



UNC CHARLOTTE

*Facilities Management*

# Strategic Planning Session

Second Quarter – Fiscal Year 2010

January 28, 2010







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 – Second Quarter FY 2010

Lead  
M. & O.

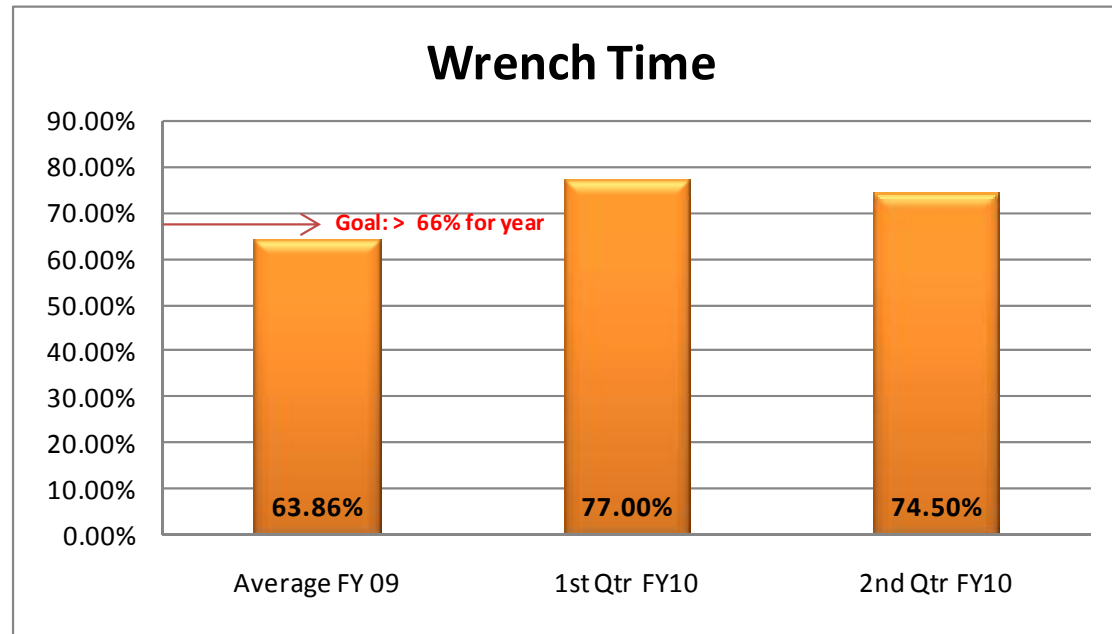
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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)

**Goal:** Greater than 66% for the year

**Balanced Scorecard Category:** Internal Business Process



STATUS



## GOAL #1 – Improve Maintenance and Operations

Lead  
M. & O.

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

### ACTION PLAN

- Actions Complete
  - 1 – Continued improvement of accounting practices for time applied to WR’s.
  - 2 – Continued adding PMs to the PM program.
- Actions Planned
  - 1 – Continue development of a more extensive PM program.
  - 2 – Continue to stress reporting accuracy.
    - a) Meet with shop supervisors and PA’s to review.
    - b) Stress importance with all employees.
    - c) “Recorded hours” has improved from 75% of available hours last quarter to 79.5% of available hours this quarter.



## Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
M. & O.

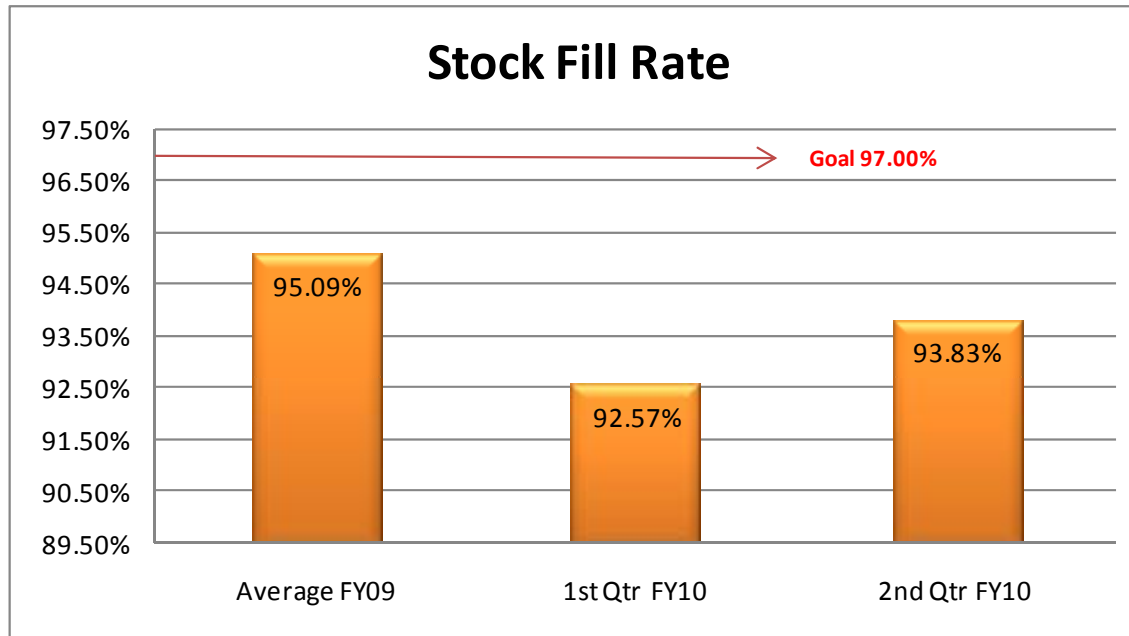
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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's automated inventory management system which automatically computes stocking levels and reorder points based on usage and replenishment time was on the entire quarter.
  - 2 – Ensured all items which had backorders placed against them were turned on for replenishment. This was a contributing factor to late deliveries and lower fill rates the first quarter of FY10. This quarter replenishment was on the entire period and fill rates have improved.
- Actions Planned
  - 1 – Continue to let automated system control and see how it works.



## Facilities Management Strategic Planning Session – Second Quarter FY 2010

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M. & O.

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

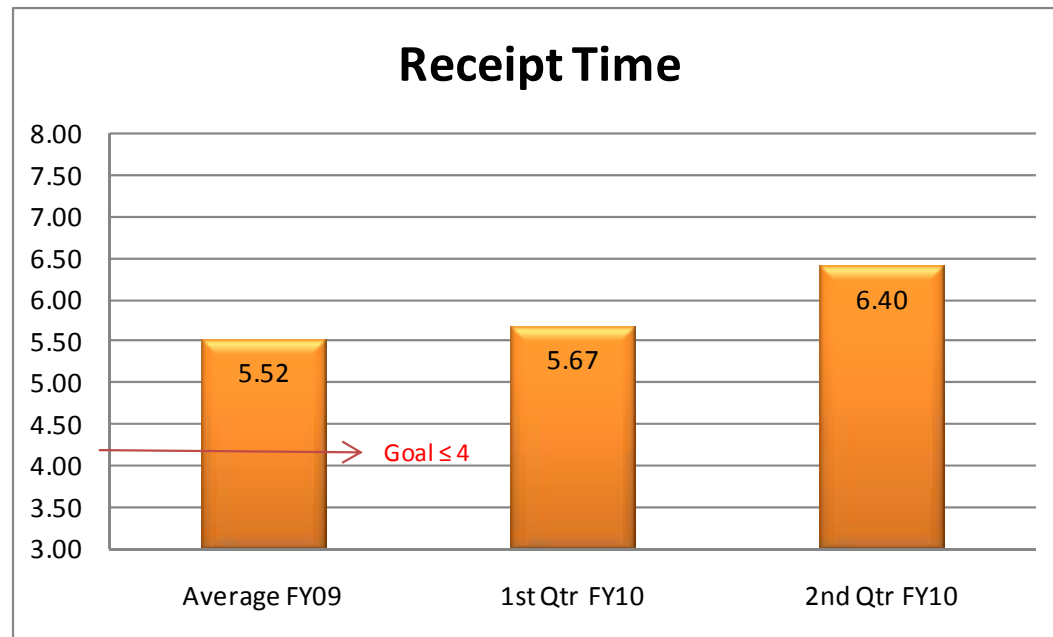
**Strategy:** 1.2 Improve Logistics Efficiency

**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 – Supervisors improved average approval time from 8.15 hrs. in Qtr 1 to 7.5 hrs. in Qtr 2.
  - 2 – Information to buyers at SDI back-tracked from 1.4% of requests needing information in Qtr 1 to 2.1% in Qtr 2.
  - 3 – Reviewed non-stock orders to determine items that should be stocked. Monthly non-stock orders averaged 292 for all of FY09. Despite tight budget; the average monthly non-stock orders this fiscal year has averaged 330 per month. The 10% increase strained SDI's resources.
- Actions Planned
  - 1 – Encourage all employees and supervisors to review orders and stop ordering as non-stock materials which are stocked in the warehouse.
  - 2 – SDI has already added additional resources on their end to help with higher volumes.



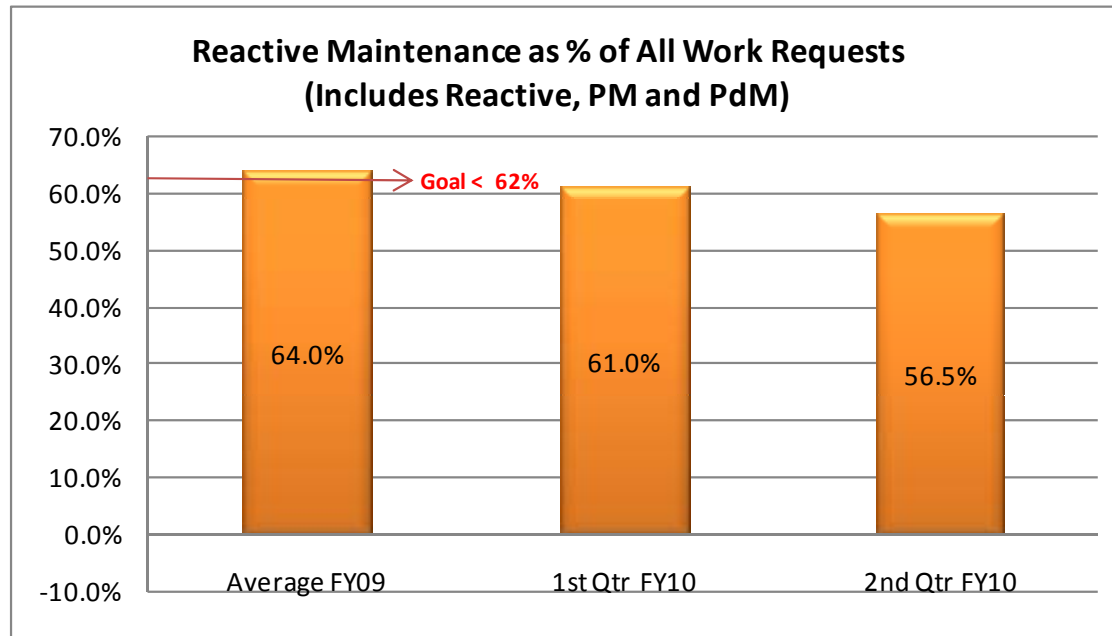
**GOAL #1 – Improve Maintenance and Operations of the Campus**

**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



STATUS

## 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 – Reviewed PM's – advised Shops & Zones of PM templates that were in use in other Shops & Zones not being employed by their shop or zone and built PM program.
- 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 reactive work requests for routine services that should be moved to “scheduled services,” or PM.



## Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
M. & O.

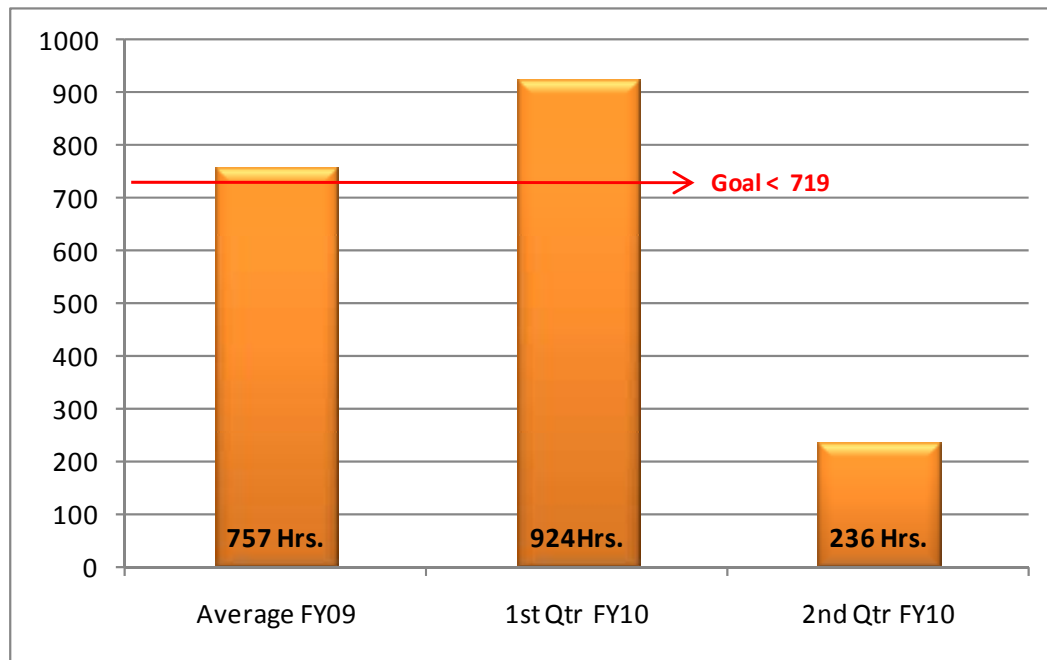
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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 ).

**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 – 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.

#### Actions Planned

- 1 – Review the manner in which data is used to calculate cycle time with FIS to ensure accuracy.
- 2 – Continued emphasis on 14 and 30 Day Report, unassigned WR's, and prompt completion of paperwork.





## Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
Housekeeping

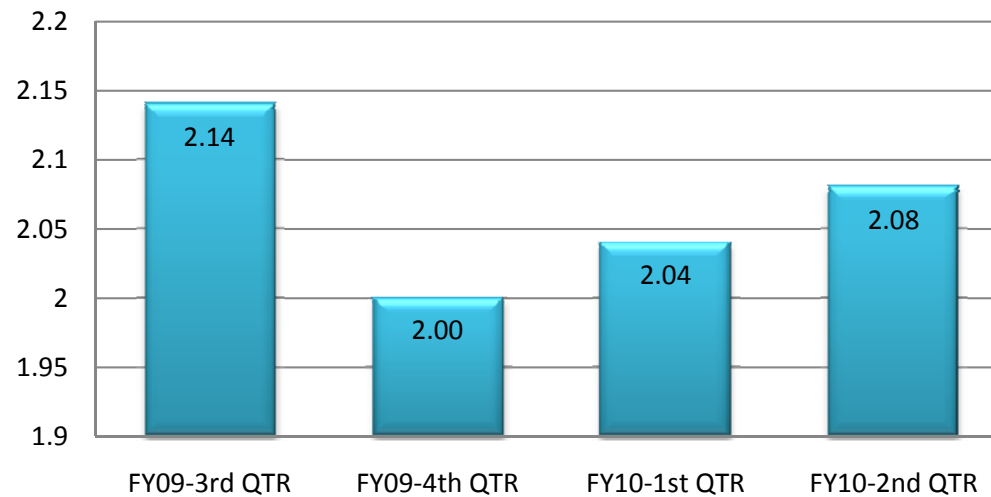
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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

## Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
M. & O.

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

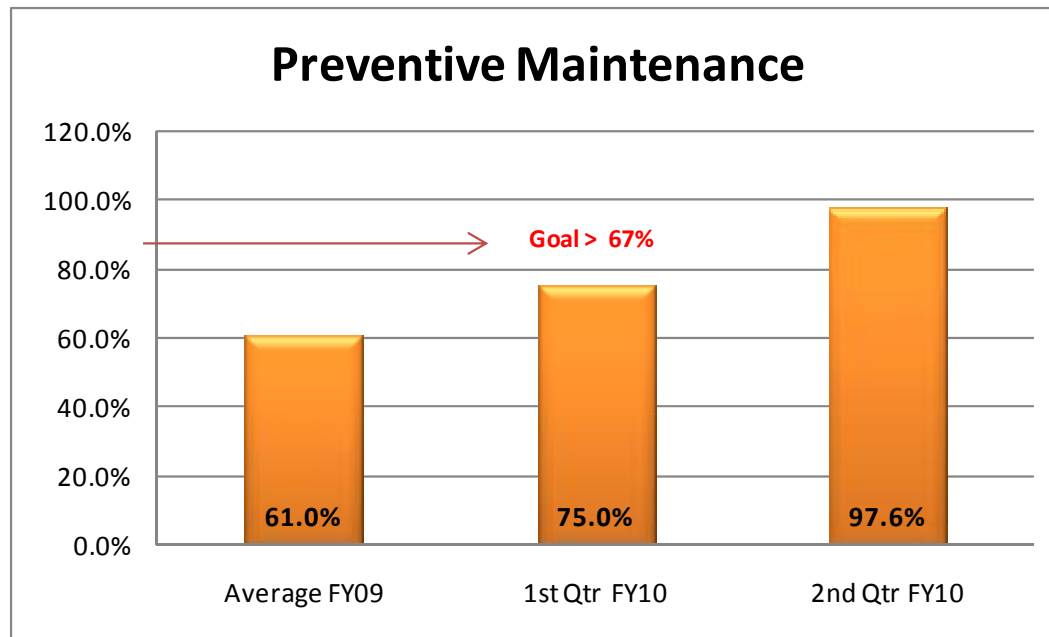
**Strategy:** 1.5 Improve Reliability

**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 importance of PM's with managers; 1239 of 1270 PM's completed in 2<sup>nd</sup> Qtr.
- 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 – Second Quarter FY 2010

Lead  
M. & O.

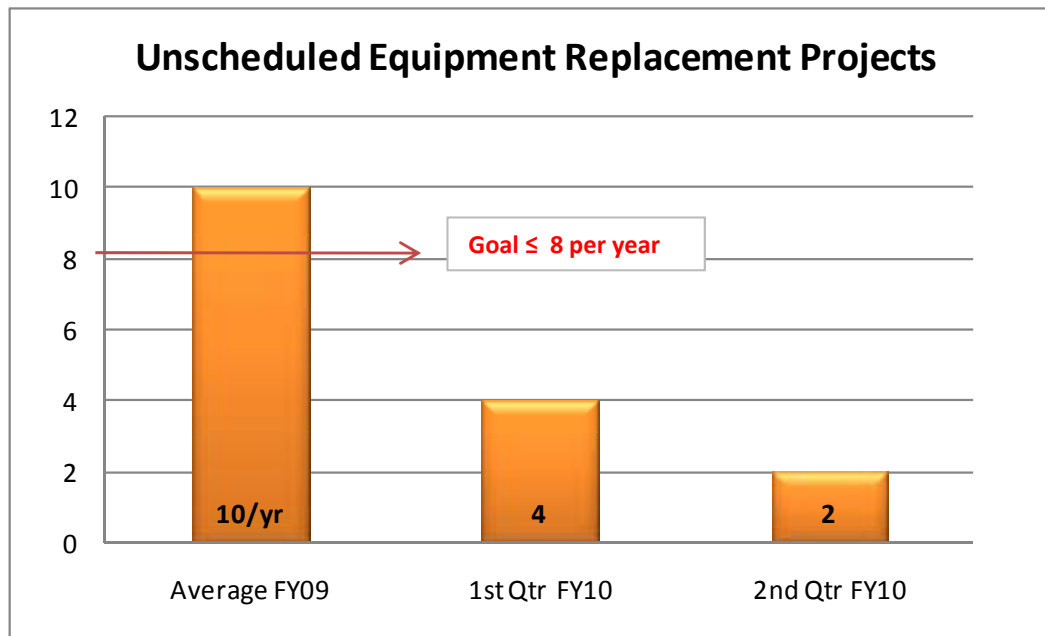
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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

**Goal:** Less than 8 per year

**Balanced Scorecard Category:** Internal Business Process



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 equipment to PM program.
  - 2 – Initiated of an “Out of Service” measure in Archibus.
- Actions Planned
  - 1 – Continue expansion of PM Program.
  - 2 – Continue expansion of predictive maintenance program.

Note: Failures included – Pump for Filtration System at Grigg, 50 HP Motor at SAC

## Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
M. & O.

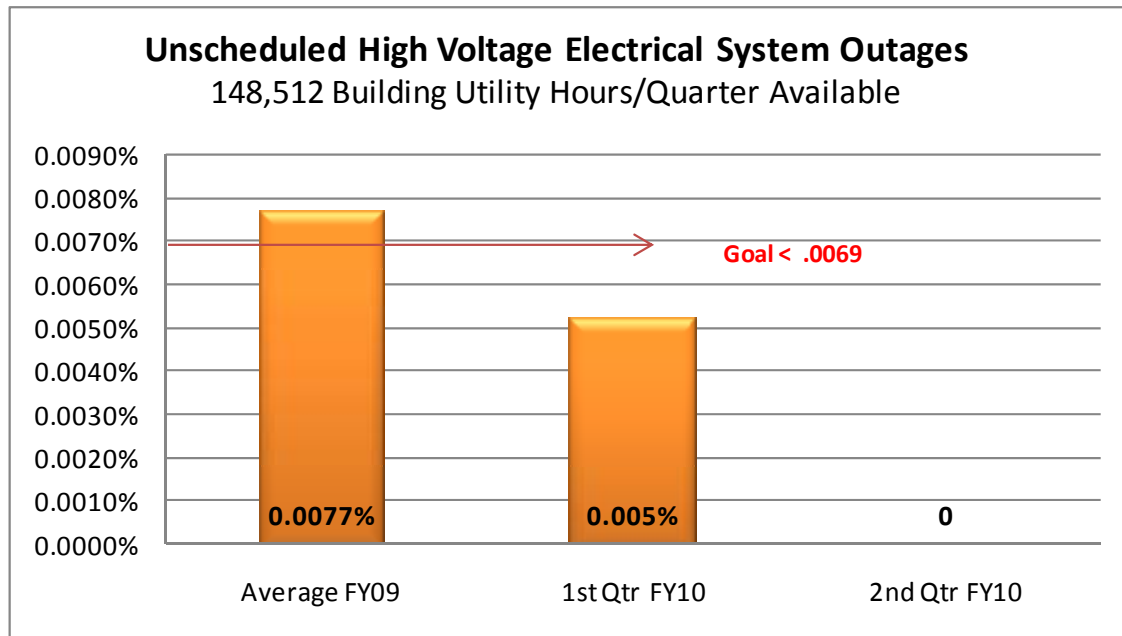
### GOAL #1 – Improve Maintenance and Operations of the Campus

**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 – Continued working closely with Project Managers and contractors performing work on-site to preclude accidental interruptions by properly identifying location of underground utilities.
  - 3 - Identified several switches needing replacement and prepared estimates for planning.
  
- 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 – Second Quarter FY 2010

Lead  
M. & O.

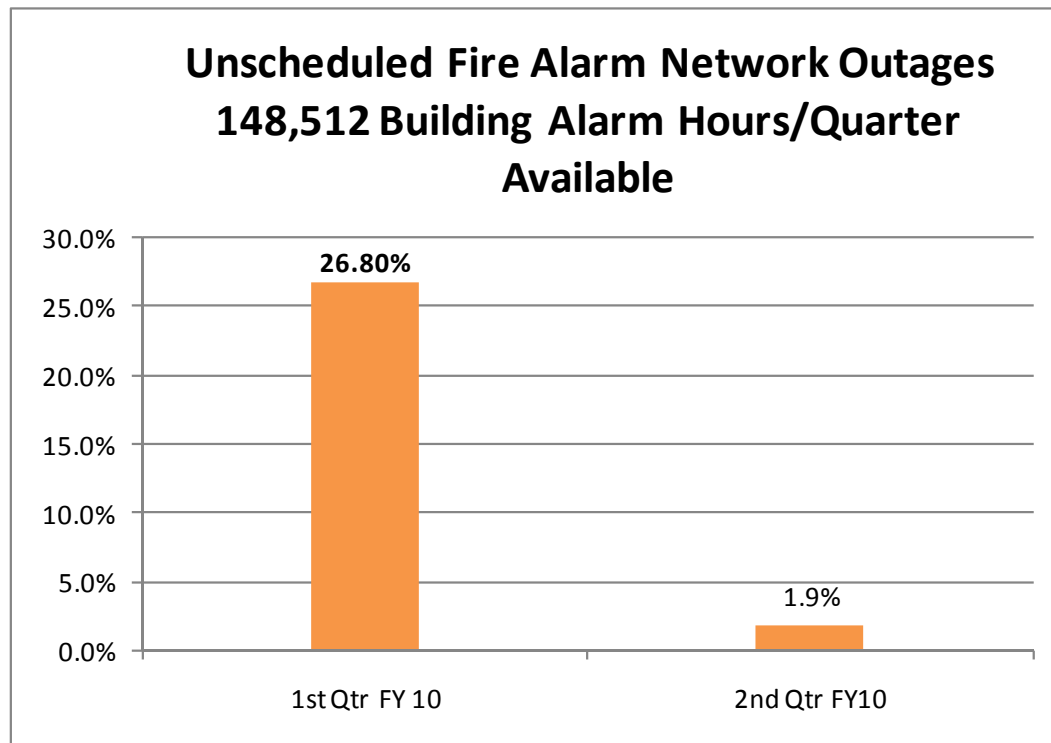
GOAL #1 – Improve Maintenance and Operations of the Campus

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)

Goal:

Balanced Scorecard Category: Internal Business Process



STATUS



## GOAL #1 – Improve Maintenance and 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.



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



UNC CHARLOTTE

# Facilities Information Systems



## FM 5-Year IT Plan Process

- Request list of technology was reviewed and assigned priority by the FM Director team.
- The priority projects were spread throughout a 18-month timeframe. At which point, we will then update FM 5-Year IT requested projects and perform prioritization for the next 18-month cycle
- NOTE: Projects assigned as a priority may run through consecutive 18-month cycles.





## FM 5YP Prioritized Projects

1. Archibus Web Central Space Audit
2. Archibus – MIPS Migration to Project Management
3. Archibus – Project Management Reports – HOLD (PM)
4. Archibus - Equipment and PM Management
5. Tridium Energy Management – Phase One: Energy Reporting
6. Archibus Key Management – HOLD (Space)
7. Infrastructure Drawings and Mapping – Phase One: Archibus/ESRI Extensions Overlay configuration and Safety Equipment identification
8. Archibus Housekeeping & Recycling Management – Phase One: APPA Cleanliness Level - HOLD (Space)
9. Primavera P6 & Contract Management – Over 18mo– Review for next steps
10. Archibus Document Management - Drawing and Manual Archive - HOLD (Space & ESRI) – Over 18mo
11. Archibus Building Utility Outages Communication - HOLD (Space)

Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
FIS

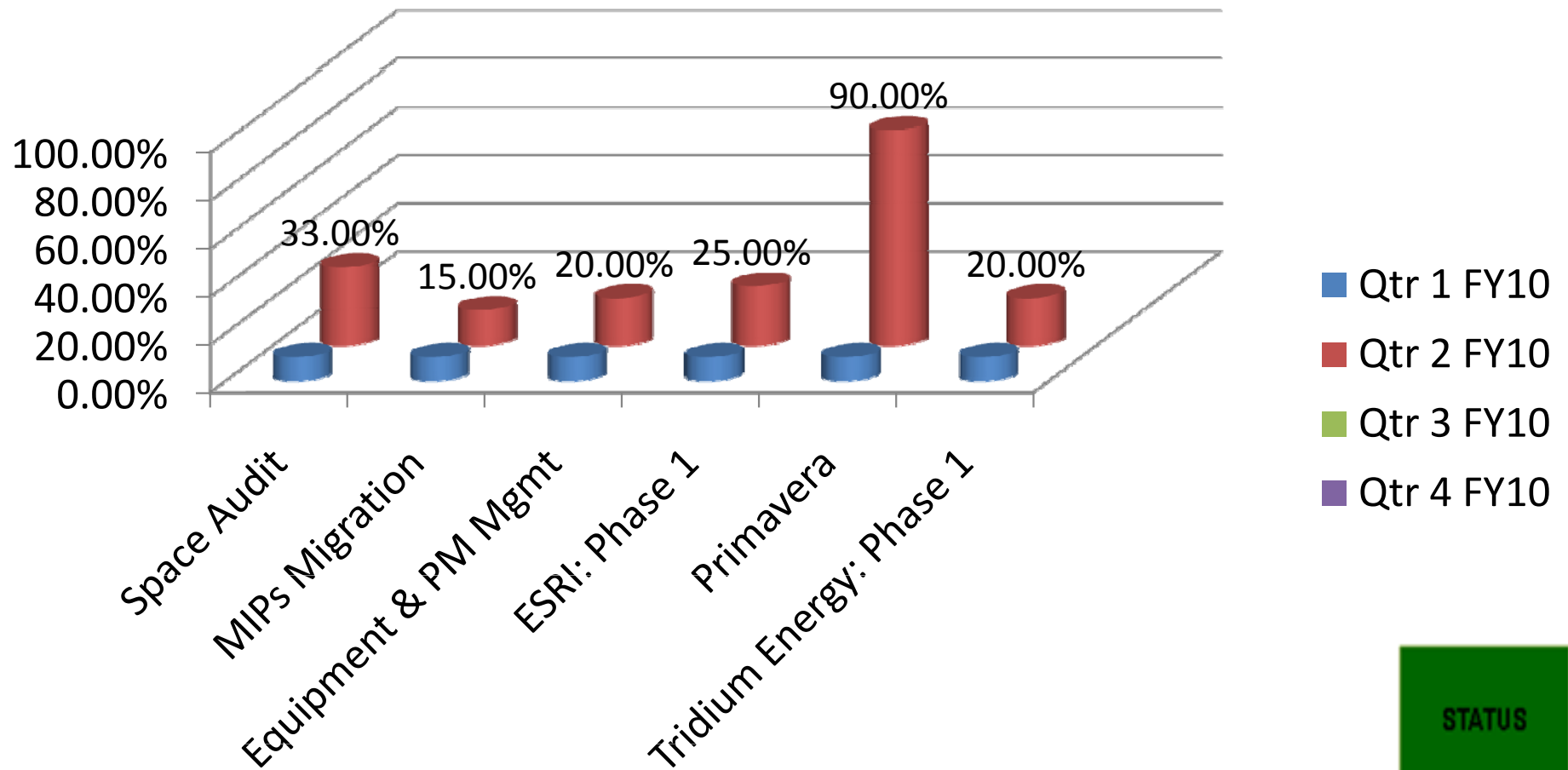
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Balanced Scorecard Category: Task Completion Milestones Percentage (FY10 – FY15)



## 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 Fiscal 2015**

# ACTION PLAN

### Actions Completed:

- ✓ Completed FM IT Technology Five Year Part II. Priorities assigned to the first 18 month cycle.
- ✓ Completed ESRI Web Server setup.
- ✓ Coordinated/Scheduled Primavera Training for Capital & Planning; Contract Mgr training conducted by PMOLink, INC Dec 2009.
- ✓ Planned & Conducted initial MIPS Migration to Project Mgmt Workgroup Kickoff Meeting & Process Review meetings; scheduled additional follow up meetings for further process review/system requirements.
- ✓ Defined Space Requirements with AVC Academic Affairs. Developed Space Audit Module/Reports; began Pilot Training Phase—collected Business Affairs Space Auditors names for the Space Pilot Feb 2010 Training session. Completed new space auditor reports for data and drawings.
- ✓ Planned/Scheduled/Conducted Initial FM Equipment Management Workgroup Meetings. Completed first portion of the Equipment SOP.

### Actions Planned:

1. Finalize Space Audit Documentation; schedule/complete BA Space Audit training. Develop training schedule for all Academic Affairs Departments and begin training program.
2. Complete MIPS Migration to Project Mgmt Documentation & Sign-Off; begin Project Development.
3. Complete Equipment Management Requirements/Documentation Sign off; begin development of Pre-existing Views.
4. BAS/Tridium - Finish R2 to AX migration. Finish Zone shop alarming and new zone home/initial view page.
5. Review Action Step/Funding for Primavera FY11 Training.
6. Complete first Archibus and ESRI extension developed and online for user testing.





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

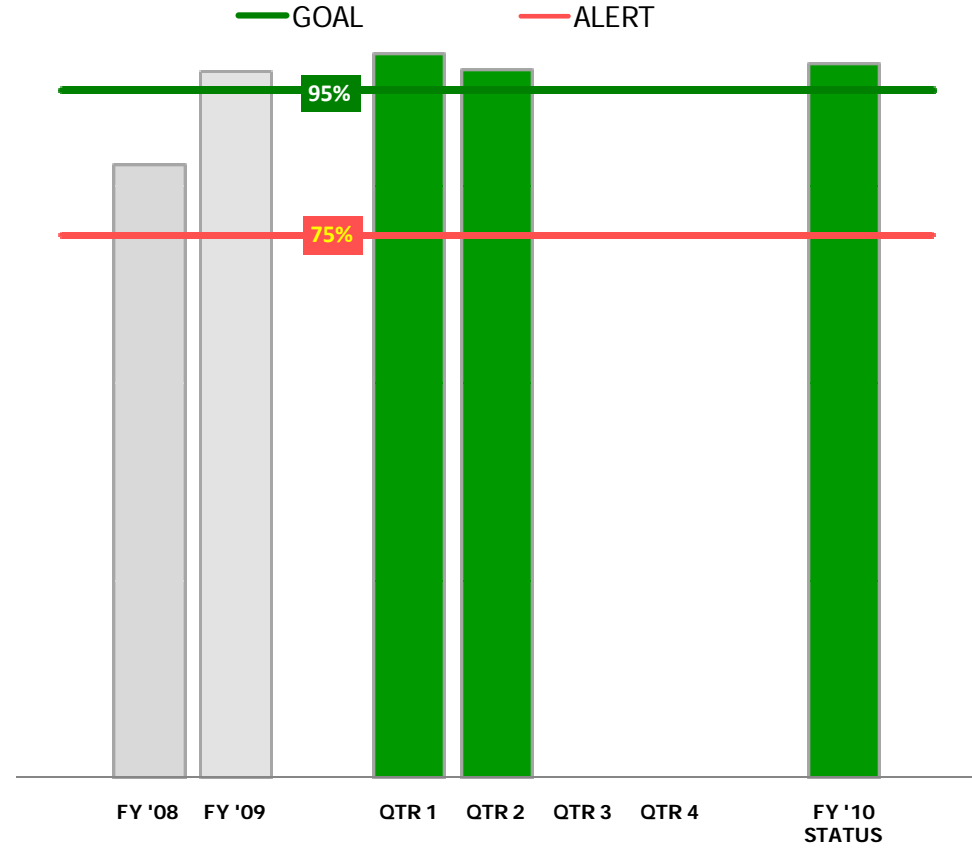
**Strategy Objective** 2.2 Improve Informal Project Design and Construction Process  
 2.2.1 **95% of Projects Designed on Time**

**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	42	41	1	97.6%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '10 STATUS</b>	<b>65</b>	<b>64</b>	<b>1</b>	<b>98.5%</b>
			<b>GOAL:</b>	<b>95.0%</b>



<b>GOAL</b> 95.0%	<b>FY'10 STATUS</b> 98.5%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.3 - Actions Completed:

- Updating and tracking all AA projects.

### 2.2.3 - Actions Planned:

- Continue adopting SCO procedural steps to secure project approvals and inspections.
- Track other customer's projects similar to the AA projects.
- Continue providing Classroom Capacity data by developing Building Capacity standards.
- Enhance "Campus Priority" and Project "Status Block" features.
- FIS to update Archibus to provide Strategic Planning reports rather than running queries.

**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.**

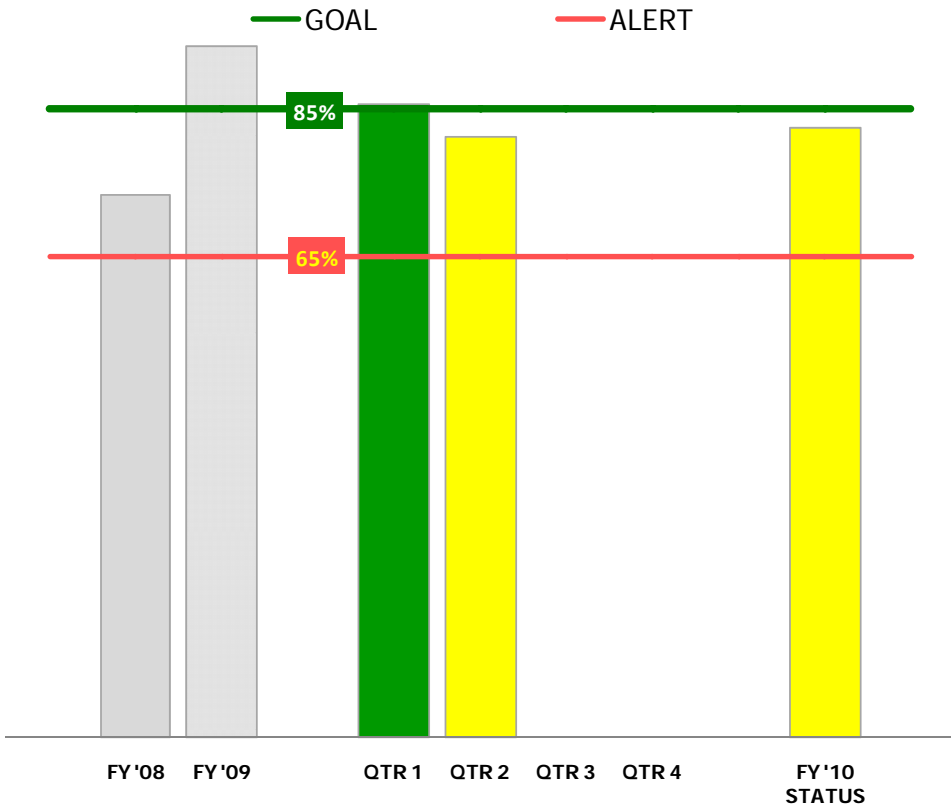
**Measure:** Percentage (Number of Projects designed with actual costs within +/- 10% of estimate, divided by total number of projects designed)

**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	16	13	3	81.3%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '10 STATUS</b>	<b>23</b>	<b>19</b>	<b>4</b>	<b>82.6%</b>

**GOAL: 85.0%**



<b>GOAL</b> 85.0%	<b>FY'10 STATUS</b> 82.6%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.2 - Actions Completed:

- FIS updated Archibus to include Amount Billed by project.

### 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
- Develop new Scope & Budget form to address project costs that are either not captured in the final estimate or not a direct billing through Design Services.

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

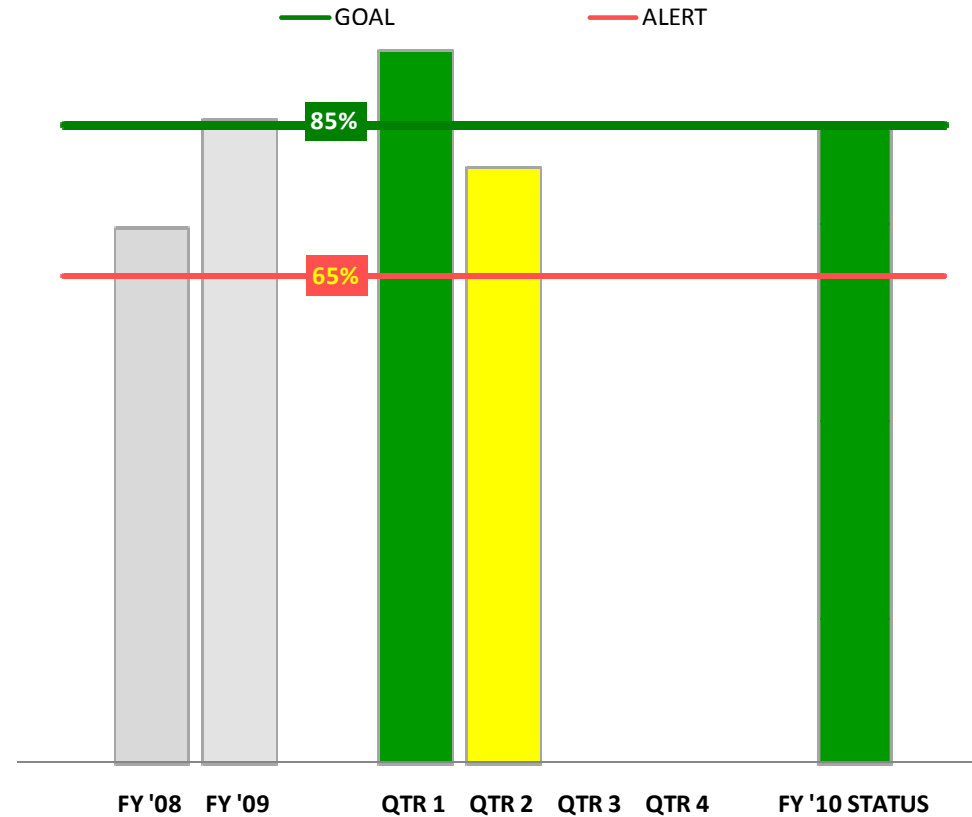
**Strategy** 2.2 Improve Informal Project Design and Construction Process  
**Objective** 2.2.3 **85% of Estimates for Contractor Construction within +/- 10%**

**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	34	27	7	79.4%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '10 STATUS</b>	<b>54</b>	<b>46</b>	<b>8</b>	<b>85.2%</b>
			<b>GOAL:</b>	<b>85.0%</b>



**GOAL**  
85.0%

**FY'10 STATUS**  
85.2%

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

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

# ACTION PLAN

### 2.2.3 - Actions Completed:

- All three JOC contractors have been awarded projects.

### 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).
- Remove 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)**

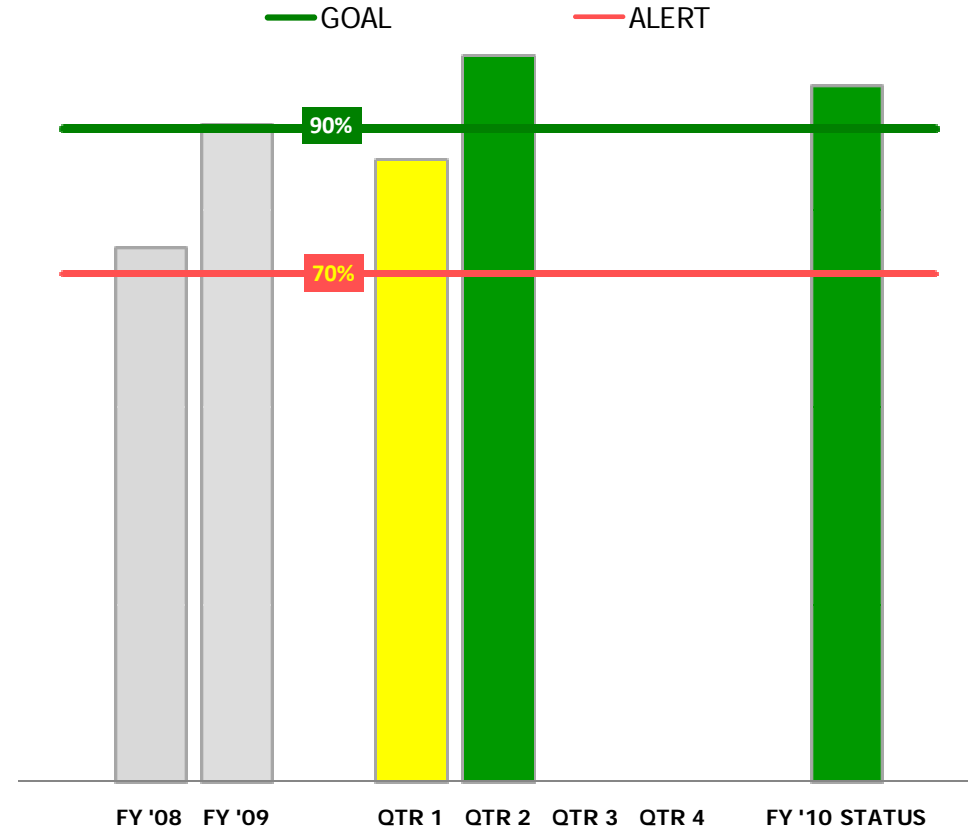
**Measure:** Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)

**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	16	16	0	100.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '10 STATUS</b>	<b>23</b>	<b>22</b>	<b>1</b>	<b>95.7%</b>

**GOAL: 90.0%**



<b>GOAL</b> 90.0%	<b>FY'10 STATUS</b> 95.7%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

<b>Strategy</b>	2.2	Improve Informal Project Design and Construction Process
<b>Objective</b>	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.
- Post construction schedules on website to increase awareness of project timeliness.

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

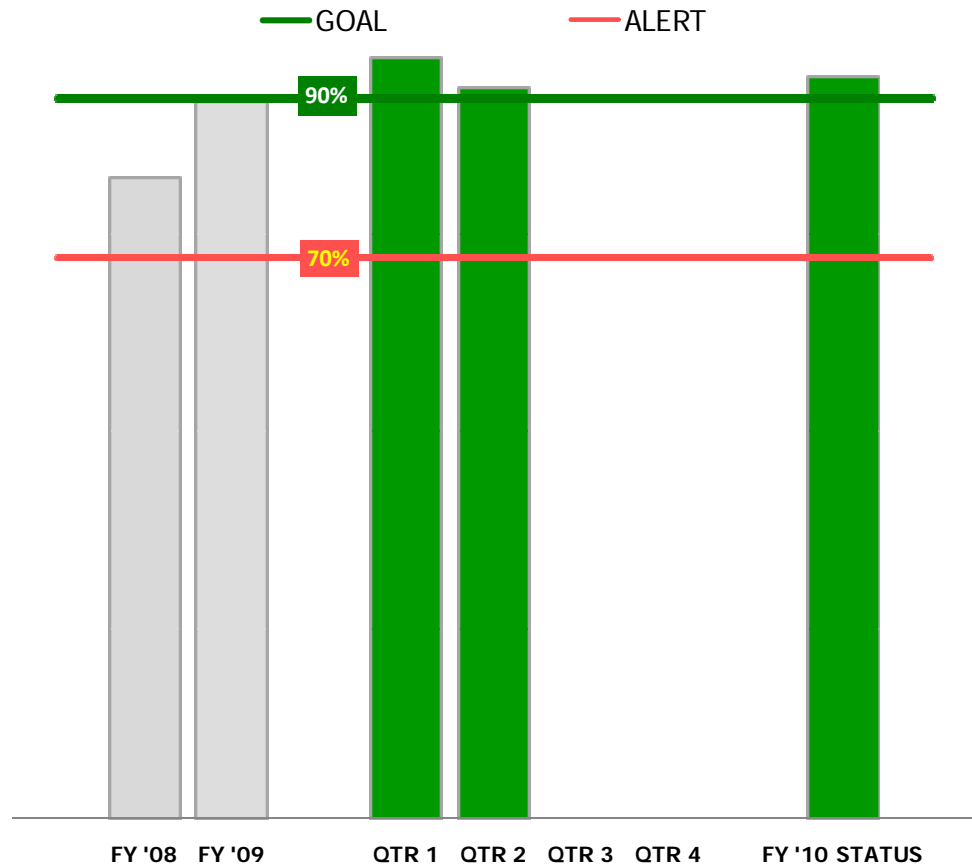
**Strategy** 2.2 Improve Informal Project Design and Construction Process  
**Objective** 2.2.5 **90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

**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	34	31	3	91.2%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
<b>FY '10 STATUS</b>	<b>54</b>	<b>50</b>	<b>4</b>	<b>92.6%</b>
			<b>GOAL:</b>	<b>90.0%</b>



<b>GOAL</b> 90.0%	<b>FY'10 STATUS</b> 92.6%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# 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 delivery process.

# Facilities Management Strategic Planning Session – Second 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

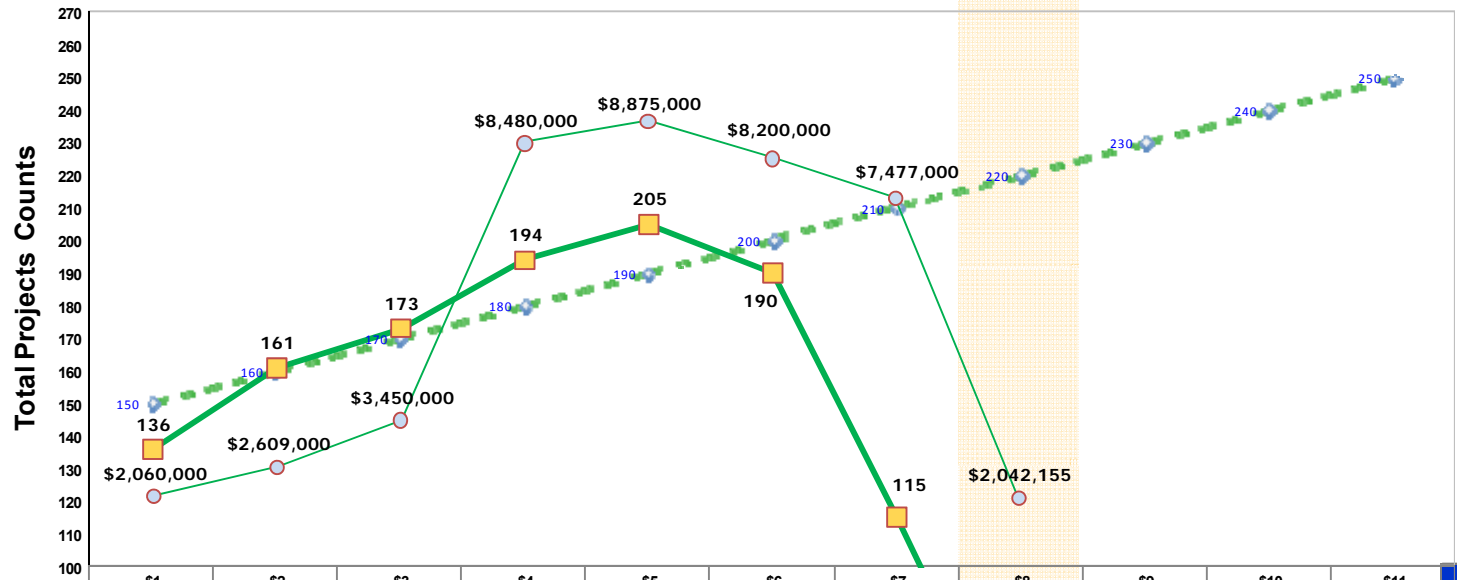
**Measure:** The 2010 Benchmark is 220 projects.

**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
<b>GOAL</b>	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
<b>Projects Completed</b>	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	36			
<b>Project Dollars</b>	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$2,042,155			

Increased Project Volume



	\$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	36			

**GOAL**  
100%

**FY'10 STATUS**  
16.4%

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

<b>Strategy</b>	2.2	Improve Informal Project Design and Construction Process
<b>Objective</b>	2.2.6	Increase Project Volume by 10 projects per year – Project Counts by Phase

# ACTION PLAN

### 2.2.6 - Actions Completed:

- Reviewed In-Construction and Punchlist phases for nearly completed projects to determine that there are approximately 100 more projects nearing Completion to increase our overall count.

### 2.2.6 - Actions Planned:

- Review FY'09 projects that went On-Hold for scheduled completion as projects are reactivated to increase our overall counts.
- Review Priority 0 projects with customers alerting them that Design Services is prepared to address their project needs this fiscal year.



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

UN



**Facilities Management Strategic Planning Session – Fourth Quarter FY 2008**

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

**Strategy            3.1        Develop and Maintain the Master Plan (ON HOLD)**

**Objective           3.1.1      90% of Master Plan Components Reviewed and Updated Every 6 Months**

**Measure:    Percentage of Various Components of Master Plan reviewed on a regular schedule**

**Balanced Scorecard Category:** Internal Business Process



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

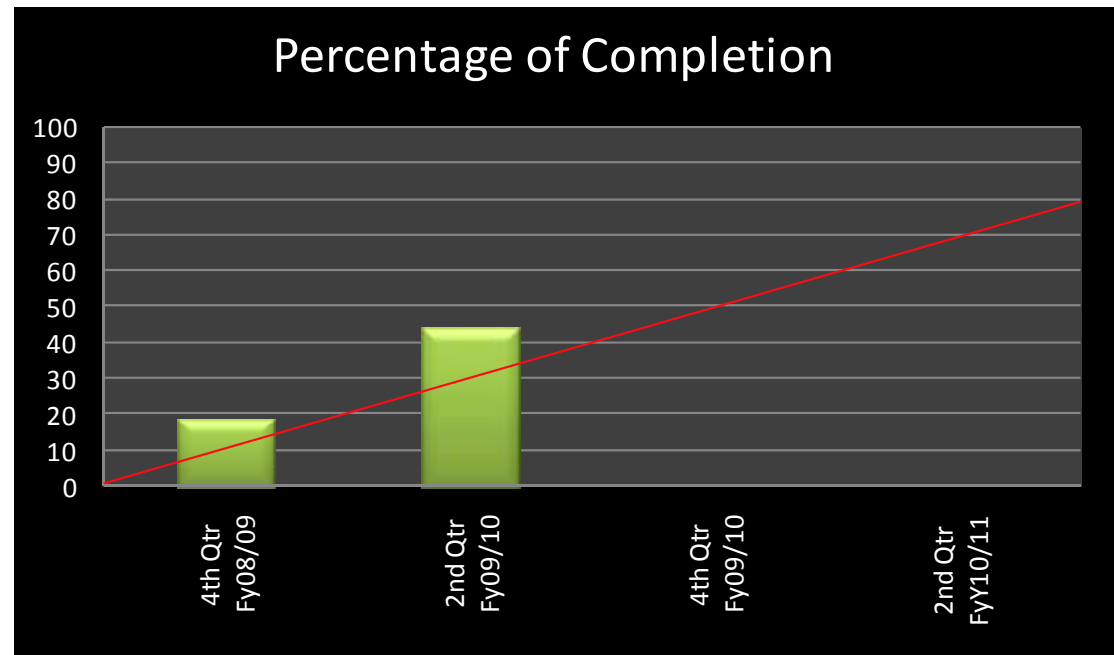
**Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements**

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

**Measure: % of Projects with completed Pre-Programs**

**Balanced Scorecard Category:** Internal Business Process

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



\* Denotes completion

\*\* Denotes completion – being revised per the customer

**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 2<sup>nd</sup> quarter FY 2011

**ACTION PLAN**

- **Actions Complete**  
Process for Academic 5 year plan complete

**Actions Planned**

Science Building: Under revision based on Academic Affairs strategic plan

Burson: Under revision based on Academic Affairs strategic plan

Atkins Library: To be reviewed with new University Librarian on February 22, 2010

Student Health and Wellness: Program

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2008

Lead  
Planning

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

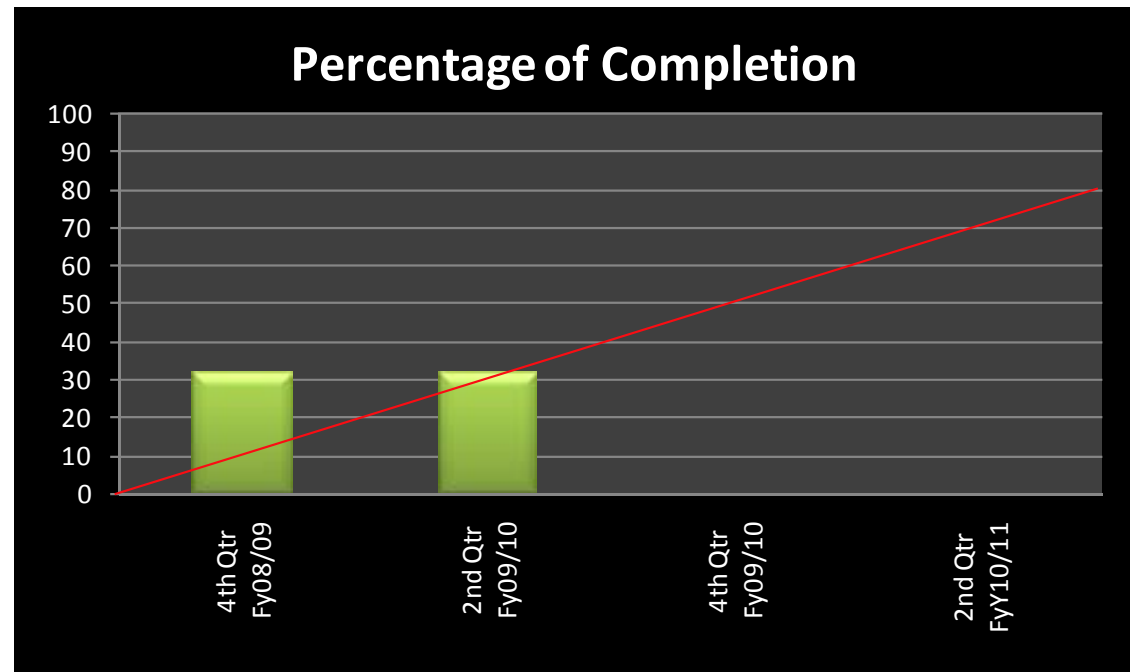
**Strategy 3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements**

**Objective 3.2.2 80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2<sup>nd</sup> Quarter FY 2011**

**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**

**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 2<sup>nd</sup> Quarter FY 2011

Lead  
Planning

**ACTION PLAN**

- **Actions Complete**  
Request for authorization:
  - Residence Dining Hall Advanced planning
  - Parking Deck J Advanced planning
- **Actions Planned**
  - Residence Dining Hall Renovation / Replacement – Advanced Planning
  - Parking Deck J – Advanced Planning

Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
Planning

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

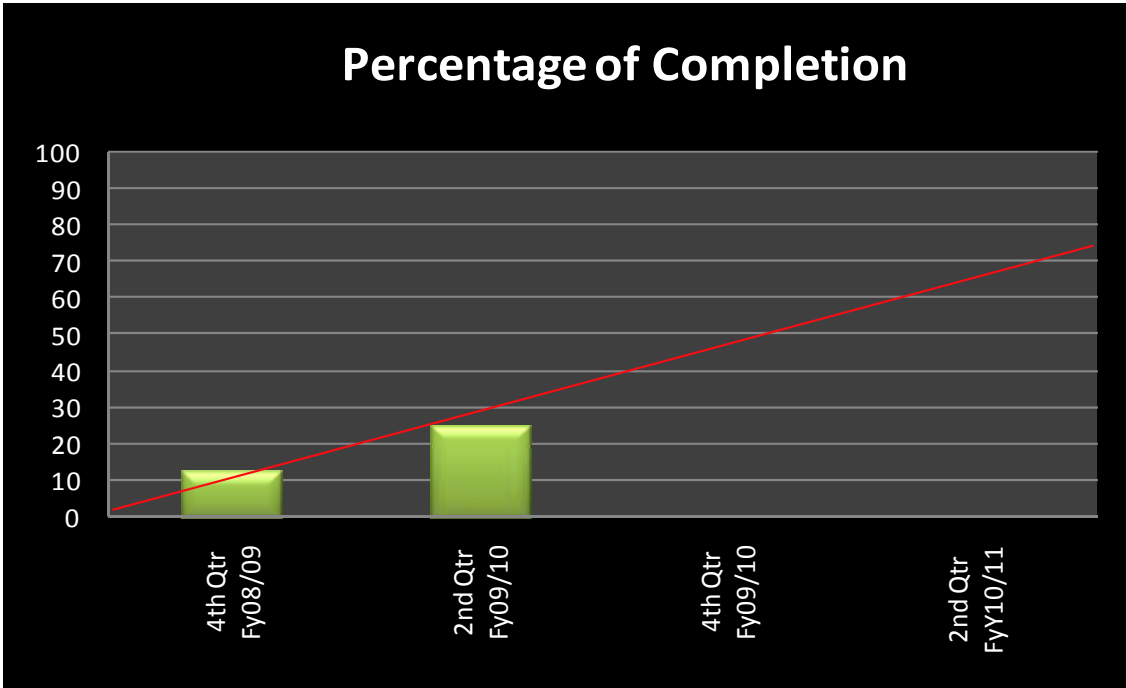
Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements with approved OC-25's

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

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

Balanced Scorecard Category: Internal Business Process

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



\* Denotes Completion  
 \*\* Denotes Completion – being revised per the customer.

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 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 2<sup>nd</sup> Quarter FY 10/11**

**ACTION PLAN**

- **Actions Complete**
  
  
  
  
  
  
  
  
  
  
- **Actions Planned**  
    Complete pre-programming so that accurate OC25s can be completed



# Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
Planning

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

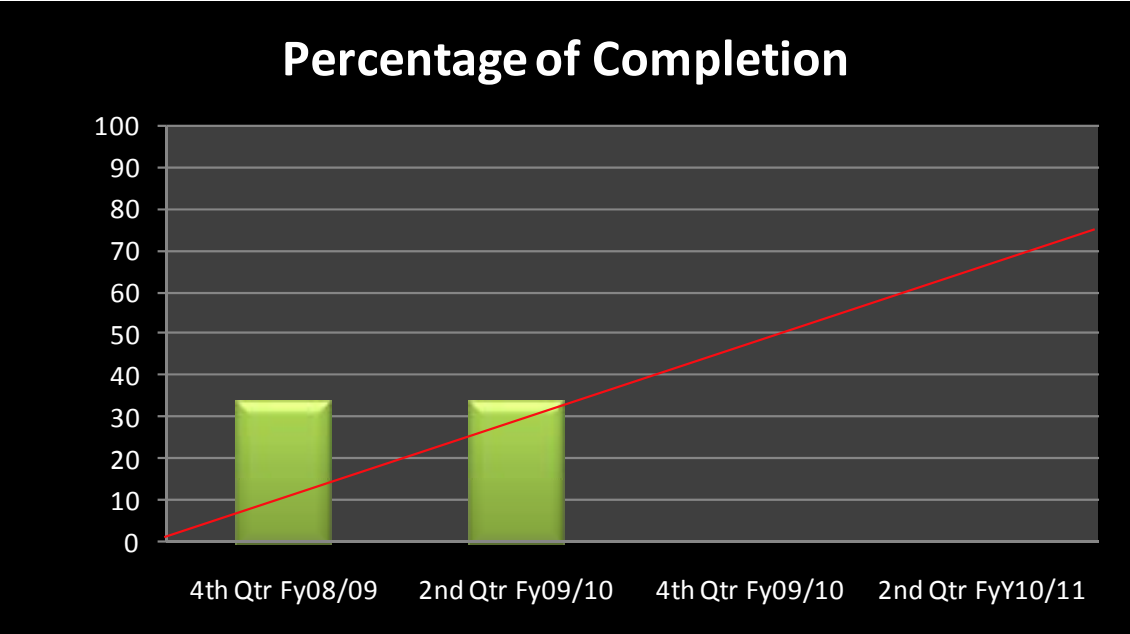
**Strategy 3.2 Improve the Six Year Plan for Non-Appropriated Capital Improvements with approved OC-25's**

**Objective 3.2.4 75% of OC-25's for projects on the Non-Appropriated Six Year Capital Improvements Plan completed by end of 2<sup>nd</sup> 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*
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9. Intercollegiate Tennis Facility*
10. Partnership, Outreach, and Research for Accelerated Learning (PORTAL) Build
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16. Development Center*
17. Parking Deck I*
18. Hall of Champions Renovation
19. Residence Dining Hall Renovation/Replacement
20. Cafeteria Activities Building Renovation
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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 2<sup>nd</sup> Quarter FY 10/11**

**ACTION PLAN**

- Actions Complete
  
  
  
  
  
  
  
  
  
  
- Actions Planned
  - Determine funding availability for programming



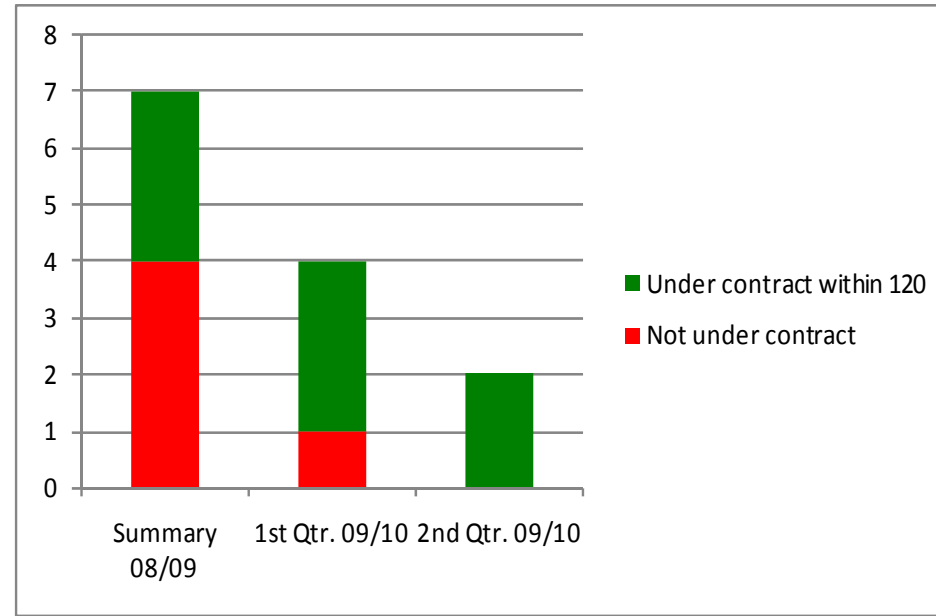
**GOAL #3 – Deliver New Facilities that Support the University's Mission**

**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	
2nd Qtr. 09/10	5	2	0	



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

Lead  
Capital

<b>Strategy</b>	<b>3.3</b>	Improve the Capital Design Process
<b>Objective</b>	<b>3.3.1</b>	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 complete
  - 2. Selected designer for Football/Sports Complex, Fire Sprinklers, Parking Deck I & Tennis Courts. Pre-planning completed.
- Actions Planned
  - 1. Fee negotiations for Football, start design.
  - 2. Fee negotiations for Parking Deck I, start design.
  - 3. Finalize Tennis fee.

Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
Capital

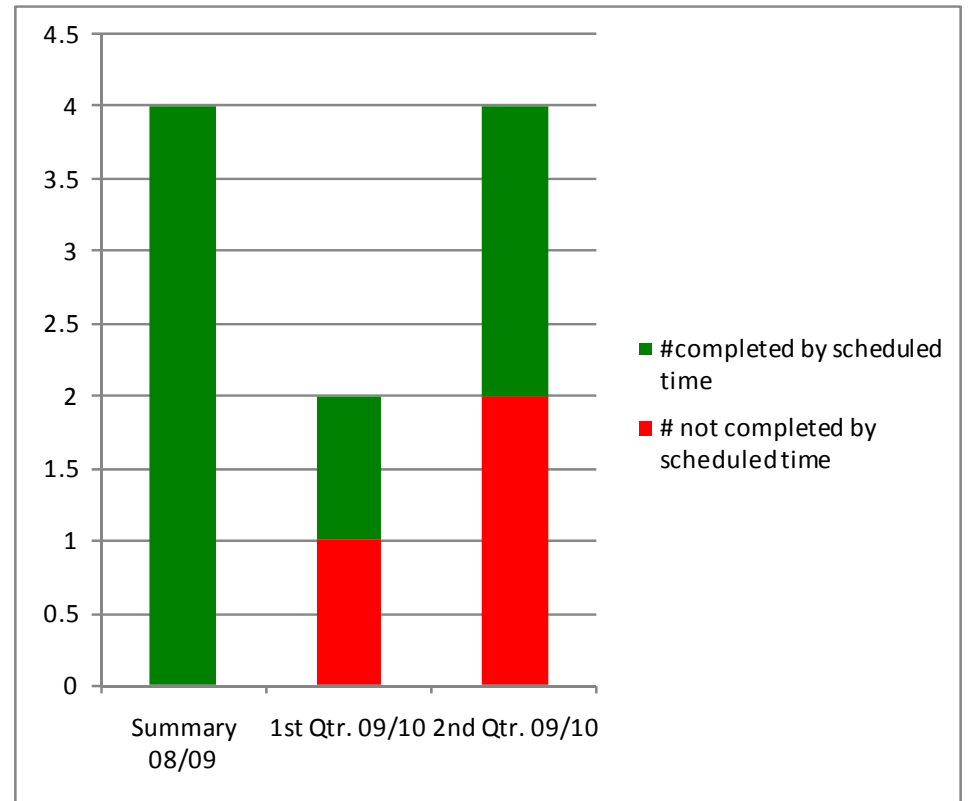
GOAL #3 – Deliver New Facilities that Support the University's Mission

**Strategy** 3.3 Improve the Capital Design Process  
**Objective** 3.3.2 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	
2nd Qtr. 09/10	2	2	



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. Trade packages for Residence Hall Phase IX
  - 2. PORTAL program finalized
  - 3. New Outdoor Rec Fields design completed
- Actions Planned
  - 1. Start PORTAL & Parking Deck I
  - 2. Complete EPIC Trade packages
  - 3. Complete Parking Deck H CD's



Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead  
Capital

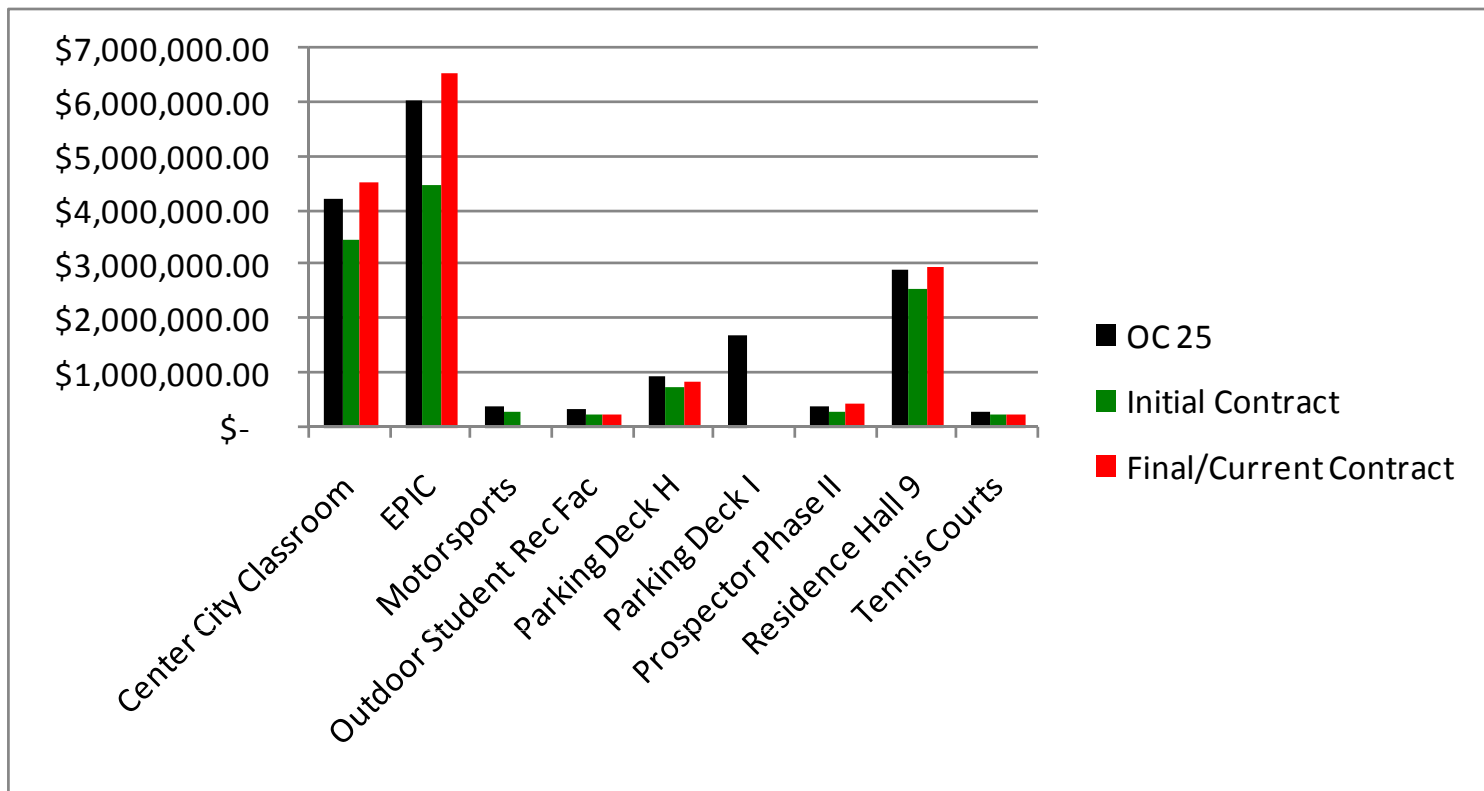
GOAL #3 – Deliver New Facilities that Support the University's Mission

**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



Status

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

<b>Strategy</b>	<b>3.3</b>	Improve the Capital Design Process
<b>Objective</b>	<b>3.3.3</b>	90% of Designs complete within design budgeted fee

Lead  
Capital

### ACTION PLAN

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

Facilities Management Strategic Planning Session – Second Quarter FY 2010

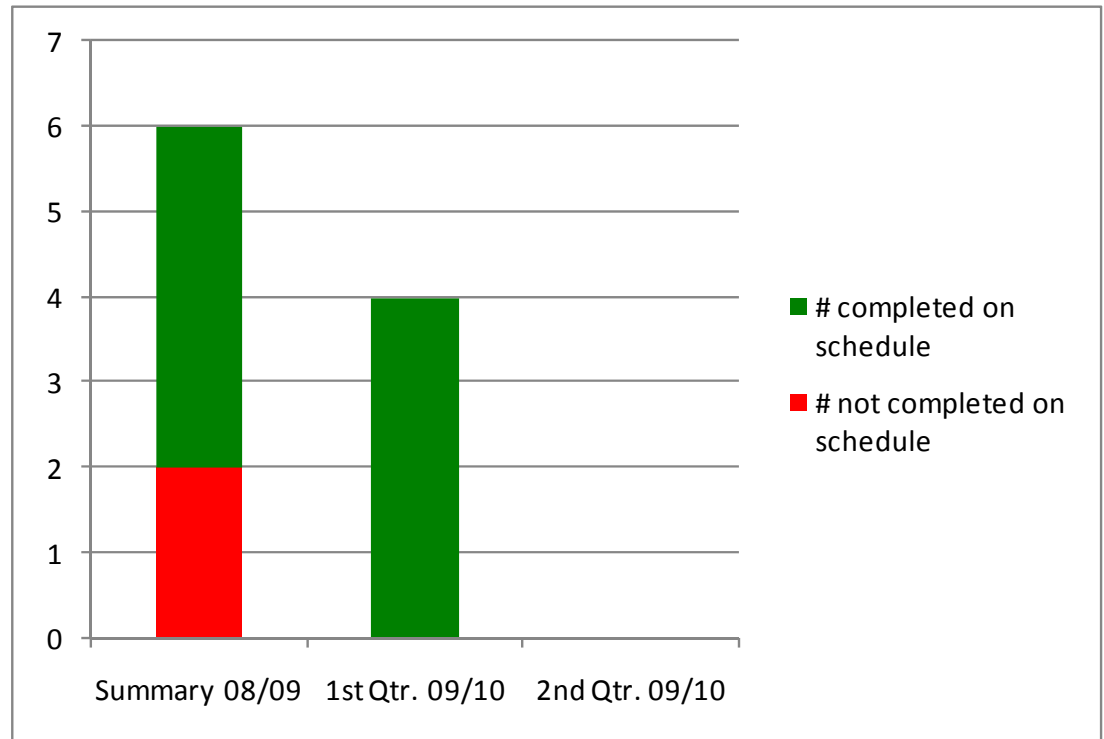
GOAL #3 – Deliver New Facilities that Support the University's Mission

**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	
1st Qtr. 09/10	4	0	
2nd Qtr. 09/10	0	0	



Status

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

<b>Strategy</b>	<b>3.4</b>	Improve Administration of the Capital Construction Process
<b>Objective</b>	<b>3.4.1</b>	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. Started early site work for EPIC
  - 5. Started trade packages for Center City Classroom
- Actions Planned
  - 1. Control change orders
  - 2. Limit customer requested change orders
  - 3. Limit additional scope request at 50% level from customer
  - 4. Start trade packages for Residence Hall Phase IX
  - 5. Start trade packages for EPIC
  - 6. Start Construction of New Outdoor Student Rec Fields

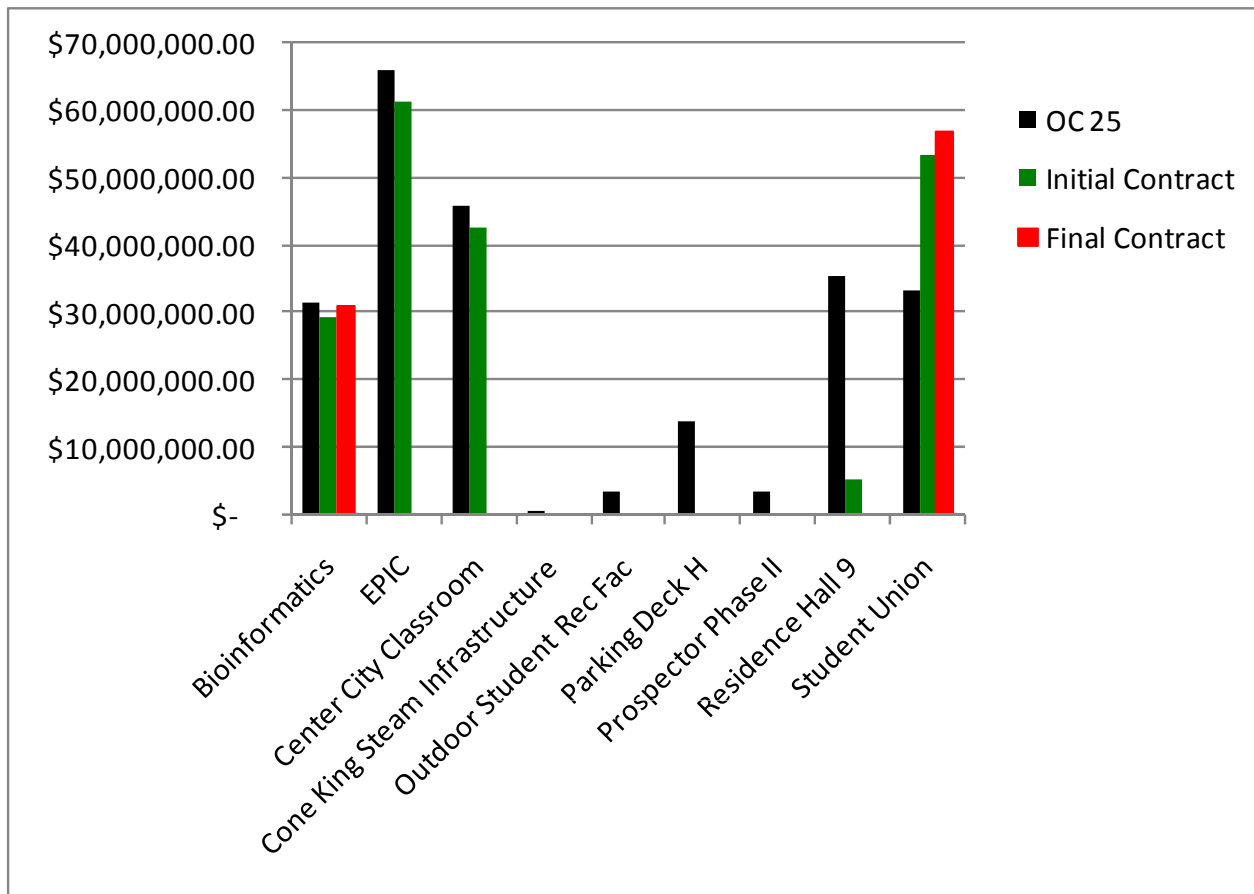
Facilities Management Strategic Planning Session – Second Quarter FY 2010

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

**Strategy Objective** 3.4 Improve Administration of the Capital Construction Process  
 3.4.2 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



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

<b>Strategy</b>	<b>3.4</b>	Improve Administration of the Capital Construction Process
<b>Objective</b>	<b>3.4.2</b>	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





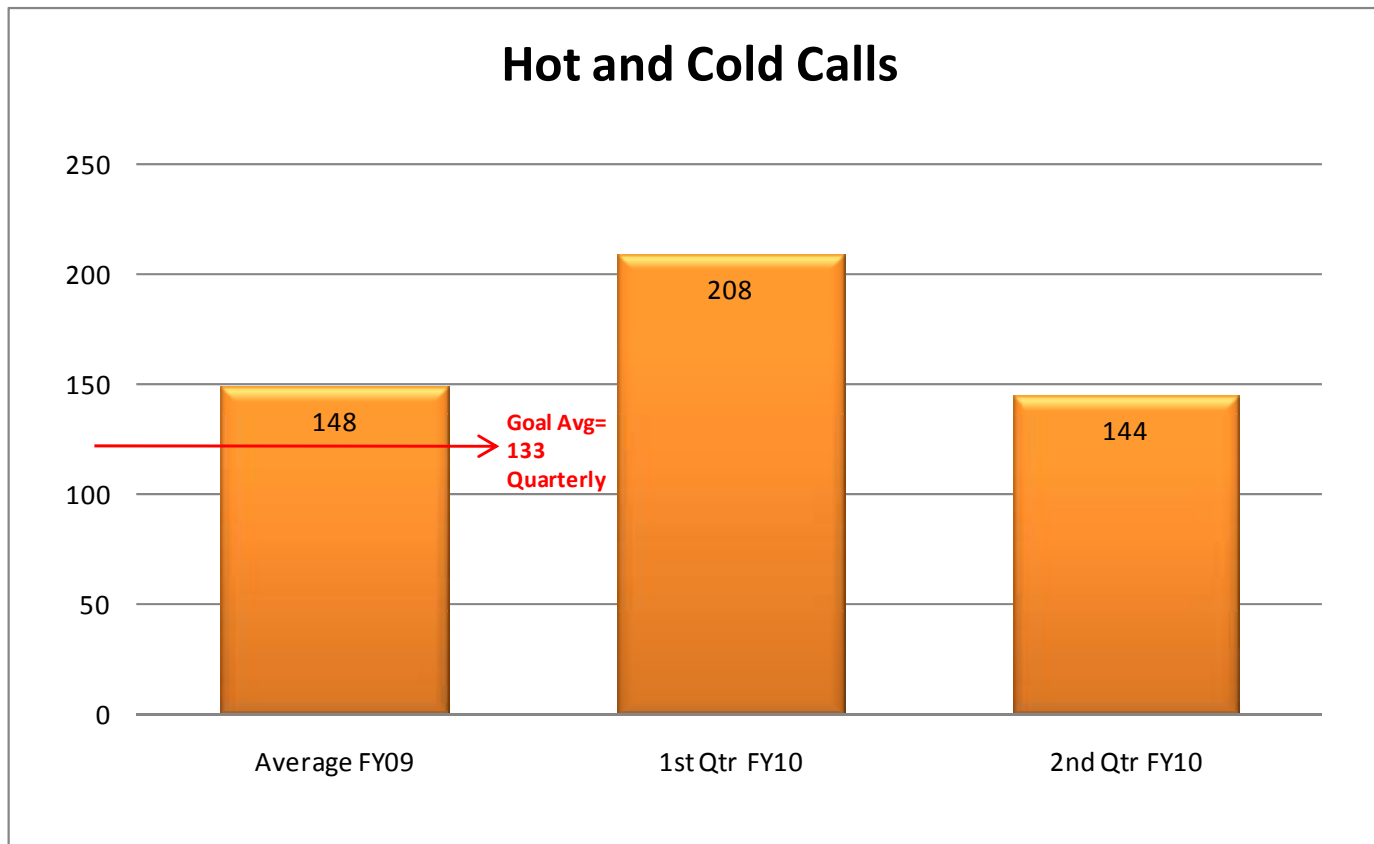
**GOAL #4 – Perfect a Customer Focused Organization**

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

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

**Goal:** Less than 133 per quarter annual average

**Balanced Scorecard Category:** Customer Perspective



STATUS

## GOAL #4 – Perfect a Customer Focused Organization

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

Lead  
M&O

### ACTION PLAN

- Actions Complete
  - 1 – Made repairs and upgrades to Chillers in Fretwell, Boilers and Heat Exchangers in Burson, Cameron, and Colvard.
  - 2 – Identified and backlogged repairs for additional HVAC System repairs.

Note: Breakdown on calls were 80 too Cold, 64 too Hot.
- 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.

**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**

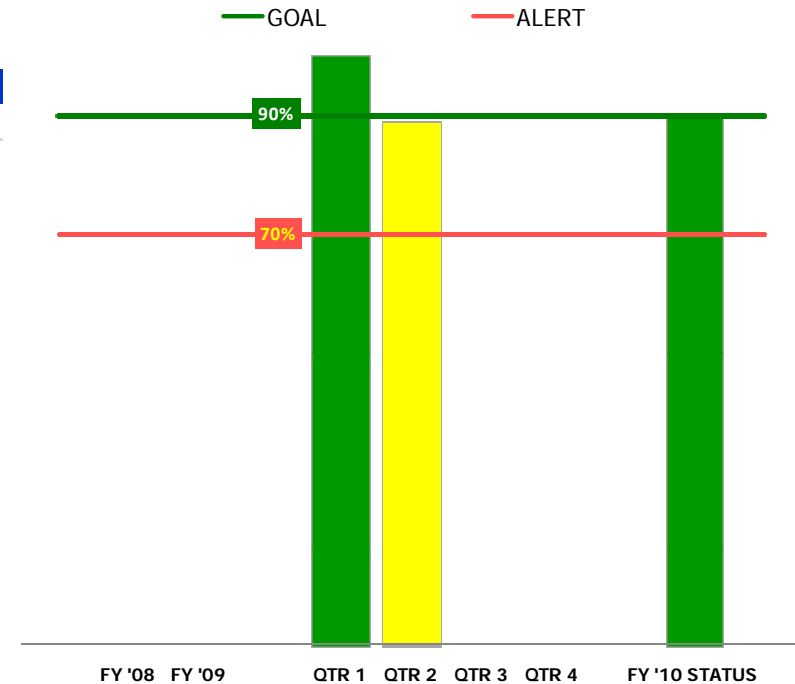
**Measure:** Results from Interactive Web-based Customer Questionnaire. (Process automated through Archibus)

**Balanced Scorecard Category:** Customer Perspective

**90% of Informal Project Customers Satisfied or very Satisfied with services Received**

QUARTERLY SURVEY	Number of Surveys Completed	Respondent Very Satisfied 4	Respondent Satisfied 3+	Respondent Somewhat Satisfied 2+	Respondent Neutral 1+	Respondent Unsatisfied 0+	Percent Satisfied or Very Satisfied
FY '08	0	0	0	0	0	0	0.0%
FY '09	0	0	0	0	0	0	0.0%
QTR 1	1	1	0	0	0	0	100.0%
QTR 2	9	5	3	1	0	0	88.9%
QTR 3	0	0	0	0	0	0	0.0%
QTR 4	0	0	0	0	0	0	0.0%
<b>FY '09 STATUS</b>	10	6	3	1	0	0	<b>90.0%</b>

**GOAL: 90.0%**



<b>GOAL</b> 90.0%	<b>FY'10 STATUS</b> 90.0%
----------------------	------------------------------

## GOAL #4 – Perfect a Customer Focused Organization

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

# ACTION PLAN

### 4.1.4 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys

### 4.1.4 - Actions Planned:

- Monitor Customer Satisfaction Survey responses and implement appropriate actions.
- Review with FIS the ability for Design Services to print survey responses from Archibus.

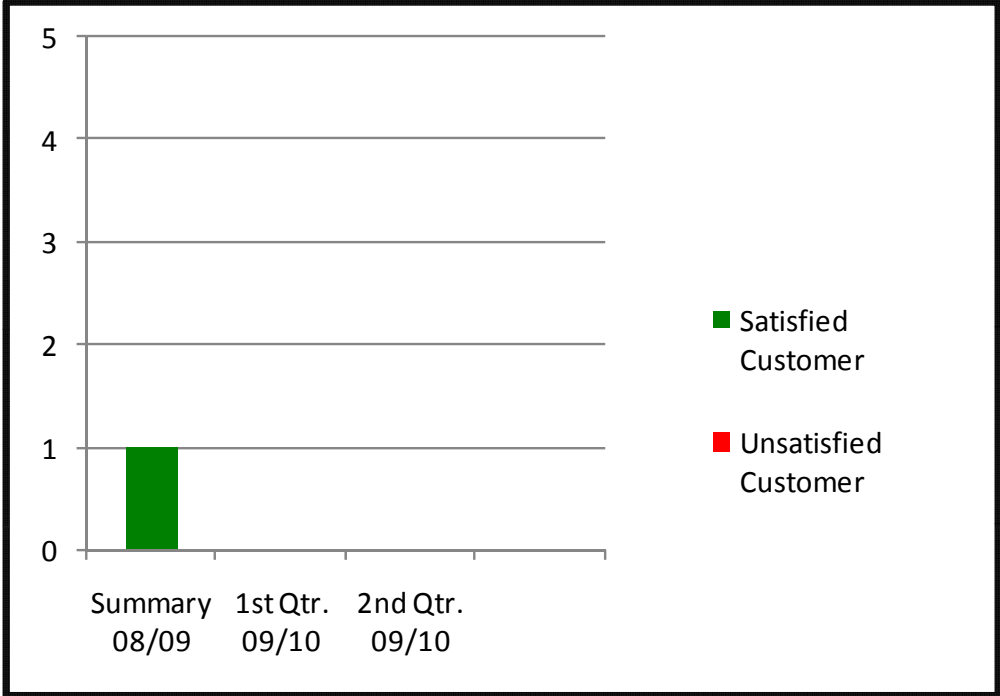
**GOAL #4 – Perfect a Customer Focused Organization**

**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
2nd Qtr. 09/10	2	0	0	No Data



No data is a result of customer not answering questionnaire

Status

## GOAL #4 – Perfect a Customer Focused Organization

<b>Strategy</b>	<b>4.1</b>	Continually Improve Customer Service/Satisfaction
<b>Objective</b>	<b>4.1.5</b>	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 EPIC and Outdoor Student Rec customers. No responses received
- Actions Planned
  - 1. Continue working with FIS to improve survey functionality

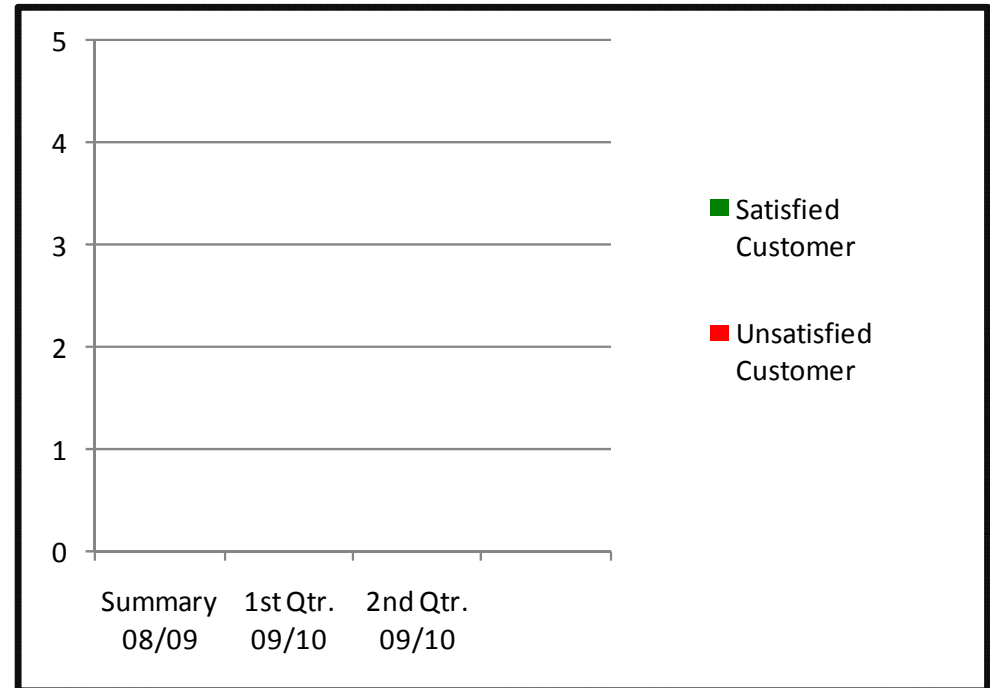
**GOAL #4 – Perfect a Customer Focused Organization**

**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			
2nd Qtr. 09/10	2	0	0	



No data is a result of customer not answering questionnaire

Status



## GOAL #4 – Perfect a Customer Focused Organization

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

Lead  
Capital

### ACTION PLAN

- Actions Complete
  - 1. Survey administered to Student Union and Bioinformatics customers. No responses received.
- Actions Planned
  - 1. Continue working with FIS to improve survey functionality



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



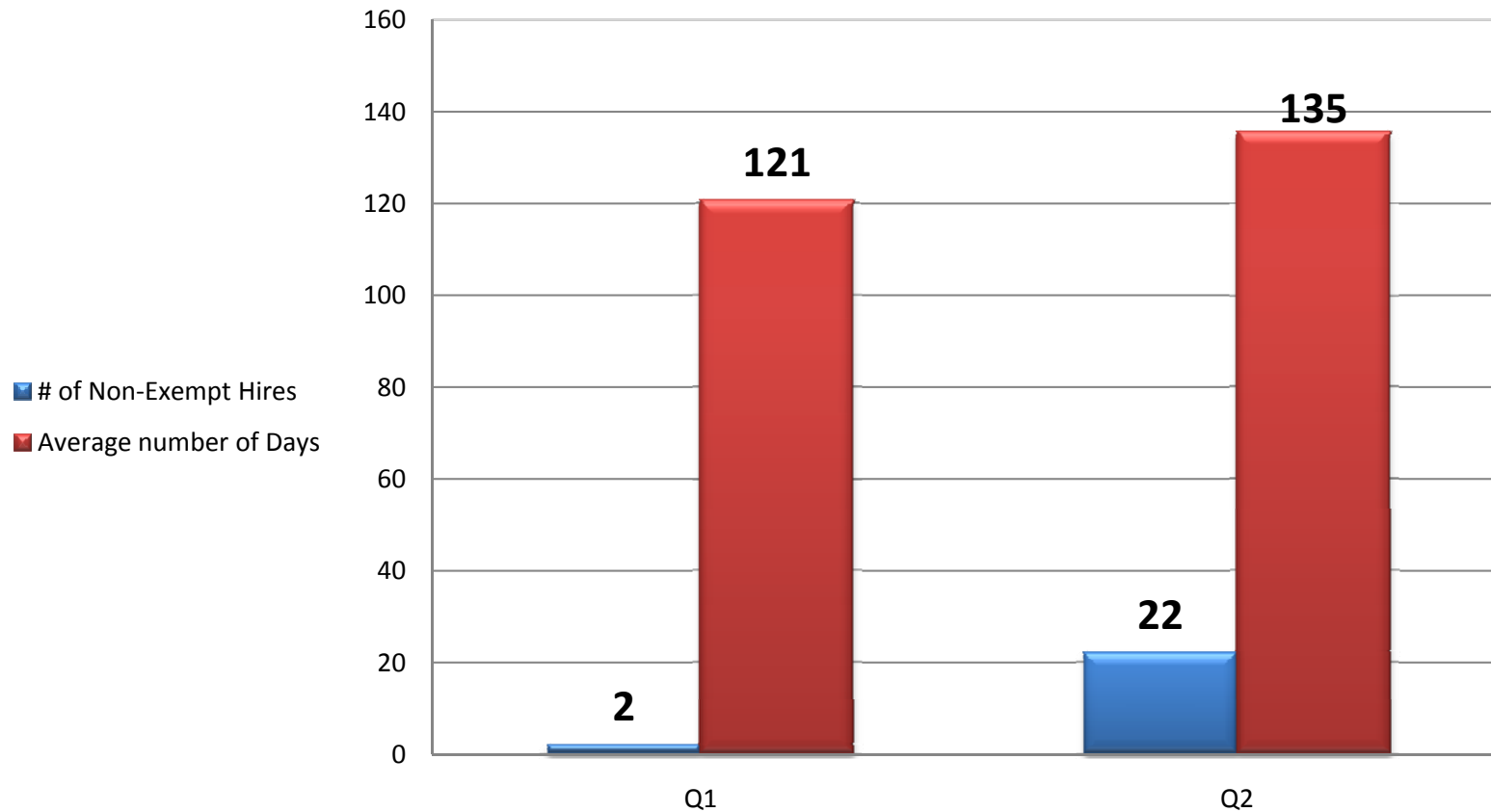
**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

**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



STATUS

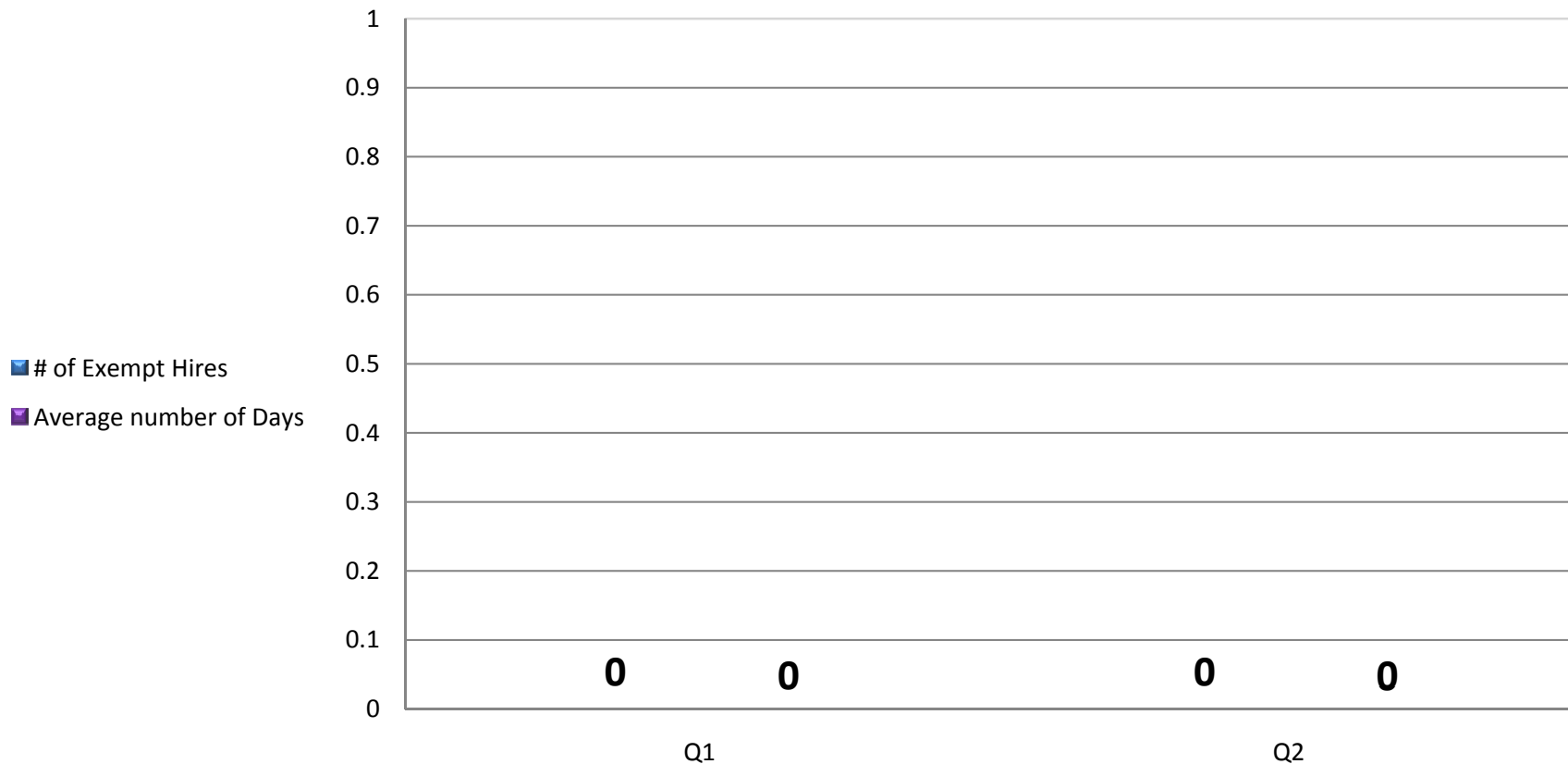
**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

**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

### 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
  5. Purchase and implementation of new HRIS for FM HR

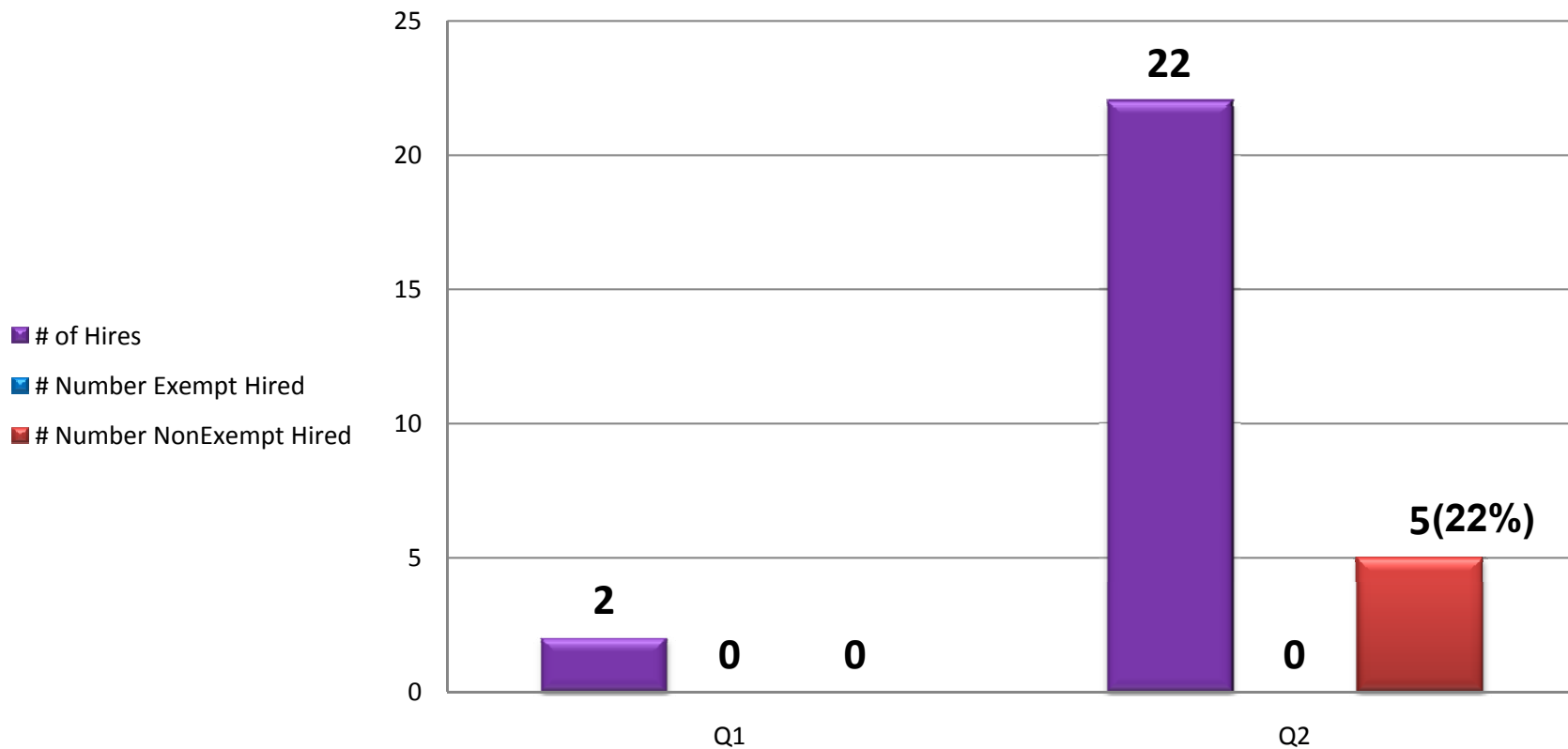
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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
  - ✓ 35 FM managers and supervisors have completed Targeted Selection Training (81%)
  
- **Actions Planned**
  1. Behavioral Targeted Selection Training for all FM managers and supervisors Feb and Apr 2010
  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 – Second Quarter FY 2010

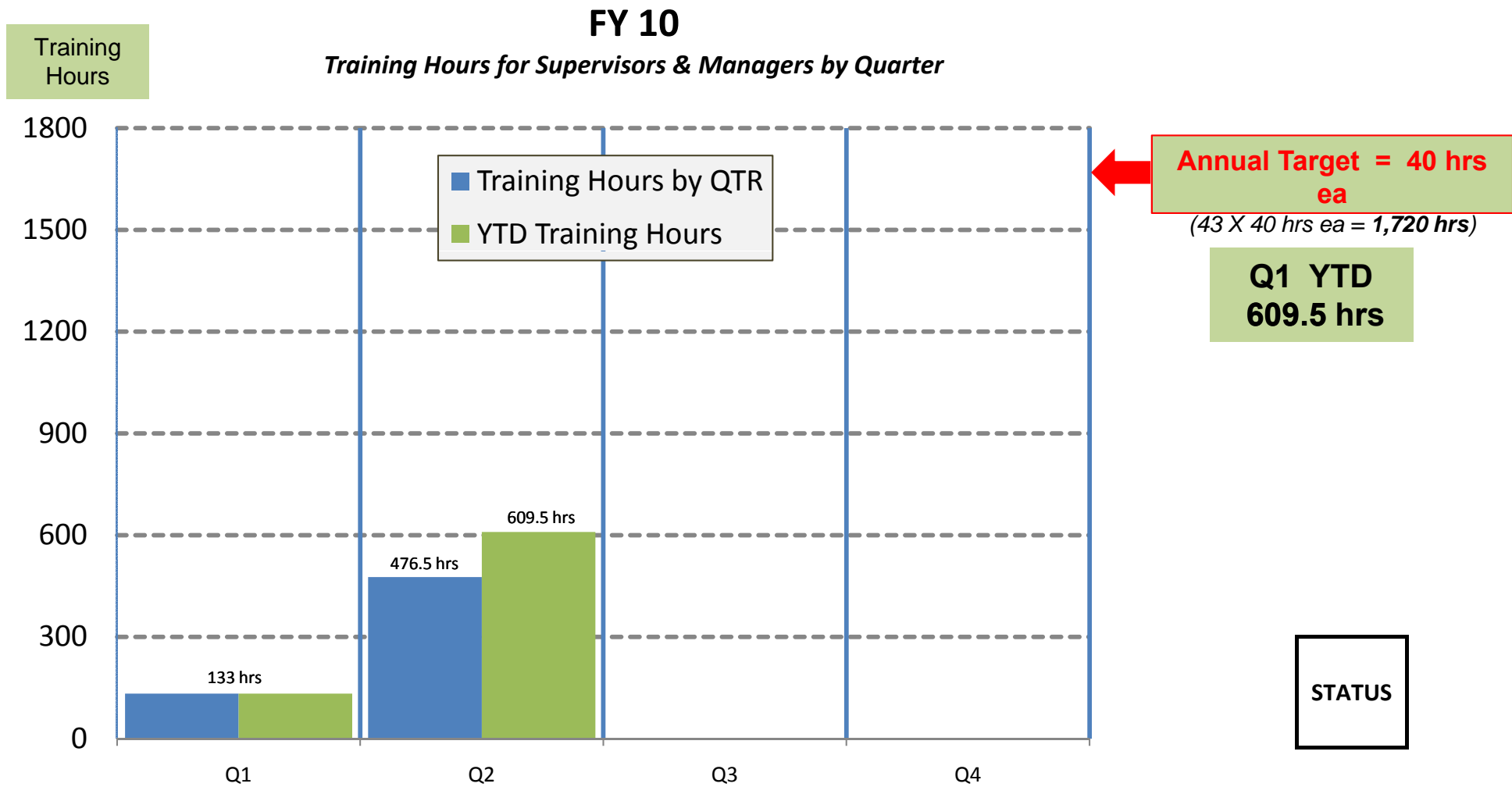
Lead  
FBO

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 5.2.1 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**
  - ✓ 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. MECC II training and coaching

Facilities Management Strategic Planning Session – Second 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.

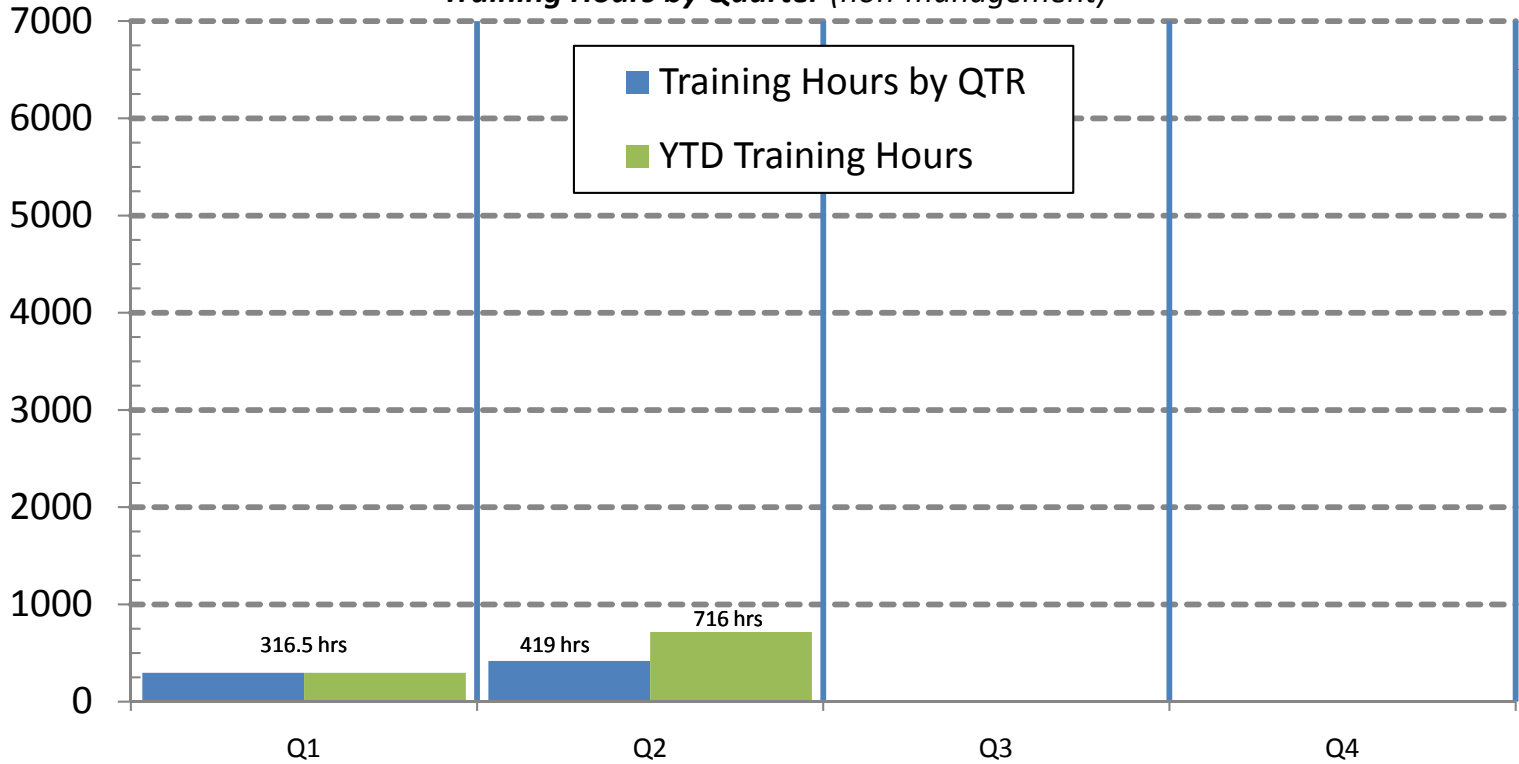
Measure: Average hours of training provided to or obtained by front line employees

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)

**Q2 YTD 716 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

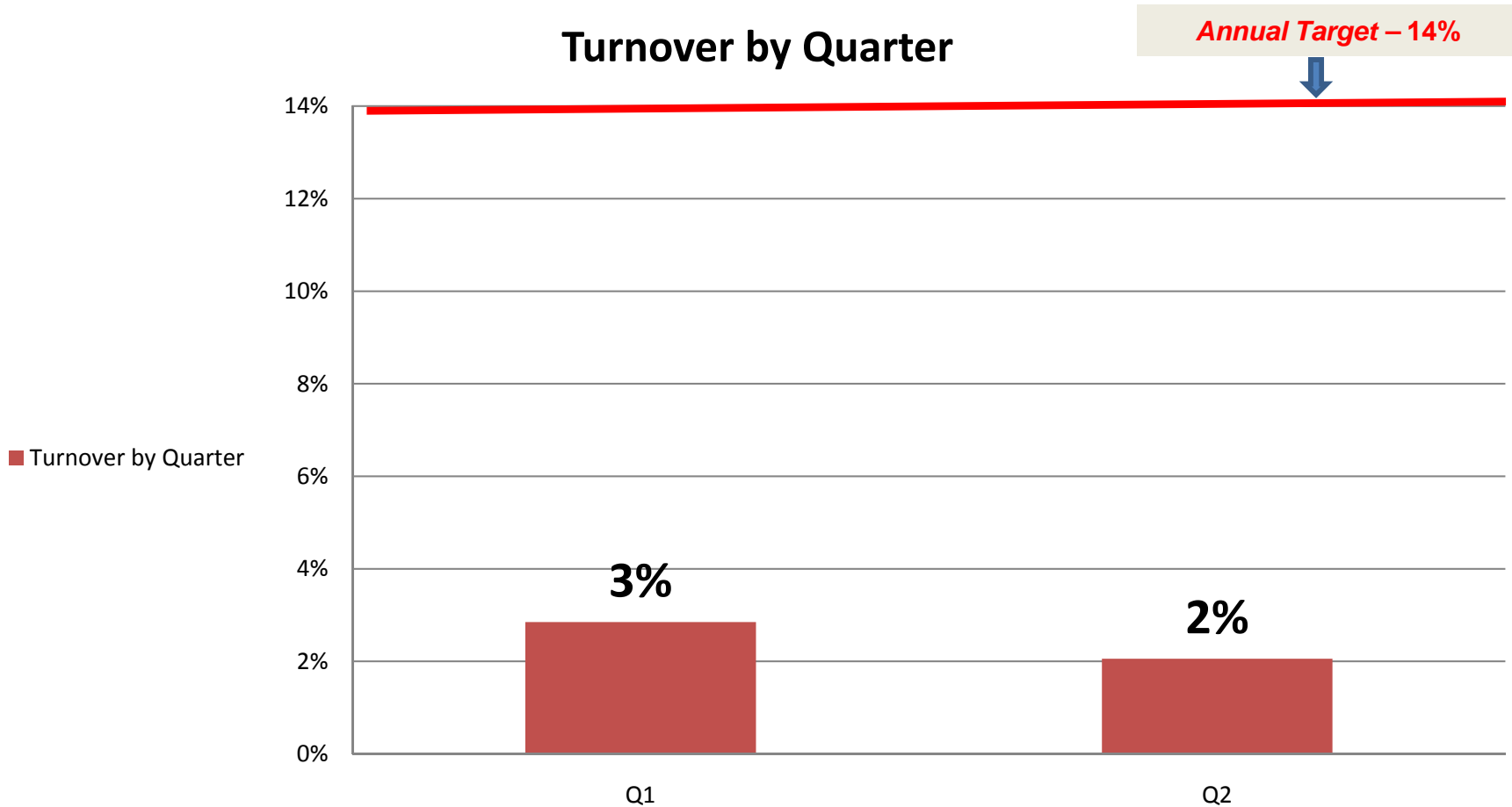
- **Actions Complete**
  - ✓ Task force commissioned to provide suggestions on improving training & promotion: 6/30/08
  - ✓ Formulated annual compliance training schedule in conjunction with Environmental Health & Safety Dept.
  - ✓ Assess current FM employee training tracking system
  
- **Actions Planned**
  1. Develop training matrix proto-type and team development list for M&O positions
  2. PC skills training for infrequent users in preparation for Web Time entry
  3. Assess compliance training requirements and expectations
  4. ESL training pilot
  5. Purchase and implementation of new HRIS for FM HR

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



**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
  - ✓ Revamp employee exit interview process – web-based
  
- **Actions Planned**
  1. Implement more aggressive recruitment activity
  2. Develop action plan to address employee satisfaction survey issues

Facilities Management Strategic Planning Session – Second Quarter FY 2010

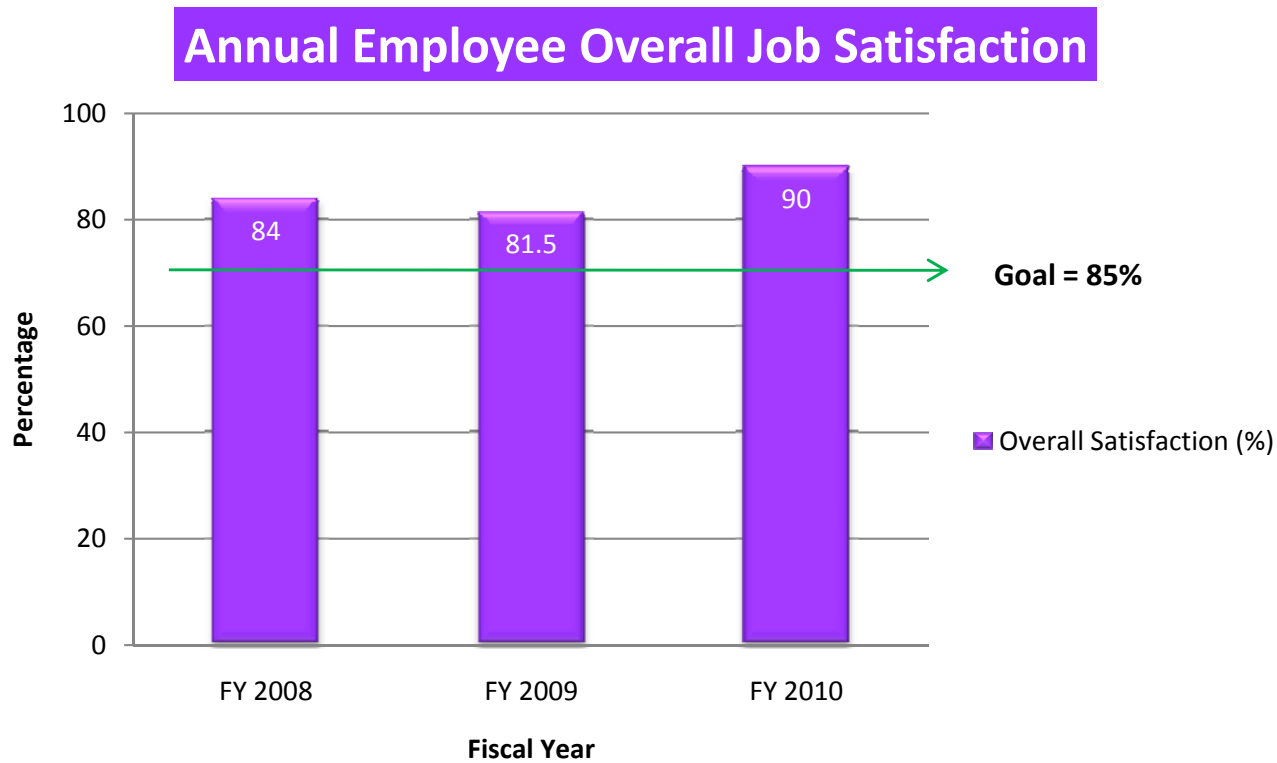
Lead  
FBO

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



STATUS

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

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

Lead  
FBO

**ACTION PLAN**

- **Actions Complete**
  - ✓ Survey administration done electronically.
  - ✓ Survey administered November through December 2009.
  - ✓ Survey results tabulated by UI and presented to Directors on January 26<sup>th</sup>.
  
- **Actions Planned**
  1. Presentation of survey results during AEM
  2. Develop action plan to address employee satisfaction survey issues





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

Facilities Management Strategic Planning Session – Second Quarter FY 2010

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

FACILITIES MANAGEMENT REPORT thru December 31, 2009

ACCOUNT DESCRIPTION	2009-10 Budget	% of Total Budget	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 83,000	3%	\$ 18,533	\$ -	\$ 18,533	\$ 64,467	\$ 64,467
PERSONAL SERVICE CONTRACTS	\$ 78,250	2%	\$ 38,017	\$ 49,725	\$ 87,742	\$ (9,492)	\$ (9,492)
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 769,524	24%	\$ 267,650	\$ 291,554	\$ 559,204	\$ 210,320	\$ 210,320
OTHER ADMINISTRATIVE EXPENSES	\$ 40,000	1%	\$ 7,783	\$ 20,000	\$ 27,783	\$ 12,217	\$ 12,217
DOMESTIC TRAVEL/TRAINING	\$ 70,000	2%	\$ 11,073	\$ 300	\$ 11,373	\$ 58,627	\$ 58,627
FIXED PURCHASED SERVICES (Maint Agr)	\$ 335,215	10%	\$ 149,831	\$ 118,357	\$ 268,188	\$ 67,027	\$ 67,027
OTHER PURCHASED SERVICES	\$ 418,000	13%	\$ 147,205	\$ 42,895	\$ 190,100	\$ 227,900	\$ 227,900
SUPPLIES	\$ 1,159,904	36%	\$ 323,353	\$ 106,001	\$ 429,354	\$ 730,550	\$ 730,550
EQUIPMENT	\$ 150,885	5%	\$ 18,527	\$ 23,956	\$ 42,482	\$ 108,403	\$ 108,403
CAPITAL OUTLAY	\$ 40,000	1%	\$ 1,532	\$ 6,261	\$ 7,793	\$ 32,207	\$ 32,207
FIXED CHARGES	\$ 34,000	1%	\$ 15,270	\$ 77	\$ 15,347	\$ 18,653	\$ 18,653
RECYCLING	\$ 34,750	1%	\$ 9,128	\$ 4,836	\$ 13,963	\$ 20,787	\$ 20,787
<b>FACILITIES MANAGEMENT Main Operating Funds</b>	<b>3,213,528</b>		<b>1,007,900.80</b>	<b>663,960.85</b>	<b>1,671,861.65</b>	<b>1,541,666.35</b>	<b>\$ 1,541,666</b>

STATUS

## GOAL #6 – Promote Good Stewardship

Lead  
FBO

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

### ACTION PLAN

#### • Actions Complete

- ✓ Periodically review expenditure reports as part of continuous improvement effort.
- ✓ Completed process mapping of first FM procurement process – Petty Cash. Map has been created electronically and will be updated as needed . Mapping process began October 1, 2009.

#### • 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. Continue process mapping efforts for the DPR and Purchase Order processes. [Anticipated completion: August 30, 2010.]
- January 2010 – development of new budget request tools and comprehensive instructions will begin.

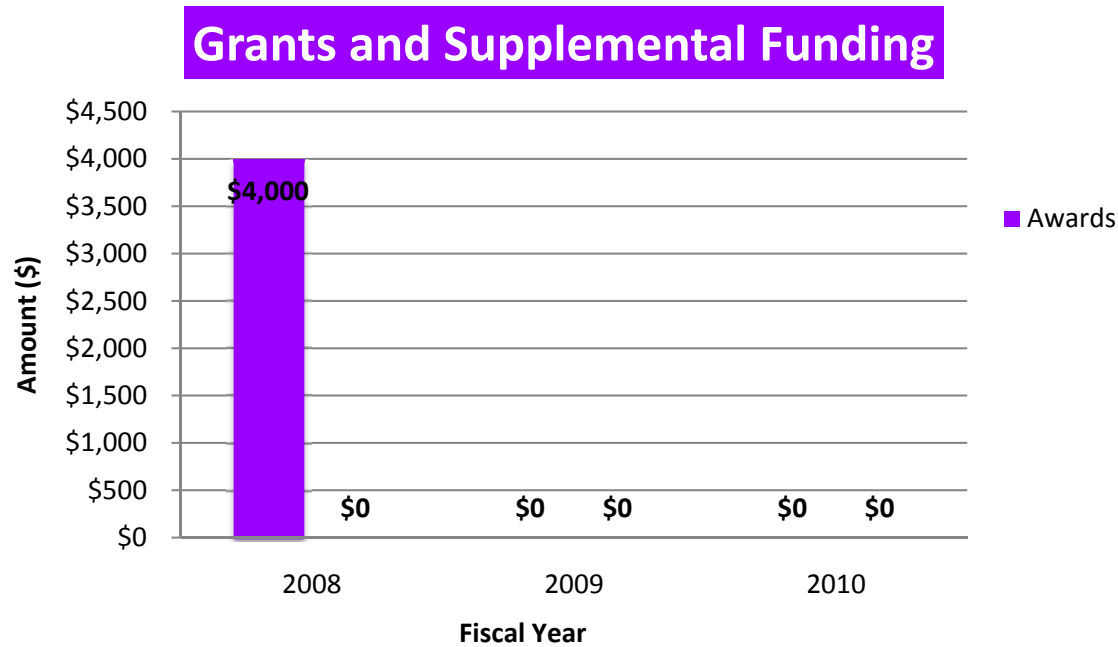
Lead  
FBO

**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

<b>Strategy</b>	<b>6.1</b>	Promote Fiscal Responsibility
<b>Objective</b>	<b>6.1.2</b>	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**
    - Development of submittal underway
- Actions Planned
  1. Encourage individuals to participate in proposal development;
  2. Submit APPA Application for Award by January 31, 2010
  3. Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals.
  4. Provide assistance in developing a strong proposal response to external funding collaboration within FM.

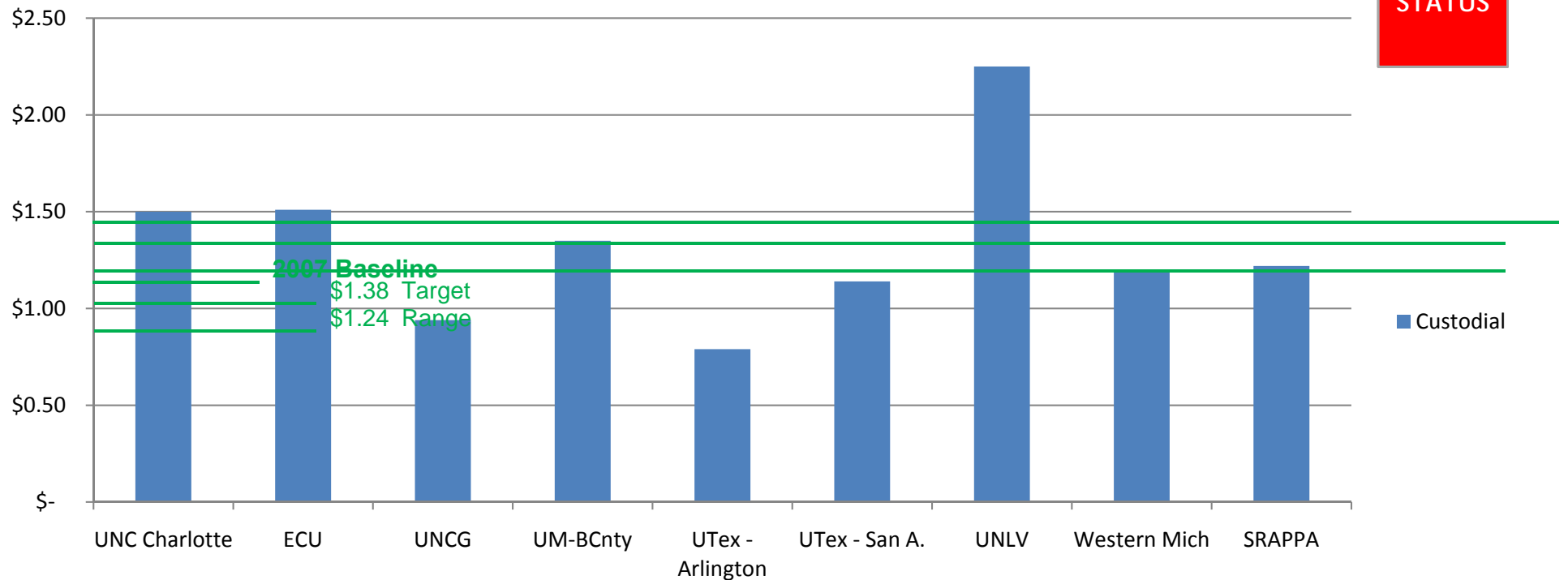
**GOAL #6 – Promote Good Stewardship**

**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**



## GOAL #6 – Promote Good Stewardship

Lead  
Housekeeping

- 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.)

### ACTION PLAN

- Actions Complete
  - Removed trash cans from classrooms
  - Shifted resources to cover reduced staffing at Bioinformatics
  - Covered added workload at Memorial Hall with existing staffing
- 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

# Facilities Management Strategic Planning Session – Second Quarter FY 2010

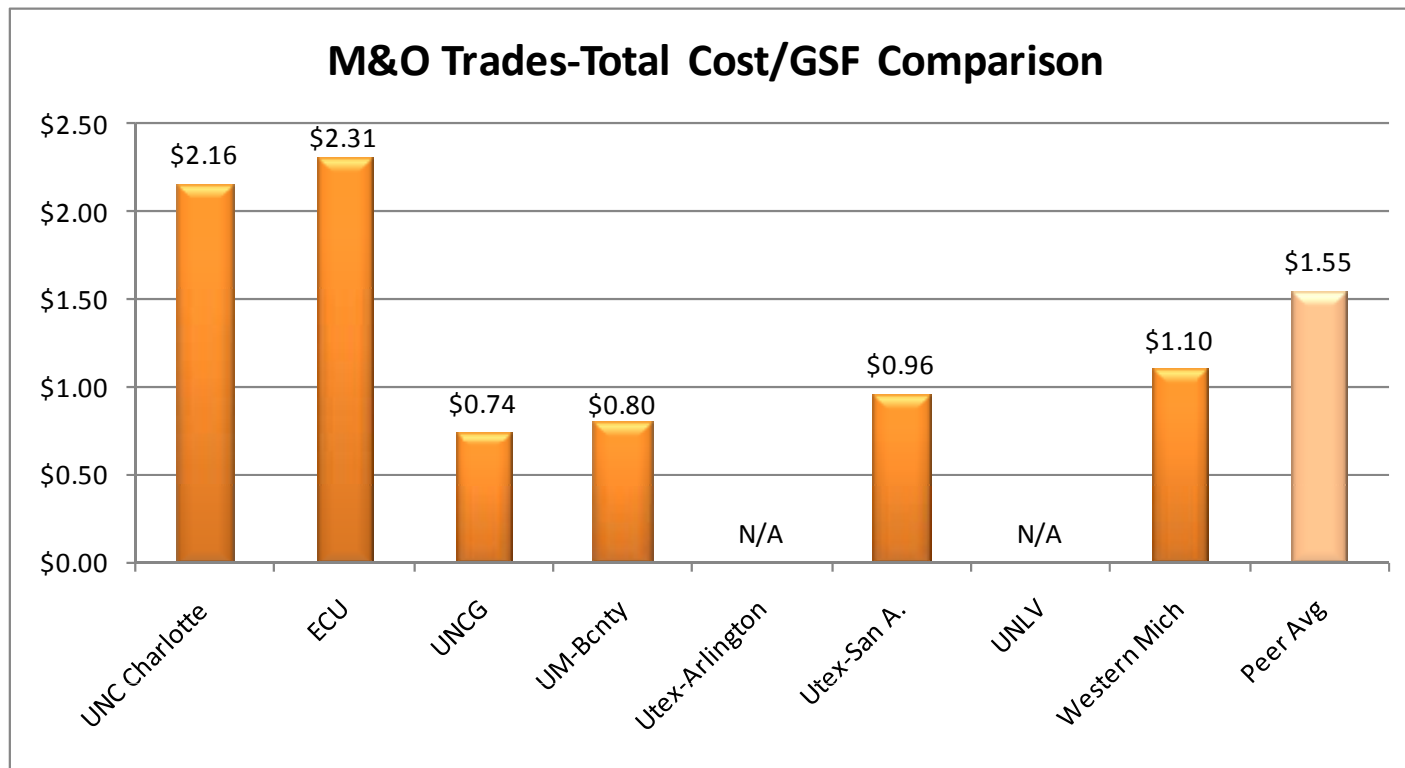
Lead  
M&O

## GOAL #6 – Promote Good Stewardship

**Strategy Objective** 6.1 Promote Fiscal Responsibility  
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



STATUS



## GOAL #6 – Promote Good Stewardship

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

Lead  
M&O

### ACTION PLAN

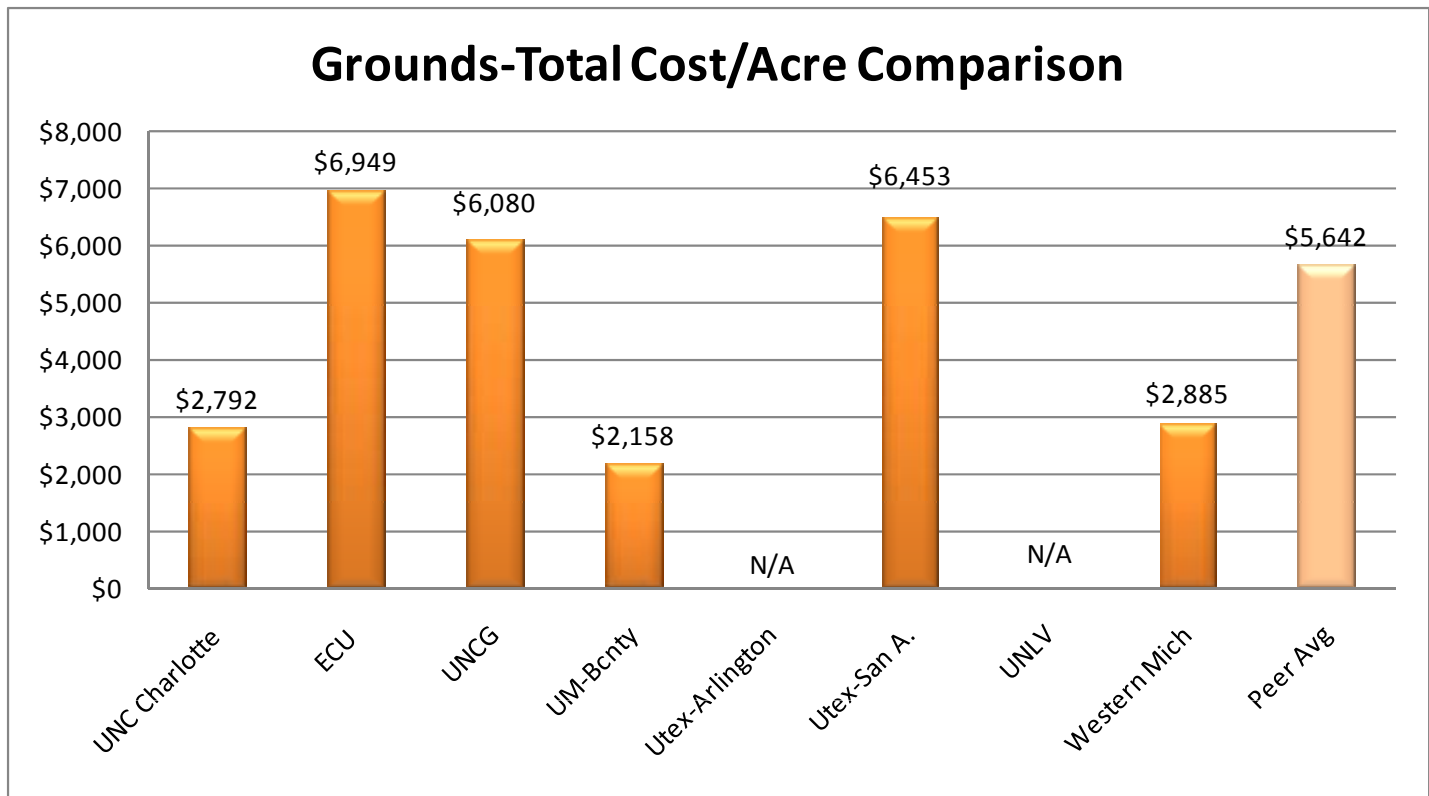
- Actions Complete
  - 1 – Pulled data from APPA RPI Report 2007/08.
- Actions Planned
  - 1 – Review how data was compiled and submitted.
  - 2 – Meet with FBO and Ray to concur on method for compilation.
  - 3 – Pull new data from next APPA RDI Report when available and update graph.

**GOAL #6 – Promote Good Stewardship**

**Strategy Objective**     **6.1**     Promote Fiscal Responsibility  
                                  **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

<b>Strategy</b>	<b>6.1</b>	Promote Fiscal Responsibility
<b>Objective</b>	<b>6.1.6</b>	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.
  - 2 – Pull new data from next APPA RDI Report when available and update graph.

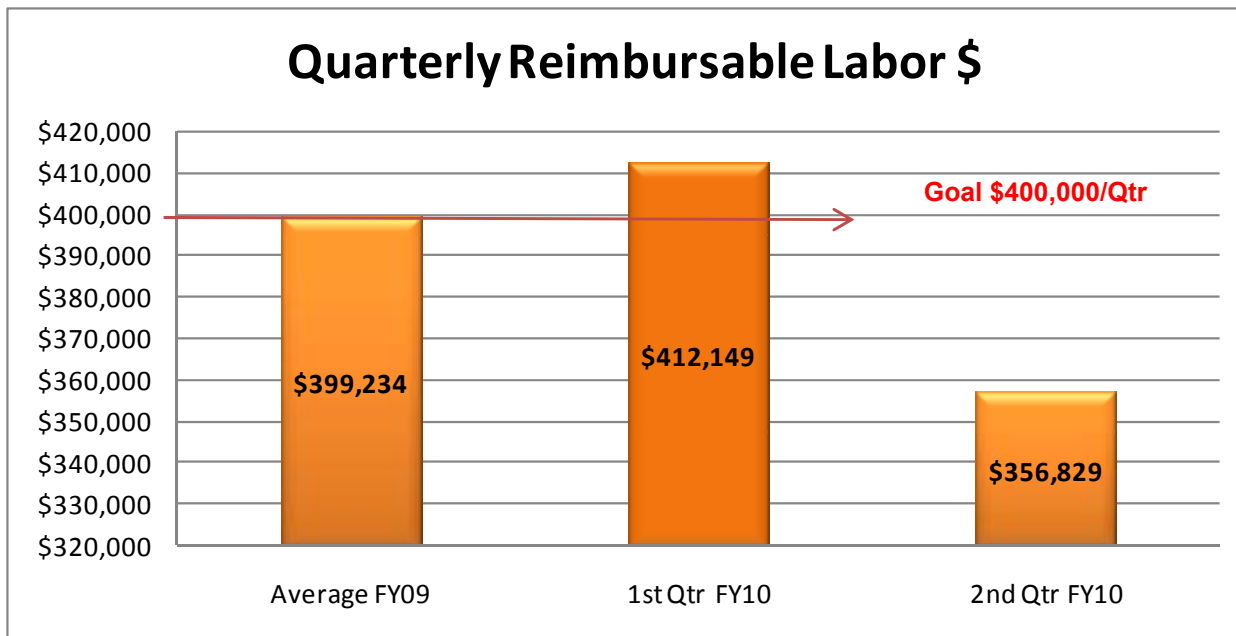
**GOAL #6 – Promote Good Stewardship**

**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

<b>Strategy</b>	<b>6.1</b>	Promote Fiscal Responsibility
<b>Objective</b>	<b>6.1.7</b>	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 on Fretwell project rather than going to outside resources.
  - 2 – Froze vacant Labor Services positions.
  - 3 – Did not use Labor Services positions on overtime for general funded work.
  - 4 – Picked up additional reimbursable work from Auxiliaries.
- 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.







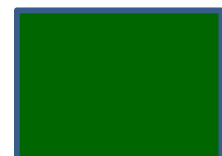
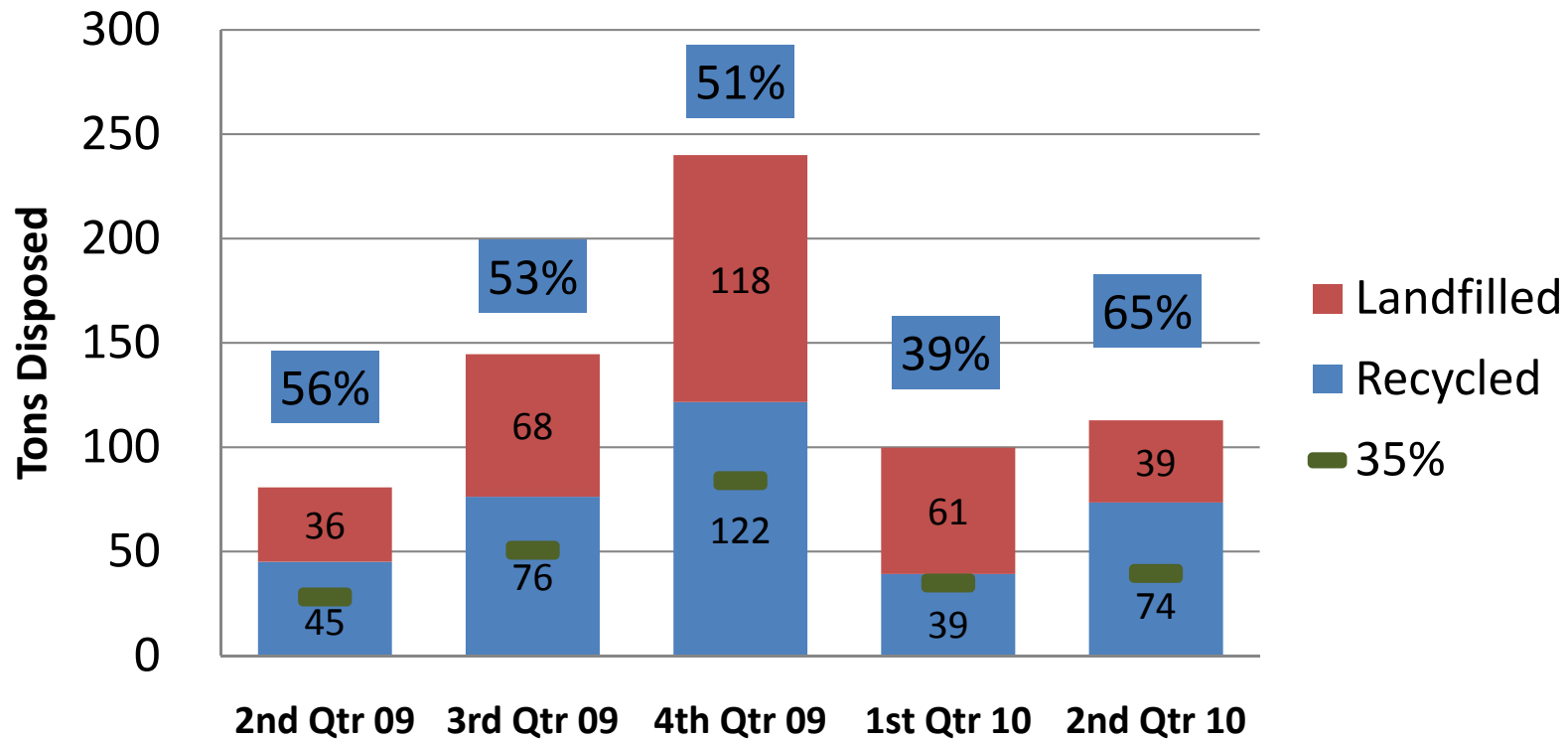
**GOAL #6 – Promote Good Stewardship**

**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  
2nd Quarter FY 2010**





## GOAL #6 – Promote Good Stewardship

<b>Strategy</b>	<b>6.2</b>	Develop a Sustainable Campus
<b>Objective</b>	<b>6.2.1</b>	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 65% for second quarter FY10 – savings of:
    - \$2,596 in tipping fees
    - \$2,675 in pull charges.
  - Met with counterpart at UNC Chapel Hill to learn more about their program.
  - New laws (banned materials) in effect as of October 2009.
  - UNC System Sustainability Policy adopted October 2009 – zero waste campus.
- Actions Planned
  - Work with Design to get built-in recycling whenever scope of renovation will allow.





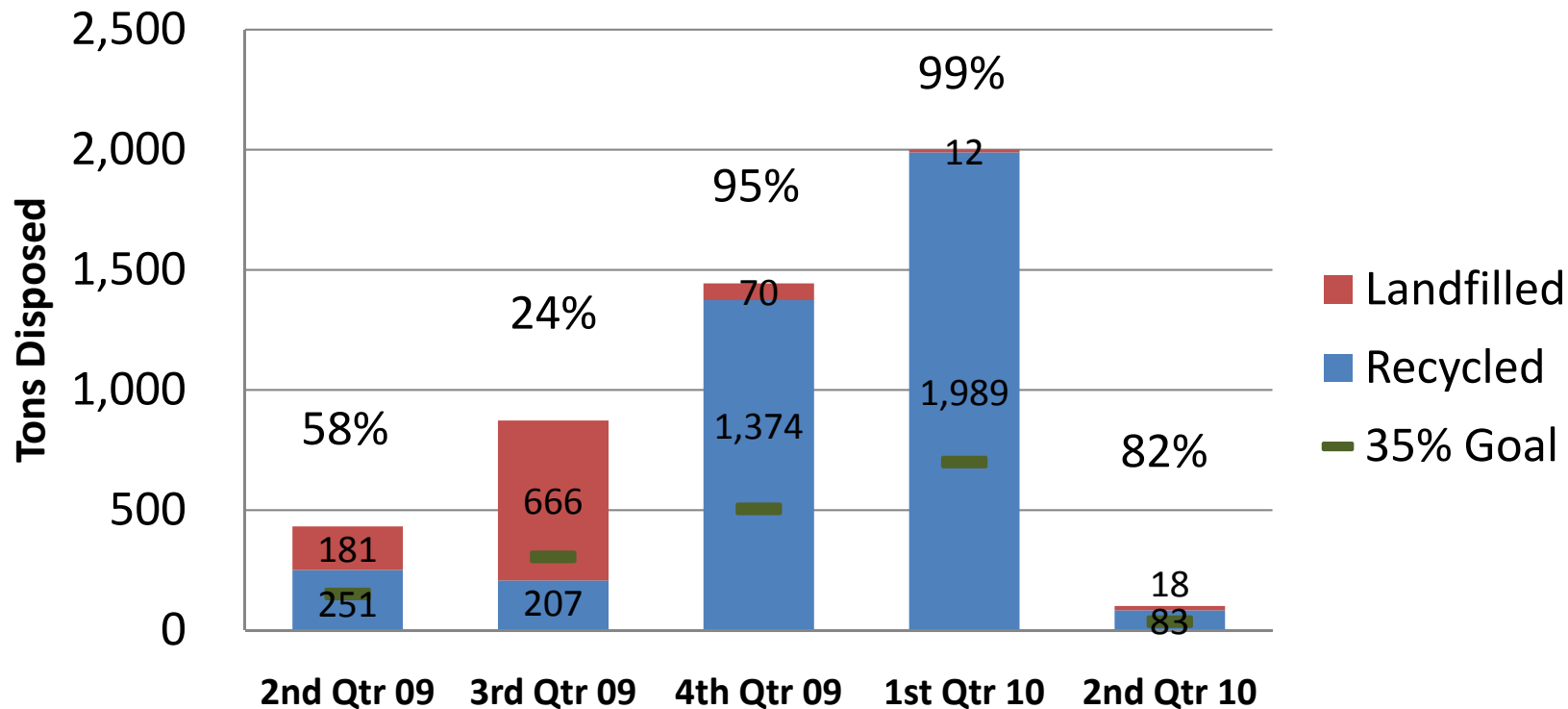
**GOAL #6 – Promote Good Stewardship**

**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  
2nd 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
  - Met with counterpart at UNC Chapel Hill to learn more about their program.
  - New laws (banned materials) in effect as of October 2009.
  - UNC System Sustainability Policy adopted October 2009 – zero waste campus.
  - Submitted updates to design manual.
  - Met with “Carolinas Green Construction” – new group working to become information clearinghouse on green building/C&D recycling.
- Actions Planned
  - Work on standardizing recycling bins in lobbies/common areas.

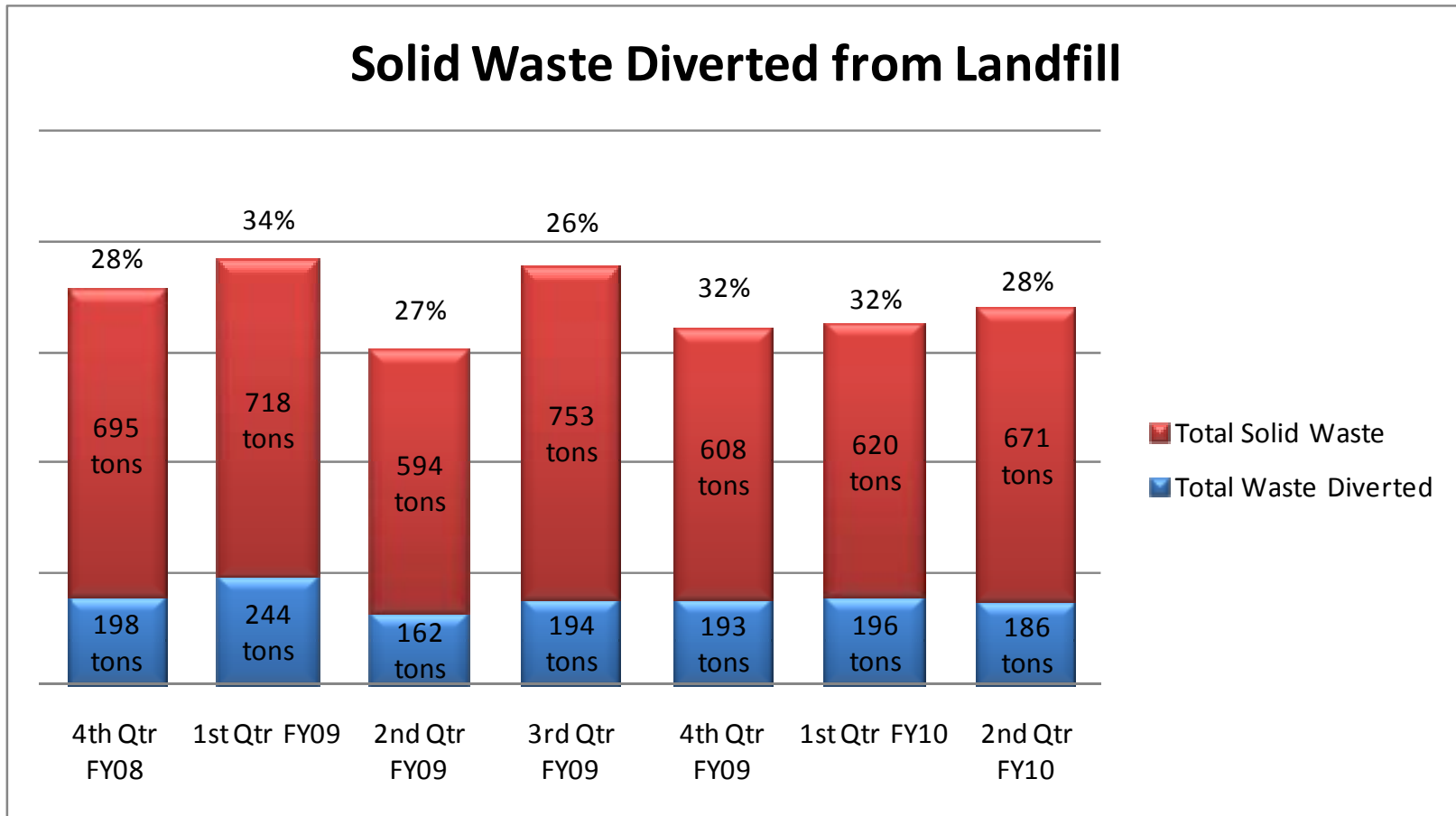


**GOAL #6 – Promote Good Stewardship**

**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

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
  - Paper recycling revisions
- Continue outreach efforts to University community (coordinated over 250 student volunteers, provided environmental tours, promoted Adopt-A-Spot program (10 groups), advise EARTH Club and CGI)
- Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
- Provided educational programs
  - to 3 English classes
  - Green Tour to SGA
  - presented at all orientations for students, staff and faculty
  - **Campus Sustainability Week**
    - CGI Forum , Campus Clean UP, Screened Trashed the Movie , Day of Action (partnered with SGA, EARTH Club, Sustainability Coordinator, Environmental Academy, CGI, Niner on the Weekend)

• Partnered with Housekeeping – classroom trashcan removal project and pilot office trash can consolidation program				
• <b>Fiscal Year</b>	<b>Total waste Diverted</b>	<b>Total Solid Waste</b>	<b>% Diverted</b>	<b>Tons Diverted</b>
2008	1,454,766	5,530,846	26%	727
2009	1,584,817	5,349,357	30%	792
2010	765,100	2,580,578	30%	383

### 2010 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
- Continue educational outreach and promotion (Sustainable Campus tour, Adopt-A-Spot program, advising EARTH Club and CGI)
- Coordinate Campus Clean UP and EARTH DAY 40<sup>th</sup> anniversary
- Design week long HEALTHY CAMPUS programs with EARTH Club and other student organizations
- Present and attend the CRA conference in March
- Will add Development office to route
- Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**

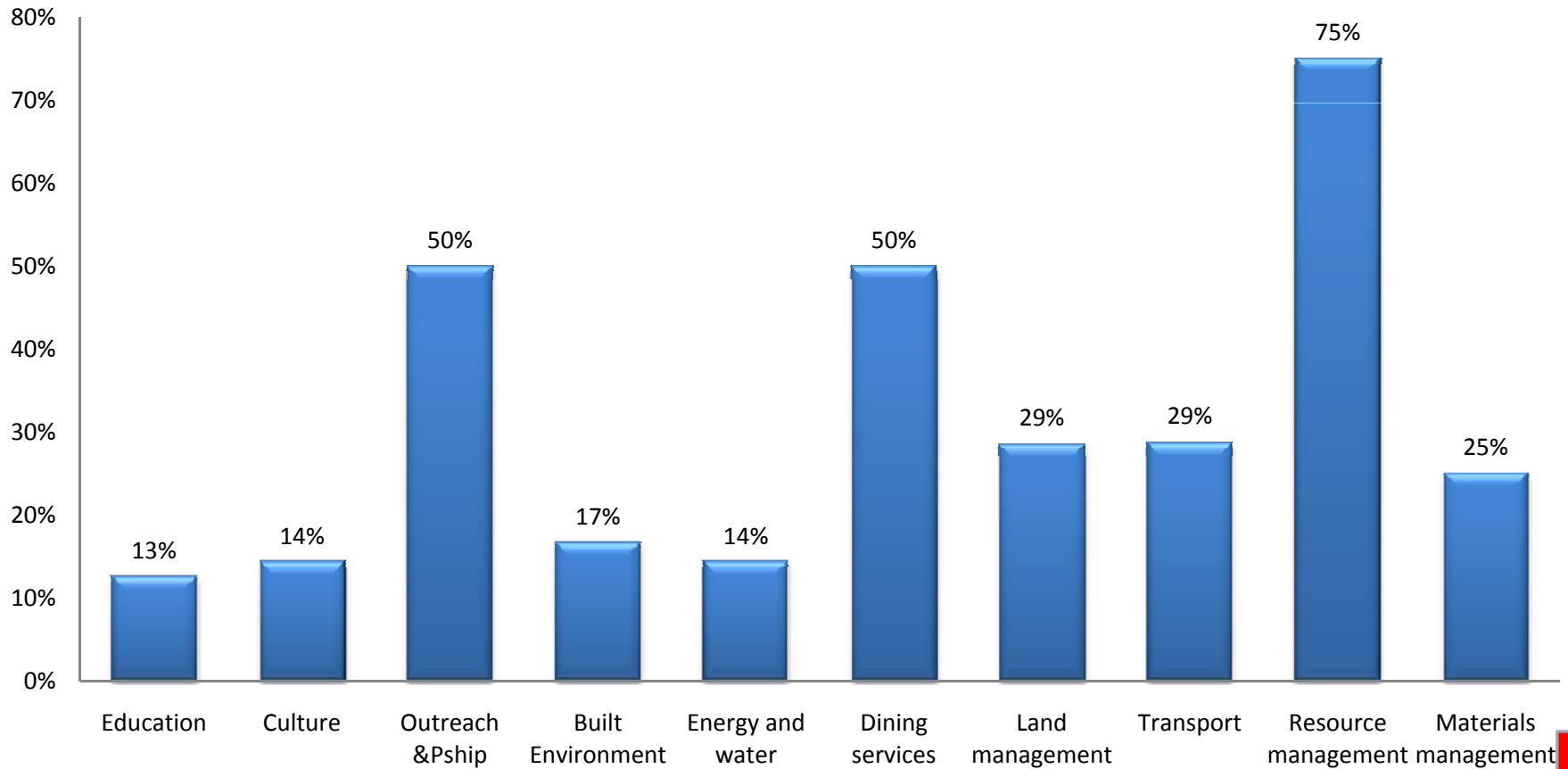
**GOAL #6 – Promote Good Stewardship**

**Strategy 6.2 Develop a Sustainable Campus**

**Objective 6.2.4 Implement 35% of the 2008 sustainability plan goals in each category by end of FY 2010**

**Measure: Number of goals achieved in each category**

**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 plan actions

Lead  
Planning

# ACTION PLAN

## Actions Completed

- Campus sustainability presentations
- Campus sustainability week events – we moved the earth
- ACUPCC
  - Implementation management plan
  - Campus awareness raising sessions
  - Campus recruitment
- NPDES Phase II permit
  - Meetings with DWQ.
  - Permit review
- Sustainability committee
  - Sustainability committee work plan

## GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

Lead  
Planning

# ACTION PLAN

- **Actions Planned**

- Education/Research:
  - Engage with Provost regarding infusing sustainability into the curriculum
- Culture and Community
  - Institute Campus Sustainability speaker series
  - Enhance the sustainability website.
  - Conduct campus sustainability tabling events
- Outreach and partnership
  - Develop process for tracking community sustainability activities.
  - Embark on joint program with Mecklenburg county environmental policy department
- Built Environment
  - Development of campus green building resource database
  - Sustainability committee to discuss development of green building policy
  - Review LEED EB
- Energy and water management
  - Green house gas inventory

**GOAL #6 – Promote Good Stewardship**

**Strategy**      6.2      **Develop a Sustainable Campus**

**Objective**      6.2.4      Implementation of Sustainability plan actions

Lead  
Planning

**ACTION PLAN**

**Actions Planned**

- Dining Services
  - Meal plan - bottled water ban
- Land management
  - NPDES Phase II presentation
  - Reclaimed water lunch and learn
- Transport
  - Meet with transportation services department
- Resource Management
  - Support recycling
  - Joint class presentations
- Materials Management
  - Support green purchasing policy development



Lead  
Capital

GOAL #6 – Promote Good Stewardship

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

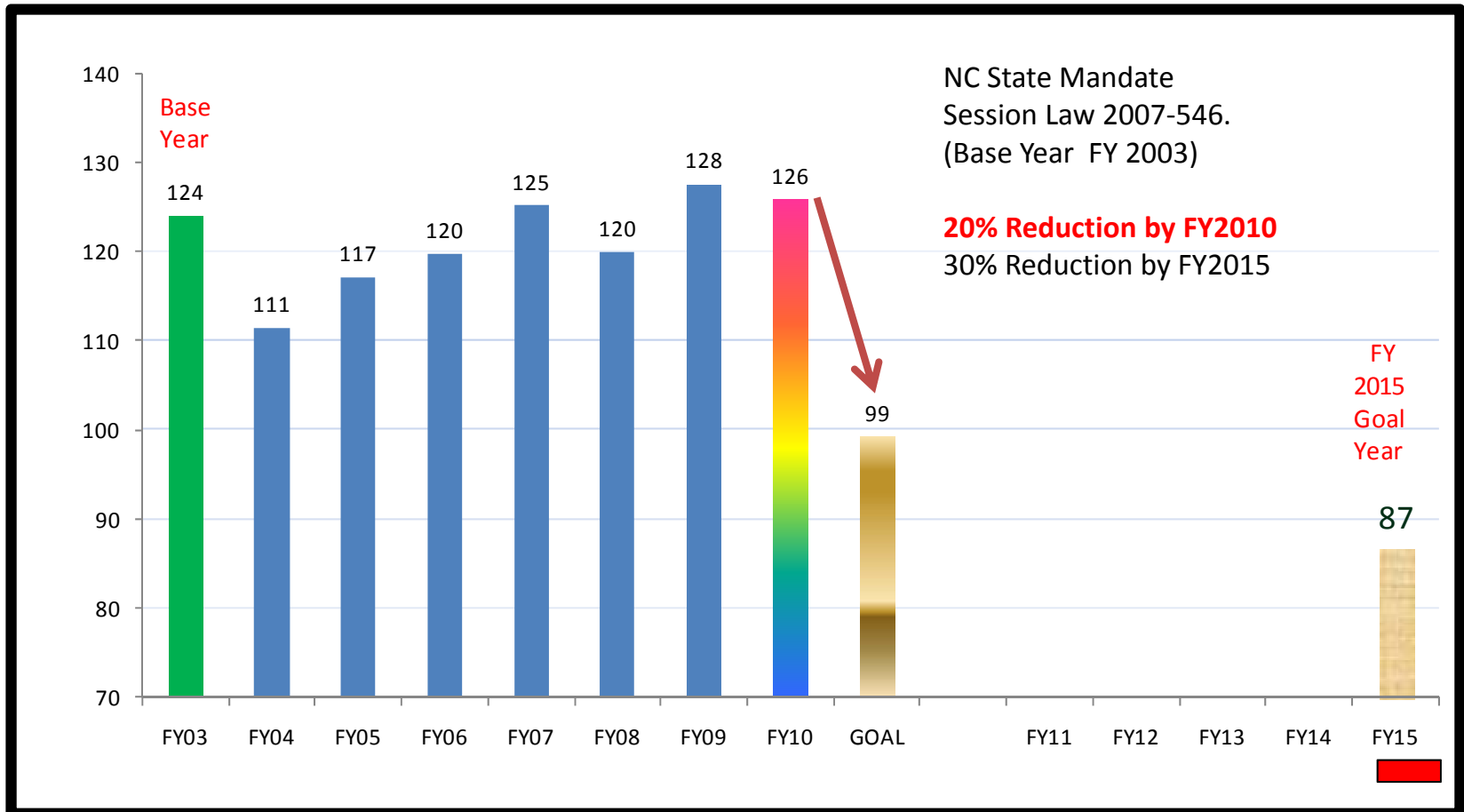
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

# CAMPUS ENERGY USAGE

## Kbtu/GSF



**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

**HISTORICAL ACTIONS TO REDUCE  
CAMPUS ENERGY USAGE**

STATUS

- Dedicated Energy Manager/Team
- Awareness
- Reduce lighting loads and schedule for unoccupied periods
- HVAC
  - Install high efficiency equipment and systems (motors, drives, etc)
  - Install energy recovery
  - Schedule systems for unoccupied mode
  - Establish space temperature guidelines with support of Chancellor and Provost
  - Install building automation systems AND utilize to max capabilities
- Performance Contracting
- Retro-commissioning
- Renewable Energy Projects

**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

- **Actions Complete**
  - Proposals received from 4 ESCO's. Evaluation in progress.
  - 3<sup>rd</sup> Party consultant selected (Celtic Energy)
  
- **Actions Planned**
  - ESCO Selection (February, 2010)
    - Investment Grade Audit (IGA) (2<sup>nd</sup> Quarter, 2010)
      - Energy Services Agreement (ESA) ( 3<sup>rd</sup> Quarter 2010)
        - ESCO Completes Installation of Energy Conservation Measures (2010 - 2011)

GOAL #6 – Promote Good Stewardship

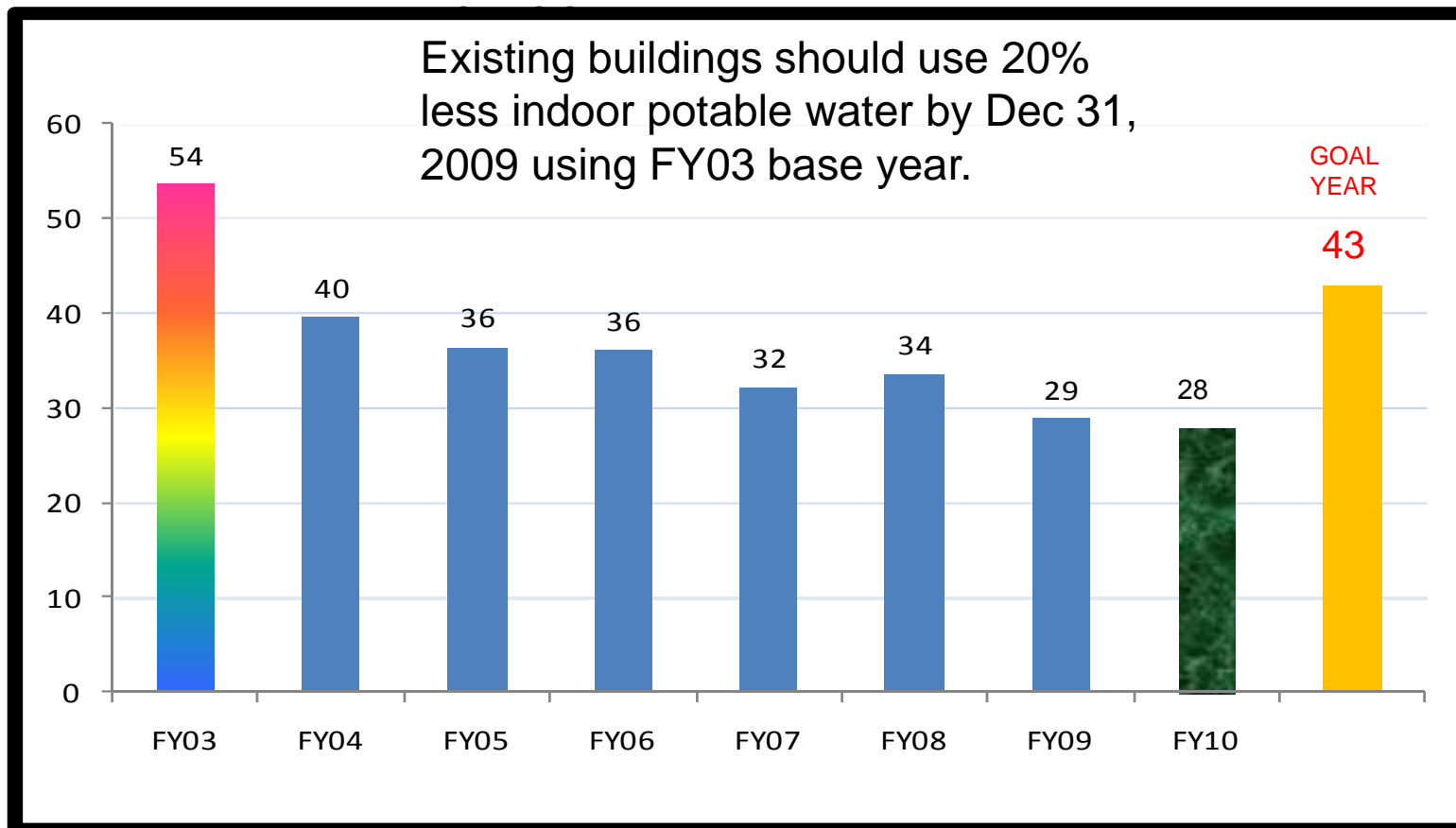
Strategy 6.3 Conserve Natural Resources  
Objective 6.3.2 Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

*Still need to reduce water usage to help preserve*



Lead  
M&O

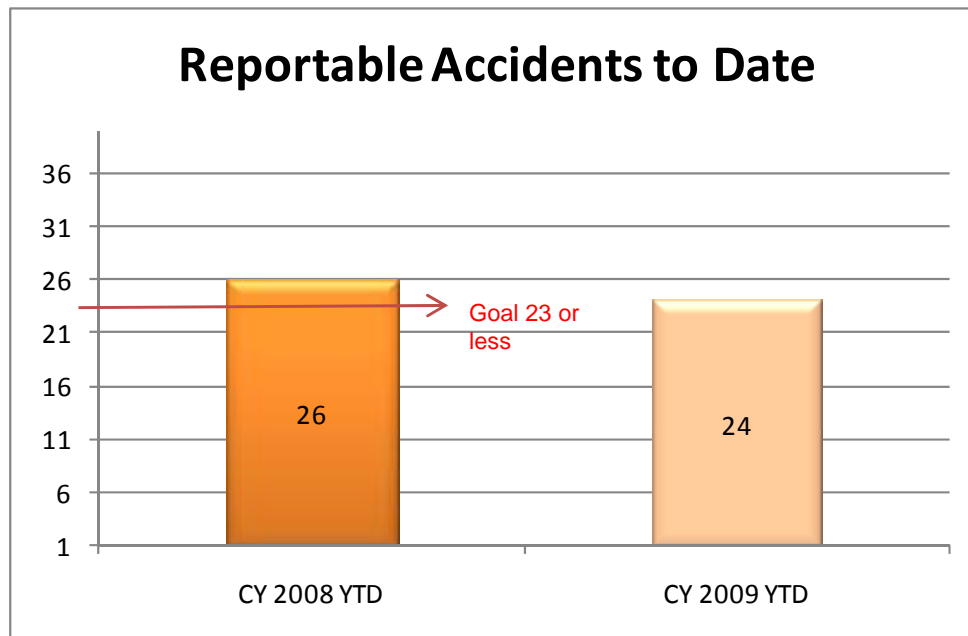
**GOAL #6 – Promote Good Stewardship**

**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 new hand tools and equipment to replace defective tools and equipment which could result in injuries.
  - 3 – Procured new foul weather uniforms to replace defective uniforms to ensure employee comfort in harsh weather and improve working condition.
- Actions Planned
  - 1 – Zone supervisors to continue safety training and audits to improve overall OSHA compliance.
  - 2 – Encourage staff by posting the number of accident free days on the message board.

Facilities Management Strategic Planning Session – Second Quarter FY2010

Lead  
Capital

GOAL #6 – Promote Good Stewardship

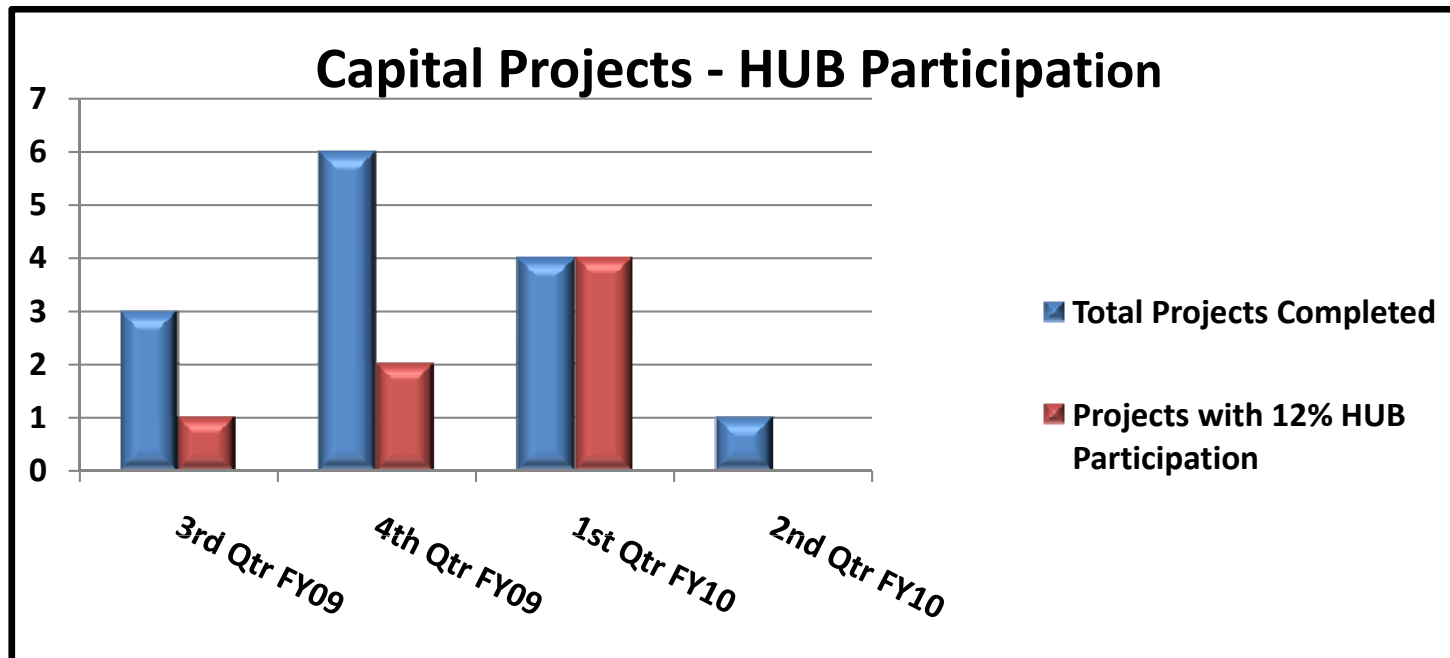
**Strategy** 6.5 Improve Historically Underutilized Business (HUB) Participation  
**Objective** 6.5.1 80% of Capital Projects achieve 12% HUB Participation

**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 Participation Goal
3rd Qtr FY09	3	1	33%
4th Qtr FY09	6	2	33%
1st Qtr FY10	4	4	100%
2nd Qtr FY10	1	0	0%
Total	14	7	50%

High Voltage Duct Bank Replacement - 11.35%



STATUS

## GOAL #6 – Promote Good Stewardship

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

Lead  
Capital

# ACTION PLAN

## ▪ **Actions Complete**

- Project Information/Vendor Outreach session for EPIC (Early Site Package)
- “Networking Your Business” workshop
- Implementation of Statewide Uniform Certification Program (SWUC)
  - October 15<sup>th</sup> – utilization of SWUC vendor

## ▪ **Actions Planned**

- Conduct workshops to enhance business skills; managing people/projects, completing pre-qualification forms, CM vs Single Prime projects, Joint Venture partnerships, Mentor-Protégé Programs, using IPS/Vendor Link NC, completing MBE forms, etc.
- Work with CMs on developing Joint Venture partnerships at 2<sup>nd</sup> tier subcontractors level
- 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 – Second Quarter FY2010

Lead  
Capital

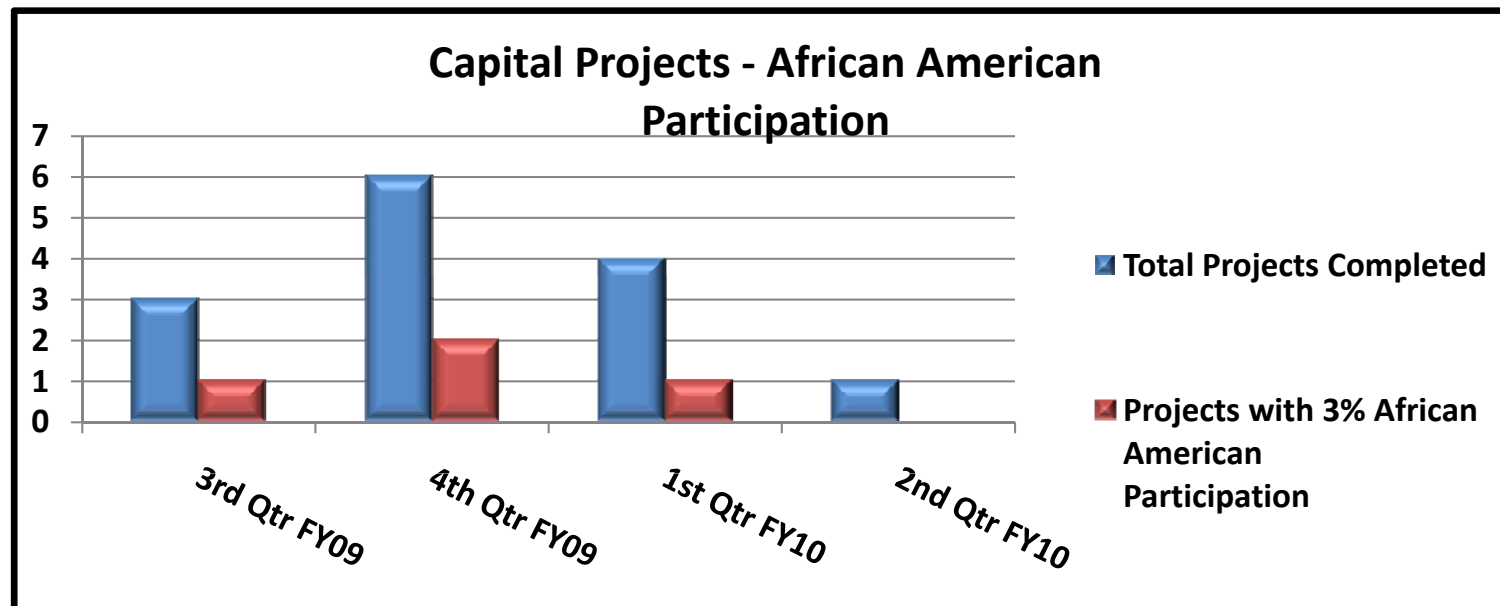
GOAL #6 – Promote Good Stewardship

**Strategy** 6.5 Improve Historically Underutilized Business (HUB) Participation  
**Objective** 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 Participation Goal
3rd Qtr FY09	3	1	33%
4th Qtr FY09	6	2	33%
1st Qtr FY10	4	1	25%
2nd Qtr FY10	1	0	0%
Total	14	4	29%



STATUS

## GOAL #6 – Promote Good Stewardship

Lead  
Capital

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

# ACTION PLAN

## ▪ **Actions Complete**

– Ensuring CMs accomplish/exceed project goals; Center City Classroom Building project is currently showing 32.97% overall participation and 21.47% African American participation, exceeding their 20% overall (10% African American) participation goals.

## ▪ **Actions Planned**

– Continue . . .

- Focus efforts to assist qualified African American firms increase capacity
- Work with other agencies and general contractors to develop African American firms for public sector projects
- Monitor Good Faith Efforts
- Community outreach efforts
- Keep community apprised of opportunities/events

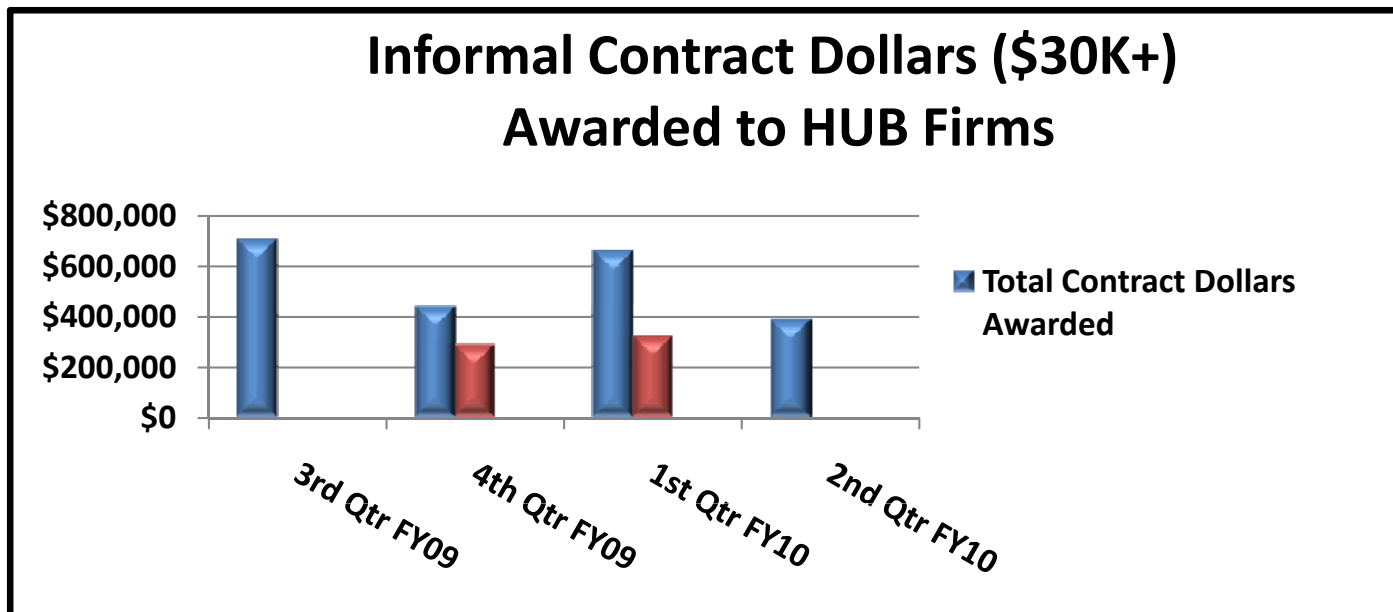
**GOAL #6 – Promote Good Stewardship**

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

**Measure:** Percentage of Informal Contract 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
3rd Qtr FY09	\$703,492	0	0%
4th Qtr FY09	\$437,475	\$286,158	65%
1st Qtr FY10	\$659,799	\$321,332	49%
<b>2nd Qtr FY10</b>	<b>\$385,120</b>	<b>\$500</b>	<b>0%</b>
Totals	\$2,185,886	\$607,990	28%



## GOAL #6 – Promote Good Stewardship

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

Lead  
Capital

# ACTION PLAN

## ▪ **Actions Complete**

- Informal construction process using the same MBE participation guidelines/forms required for the Formal process

## ▪ **Actions Planned**

- Work with Materials Management on Good Faith Effort requirements
- 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.**

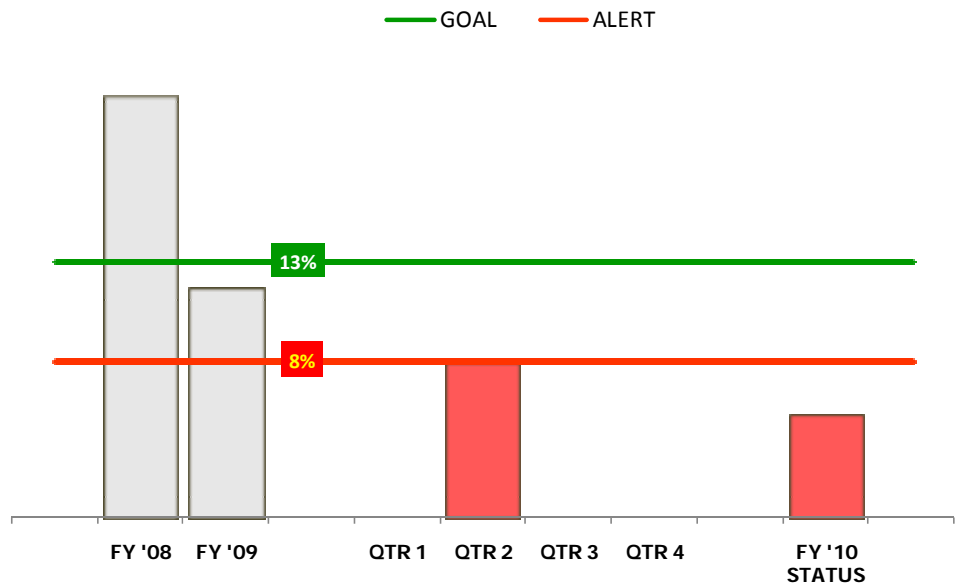
**Measure:** Total % of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

**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	\$ 522,917	\$ 40,731	7.8%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
<b>FY '10 STATUS</b>	<b>\$ 792,962</b>	<b>\$ 40,731</b>	<b>5.1%</b>

**HUB OVERALL GOAL: 13.0%**



<b>GOAL</b> 13.0%	<b>FY'10 STATUS</b> 5.1%
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## 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.

Lead  
Design  
Services

# ACTION PLAN

### 6.5.4 - Actions Completed:

- Assigned Amanda Felock to promote utilization of HUB firms and other successful vendors.
- Reports processed by PO Date, Project Number and Contract Amount.

### 6.5.4 - Actions Planned:

- Promote usage of HUB firms with Project Coordinators (Amand Felock).
- Implement Meet & Greet sessions with successful HUB firms that have been used but need greater exposure to all of Design Services.
- Individual meetings with JOC Contractors to discuss ways to improve use of HUB firms.
- FIS to update Archibus to provide Strategic Planning reports rather than running queries.

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.**

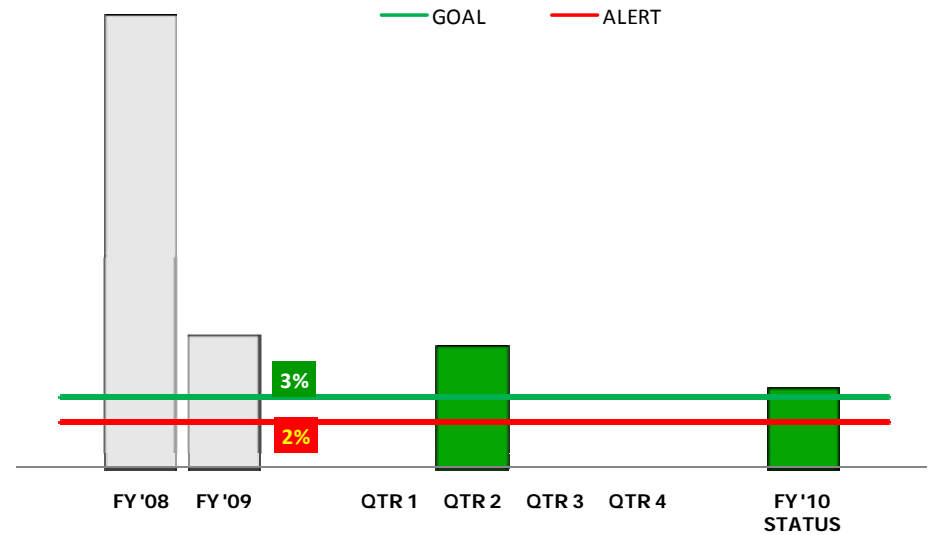
Measure: Total volume of African American participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

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	\$ 522,917	\$ 26,015	5.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '10 STATUS	\$ 792,962	\$ 26,015	3.3%

AFRICAN AMERICAN GOAL: 3.0%



GOAL 3.0%	FY'10 STATUS 3.3%
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