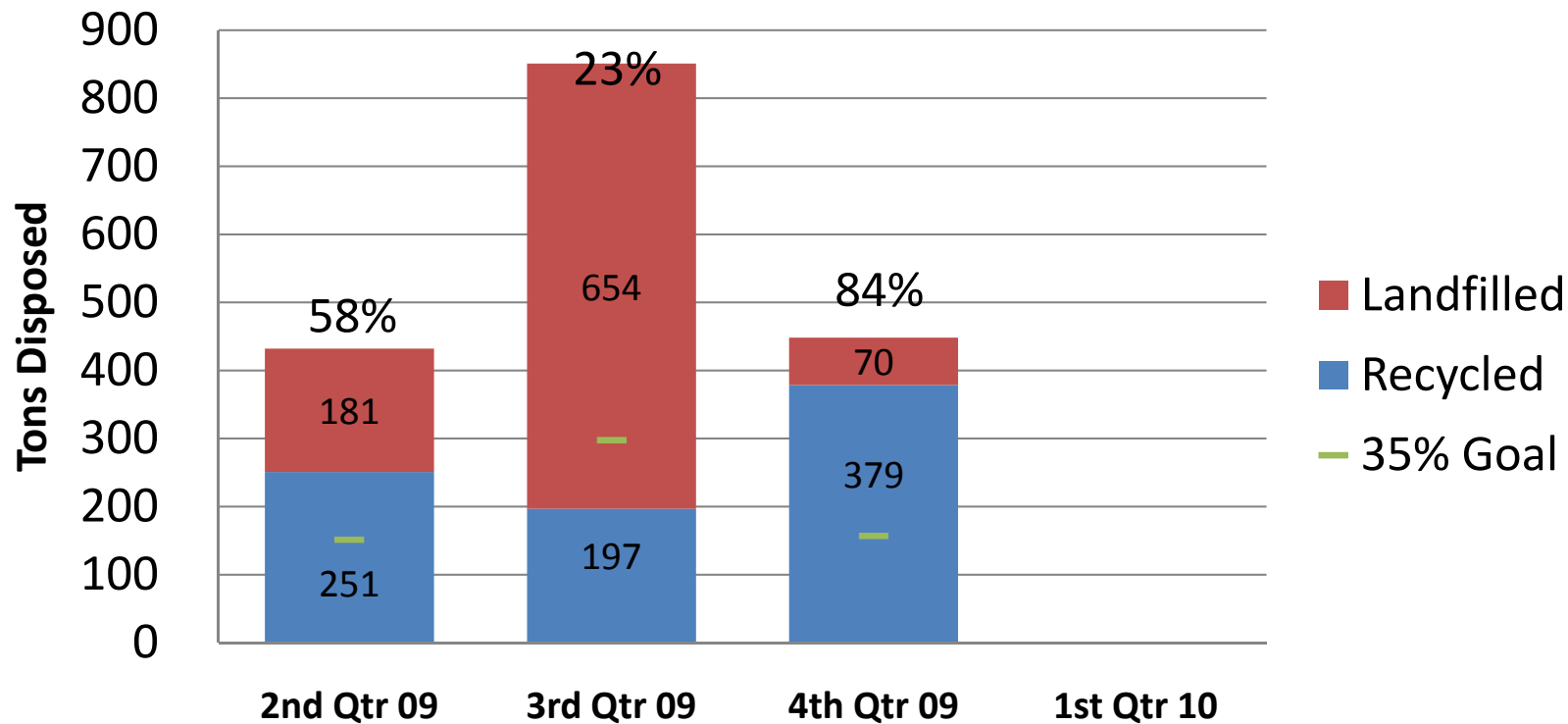
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.2 Increase Recycling of Construction and Demolition Materials on Capital Projects to 35% 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

**Formal Projects – Disposal Methods
1st Quarter 2010**



GOAL #6 – Promote Good Stewardship

Strategy	6.2	Develop a Sustainable Campus
Objective	6.2.2	Increase Recycling of Construction and Demolition Materials on Capital/Formal Projects to 35% of Total C&D Waste



ACTION PLAN

- Actions Complete
 - Attended preconstruction meetings for Phase IX, and continue reviewing plans for upcoming projects.
 - Brochures created for “green” aspects of Student Union and Bioinformatics (gained a LEED point for Bioinformatics for this).
 - Added section to website recognizing contractors that do well on recycling
- Actions Planned
 - Continue current practices.
 - Work on campus standard for interior recycling bins.

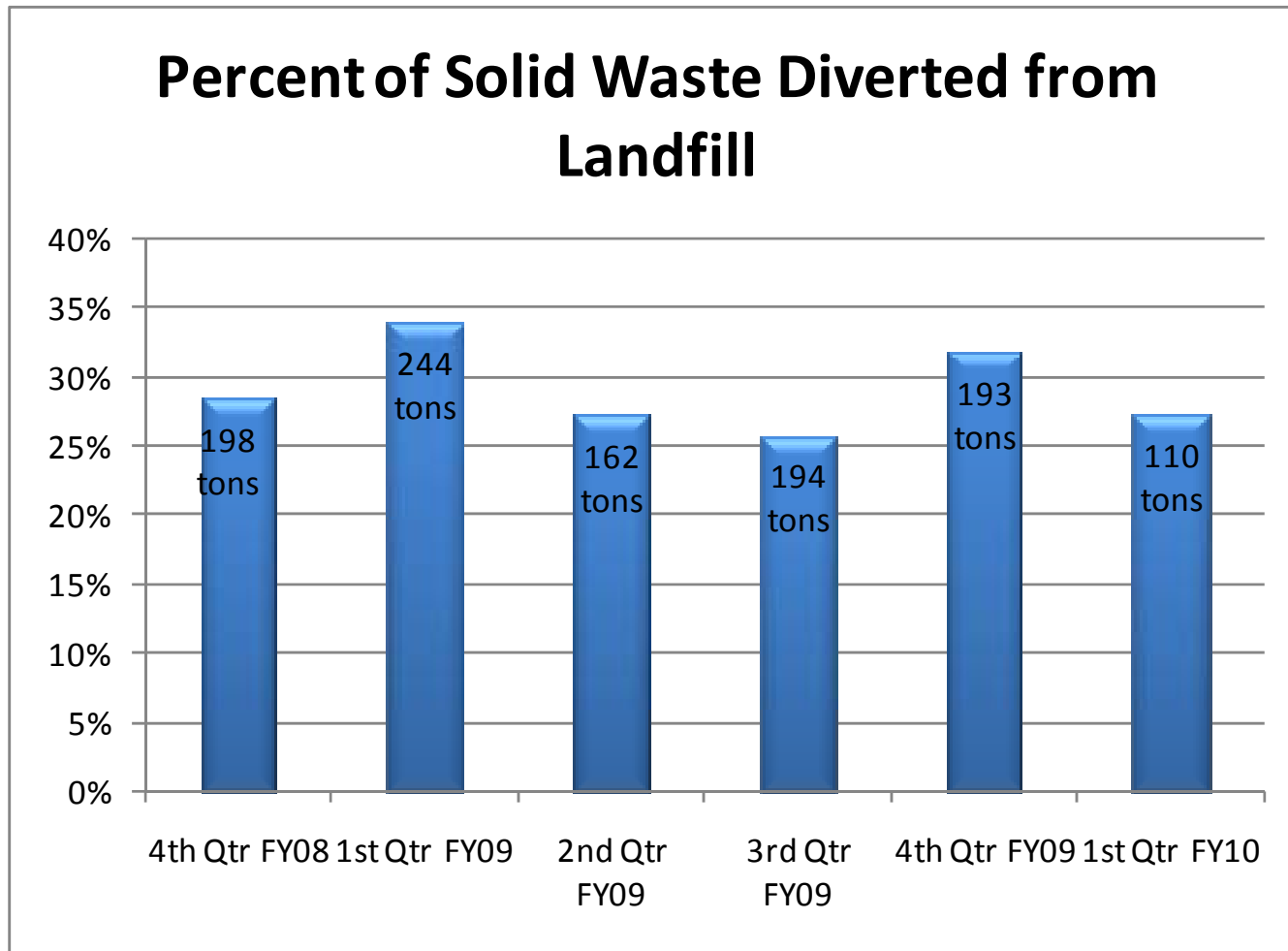


GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.3 Increase Percent of Solid Waste Recycled on Campus by 5%

Measure: Pounds of solid waste recycled annually divided by total solid waste

Balanced Scorecard Category: Financial Perspective



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 2007)



ACTION PLAN

Actions Complete

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Paper recycling revisions – continue to meet challenges of paper market crash
 - added Bioinformatics, Memorial Hall and Student Union to recycling collection route
 - collecting Dannon and Stoneyfield yogurt containers and granola /energy bar wrappers
- Continue outreach efforts to University community (Week of Welcome, coordinated over 250 student volunteers, provided environmental tours, promoted Adopt-A-Spot program (6 groups, 3 pending), advise EARTH Club and CGI)
- Continue to chair Carolina Recycling Coalition's Collegiate Recycling Council.
- Presented program and coordinated campus Clean up with Dr. McGavran's 100 English students
- MOVE IN – collected cardboard and Styrofoam from incoming residential students
- Presented at all orientations for students, staff and faculty

Actions Planned

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Continue to research markets and collection options for more efficient recycling with reduced staff
- Campus Sustainability Week
 - CGI Forum – Tuesday Oct 20th 6pm
 - Campus Clean UP 10am - 2pm Thursday Oct 22nd
 - partnering with EARTH CLUB and SGA
 - Trashed the Movie 6pm Thursday Oct 22nd
 - Day of Action – Saturday Oct 24th
- Continue educational outreach and promotion (Sustainable Campus tour, Adopt-A-Spot program, advising EARTH Club and CGI)
- Coordinate America Recycles Day event
- Design week long HEALTHY CAMPUS programs with EARTH Club and other student organizations
- Will present at all orientations for students, staff and faculty

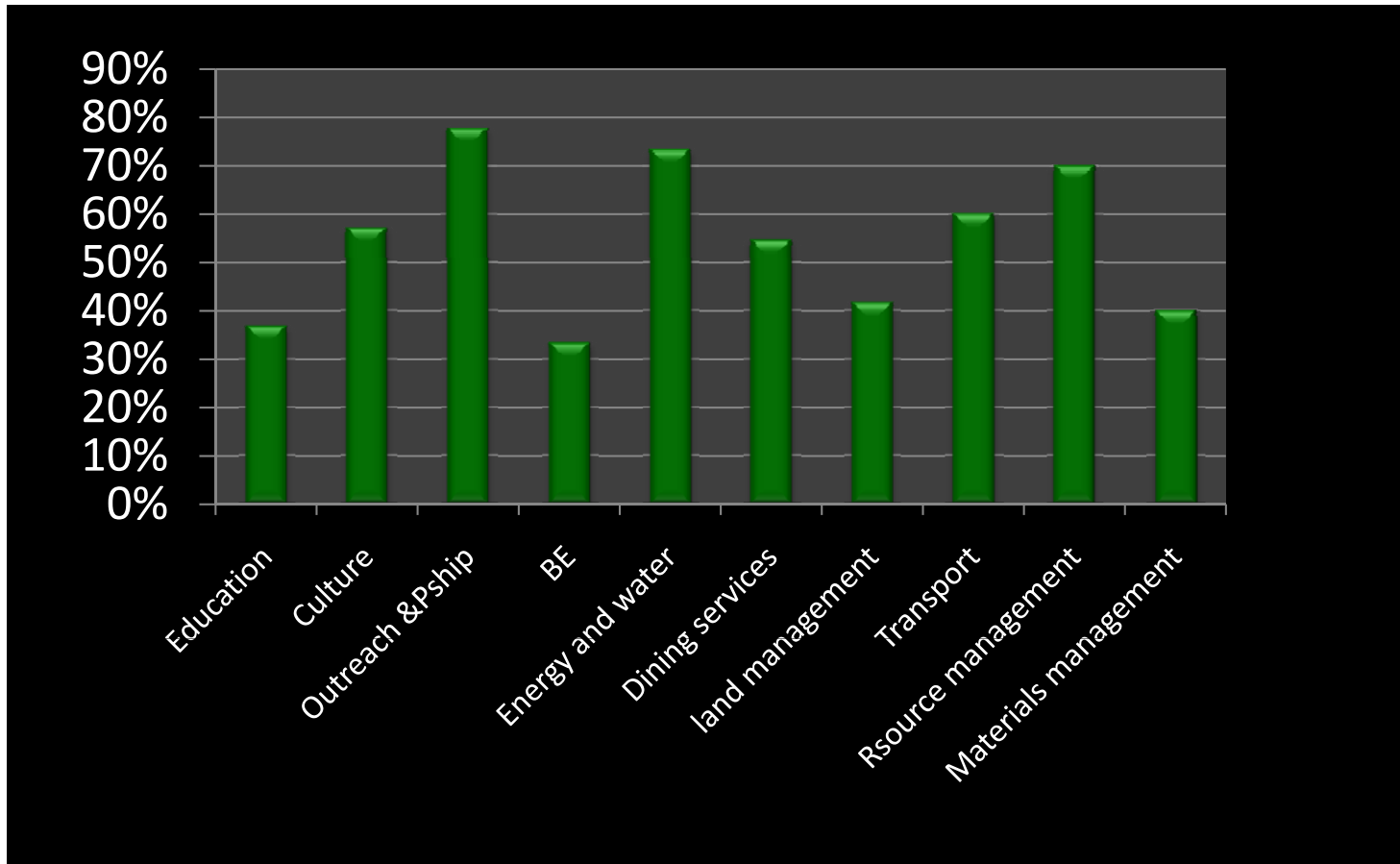
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of Sustainability Assessment and Plan recommendations

Measure: Percentage of sustainability practices rated green or yellow based on the sustainability assessment and plan

Balanced Scorecard Category: Innovation and Learning



Status

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability assessment/plan recommendations

Lead
Planning

ACTION PLAN

Actions Completed

- Freshman seminar presentations
- Campus sustainability day planning
- Chancellor committed to signing ACUPCC
- Green building resource development [Harvard Green Building Resource](#)
- Solar
 - CGI Student project
 - solar projects feasibility investigations
- NPDES Phase II permit
 - Research into the permit requirements
 - Meetings UNCC departments (EH&S, Grounds, Planning, Capital Projects, Faculty, Design Services) to provide information to departments on what is required for the NPDES II permit along with discussions on commitments of those departments.
 - Review UNC Charlotte stormwater mapping database
 - Initial discussion with Department of Water Quality
 - Preliminary desk audit completed
 - Faculty research discussions
- USGBC 10:10 project

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability assessment/plan recommendations

Lead
Planning

ACTION PLAN

- **Actions Planned**

- Education/Research:
 - Present to freshman classes
 - Obtain/research funding for sustainability literacy assessment in conjunction with UI
 - Faculty training funding
- Culture and Community
 - Campus Sustainability Day
 - Sustainability Committee meeting
- Outreach and partnership
 - USGBC 10:10 Partnership
 - Newsletter
 - Website
- Built Environment
 - Green building resource development

- **Energy and water management**

- ACUPCC awareness session

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of Sustainability assessment/plan recommendations

Lead
Planning

ACTION PLAN

Actions Planned

- Dining Services
- Land management
 - DWQ Discussions – Discuss with Department of Water Quality UNC Charlotte’s permit and DWQ expectations.
 - UNCC full audit – complete audit of stormwater programs on campus
 - Financial analysis
 - Presentation to management
 - Begin permit application
- Transport – n/a
- Resource Management – n/a
- Materials Management
 - Discuss sustainable purchasing policies

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 20% by FY2010

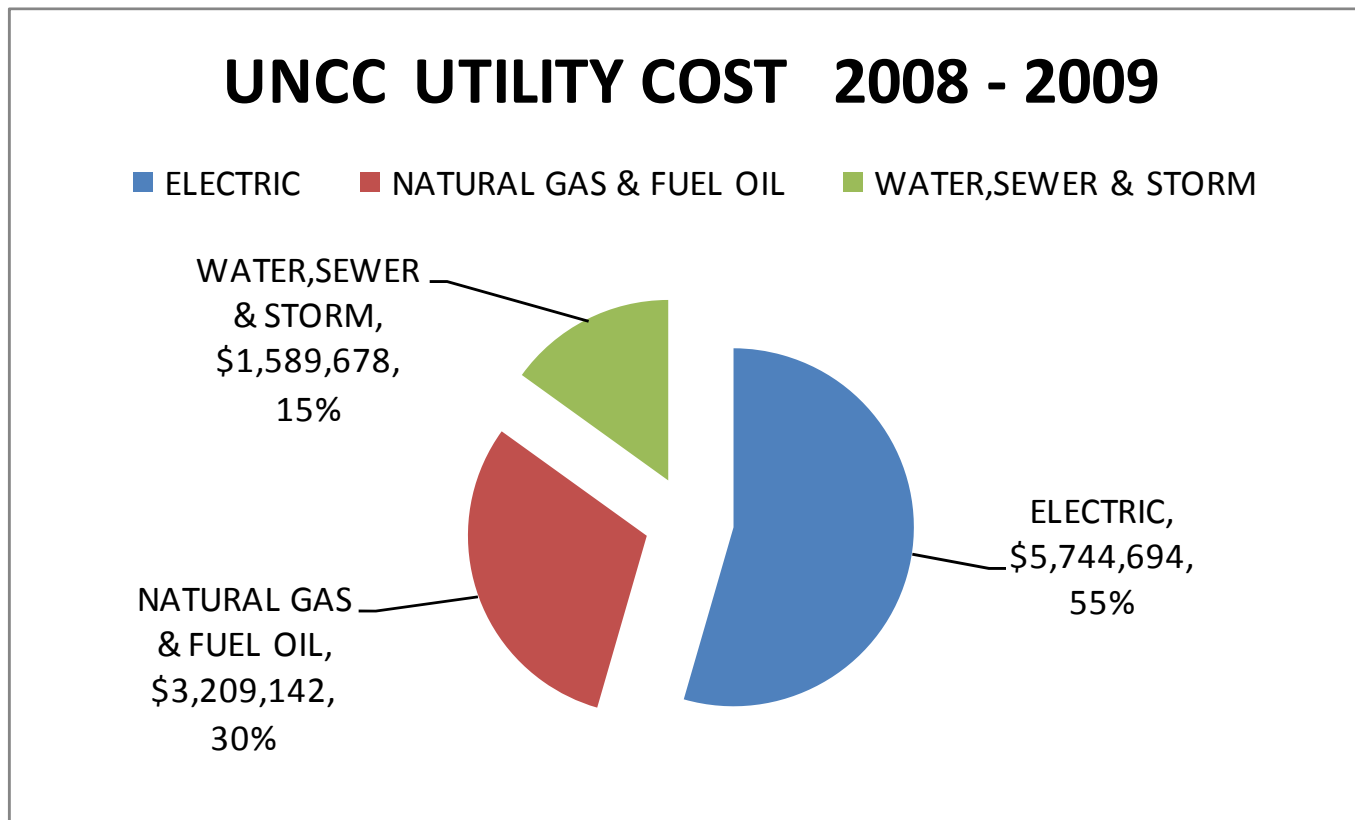
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Meeting State Mandated 20% Goal = \$2 Million
Annual Reduction in Avoided Costs

University Utility Expenditures Exceeded \$10 Million in FY



Lead
Capital

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 20% by FY2010

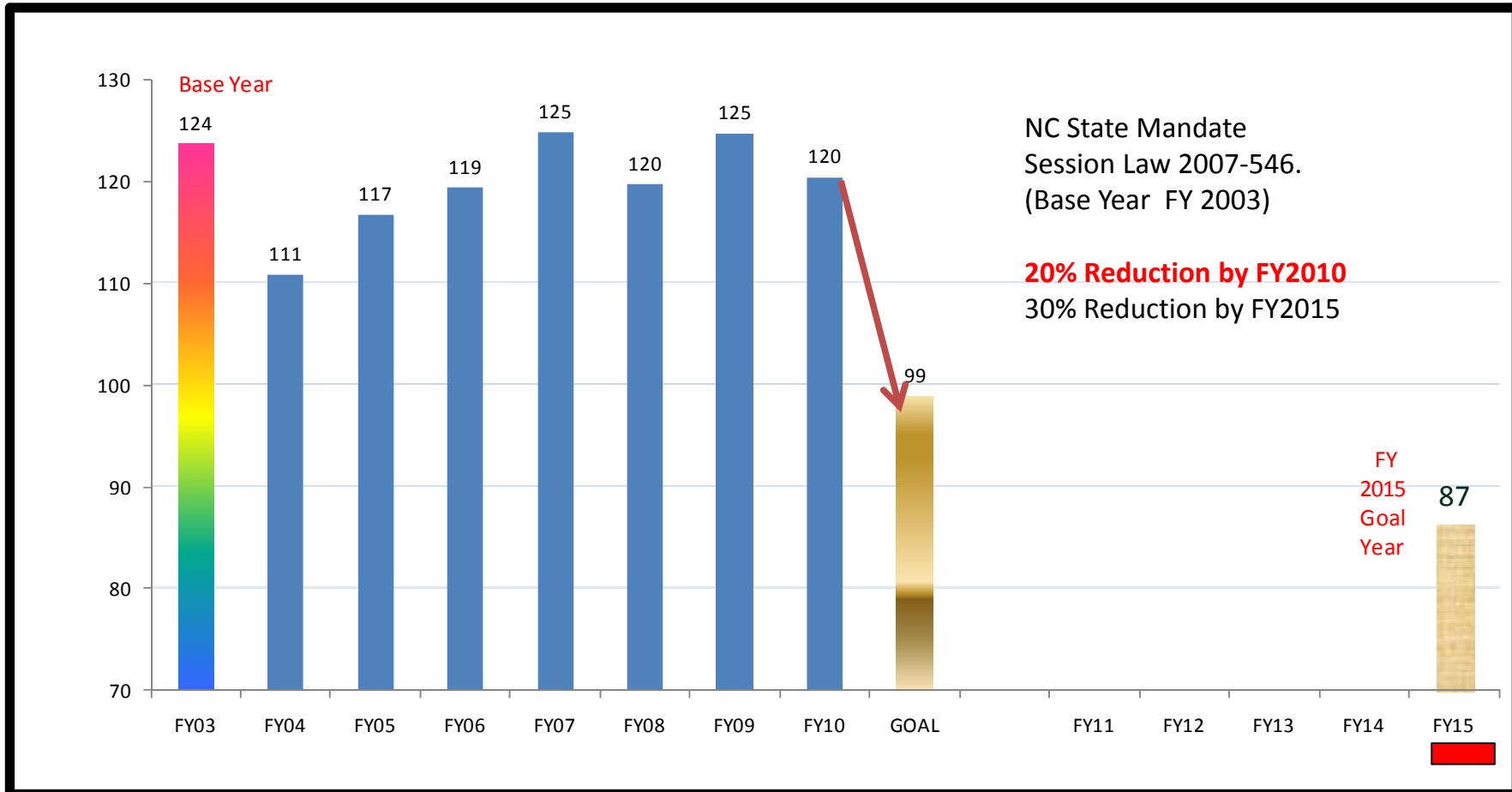
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE

Kbtu/GSF



GOAL #6 – Promote Good Stewardship

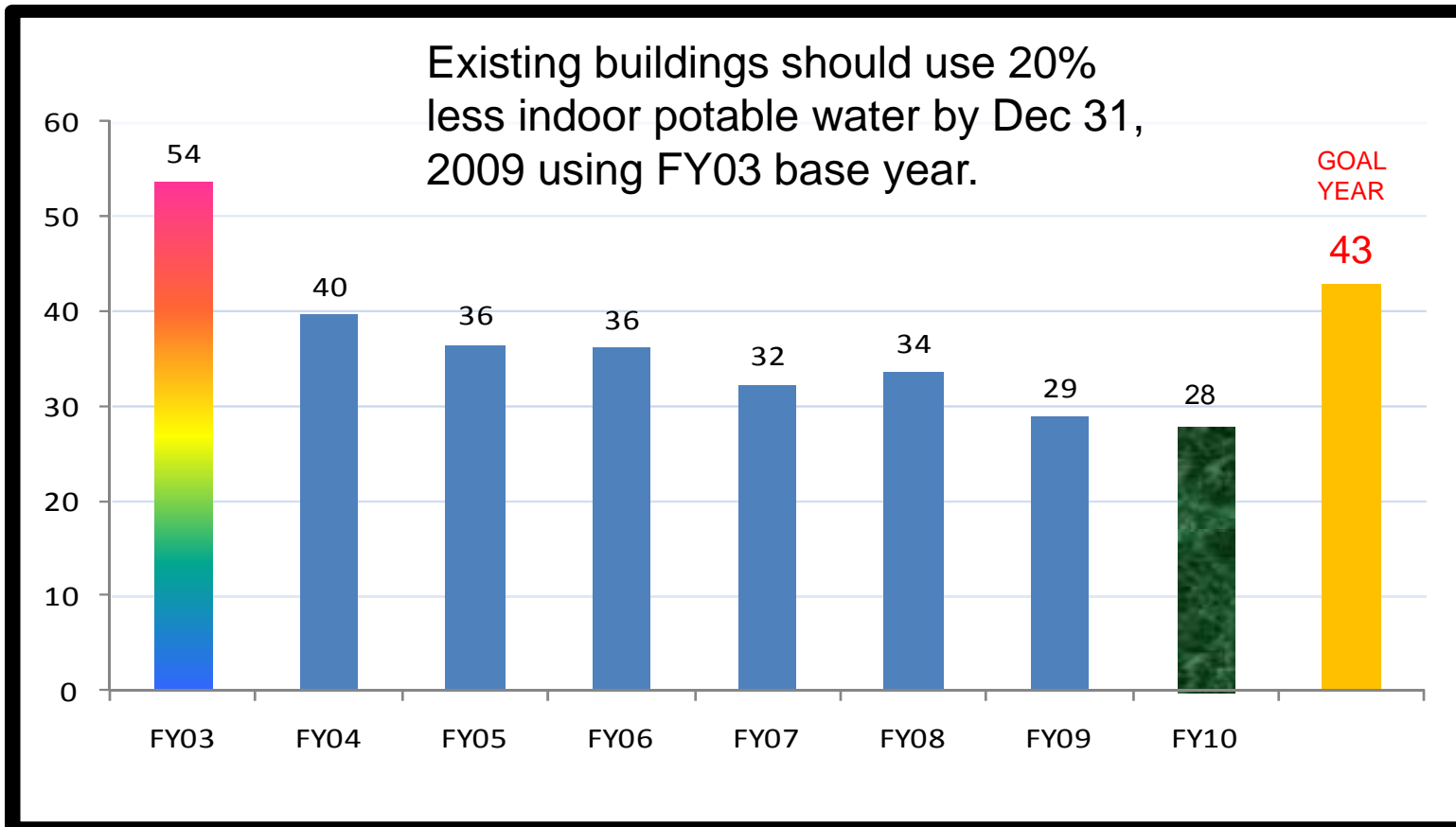
Strategy **6.3** Conserve Natural Resources
Objective **6.3.2** Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve



GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - ESPC

STATUS

Energy Savings Performance Contract

- **Actions Complete**
 - RFP advertised and ESCO's are performing building surveys.
 - 3rd Party consultant proposals (2) received.

- **Actions Planned**
 - ESCO Selection (December,2009 – January 2010)
 - Investment Grade Audit (IGA) (1st Quarter, 2010)
 - Energy Services Agreement (ESA) (2nd Quarter 2010)
 - ESCO Completes Installation of Energy Conservation Measures (2010 - 2011)

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - ESPC

Energy Savings Performance Contract

STATUS

ESCOs to individually propose innovative and creative solutions to current energy and operational problems. In order to make the evaluation process more objective, and to ease comparison of the submitted proposals, the ESCOs, shall consider, at a minimum the following list of ECMs:

- Buildings: Colvard, Cameron, Friday, Fretwell, Storrs, Reese
 - *Convert standard T12 / T8 light fixtures to high performance T8 fixtures and controls including occupancy sensors.*
 - *Upgrade HVAC controls to allow implementation of night and weekend shutdowns/setback.*
 - *Installation new DDC controls to replace existing pneumatic controls and tie into main campus BAS*
 - *Consider using variable speed drives on HVAC fans and pumps.*
 - *Consider upgrading or replacing lab exhaust systems to more efficiency units.*
 - *Include analysis of gas fired water boiler in lieu of steam to hot water converter.*
 - *Upgrade chiller, cooling towers, heating plants, and motors where low efficiencies exist.*
- Main Steam Plant
 - *Full Conservation Analysis including efficiency improvements, DDC controls*
 - *Stack economizer(s), blow down heat recovery, combustion controls, and condensate recovery.*
- Regional Utility Plant (RUP 2)
 - *Perform analysis for Thermal Energy Storage (ice or chilled water) to reduce on-peak demand .*
 - *Convert from primary-secondary-tertiary chilled water to variable primary chilled water.*

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 20% by FY2010

Lead
Capital

ACTION PLAN -ENERGY

STATUS

- **Actions Complete**
 - Performance contract Project Manager assigned.
 - Building audits and retro-commissioning projects reviewed for required actions.
 - In process of identifying energy reduction opportunities.
 - Advertised and reviewing Energy Manager applicants.
- **Actions Planned**
 - **Hire New Energy Manager**
 - **Meet the 20% energy reduction goal for FY 2010 with operation changes.**
 - Identify all air handlers that can be turned off at nights & weekends.
 - Ensure all air handlers economizers operate correctly to reduce load on chillers.
 - Optimize the operation of the RUP's and Steam Plants to reduce energy use.
 - Identify additional campus energy/utility conservation opportunities
 - Update Design Manual to reflect energy Best Practices.

NOTE: Achieving above planned actions will not be possible without the energy manager and priority involvement by all FM departments.

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - WATER

STATUS

- **Actions Complete**

- Reclaim Water Study for Charlotte Research Institute and New Football Stadium (75 to 100 Million Gallons per Year) in progress. Southwest Engineering water treatment gratis analysis in progress.
- Purchasing through State Contract of low flow shower heads and aerators in progress.
- Attended CMU Smart Irrigation Seminar for utilizing Smart Irrigation Controllers.
- Grounds investigated feasibility of utilizing a rainwater capture/storage system on existing buildings. Awaiting approval and funding to implement. Possible conflict with reclaim water for funding.

- **Actions Planned**

- Continue education and outreach for need for water conservation.
- Work with Zone M&O on installation of aerators and low flow shower heads on all existing faucets. Dec. 31, 2009 deadline to be met.
- Continue investigation for utilizing CMU reclaim water by firming up demand on irrigation at CRI.
- Incorporate “Best Practices” on all future Capital Projects, Renovations and modernizations.

Lead
M&O

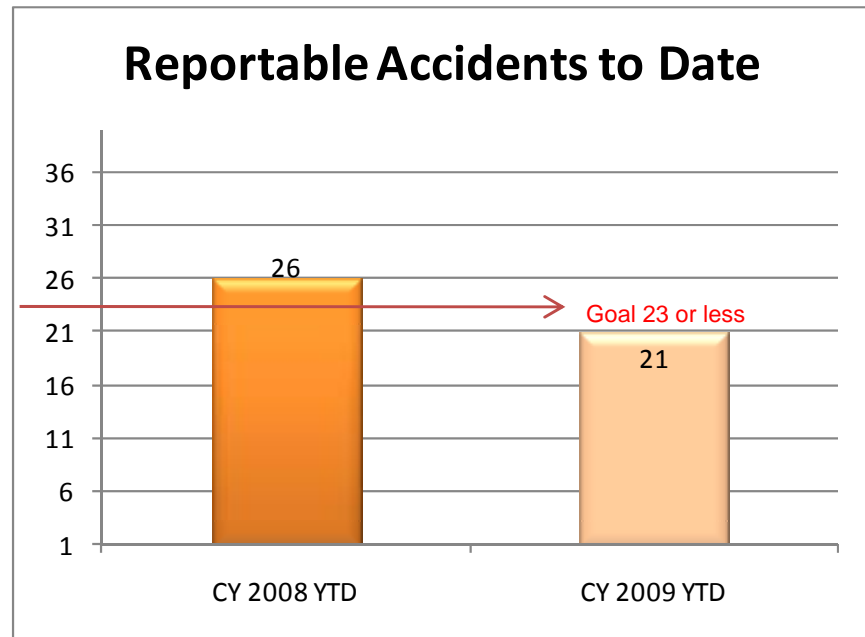
GOAL #6 – Promote Good Stewardship

Strategy 6.4 Improve Employee Safety
Objective 6.4.1 Reduce Accidents by 10 Percent Annually

Measure: Number of reportable accidents (Measured by Calendar Year)

Goal: Less than 23 per year.

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



STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.4	Improve Employee Safety
Objective	6.4.1	Reduce Accidents by 15 Percent Annually

Lead
M&O

ACTION PLAN

- Actions Complete
 - 1 - Continued to emphasize safety through safety meetings, safety training and safety audits.
 - 2 – Procured FR uniforms for all employees requiring them.
- Actions Planned
 - 1 - Zone supervisors to continue safety training and audits to improve overall OSHA compliance.

Facilities Management Strategic Planning Session –

Lead
Capital

GOAL #6 – Promote Good Stewardship

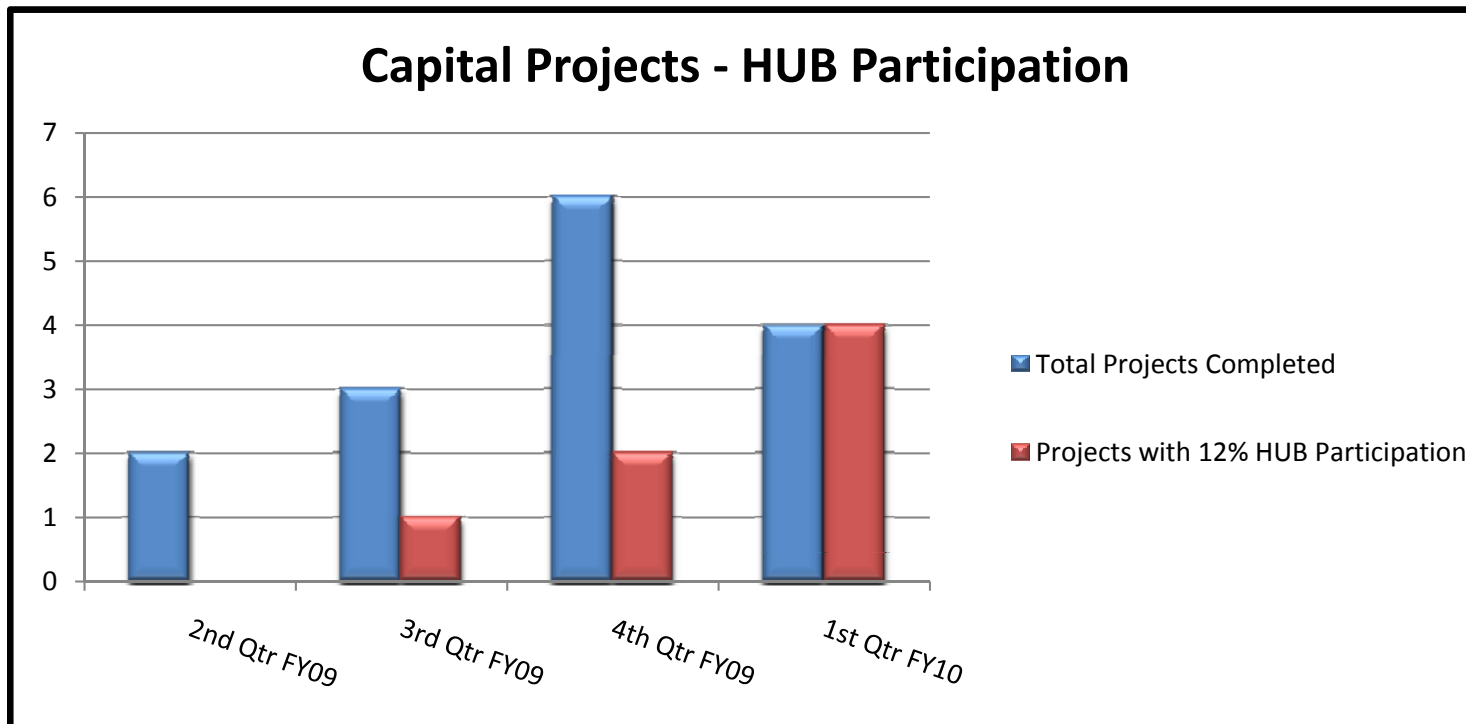
Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.1 80% of Capital Projects achieve 12% HUB Participation

Measure: Percentage of Individual Capital Projects achieving 12% HUB Participation

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Projects Completed	Projects with 12% HUB Participation	80% HUB GOAL
2nd Qtr FY09	2	0	0%
3rd Qtr FY09	3	1	33%
4th Qtr FY09	6	2	33%
1st Qtr FY10	4	4	100%

Bioinformatics - 20.26%
 Student Union - 20.78%
 Hawthorn Fire Sprinklers -12.22%
 Pine, Maple, Elm Sprinklers - 49.25%



STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.5	Improve Historically Underutilized Business (HUB) Participation
Objective	6.5.1	80% of Capital Projects achieve 12% HUB Participation

Lead
Capital

ACTION PLAN

▪ **Actions Complete**

- Project Information/Vendor Outreach sessions for Center City Classroom (Phase 2 Packages) and Residence Hall Phase IX (Early Site Package)
- “Networking Your Business” workshop
- Worked with CMs to identify Reduced Barrier Packages to increase minority participation
- Worked with CMs and HUB Coordinators to identify qualified HUB firms to participate on University projects

▪ **Actions Planned**

- Conduct “Contractor Pre-qualification Form” workshop
- Conduct “Speed Networking “ event
- Continue . . .
 - Encourage contractors to obtain higher participation levels
 - Community outreach efforts
 - Monitor Pay Applications/Good Faith Efforts
 - Keep community apprised of opportunities/events
 - Efforts to develop HUB firms for public sector projects

Facilities Management Strategic Planning Session –

Lead
Capital

GOAL #6 – Promote Good Stewardship

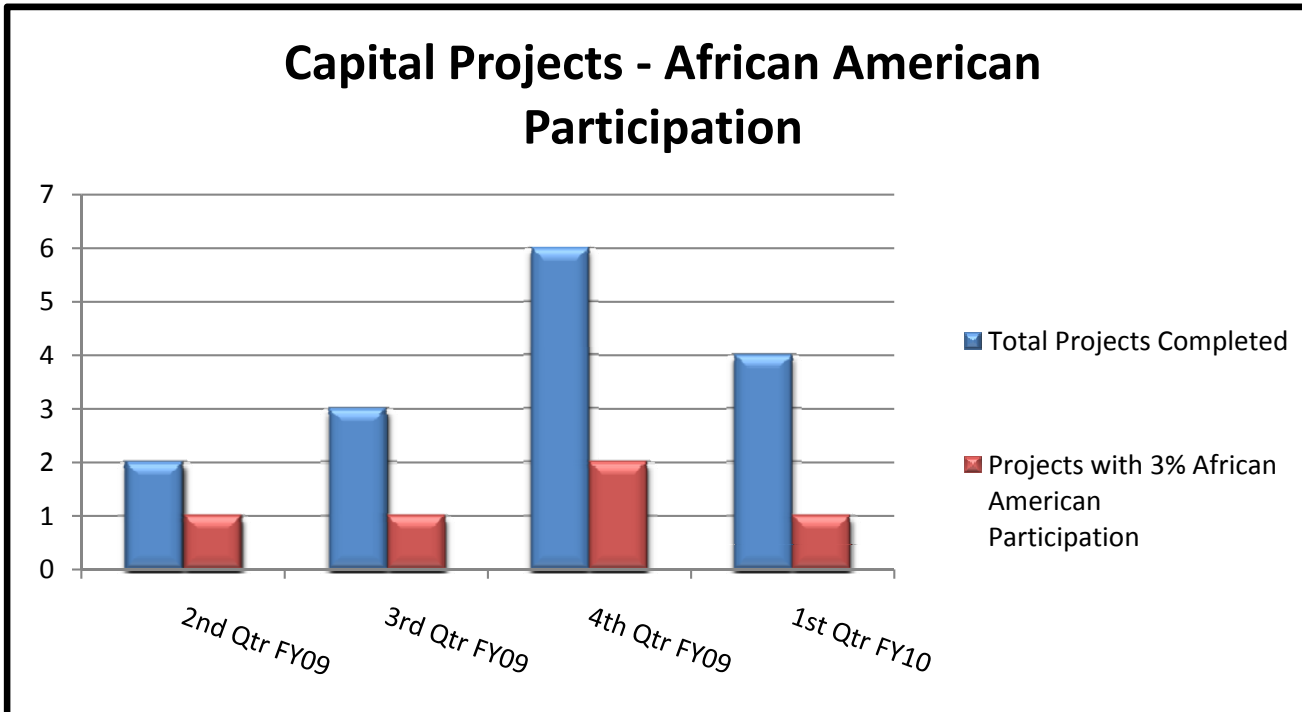
Strategy Objective **6.5** Improve Historically Underutilized Business (HUB) Participation
 6.5.2 50% of Capital Projects achieve 3% African American Participation

Measure: Percentage of Individual Capital Projects achieving 3% African American Participation

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Projects Completed	Projects with 3% African American Participation	50% African American GOAL
2nd Qtr FY09	2	1	50%
3rd Qtr FY09	3	1	33%
4th Qtr FY09	6	2	33%
1st Qtr FY10	4	1	25%

Student Union 6.27%



STATUS

GOAL #6 – Promote Good Stewardship

Lead
Capital

Strategy	6.5	Improve Historically Underutilized Business (HUB) Participation
Objective	6.5.2	50% of Capital Projects achieve 3% African American Participation

ACTION PLAN

▪ **Actions Complete**

- Project Information/Vendor Outreach sessions for Center City Classroom Building (Phase 2 Packages) and Residence Hall Phase IX (Early Site Package)
- “Networking Your Business” workshop
- Worked with CMs to identify Reduced Barrier Packages to increase minority participation
- Worked with CMs and HUB Coordinators to identify qualified HUB firms to participate on University projects

▪ **Actions Planned**

- Focus efforts to assist select African American firms increase capacity; training, business development, strategic planning, etc.
- Conduct “Contractor Pre-qualification Form” workshop and “Speed Networking” event
- Continue . . .
 - Community outreach efforts
 - Keep community apprised of opportunities/events
 - Work with other agencies to develop African American firms for public sector projects

Facilities Management Strategic Planning Session –

Lead
Capital

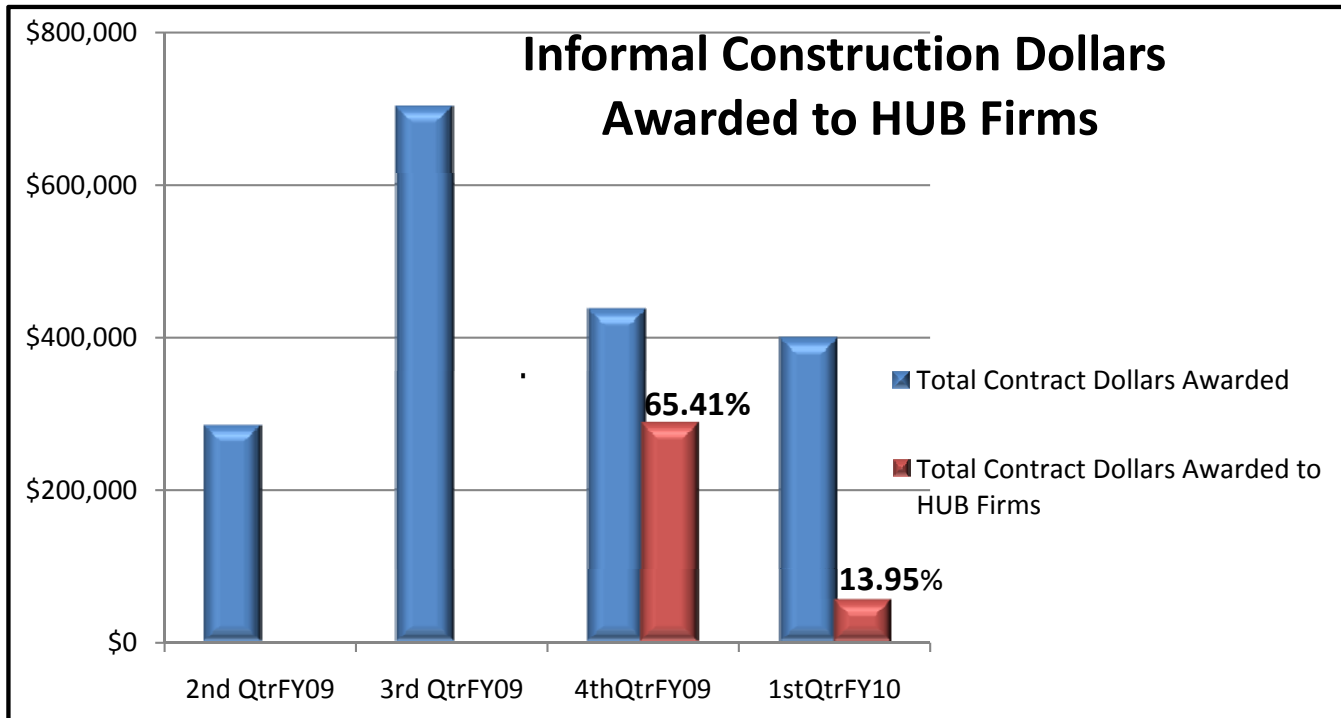
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.3 10% of Informal Construction Dollars (\$30,000 and above) awarded to HUB contractors

Measure: Percentage of Informal Construction Dollars (\$30,000 and above) awarded to HUB Contractors

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Contract Dollars Awarded	Total Contract Dollars Awarded to HUB Firms	Percentage of Dollars Awarded to HUB Firms
2nd QtrFY09	\$284,621	0	0.00%
3rd QtrFY09	\$703,492	0	0.00%
4thQtrFY09	\$437,475	\$286,158	65.41%
1stQtrFY10	\$399,333	\$55,719	13.95%



STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.5	Improve Historically Underutilized Business (HUB) Participation
Objective	6.5.3	10% of Informal Construction Dollars (\$30,000 and above) awarded to HUB Contractors

Lead
Capital

ACTION PLAN

- **Actions Complete**
 - “Job Order Contracting Information/Vendor Outreach” session
- **Actions Planned**
 - Utilize MBE participation guidelines and forms required for projects \$500,000 and above;
 - Conduct workshop on MBE participation guidelines for GCs working Informal projects
 - Conduct Vendor “Mix & Meet” session for GCs and HUB firms bidding Informal projects
 - Continue . . .
 - Encourage firms to participate in the process
 - Conduct quarterly workshops
 - Community outreach efforts
 - Work with Design Services and Materials Management to identify qualified HUB contractors

GOAL # 6 – Promote Good Stewardship

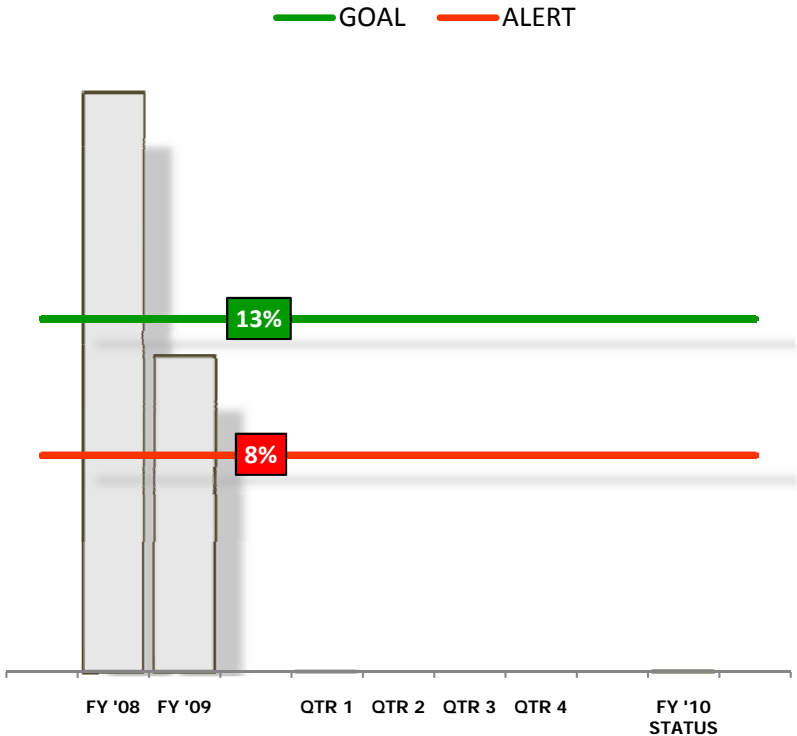
Strategy 6.5 Improve Historically Underutilized Business Participation
 Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000.**

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 '08	\$ 2,861,776	\$ 608,415	21.3%
FY '09	\$ 1,404,456	\$ 163,049	11.6%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2	\$ -	\$ -	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '10 STATUS	\$ 270,045	\$ 0	0.0%



GOAL
13.0%

STATUS
0.0%

GOAL # 6 – Promote Good Stewardship

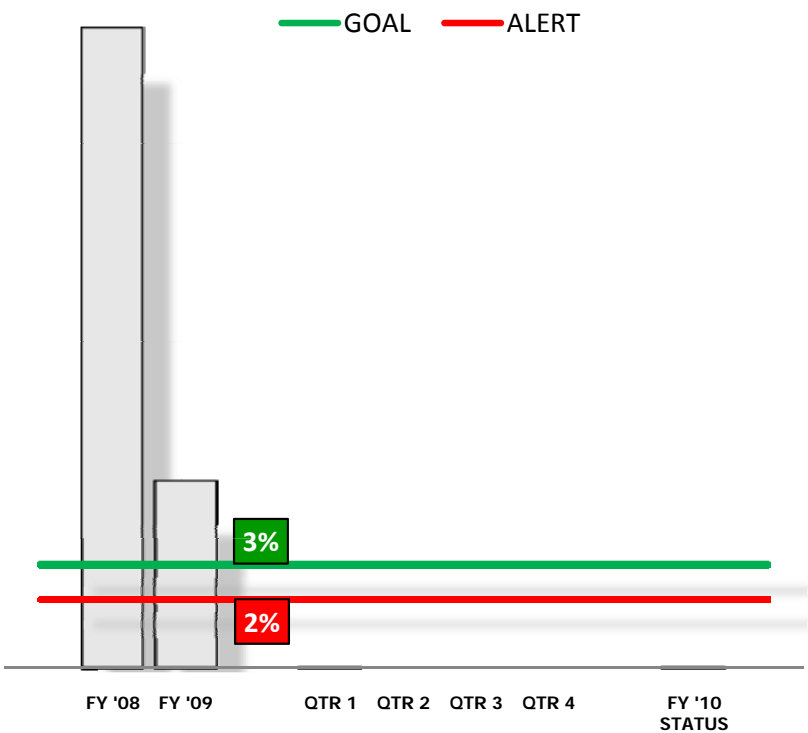
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.5 **3% African American participation on informal projects below \$30,000.**

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

Balanced Scorecard Category: Internal Business Process

3% African American participation on informal projects below \$30,000 - 6.5.5

QUARTERLY REVIEW	Value of Contracts under 30K	African American Contribution	African American
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2			0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '10 STATUS	\$ 270,045	\$ 0	0.0%



GOAL
3.0%

STATUS
0.0%

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

6.5.4 - Actions Planned:

- Continue to work with FIS on reports for extracting project data from Archibus.
- Reporting process by utilizing Project Number, PO Date and Contract Amount.
- Continue refining HUB reporting information in regards to Strategic Planning information.
- Stress usage of HUB firms with Project Coordinators