



UNC CHARLOTTE

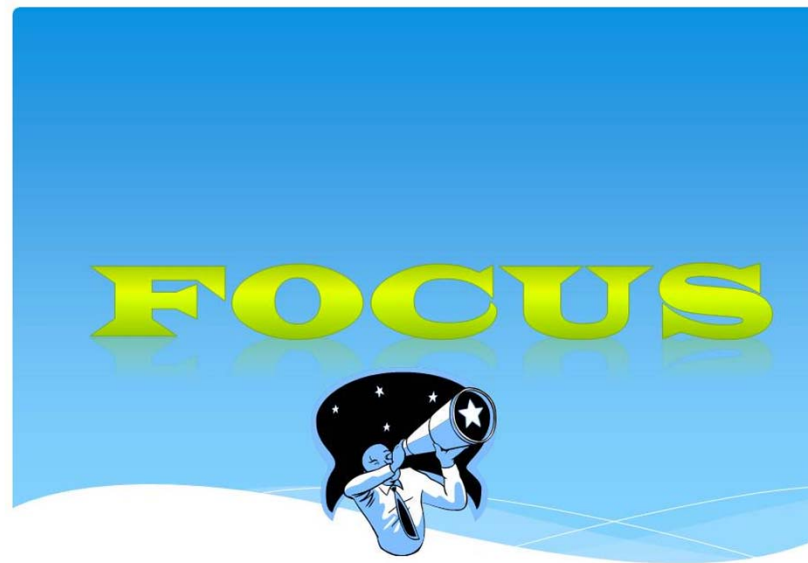
Facilities Management

Strategic Planning Slides

Reported to Phil Jones Individually via Director

First Quarter – Fiscal Year 2012

October 2011

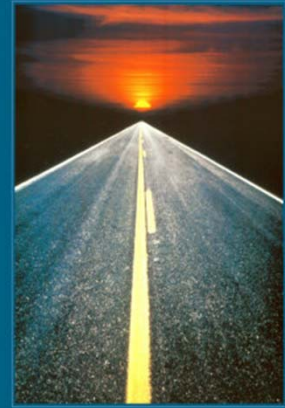


...Creating a Campus of Distinction



UNC CHARLOTTE

GOALS



*To get started,
you must have a destination.*

Goal 1 - Improve Operation and Maintenance of the University's Campus.

Goal 2 - Adapt existing facilities to meet new requirements.

Goal 3 - Deliver new facilities that support the University mission.

Goal 4 - Perfect a customer-focused organization.

Goal 5 - Develop a valued, well-trained, motivated and diverse workforce

Goal 6 - Promote good stewardship.



UNC CHARLOTTE

Balance Score Card

CUSTOMER

Perspective

Strategic Objectives:

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



UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Strategic Objectives:

Manage Budget, Maximize Revenue Stream

Promote Fiscal Responsibility

Sustainable Practices

Conserve Natural Resources

Improve Employee Safety

Improve HUB Participation



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

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



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Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

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



UNC CHARLOTTE

**Facilities Operations
Report
Lee Snodgrass, Director**

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Continued improvement of accounting practices for time applied to WR’s.
 - 2 – Continued development of the PM program.

- Actions Planned
 - 1 – Continue to stress reporting and recording of employee’s time.
 - a) Meet with shop supervisor and PA’s to review
 - b) Stress importance with all employees.
 - 2 - Get employees out of the shop

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

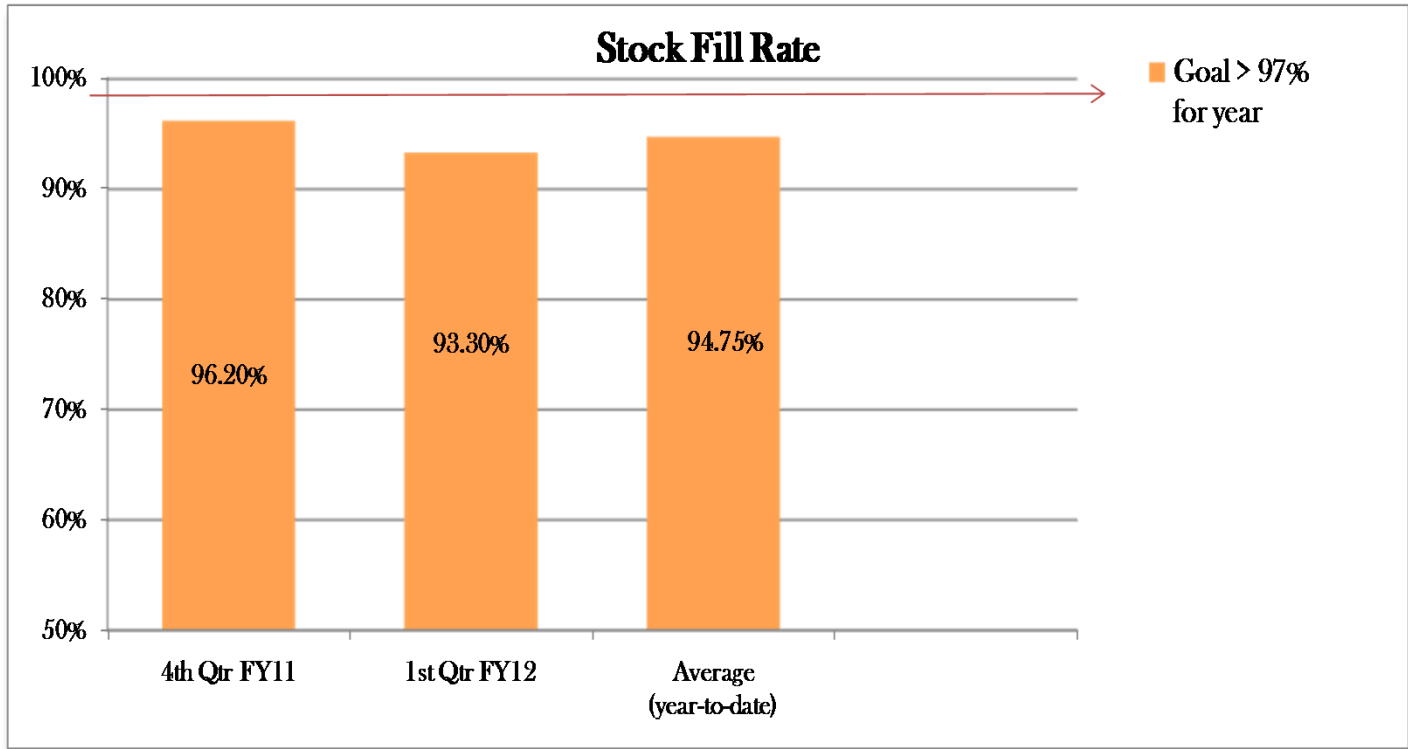
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – No actions taken. Restocking being controlled by SDI’s automated system.

- Actions Planned
 - 1 - Continue to let automated system control and see how it works.
 - 2 - Adding items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
 - 3 - Long lead items and spikes in usage were the main causes for inability to fill.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

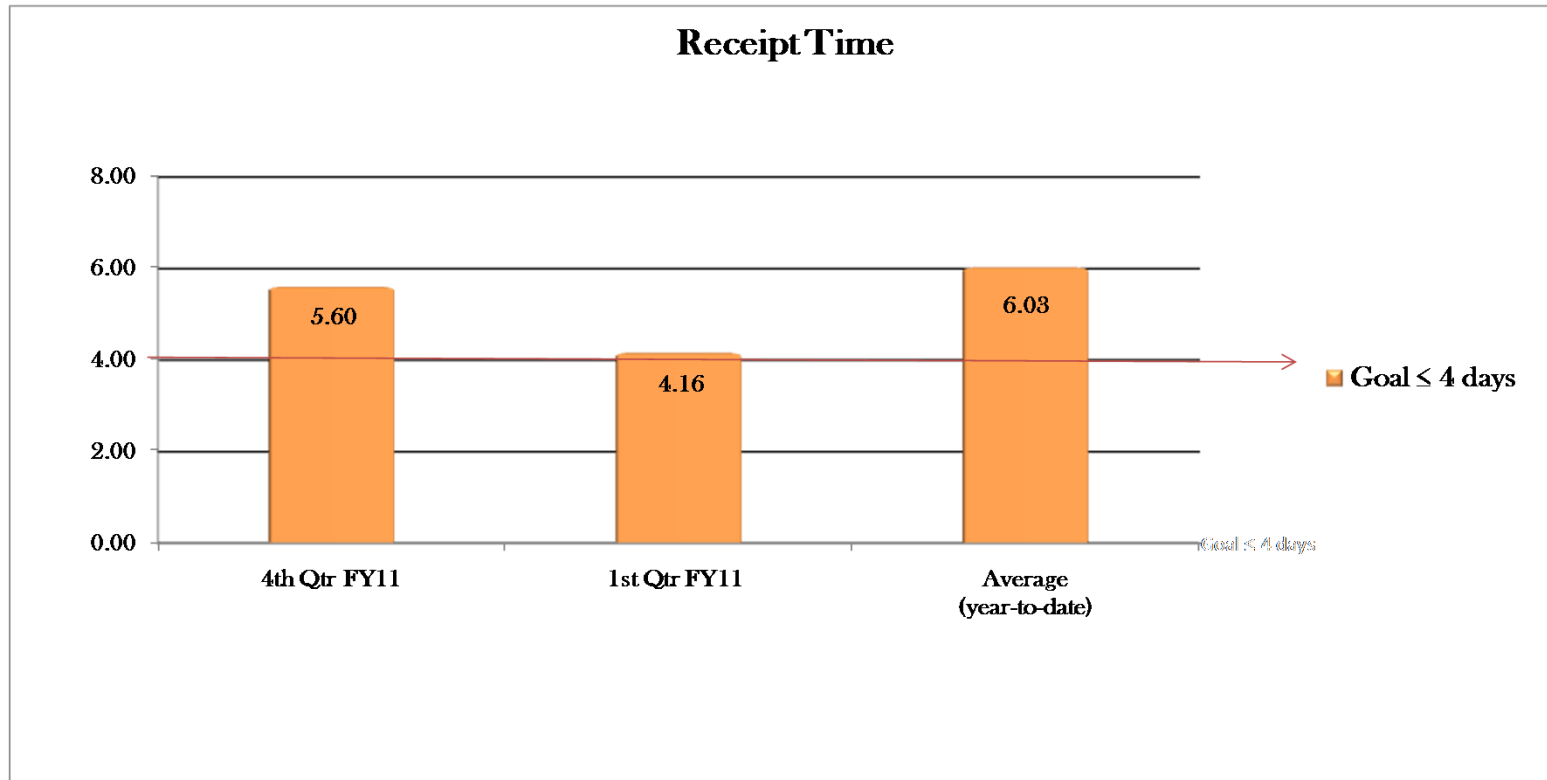
GOAL #1 – Improve maintenance and operations of the Campus

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

Measure: Days (SDI's KPI – Non-stock Requisition to Receipt Time)
Calculation on: Weighted average of monthly request-to-receipt times.

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Req to Quote approval was dramatically lowered by 31% (down to 15.2 hours).
- Actions Planned
 - 1 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

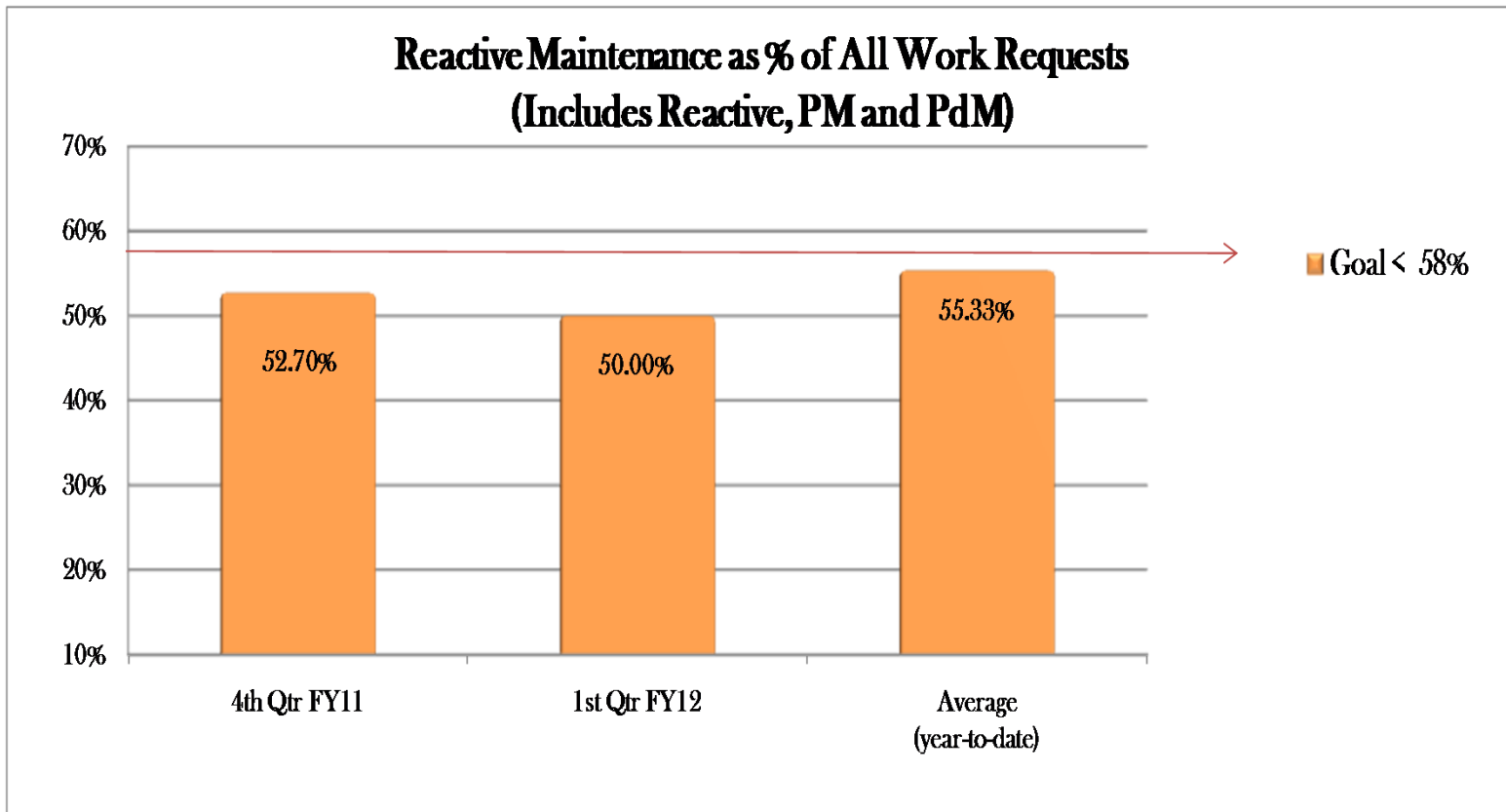
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Percentage to average < 58% for year.

Balanced Scorecard Category: Customer Service



STATUS

GOAL #1 – Improve Facilities Operations

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

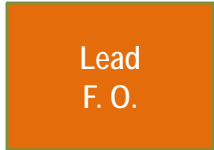
Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Reviewed Chillers, and Fire pump PM’s – added missing PMs.

- Actions Planned
 - 1 – Continue to build PM program to cover all equipment.
 - a) Continue work with Auxiliary Services
 - 2 – Continue increasing predictive maintenance measures as funds permit.
 - 3 – Continue review of reactive work requests for routine services that should be moved to “scheduled services,” or PM.

Facilities Management Strategic Planning Session – First Quarter FY 2012



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).

Goal: Less than 719 quarterly average for the year

Balanced Scorecard Category: Internal Business Process

Archibus
Report
In error
FIS Contacted



GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

Actions Complete

- 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.
- 4 - Review the manner in which data is used to calculate cycle time with FIS to ensure accuracy.

Actions Planned

- 1 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

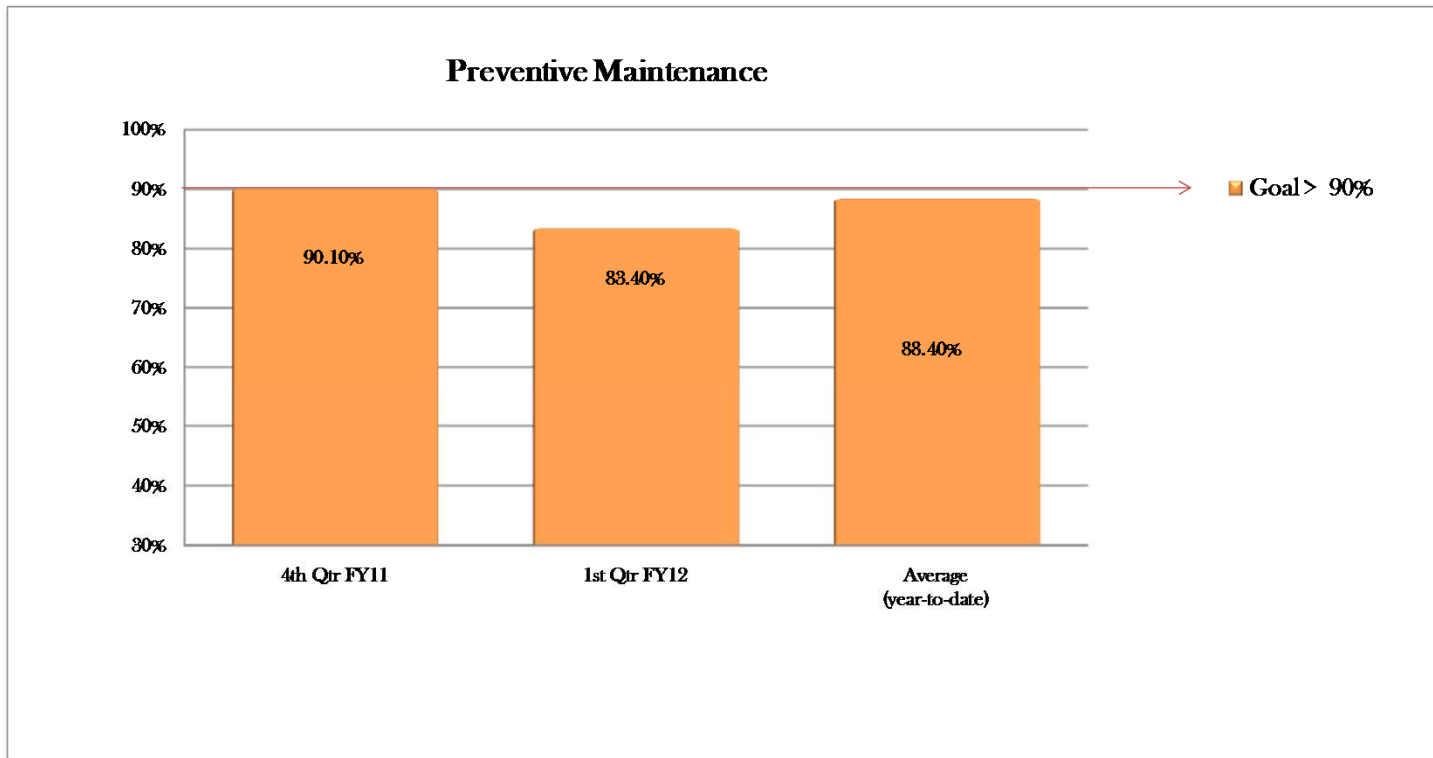
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90% from 87% last year.

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

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Continue development of PM Program.
- Actions Planned
 - 1 – Complete development of PM Program.
 - 2 – Closer monitoring of PM completions by Supervisor and Managers.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

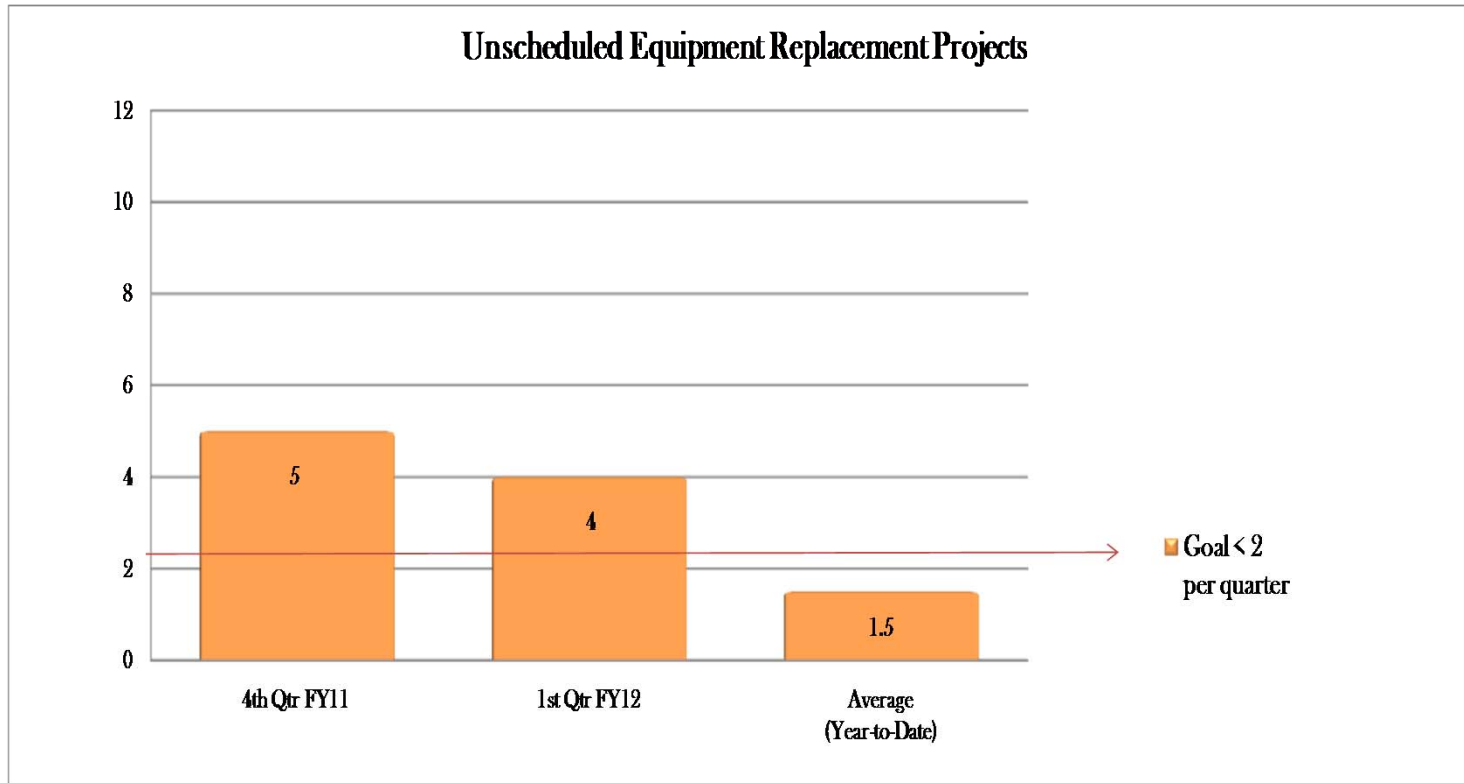
GOAL #1 – Improve maintenance and operations of the Campus

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

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Continued adding equipment to PM program.

- Actions Planned
 - 1 – Continue expansion of PM Program.
 - 2 – Continue expansion of predictive maintenance program.

Facilities Management Strategic Planning Session – First Quarter FY 2012

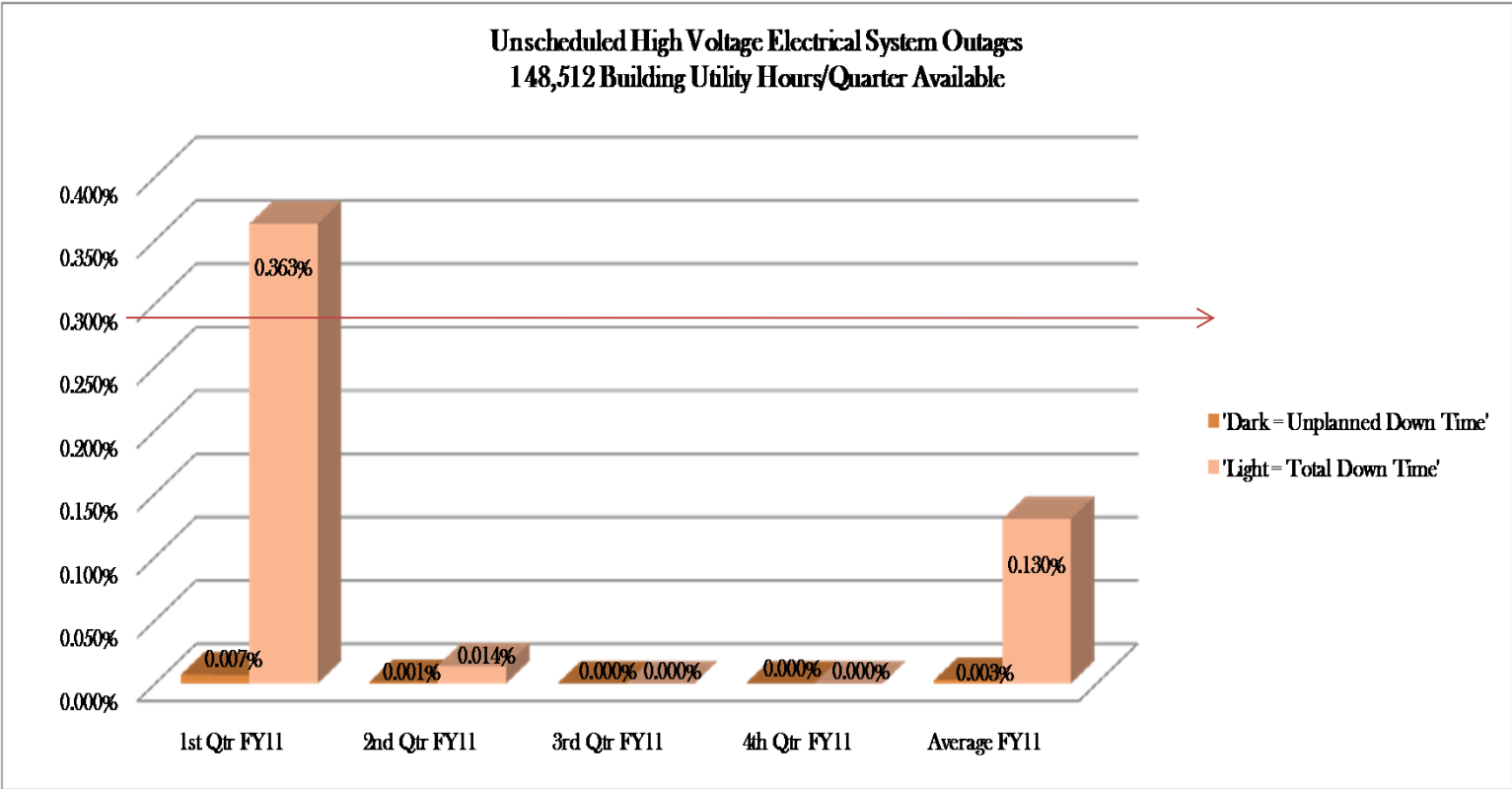
GOAL #1 – Improve maintenance and operations of the Campus

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



GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- **Actions Complete**
 - 1 – Completed PM’s as scheduled.
 - 2 – Completed first half of thermal scanning.
- **Actions Planned**
 - 1 – Continue PM’s.
 - 2 – Prepare program for major equipment repairs and replacement.
 - 3 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

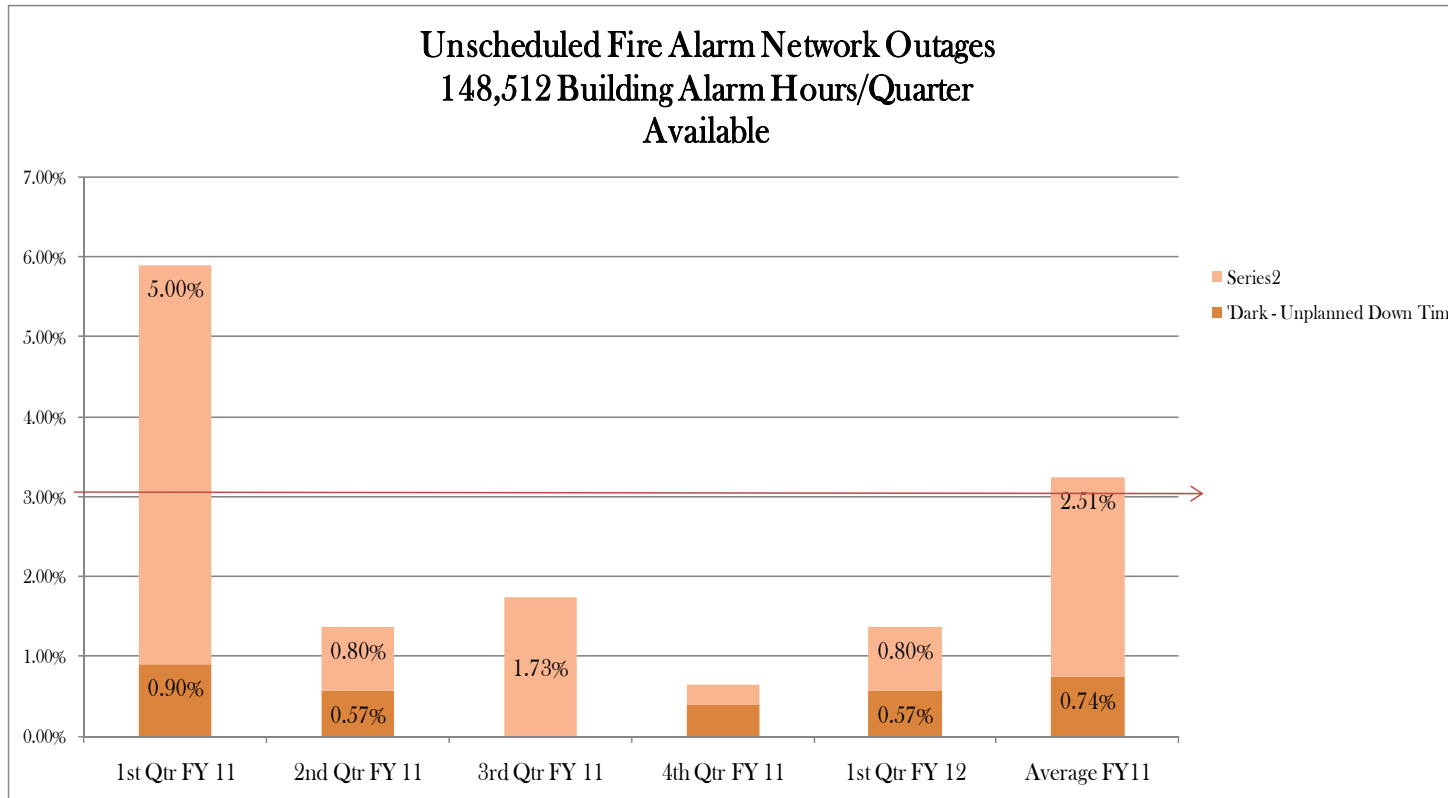
GOAL #1 – Improve maintenance and operations of the Campus

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)

Goal: Less than 10%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

Actions Complete

- 1 – Worked closely with Simplex-Grinnell performing work on-site to alleviate accidental interruptions.
- 2 – Prepared data monitoring program for quarterly reporting.

Actions Planned

- 1 – Continue working with Simplex to bring the last buildings online with the network.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

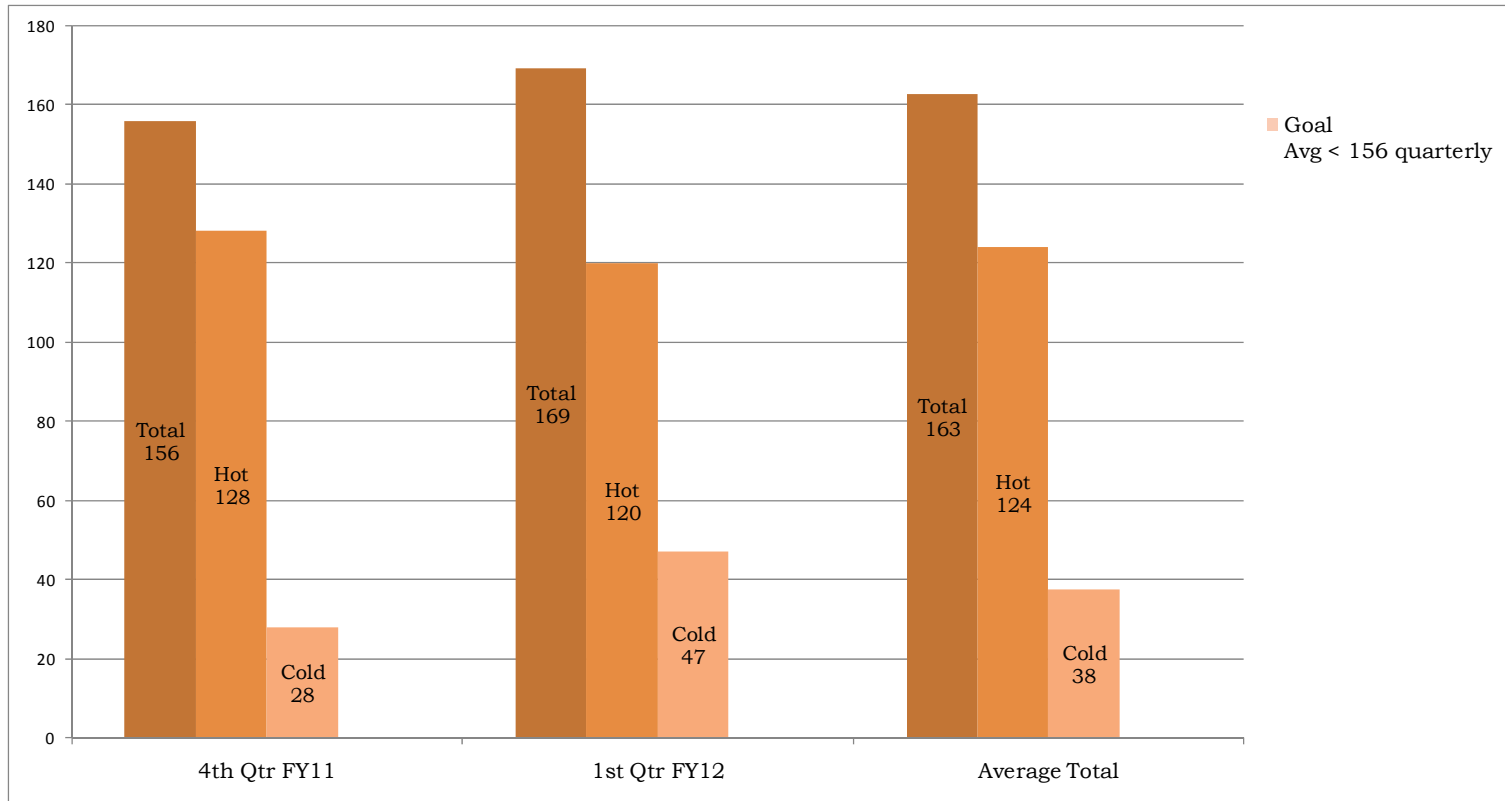
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% from FY10 Average of 174 (Goal = 156)

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

Goal: Less than 156 per quarter annual average

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #4 – Perfect a Customer Focused Organization

Lead
F. O.

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

ACTION PLAN

- **Actions Complete**
 - 1 – Created new problem type “HVAC-TEMPOK” for editing work requests that have requested a too hot or too cold that are found within the proposed standards.

- **Actions Planned**
 - 1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
 - 2 – See what ESCO’s might recommend that would improve comfort and seek wider application.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

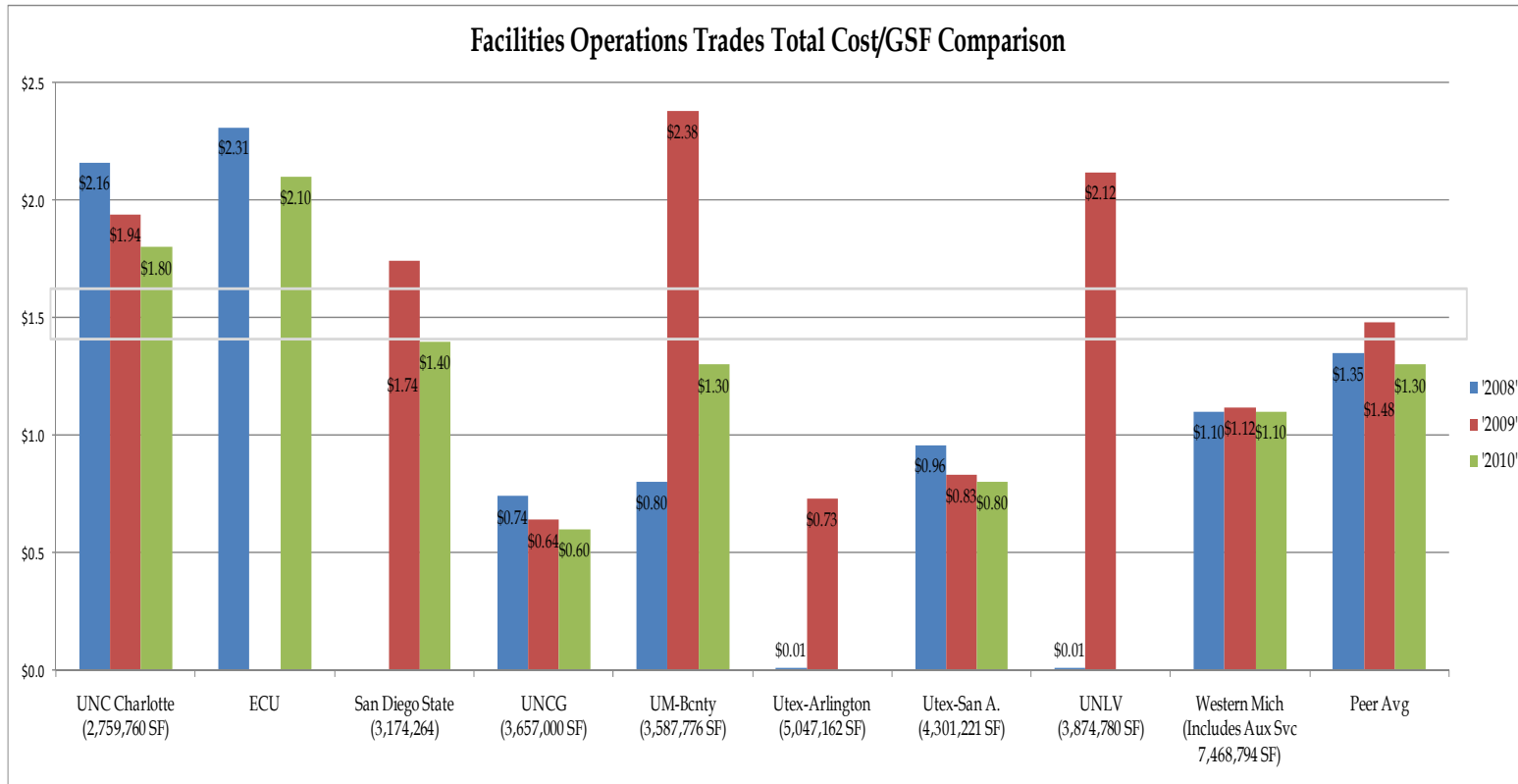
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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



STATUS

GOAL #6 – Promote Good Stewardship

Lead
F. O.

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

ACTION PLAN

- Actions Complete
 - 1 – Pulled data from 2010 APPA RPI Report.

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

Lead
F. O.

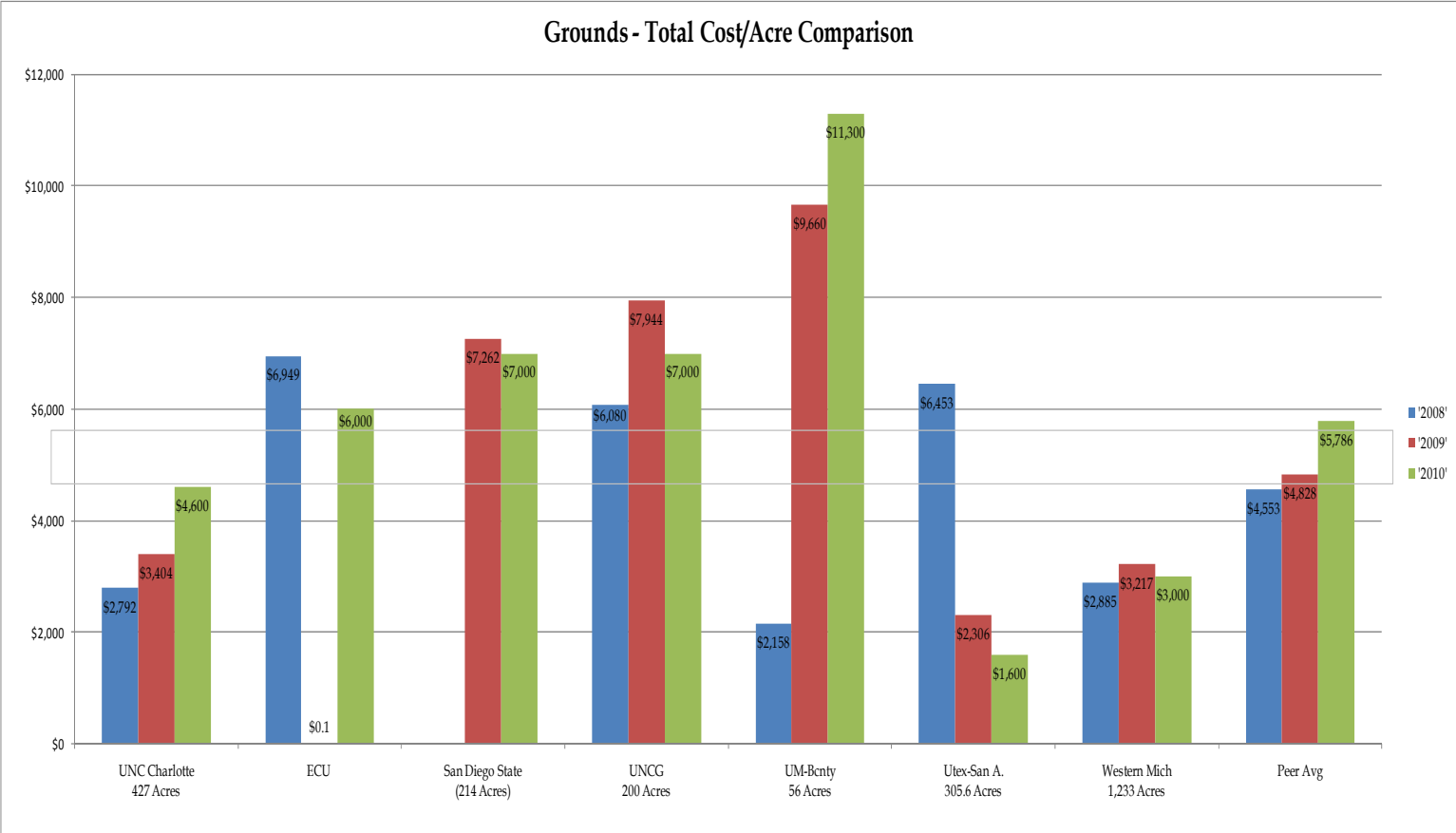
Facilities Management Strategic Planning Session – First Quarter FY 2012

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

Lead
F. O.

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

ACTION PLAN

- **Actions Complete**
 - 1 – Pull data from 2010 APPA RDI Report.
 - 2 – Added additional labor services staffing to raise level of maintenance for reimbursable customers.
 - 3 – Calculated a cost per acre based on weighted average using acreage and found better fit.
- **Actions Planned**
 - 1 – Review the manner in which data was collected and provided for the FPI Report.

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
F. O.

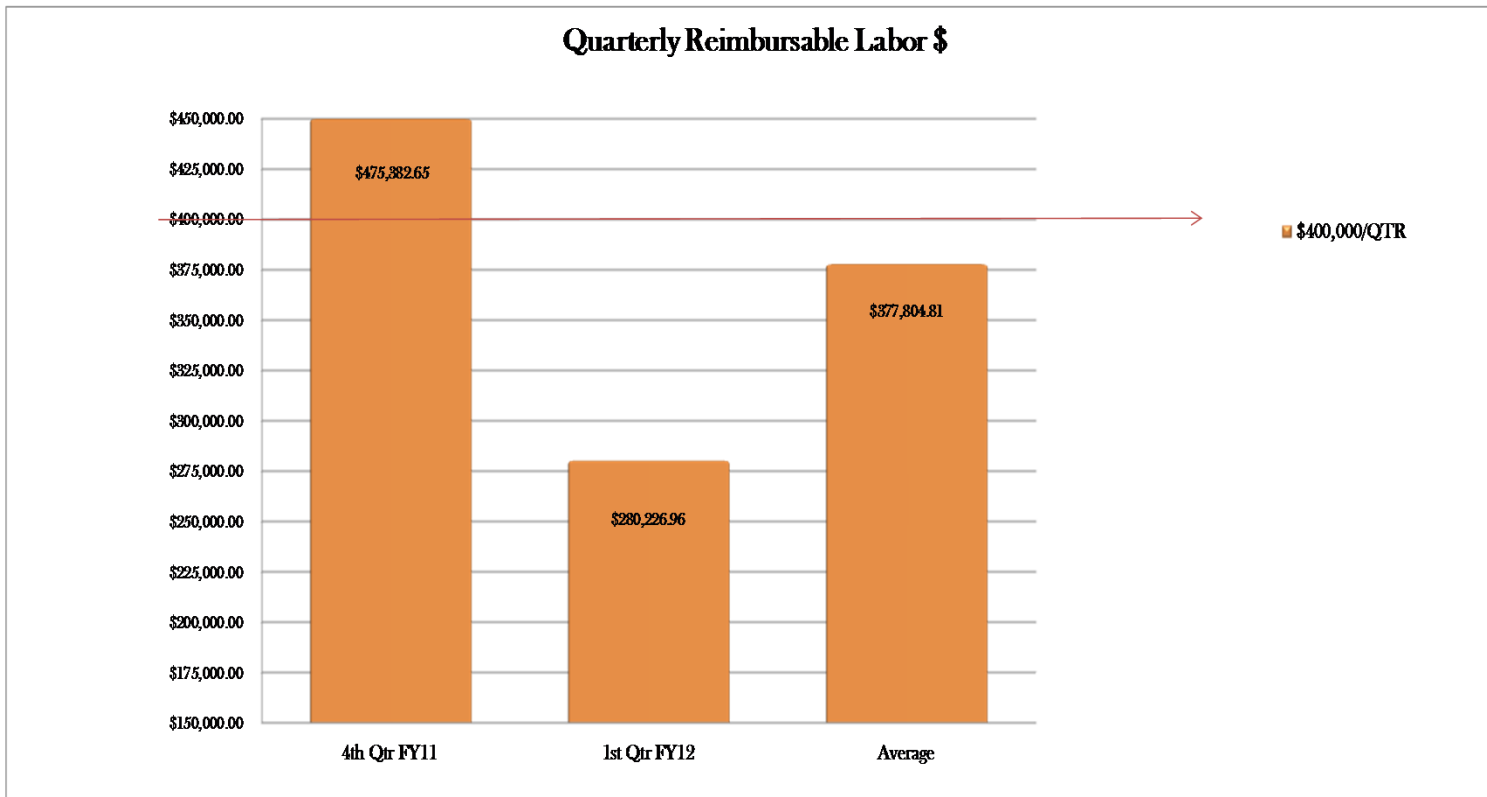
GOAL #6 – Promote Good Stewardship

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

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

Goal: \$400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

Lead
F. O.

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

ACTION PLAN

- **Actions Complete**
 - 1 – Utilized in-house staffing from other areas of Facilities Operations on projects rather than going to outside resources.

Actions Planned

- 1 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
- 2 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.



UNC CHARLOTTE

**Design Services
Report
Mac Fake, Director**

Facilities Management Strategic Planning Session – First Quarter FY 2012

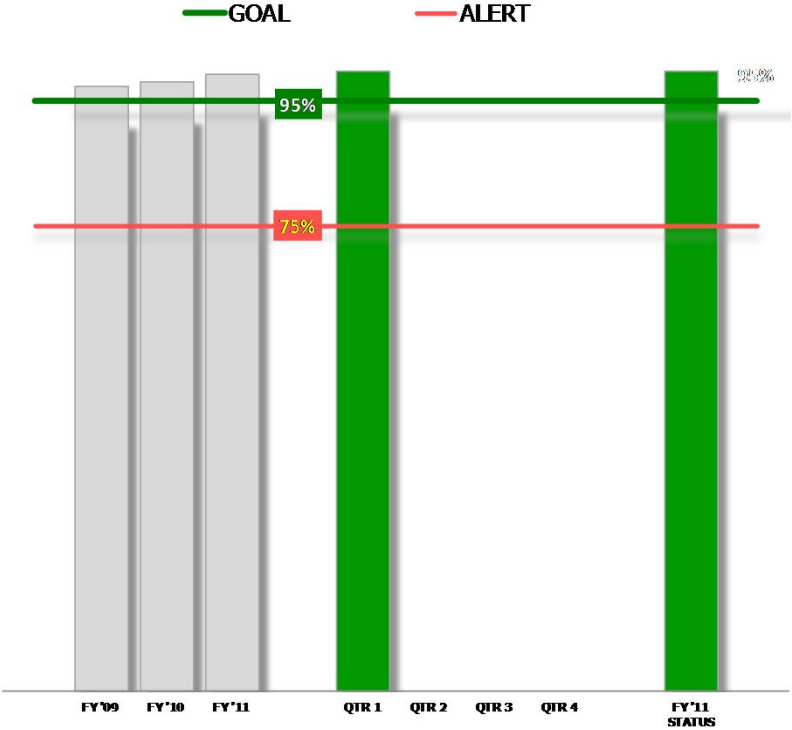
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Measure: Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)
 Balanced Scorecard Category: 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'09 | 115 | 112 | 3 | 97.4% |
| FY'10 | 173 | 170 | 3 | 98.3% |
| FY'11 | 300 | 298 | 2 | 99.3% |
| QTR 1 | 22 | 22 | 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 '12 STATUS | 22 | 22 | 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 |

ACTION PLAN

2.2.1 - Actions Completed:

2.2.1 - Actions Planned:

- New "Wildly Important Goal" - handout guiding Customers through Design Services' project processes and Archibus.**
- Continue refining reports from Archibus used to collect information for Strategic Planning - **on going.**
- Complete Classroom Capacity info and egress data by developing Building Capacity standards - **on going.**
- Embrace new SCO procedural steps and secure project approvals and inspections - **on going.**

Facilities Management Strategic Planning Session – First Quarter FY 2012

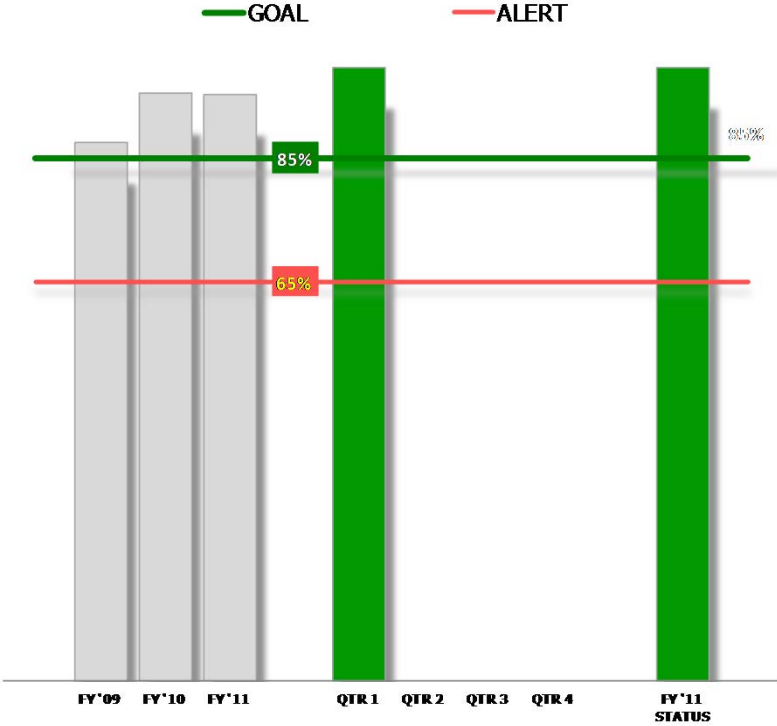
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

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

| QUARTERLY REVIEW | No. Of Projects Estimated | Projects Estimated within +/- 10% | Projects Not Estimated within +/- 10% | Estimates within +/- 10% |
|------------------|---------------------------|-----------------------------------|---------------------------------------|--------------------------|
| FY'09 | 115 | 101 | 14 | 87.8% |
| FY'10 | 255 | 244 | 11 | 95.7% |
| FY'11 | 297 | 284 | 13 | 95.6% |
| QTR 1 | 32 | 32 | 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 '12 STATUS | 32 | 32 | 0 | 100.0% |



GOAL
85.0%

STATUS
100.0%

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

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

ACTION PLAN

2.2.2 - Actions Completed:

2.2.2 - Actions Planned:

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

Facilities Management Strategic Planning Session – First Quarter FY 2012

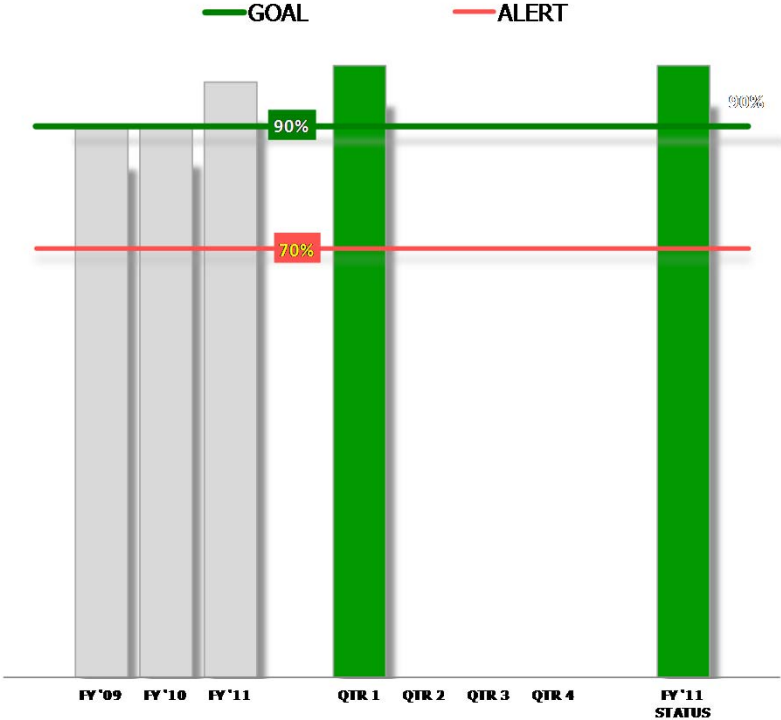
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Measure: Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)
 Balanced Scorecard Category: Internal Business Process

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

| QUARTERLY REVIEW | No. of Projects | No. of met Beneficial Occupancy | No. that did not meet Delivery Date | Completed On Time |
|----------------------|-----------------|---------------------------------|-------------------------------------|-------------------|
| FY'09 | 116 | 104 | 12 | 89.7% |
| FY'10 | 182 | 164 | 18 | 90.1% |
| FY'11 | 297 | 289 | 8 | 97.3% |
| QTR 1 | 32 | 32 | 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 '12 STATUS | 32 | 32 | 0 | 100.0% |



GOAL
90.0%

STATUS
100.0%

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

Lead
Design
Services

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)

ACTION PLAN

2.2.4 - Actions Completed:

2.2.4 - Actions Planned:

- Project schedules from Scope & Budget, Design and Construction through**
- Continue to establish proven steps to beneficial occupancy via departmental meetings - **on going.**
- New "Wildly Important Goal" - Customer involvement with project Punch List process - **on going.**
- Post construction schedules on website to increase awareness of project**

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead Design Services

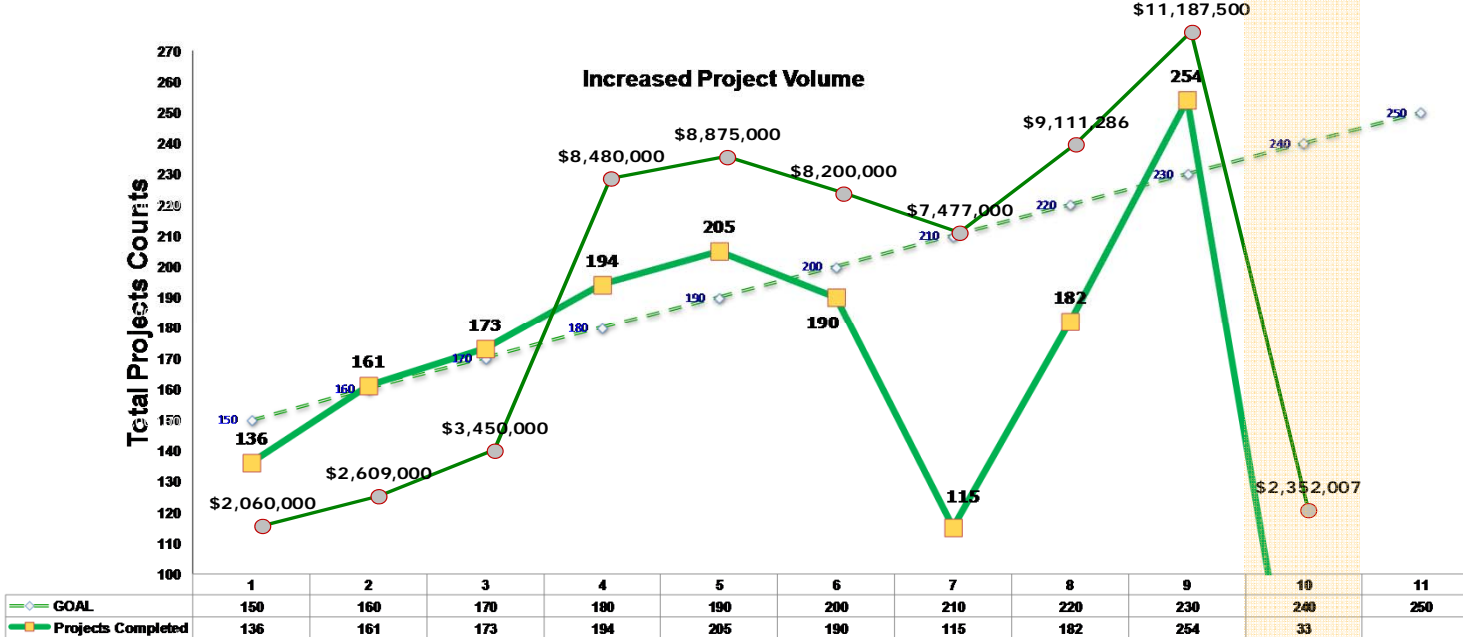
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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 | | | | | | | | | | | |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| GOAL | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| | Goal FY 2003 | Goal FY 2004 | Goal FY 2005 | Goal FY 2006 | Goal FY 2007 | Goal FY 2008 | Goal FY 2009 | Goal FY 2010 | Goal FY 2011 | Goal FY 2012 | Goal FY 2013 |
| | 150 | 160 | 170 | 180 | 190 | 200 | 210 | 220 | 230 | 240 | 250 |
| Projects Completed | FY 2003 | FY 2004 | FY 2005 | FY 2006 | FY 2007 | FY 2008 | FY 2009 | FY 2010 | FY 2011 | FY 2012 | FY 2013 |
| | 136 | 161 | 173 | 194 | 205 | 190 | 115 | 182 | 254 | 33 | |
| Project Dollars | \$2,060,000 | \$2,609,000 | \$3,450,000 | \$8,480,000 | \$8,875,000 | \$8,200,000 | \$7,477,000 | \$9,111,286 | \$11,187,500 | \$2,352,007 | |
| AVG\$/Project | \$15,147 | \$16,205 | \$19,942 | \$43,711 | \$43,293 | \$43,158 | \$65,017 | \$50,062 | \$44,045 | \$71,273 | |



GOAL 100%

STATUS 13.8%

Facilities Management Strategic Planning Session – First Quarter FY 2012

GOAL #4 – Perfect a Customer Focused Organization

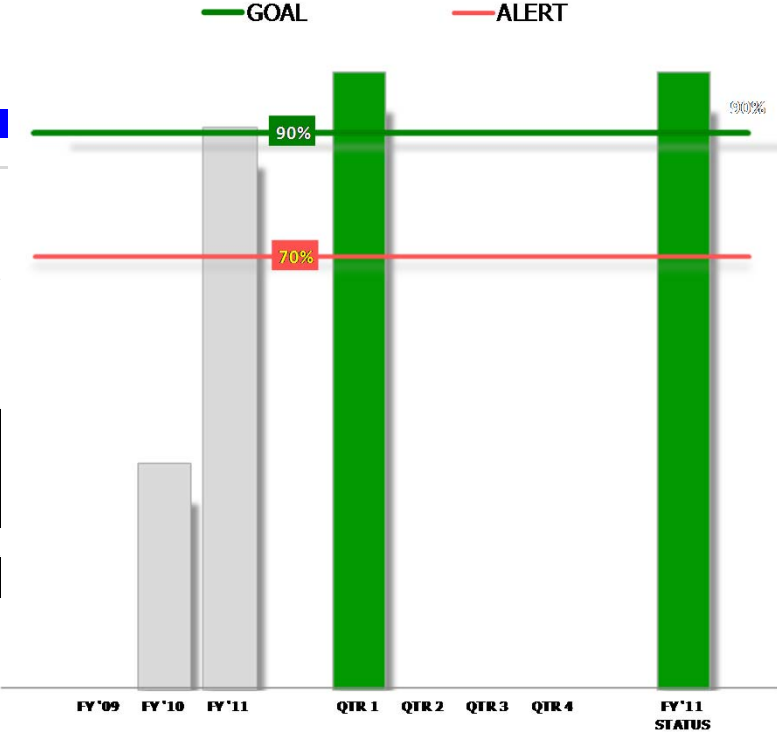
Strategy 4.1 Continually improve customer service/satisfaction
 Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

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

Balanced Scorecard Category: Customer Perspective

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

| QUARTERLY SURVEY | Number of Projects Surveyed | Very Satisfied 5 | Satisfied 4+ | Somewhat Satisfied 3+ | Neutral 2+ | Somewhat Dissatisfied 1+ | Unsatisfied 0+ | Percent Satisfied |
|------------------|-----------------------------|------------------|--------------|-----------------------|------------|--------------------------|----------------|-------------------|
| FY'09 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% |
| FY'10 | 30 | 18 | 5 | 0 | 6 | 1 | 0 | 36.7% |
| FY'11 | 33 | 24 | 6 | 2 | 0 | 1 | 0 | 90.9% |
| QTR 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 100.0% |
| QTR 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% |
| QTR 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% |
| QTR 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% |
| FY '12 STATUS | 1 | 1 | 0 | 0 | 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:

4.1.1 - Actions Planned:

- Review Customer Satisfaction Survey responses and implement appropriate**

Facilities Management Strategic Planning Session – First Quarter FY 2012

GOAL # 6 – Promote Good Stewardship

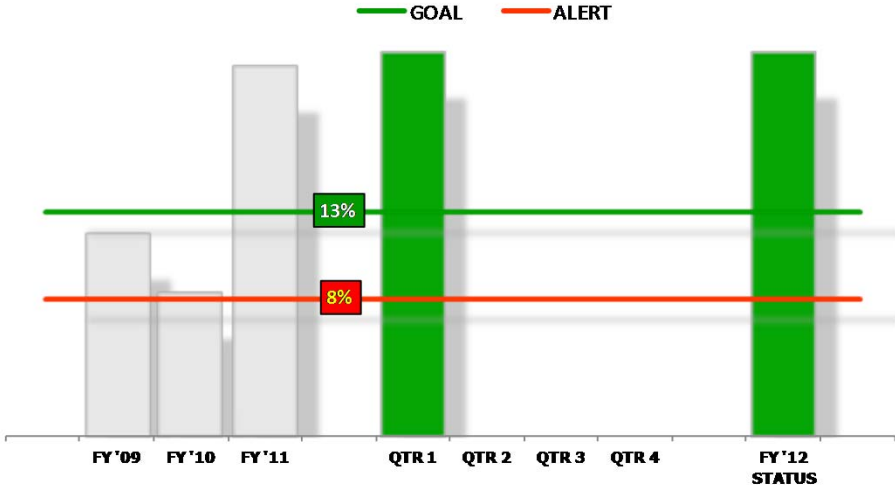
Strategy 6.5 Improve Historically Underutilized Business Participation
 Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Internal Business Process

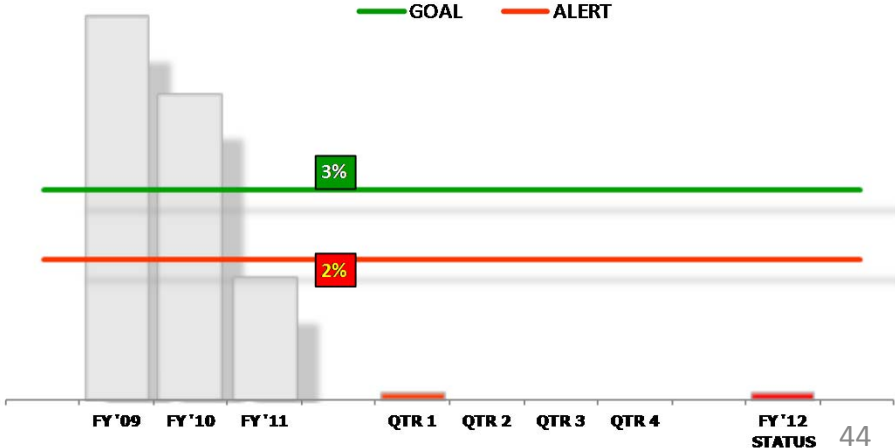
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

| QUARTERLY REVIEW | Value of Contracts under 30K | H.U.B. Contribution | HUB Total |
|----------------------|------------------------------|---------------------|--------------|
| FY '09 | \$ 1,404,456 | \$ 163,049 | 11.6% |
| FY '10 | \$ 2,626,647 | \$ 214,381 | 8.2% |
| FY '11 | \$ 6,244,956 | \$ 1,324,607 | 21.2% |
| QTR 1 | \$ 798,506 | \$ 175,620 | 22.0% |
| QTR 2 | \$ - | \$ - | 0.0% |
| QTR 3 | \$ - | \$ - | 0.0% |
| QTR 4 | \$ - | \$ - | 0.0% |
| FY '12 STATUS | \$ 798,506 | \$ 175,620 | 22.0% |



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

| QUARTERLY REVIEW | Value of Contracts under 30K | African Am. Contribution | African Am. Total |
|----------------------|------------------------------|--------------------------|-------------------|
| FY '09 | \$ 1,404,456 | \$ 75,961 | 5.4% |
| FY '10 | \$ 2,626,647 | \$ 113,196 | 4.3% |
| FY '11 | \$ 6,244,956 | \$ 107,076 | 1.7% |
| QTR 1 | \$ 798,506 | \$ 700 | 0.1% |
| QTR 2 | \$ - | \$ - | 0.0% |
| QTR 3 | \$ - | \$ - | 0.0% |
| QTR 4 | \$ - | \$ - | 0.0% |
| FY '12 STATUS | \$ 798,506 | \$ 700 | 0.1% |



GOAL # 6 – Promote Good Stewardship

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

ACTION PLAN

6.5.3 - Actions Completed:

6.5.4 - Actions Planned:

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



UNC CHARLOTTE

**Architectural Planning
Report
Chris Gilbert, Director**

Architectural Planning Department Strategic Planning Slides (1 of 2):

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

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



Status

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

Measure: % of projects documented and input into the CRDM system by July, 2011.

Lead: **Architectural Planning Dept**



Status

Objective 3.2.1

100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by Fall, 2011

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

Lead: **Architectural Planning Dept**

Architectural Planning Department Strategic Planning Slides (2 of 2):

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

Strategy 3.5: Improve Infrastructure improvement planning

Status

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

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

Lead: **Architectural Planning Dept**

Status

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

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

Measure: % of sections updated and posted.

Lead: “**Architectural Planning Dept**”

Status

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.

Lead: “**Architectural Planning Dept**”

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
Architectural
Planning

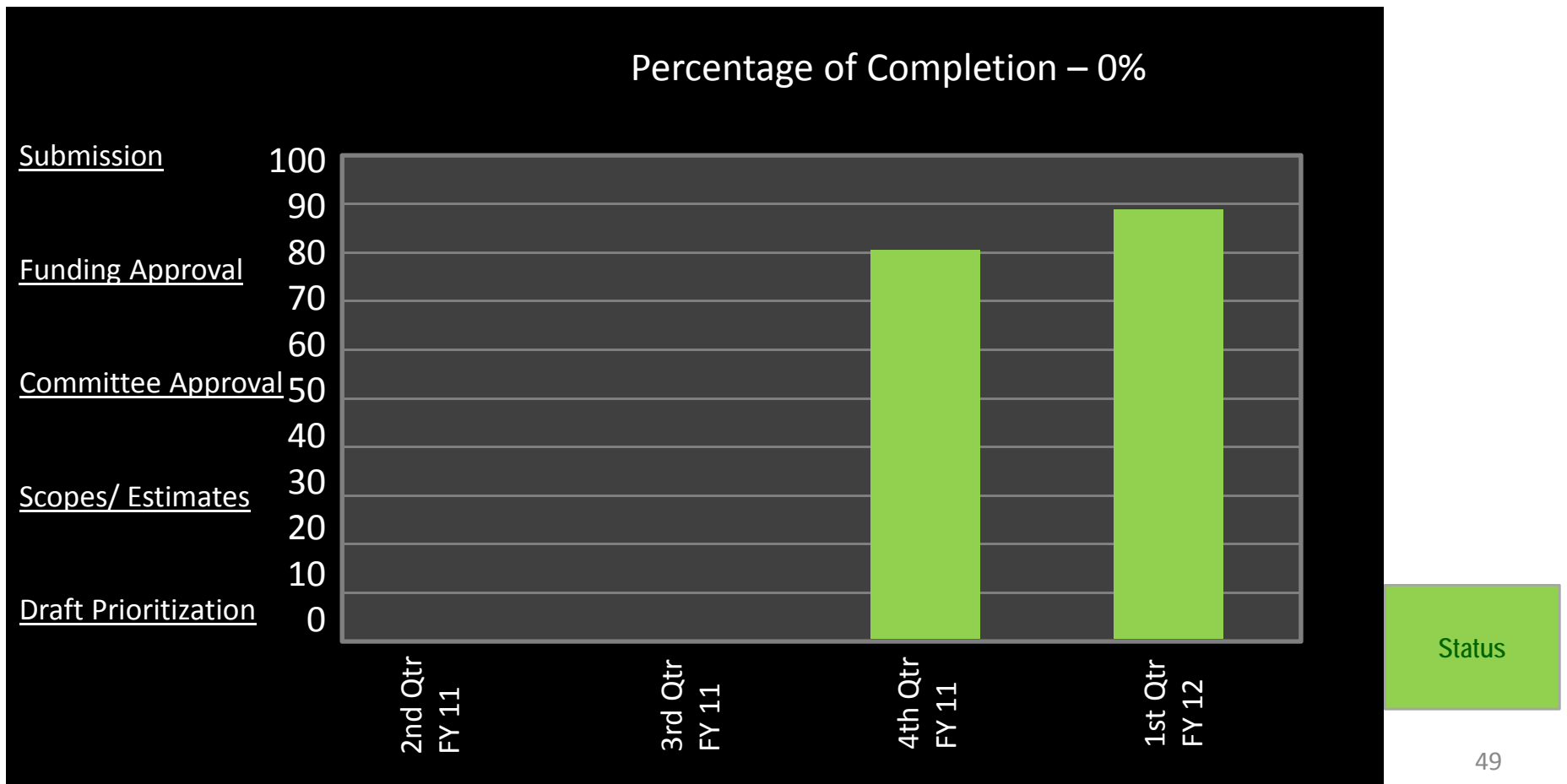
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

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

Balanced Scorecard Category: Internal Business Process



Facilities Management Strategic Planning Session – First Quarter FY 2012

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

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.
Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Actions Complete
 - Consolidated R & R List
 - List under review by M & O
 - Worked with FIS to develop CRDM in Archibus
 - Receive review by M & O
 - Implementation of CRDM
 - Data entry of existing list
 - Prioritization

- Actions Planned:
 - Prep for committee meetings/ funding meetings/ submission
 - Move to Phase 2 – Integration of FCAP; Facility Quality Index for buildings; Projects Total (condition and quality projects)/ CRV.
 - **Consider amending the objective above to reflect phase 2**

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
Architectural
Planning

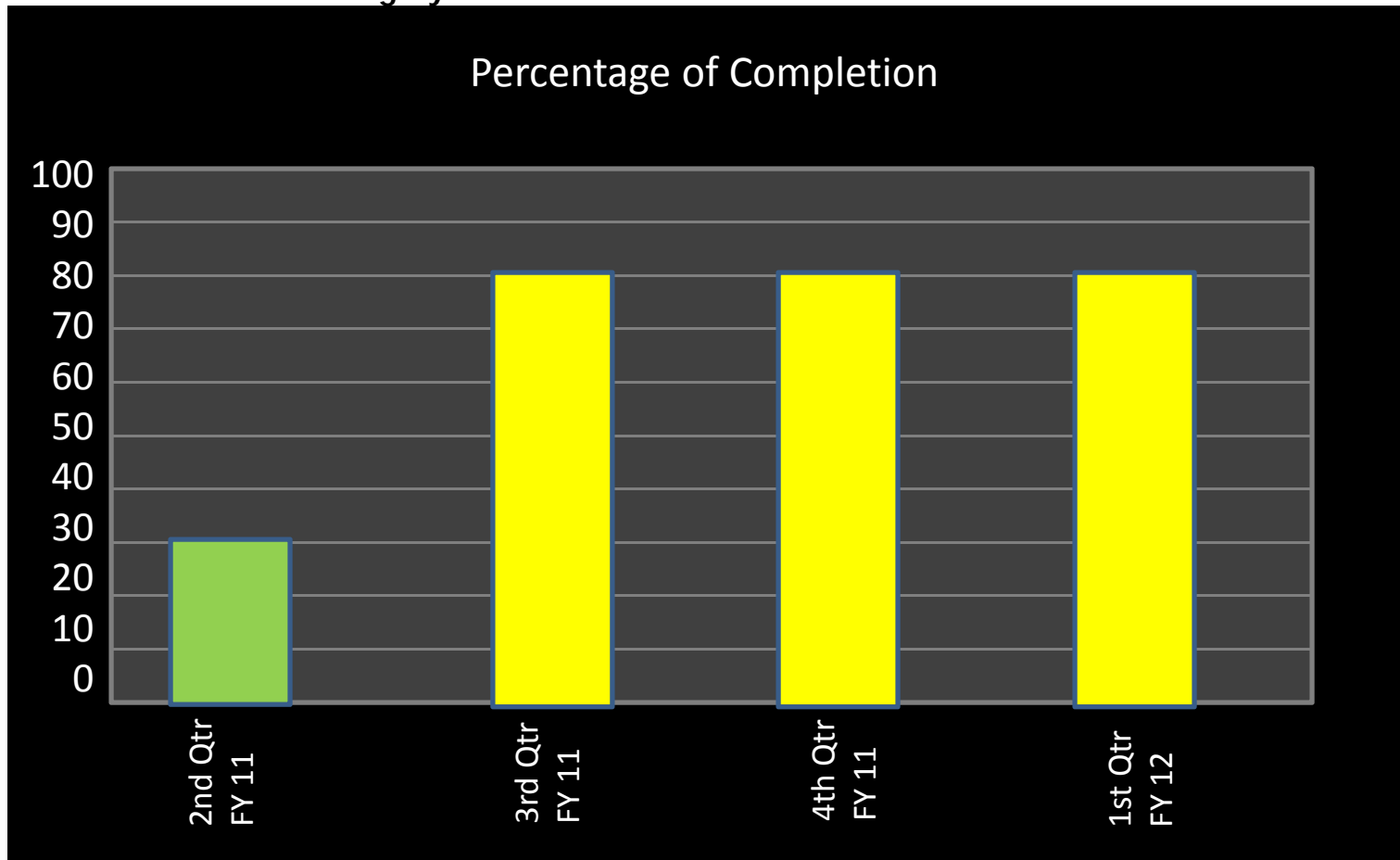
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2011

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

Balanced Scorecard Category: Internal Business Process



Status

Facilities Management Strategic Planning Session – First Quarter FY 2012

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

ACTION PLAN

Appropriated Projects

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

* Pending AA review , changes, and approval

- Actions Complete
 - Requested a meeting with Library Staff re: revised program
 - Offered alternate plans for Belk Gym and RDH which may affect projects on the Six Year plan.
- Actions Planned: Validating Programs
 - Science Building: Pending meeting with AA
 - Burson: Pending meeting with AA
 - Student Academic Success and Retention Center: Pending meeting with AA
 - Atkins Library: Pending meeting with University Librarian
 - Obtain guidance on future of Belk Gym (some funding may be non-appropriated) and RDH (which could mean taking Physical plant Complex off the list or modifying it).

Facilities Management Strategic Planning Session – First Quarter FY 2012

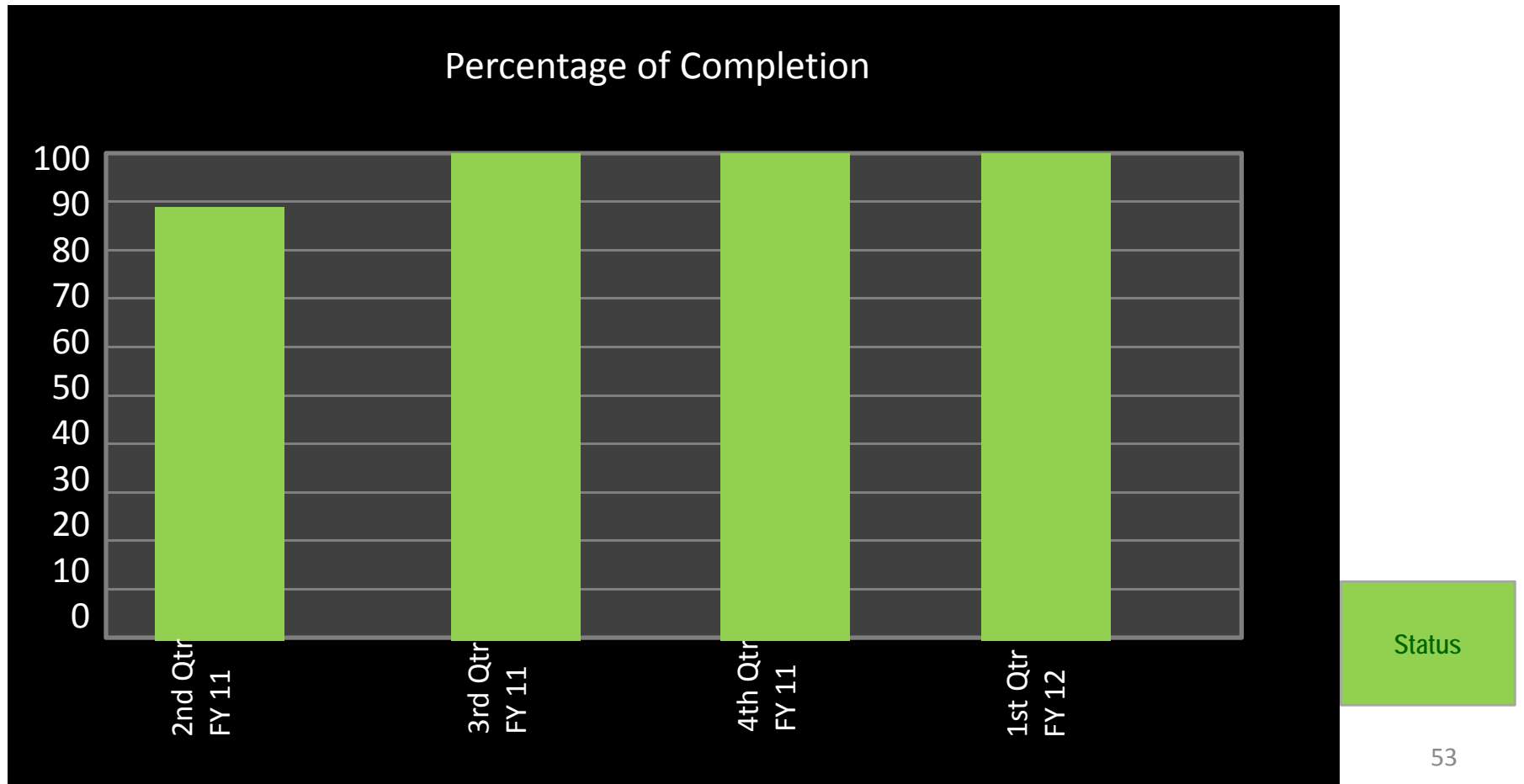
Lead
Architectural
Planning

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

Strategy 3.5: Improve Infrastructure improvement planning

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

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



Facilities Management Strategic Planning Session – First Quarter FY 2012

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

Strategy 3.5: Improve Infrastructure improvement planning

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

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

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Actions Complete:
 - Receive list of projects and estimates from ASG
 - Establish Capital Project Areas of Responsibility
 - Integrate List of Infrastructure into Capital Projects
 - Add estimates of probable costs for infrastructure to the estimates
 - Submitted revised estimates to GA

- Actions Planned:
 - Update and review based on updated information (South Village, the CRI Electrical Circuit, potential changes to the Appropriated 6 year List, etc)

Facilities Management Strategic Planning Session – First Quarter FY 2012

Lead
Architectural
Planning

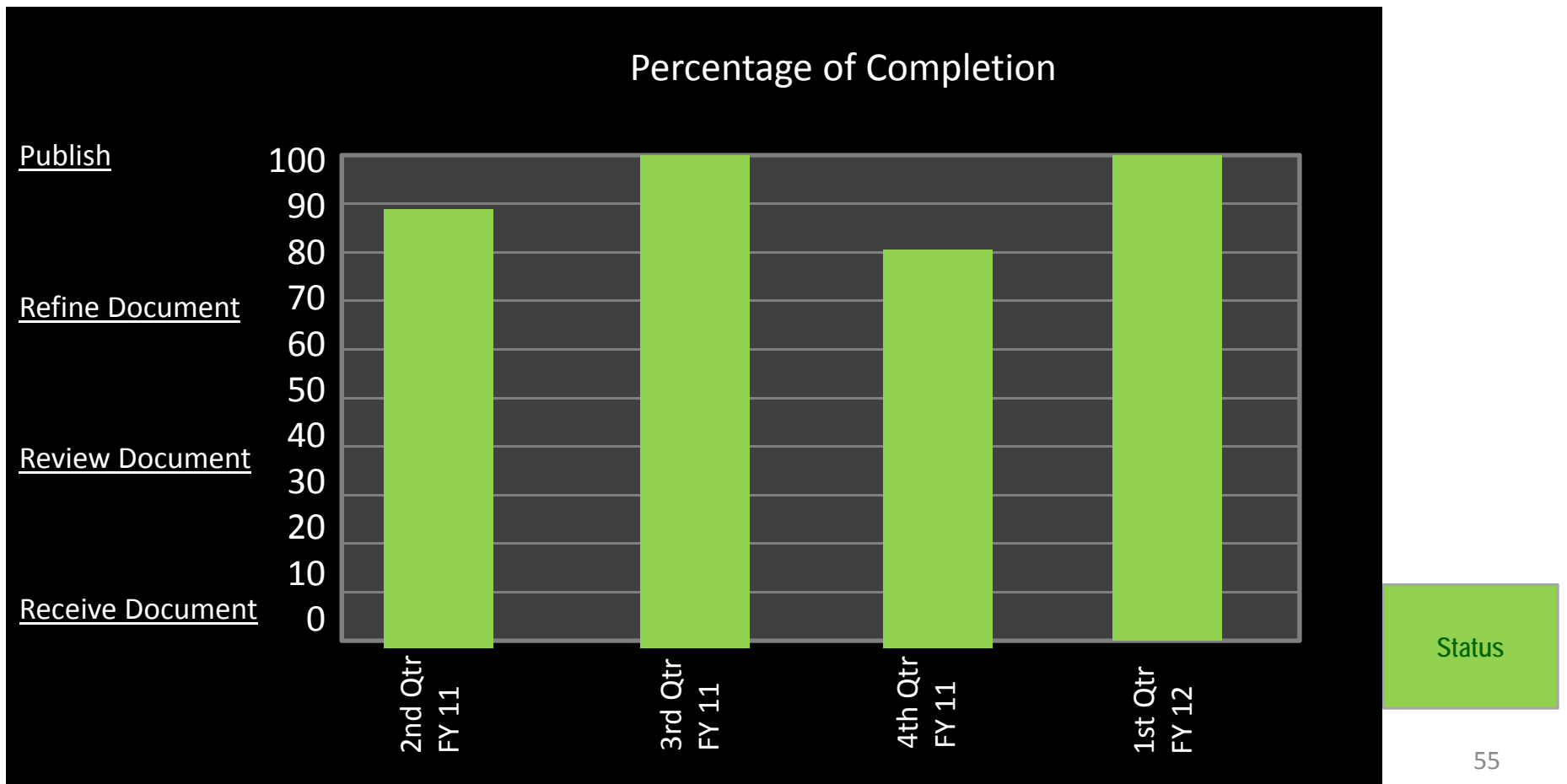
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process



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

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

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Actions Complete:
 - ASG has provided their “final” product
 - Architectural Planning Team has gone through entire document for corrections
 - Design manual has been posted
 - A meeting was held with the departments and sections for review distributed.
 - Conducted major review with Capital, Design Services, and some consultant input.

- Actions Planned:
 - Receive input from the Departments
 - Compile changes
 - Conduct quarterly updates

Facilities Management Strategic Planning Session – First Quarter FY 2012

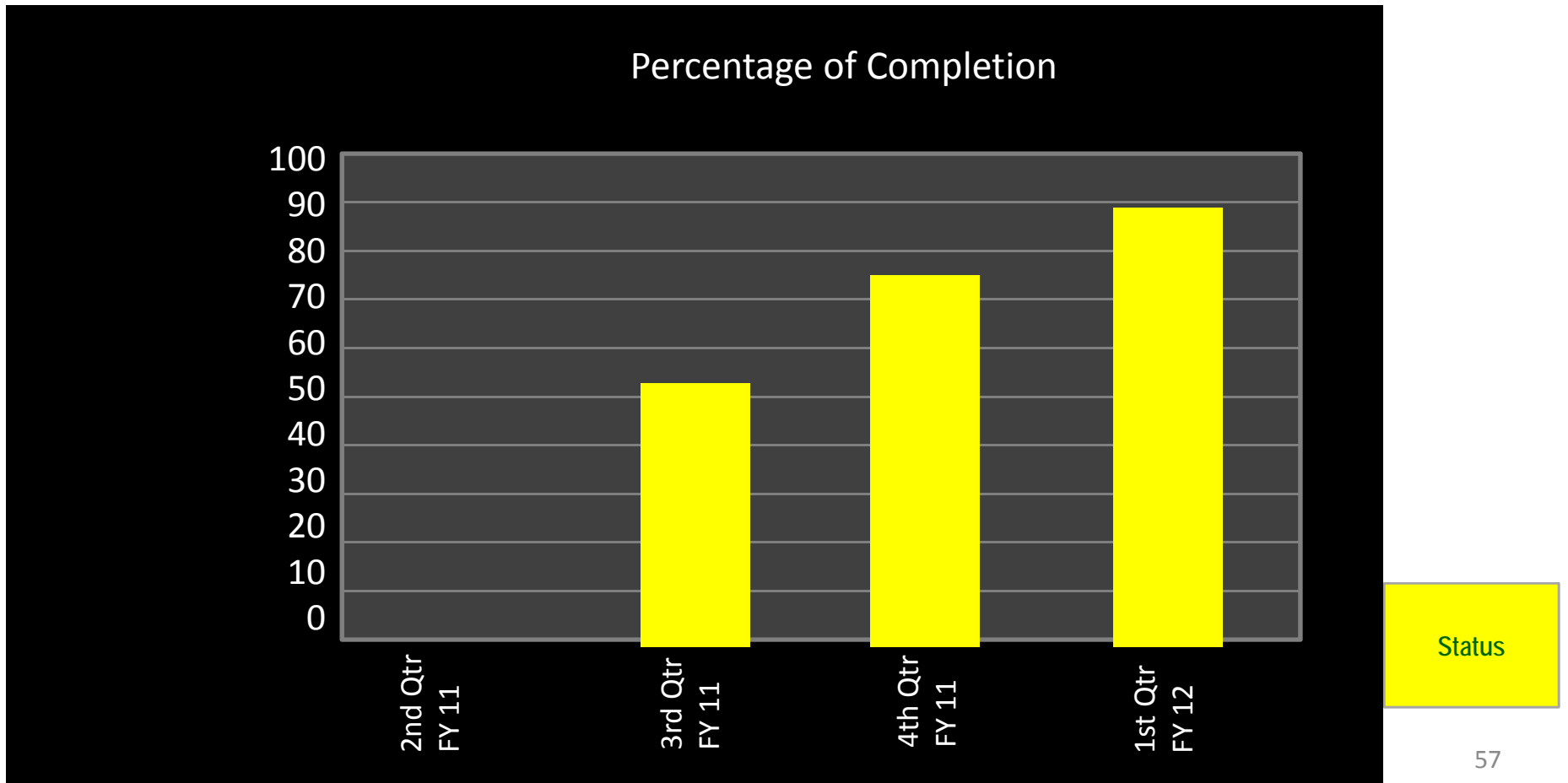
Lead
Architectural
Planning

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

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.





UNC CHARLOTTE

**Facilities Business Office
Report
Melanie Witherspoon, Director**

Facilities Management Strategic Planning Session – First Quarter FY 2012



Annual objective

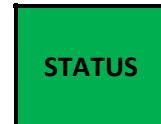
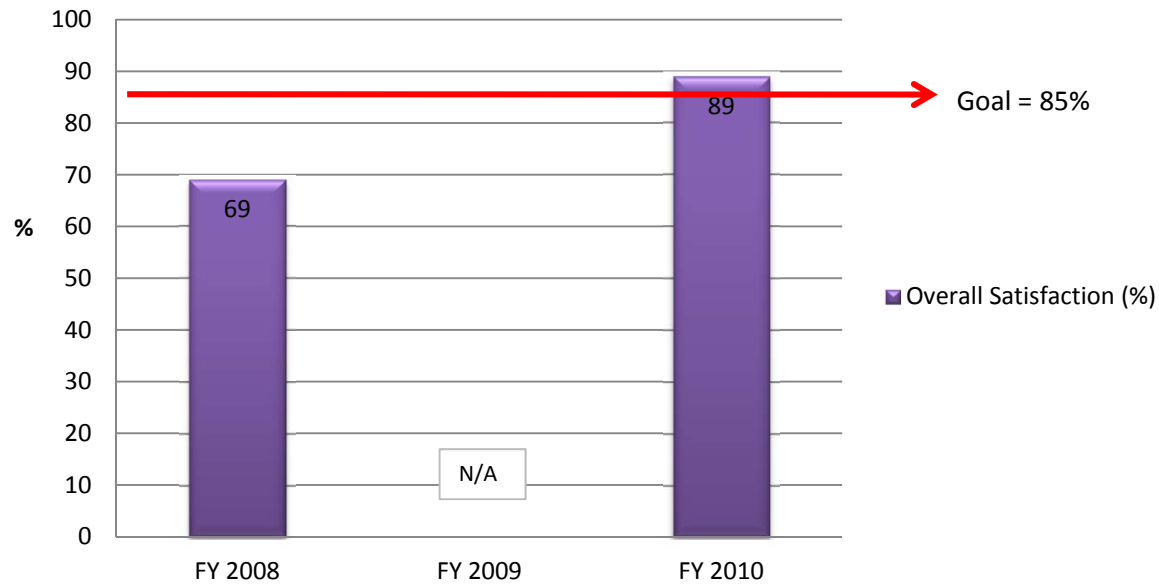
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%

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

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
FBO

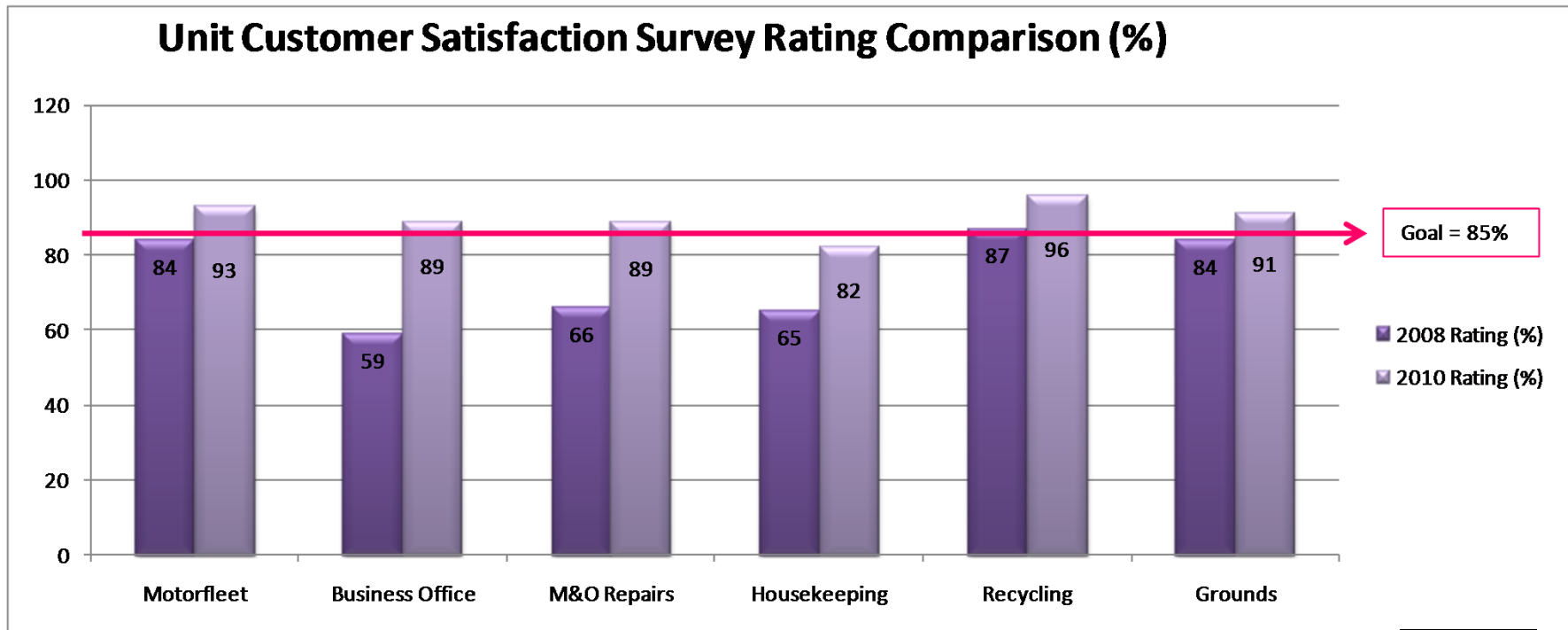
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 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



STATUS

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
FBO

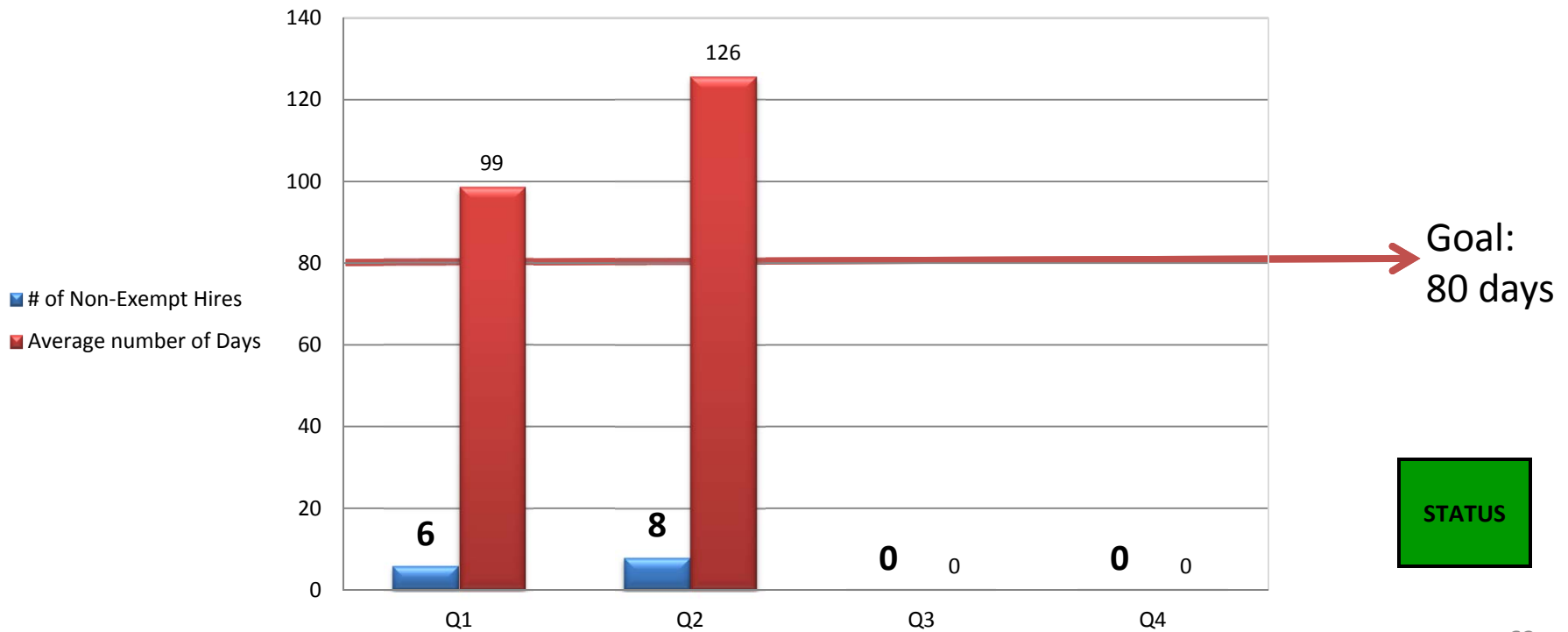
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Nonexempt (Hourly) Vacancies



Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
FBO

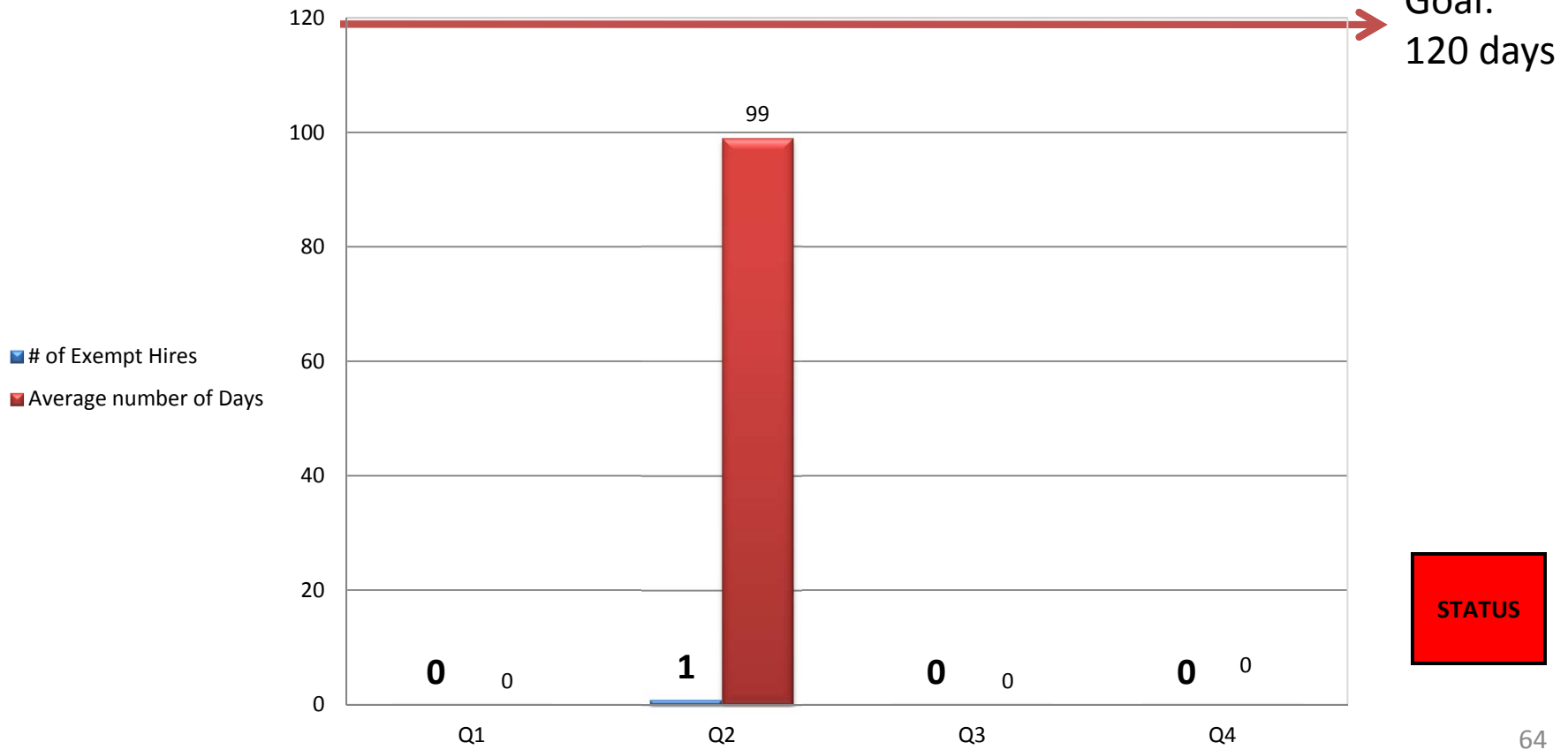
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Exempt (Salaried) Vacancies



Facilities Management Strategic Planning Session - 1st Quarter FY 2012

Lead
FBO

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

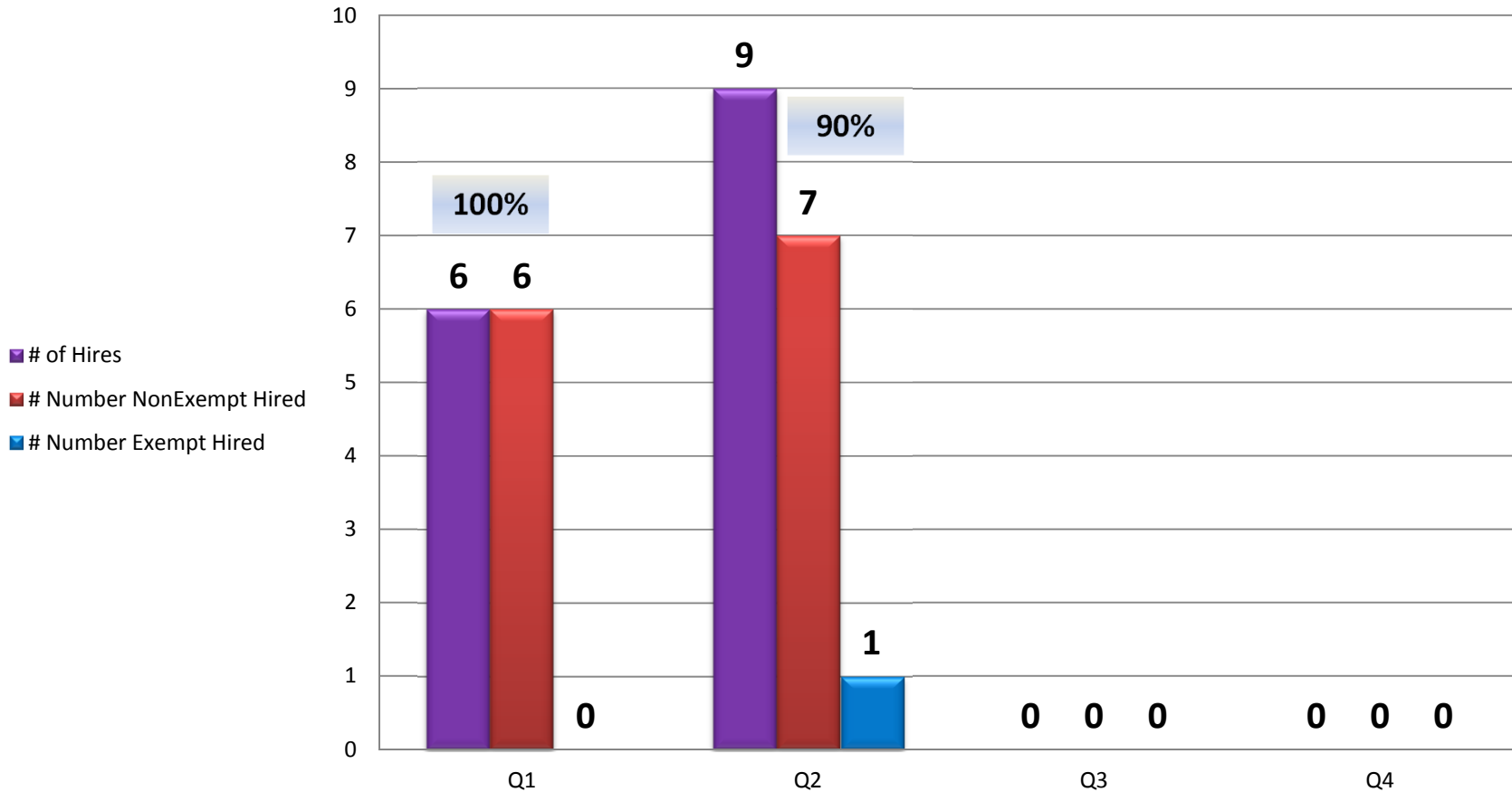
(22%)

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

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
FBO

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

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% 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

- Actions Planned
 1. Communication to Managers and Supervisors – more guidance on process
 2. Develop Targeted Selection on-line training session

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

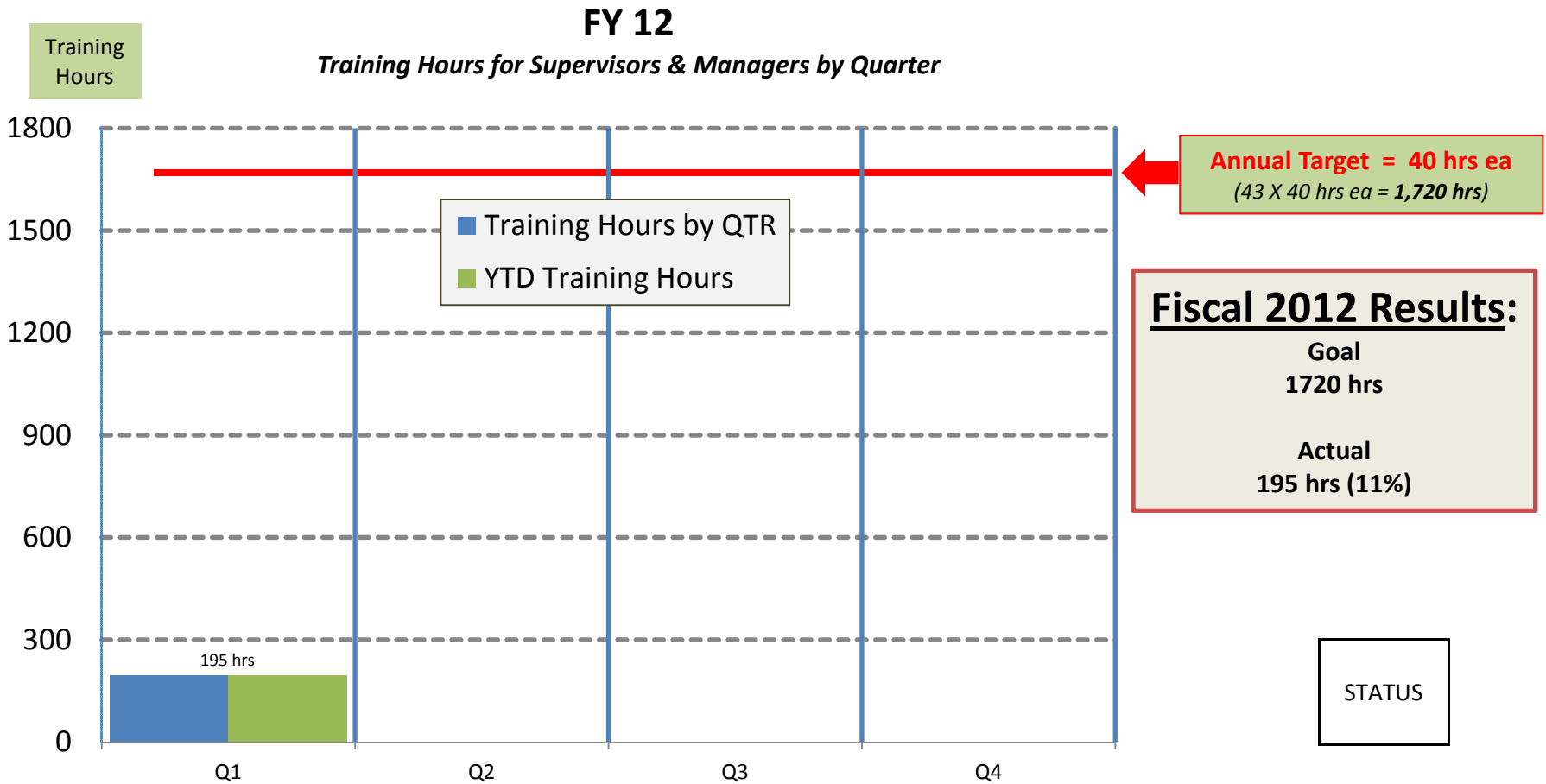
Lead
FBO

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

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

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

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



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**
 - ✓ Completed Electrician Matrix development

- **Actions Planned**
 1. Unveil Electrical Lab
 2. Continue matrix updates – HVAC underway
 3. Continued review of Leadership Development Matrix
 4. Develop compliance training and mission specific training metrics

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

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.

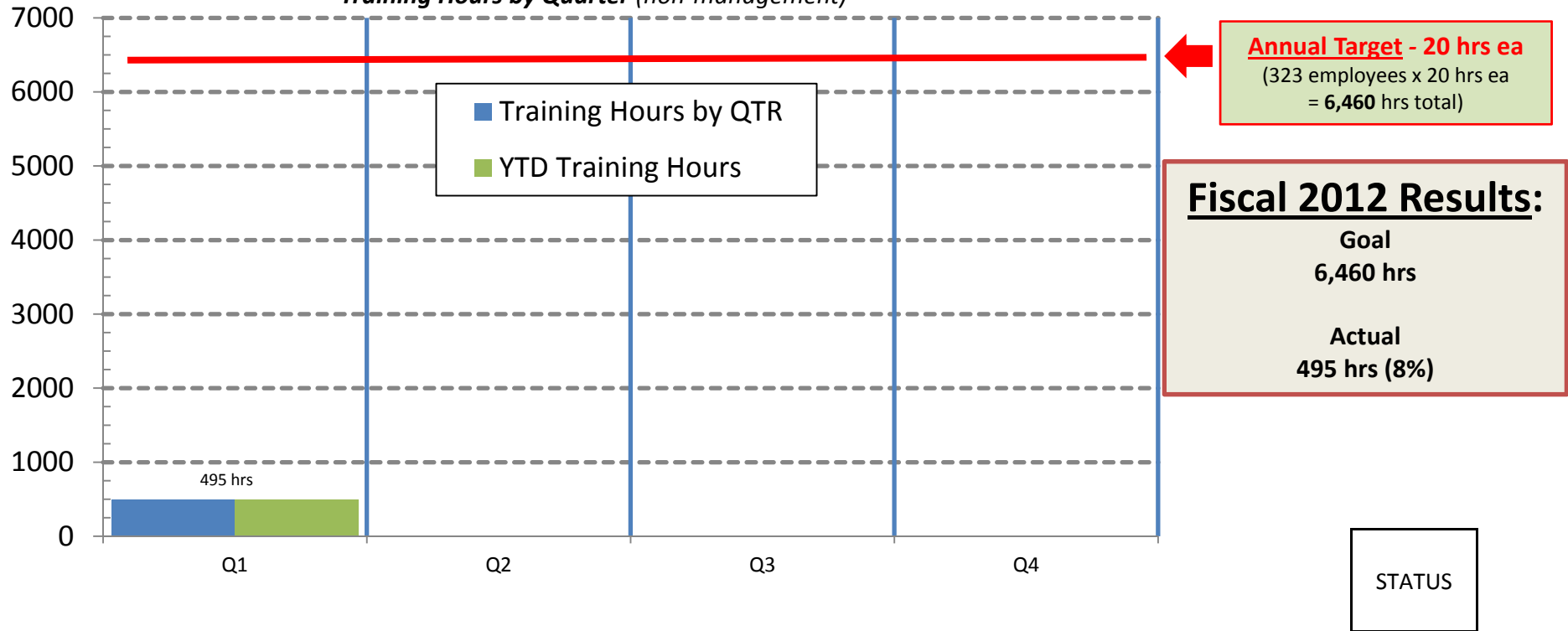
Measure: Average hours of training provided to or obtained by front line employees

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

Training
Hours

FY 12

Training Hours by Quarter (non-management)



FY12 YTD Training Hours & Percentages (1st Quarter)

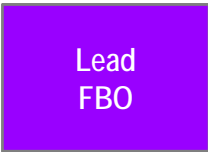
| Unit/Zone | Hours | % YTD | Unit/Zone | Hours | % YTD |
|----------------------------|-------|-------|------------------------|-------|-------|
| Design Services | 12 | 4% | Facilities Operations | 0 | 0 |
| Grounds | 30 | 3% | Zone 4 | 17 | 5% |
| FIS | 6 | 4% | Central Operations | 21 | 26% |
| Steam Plant | 0 | 0 | Auto | 66.5 | 48% |
| Zone 7 | 16.5 | 6% | Recycling | 70.5 | 21% |
| Capital Projects | 17 | 6% | Planning/Architectural | 12.5 | 13% |
| Housekeeping | 271 | 10% | Real Estate/Land Use | 28 | 28% |
| Lock Shop | 0 | 0 | Business Office | 29 | 15% |
| Zone 5 | 0 | 0 | AVC | 53 | 88% |
| High Voltage & Fire Alarms | 0 | 0 | Zone 3 | N/A | N/A |
| Zone 1 | 0 | 0 | | | |
| Zone 6 | 0 | 0 | | | |
| Zone 2 | 40 | 15% | | | |

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



ACTION PLAN

- Actions Complete
 - ✓ Worked with UNC Charlotte Continuing Ed to create Leadership Training Program for supervisors, managers and directors. Successfully completion will result in a certificate of graduation and CEU credits.
 - ✓ Training program submitted to AVC for review

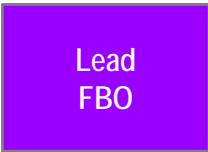
- Actions Planned
 1. Develop plan for new Lunch and Learn Series
 2. Develop case for an FM Computer Training Lab
 3. Continue development of training matrix for trades positions
 4. PC skills training for infrequent users in preparation for Web Time entry, PeopleAdmin, etc.

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



ACTION PLAN

- **Actions Complete**
 - ✓ Revamped employee exit interview process – web-based

- **Actions Planned**
 1. Develop succession plan for management

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**
 - Initial survey planning meetings held with Urban Institute
 - Directors asked for input regarding survey – potential changes, updates, etc.
 - BETA testing of survey completed

- **Actions Planned**
 - Survey administration by the Urban Institute to commence at the beginning of November 2011.
 - Survey to complete in December 2011.
 - Report anticipated in January 2012.

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
FBO

GOAL #6 – Promote Good Stewardship

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

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ Periodically review expenditure reports as part of continuous improvement effort;
 - ✓ Met with key stakeholders within Facilities Operations to discuss process improvements and new operational methods (i.e., use of standardized account codes, the financial report, etc.)

- **Actions Planned**
 - As part of FM’s Training and Development Academy, create training course - FM Budgeting 101 - which will focus on budget management skills. Program development placed on hold due to turnover and implementation of new technology;

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

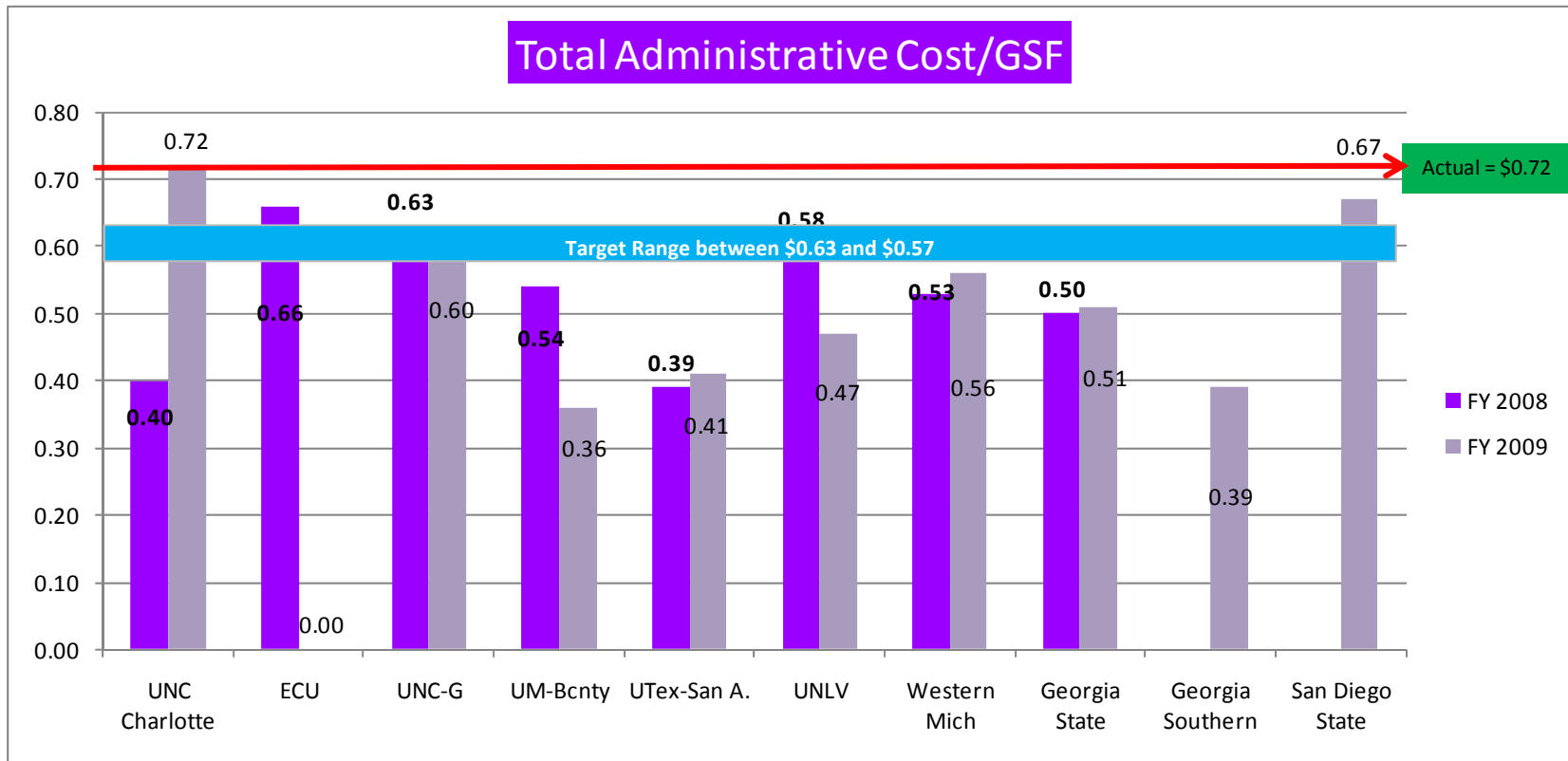
Lead
FBO

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

Strategy **6.1** Promote Fiscal Responsibility
Objective **6.1.1** Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ Data received from most survey participants
 - ✓ Data entry into survey module is 35% complete.

- **Actions Planned**
 1. Submit survey data requirements to all participants in July 2011
 2. Survey open through December 2011; Goal to submit for review to AVC-FM is November 15, 2011.

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

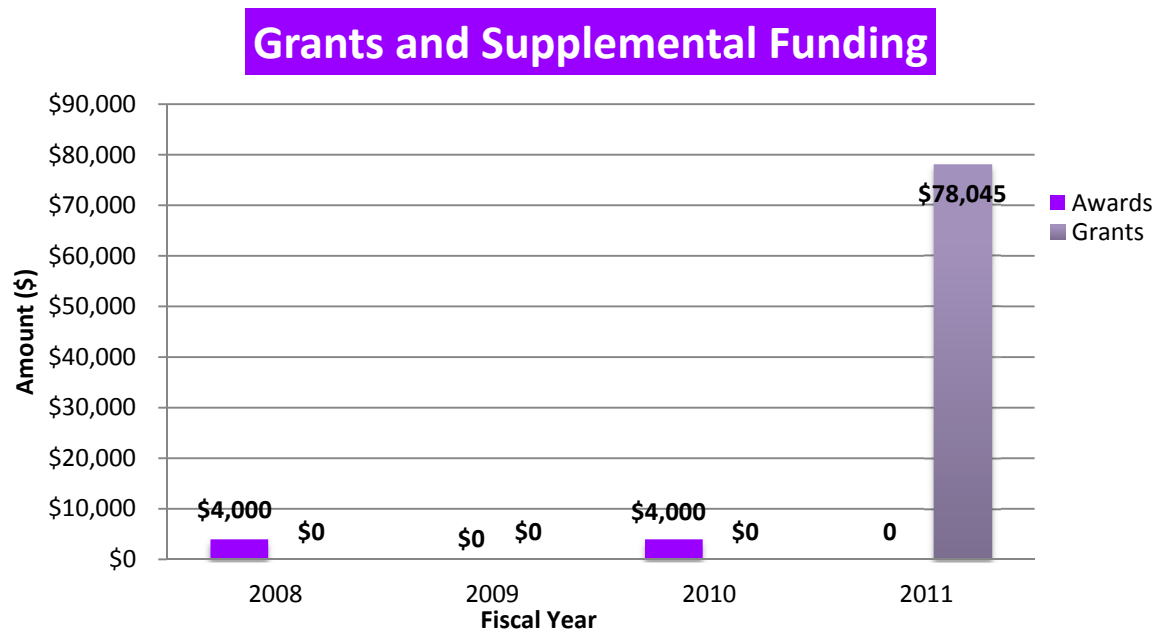
Lead
FBO

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

Lead
FBO

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

ACTION PLAN

- **Actions Complete**
 - ✓ Grant awarded for Energy Analyst position. Position reports to Energy Manager.
 - ✓ Grant awarded from ARRA – NC Department of Energy – Tony Schallert is PI.
 - ✓ Determined best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Worked with Sponsored Programs, Budget Office and Development to determine viable, legal solution

- **Actions Planned**
 1. Encourage individuals to participate in proposal development; Suggest that brief paragraphs on conceptual ideas for grants be developed for future use by Grants Management Specialist.
 2. Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals.
 3. Provide assistance in developing a strong proposal response to external funding collaboration within FM.

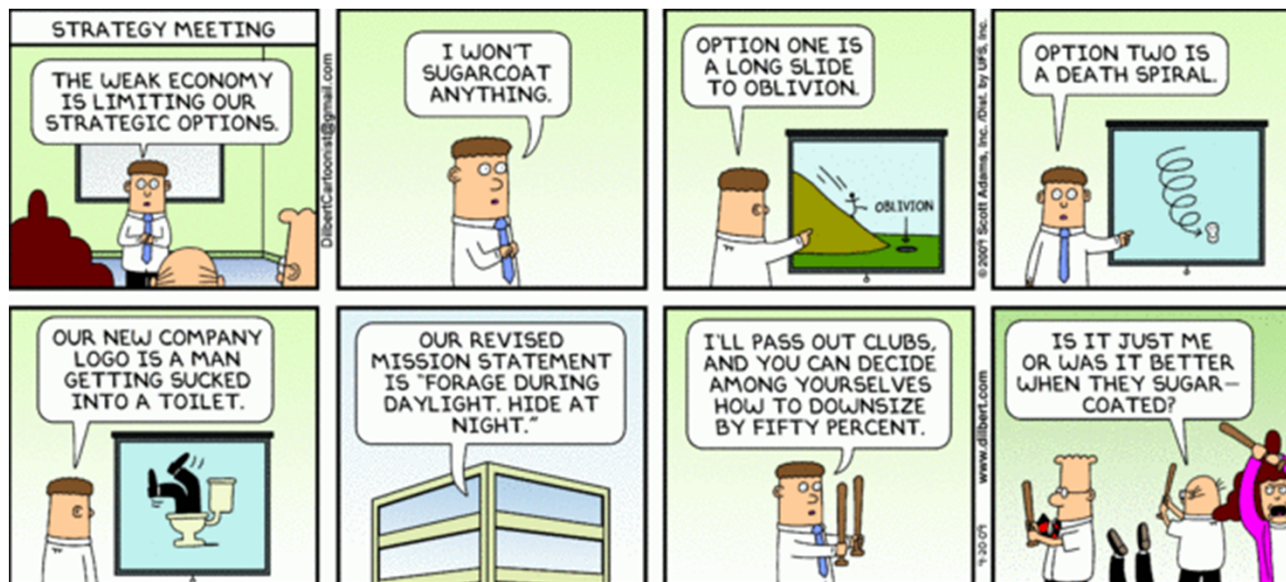


UNC CHARLOTTE

**Facilities Information Systems
Report
Ray Dinello, Director**

FM 5YP Prioritized Projects – FY11

1. Capital Renewal/Deferred Maintenance (CRDM) Process Reengineering
2. Enterprise Data Assistant (EDA) Project (Recycling, FO-WR, HSKPG, FCAP, Asset Mgmt)
3. Archibus Web Central Space Audit
4. Customer Service Improvements (Communication) - HOLD
5. Archibus - Equipment and PM Management
6. Tridium Energy Management – Phase One: SOP, Inventory and Energy Reporting
7. Archibus Key Management – Phase One & Two
8. Infrastructure Drawings and Mapping – Phase One: Archibus/ESRI Extensions Overlay configuration and Safety Equipment identification
9. Primavera P6 & Contract Management Continuous Improvements
10. Archibus Document Management - Drawing and Document Archive
11. Archibus Software Lifecycle Improvement (Begin: 6/15/2011 – 8/30/2011)



Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
FIS

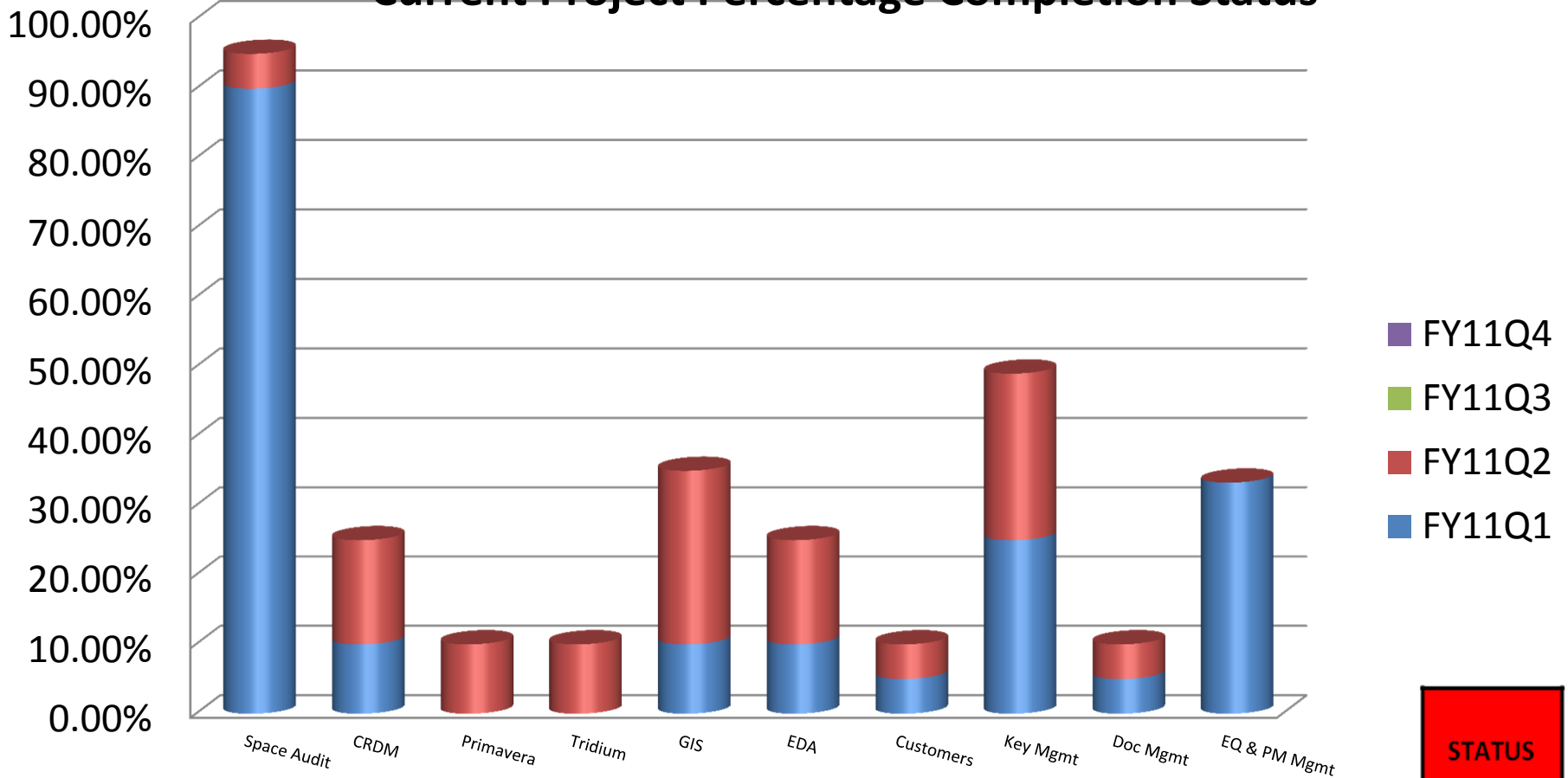
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

Balanced Scorecard Category: Internal Processes

Current Project Percentage Completion Status



STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2011

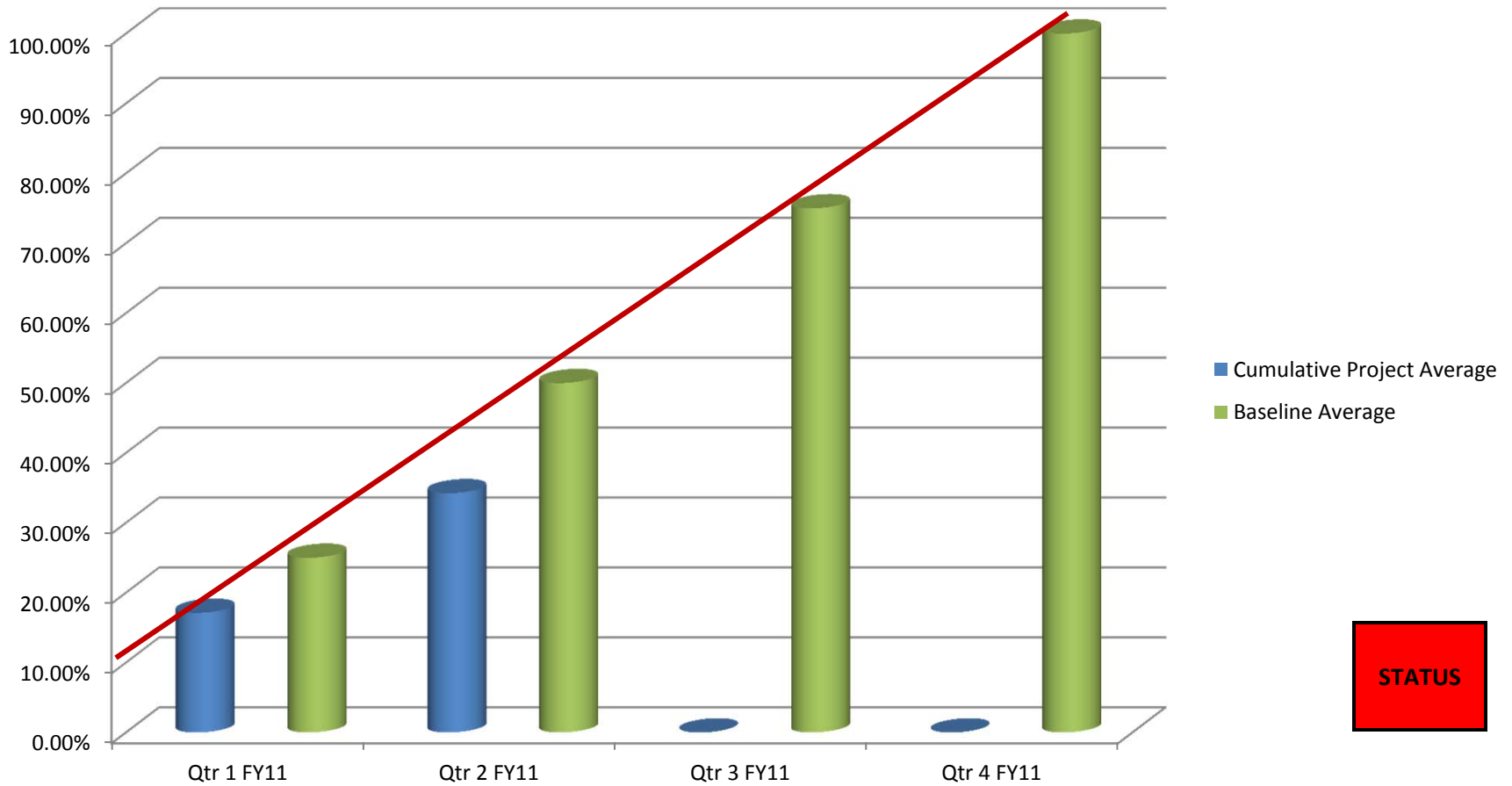
Lead
FIS

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

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

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

Balanced Scorecard Category: Internal Processes



STATUS

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

Lead
FIS

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

ACTION PLAN

Actions Completed:

1. Completed Space Audit open training sessions in November and finalize reports.
2. Completed Capital Renewal/Deferred Maintenance (CRDM) Process Reengineering Project Brainstorming session, developed Charter, Initial WF and schedule of workshops/Steering committee.
3. BAS/Tridium – David Champion started 11/1/2010 and has started BAS Inventory and SOP
4. Key Management - Close out Phase one Developments for finalizing signoff
5. Started first Customer Workgroups for Archibus Project Management
6. Enterprise Data Assistant (EDA) –
 1. Completed WF, SOP, and printed bin labels for Recycling Pilot.
 2. Completed WF and SOP FO Work Requests. (Shops have completed 65% Building barcode labels)
7. GIS and Drawings – Now available to all of campus FS under WR Customer role.

Actions Planned:

1. Space Audit – Work with AA and Art Planning to perform FM Space cleanup and to establish deadline to close out first space audit.
2. Enterprise Data Assistant (EDA) –Begin pilot for Recycling and FO pilot shops in February.
3. CRDM - Finalize process work flow and SOP
4. BAS/Tridium – Complete Inventory. Complete current bug list on all AX JACE panels. Begin monthly BAS meetings.
5. Primavera Contract Management – Have plan for next steps for improvement



UNC CHARLOTTE

Housekeeping Report

Brian Guns, Director

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
Housekeeping

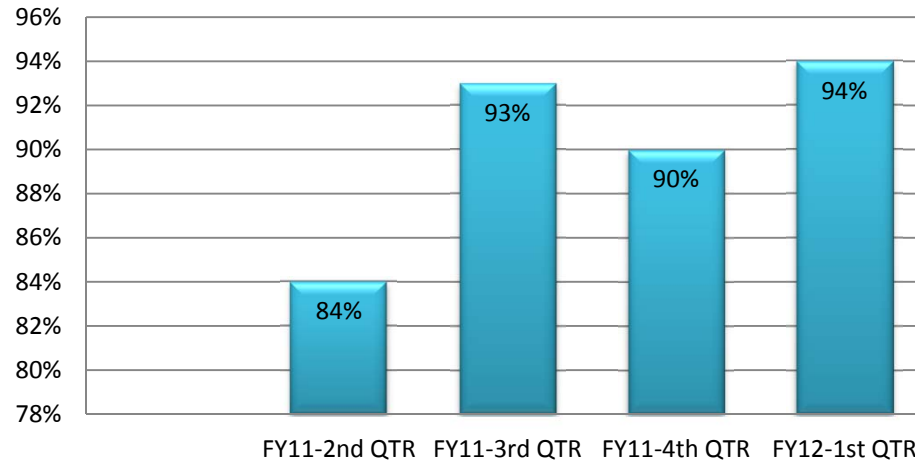
GOAL #1 – Improve Maintenance and Operations of the Campus

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



Percentage = 94%

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

Facilities Management Strategic Planning Session – 1st Quarter FY 2012

Lead
Housekeeping

GOAL #6 – Promote Good Stewardship

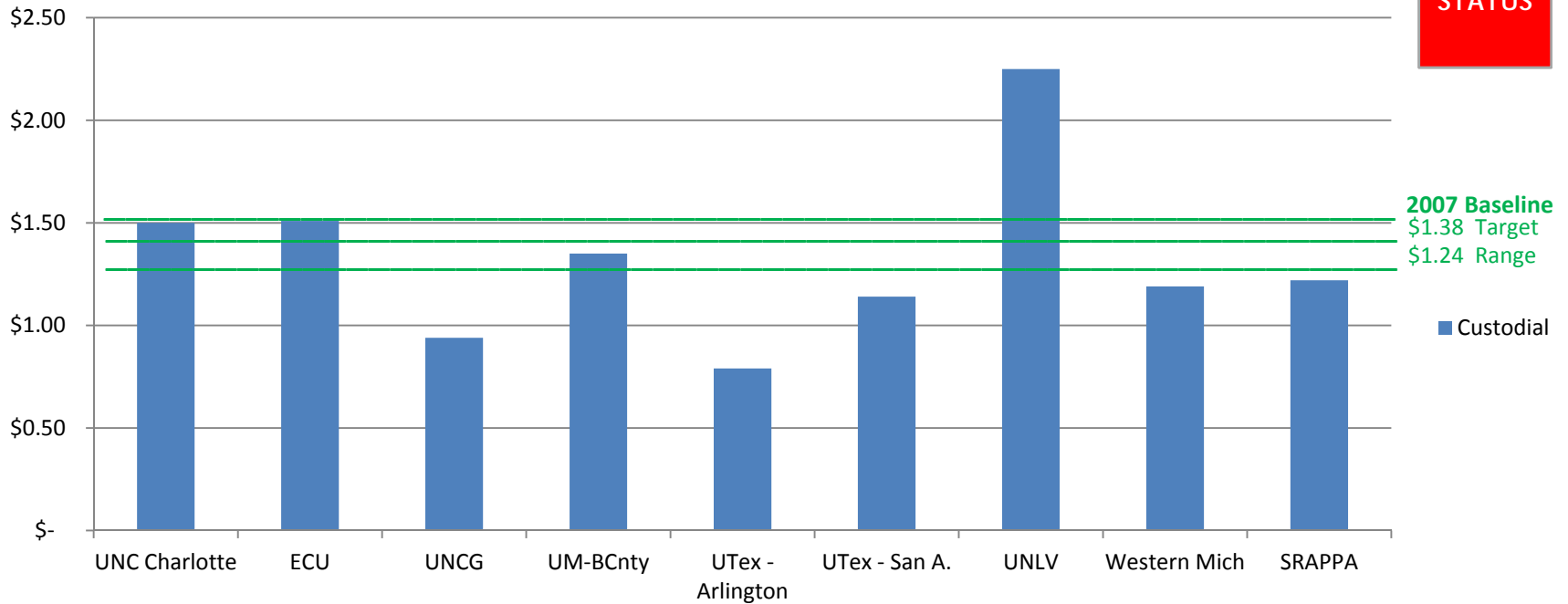
Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.4 Achieve Custodial Costs/GSF Plus or Minus 5% of the APPA Average for Peer Institutions
 (Internal UNC Peers = East Carolina, Greensboro)
 (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington, University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

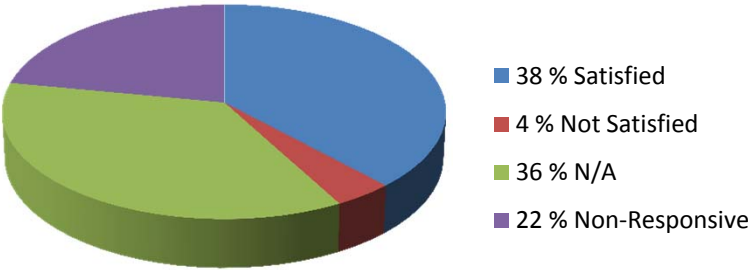
Custodial-Total Cost/GSF Comparison

STATUS

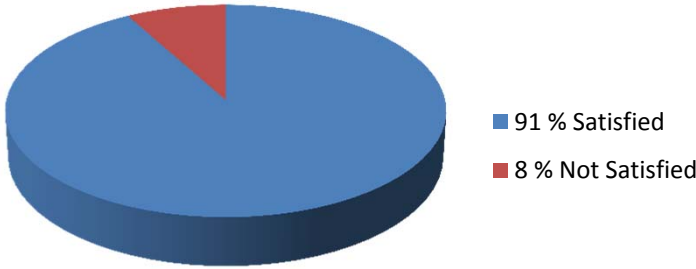


Housekeeping Work Request Customer Satisfaction

Percentages



Percentages





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Recycling Report

Kathy Boutin-Pasterz, Coordinator

Shannon Caveny-Cox



Facilities Management Strategic Planning Session – First Quarter FY 2012

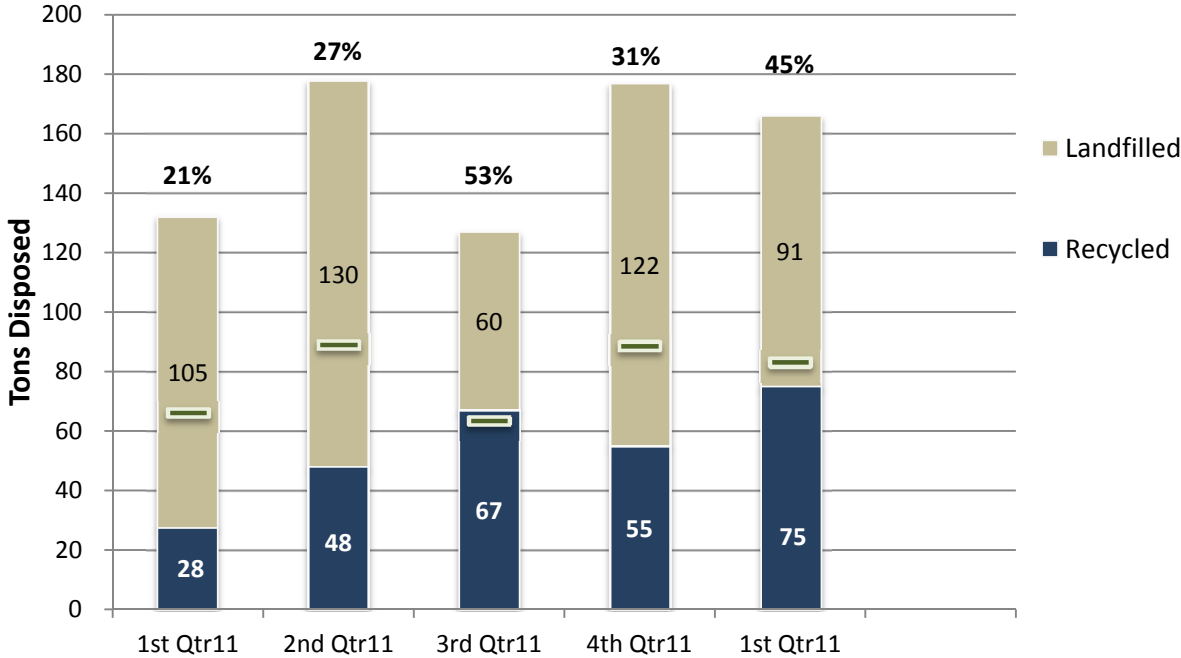
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 Increase Recycling of Construction and Demolition Materials on Renovations to 50% 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 - Materials Disposed
1st Qtr FY12



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 50% of Total C&D Waste



ACTION PLAN

- **Actions Complete**
 - First attempt at ceiling tile recycling – Colvard 4th & 5th floors was very successful thanks to Drew (project manager). Shipped two tractor trailer loads.
- **Actions Planned**
 - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
 - Closer monitoring on design projects to ensure weight tickets received from contractors.
 - Pursue partnerships that allow for alternative disposal methods.

Facilities Management Strategic Planning Session – First Quarter FY 2012



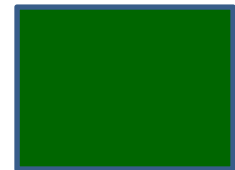
GOAL #6 – Promote Good Stewardship

Strategy **6.2** Develop a Sustainable Campus
Objective **6.2.2** Increase Recycling of Construction and Demolition Materials on Capital Projects to 50% 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

Weights too varied to graph effectively.
Recycling rate is 85%+ on all Capital projects.





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 50% of Total C&D Waste

ACTION PLAN

- Actions Complete
 - All rates are 85%+ for Capital projects.

- Actions Planned
 - Continue monitoring projects and acting as resource for contractors.



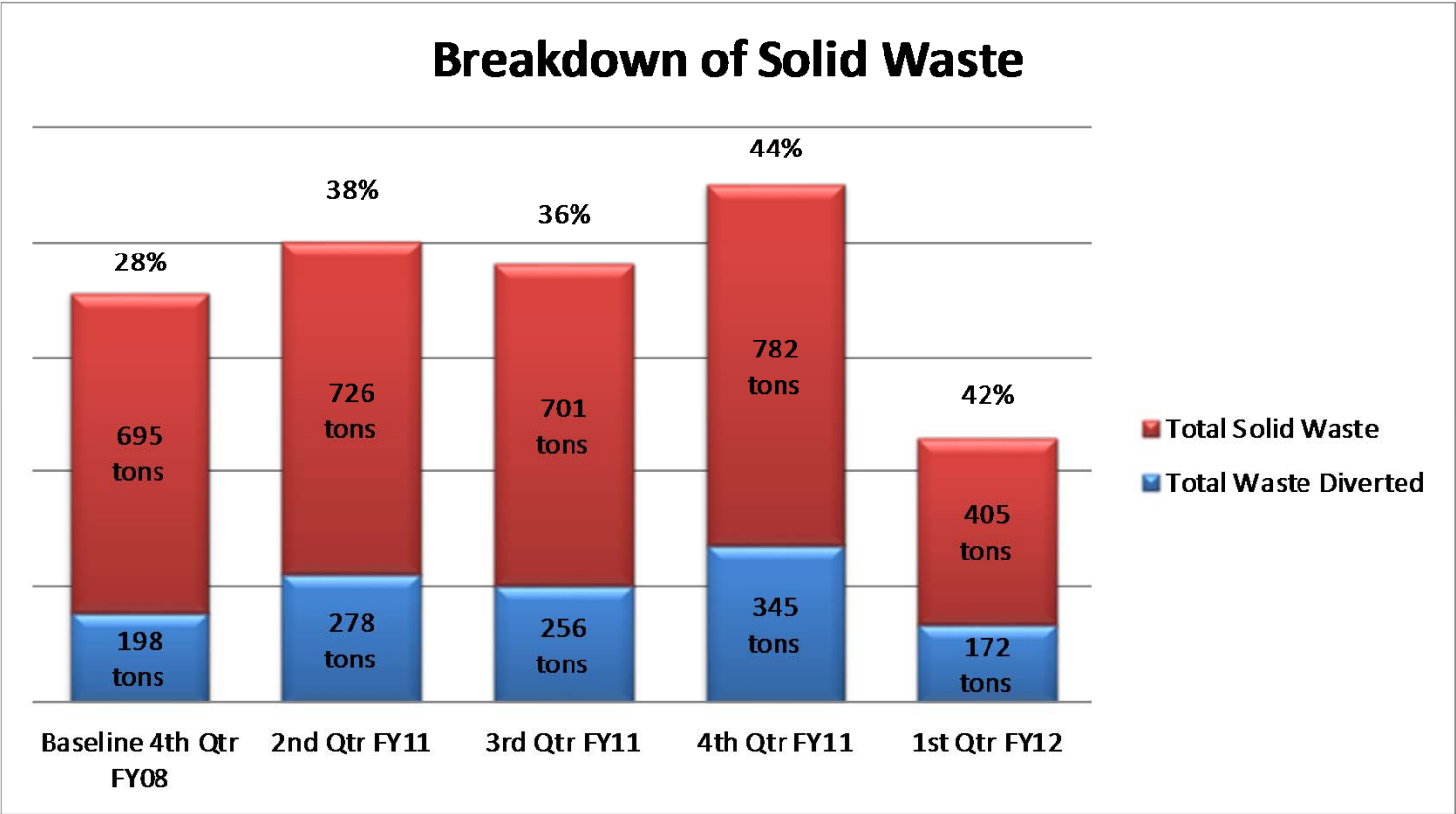
Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

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 2008)



ACTION PLAN

- **Actions Complete - TOTAL recycling for quarter 42%**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
 - Continue to Partnered with Housekeeping on the new mini office trash can reduction program
 - 2 Master Students from Civil Engineering will assist Recycling/Grounds/ Sustainability Departments to design comprehensive food composting program Summer 2011 semester
 - Developing RFP for outdoor recycling/trash bins
 - Developing RFP for waste hauler
 - Continue educational outreach and promotion
 - Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
 - continue to be advisors to EARTH Club and CGI
 - working with 2012 NCAPPA conference committee
- **1st Quarter Actions Planned**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Continue educational outreach and promotion
 - will attend all new staff and faculty orientation sessions, meet with RA/RM’s, Week of Welcome Programs, etc
 - Designing Zero Waste Options for FOOTBALL
 - Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**



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**** END ****