



UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Second Quarter – Fiscal Year 2011

January 27, 2011



...Creating a Campus of Distinction



UNC CHARLOTTE

"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

GOAL # 1

Improve Maintenance and
Operation on the Campus



UNC CHARLOTTE

"Careful planning helps us maintain a sense of perspective, purpose and ordered priorities."

-- Stephen Covey, Author and Speaker

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements



UNC CHARLOTTE

"The greater danger for most of us lies not in setting our aim too high and falling short, but in setting our aim too low and achieving our mark."

-- Michelangelo, Artist

GOAL #3

Deliver New Facilities that
Support the University's Mission



UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

GOAL #4

Perfect a Customer Focused Organization





UNC CHARLOTTE

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

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

GOAL #5

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





UNC CHARLOTTE

"The more positive you are when you think and work toward your goals, the faster you achieve them."

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship



UNC CHARLOTTE

Balance Score Card

CUSTOMER

Perspective

Strategic Objectives:

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

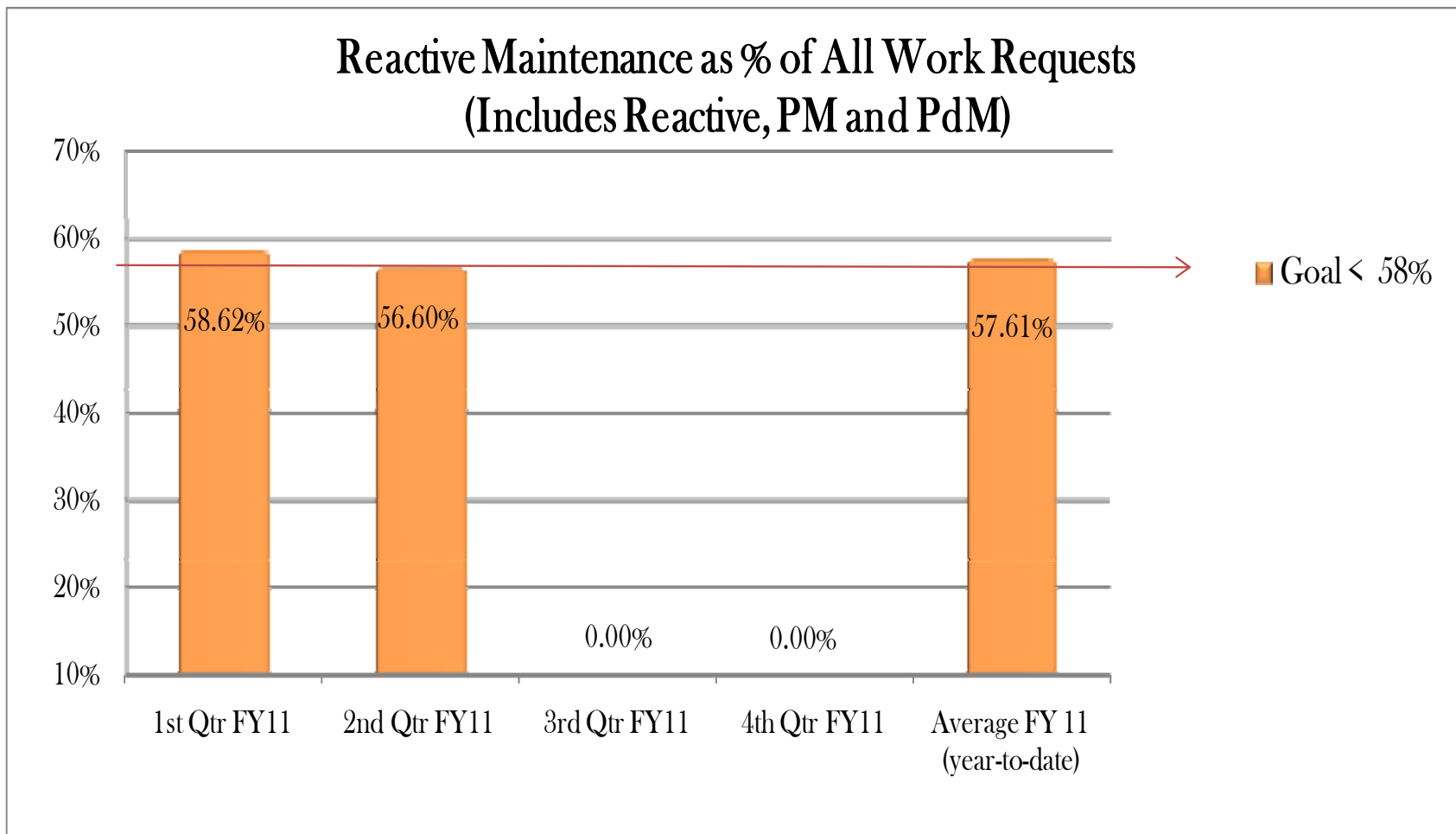
Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Reviewed Roofing PM's – added missing PMs.

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

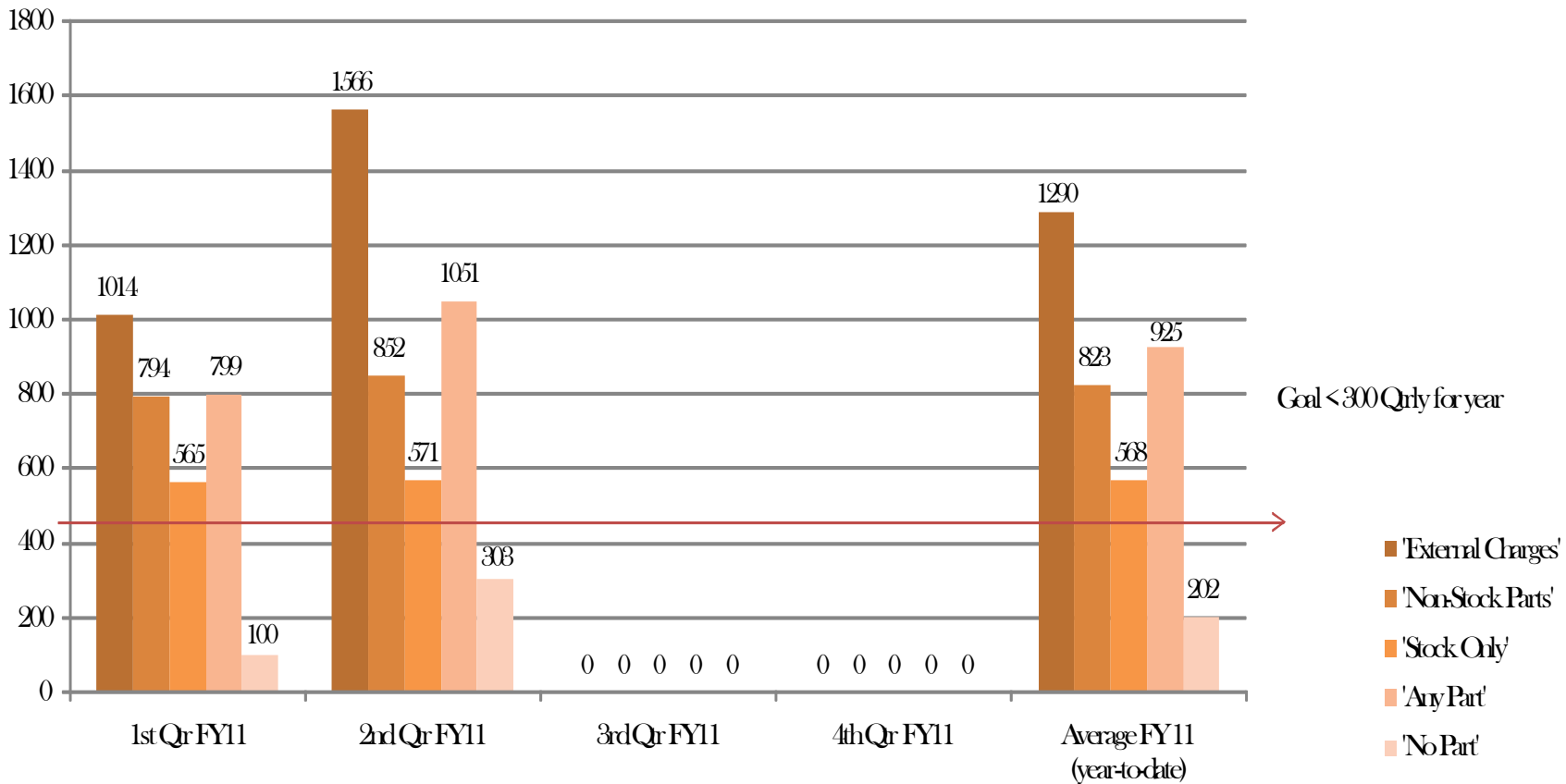
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Work Request Cycle Time by 25% or < 300 hours

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

Balanced Scorecard Category: Customer Perspective

Improve Work Request Process For WR's not requiring parts



YTD = 202

STATUS

GOAL #1 – Improve Facilities Operations

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.2 Decrease Non-emergency Work Request Cycle Time by 25% or < 300 hours

Lead
F. O.

ACTION PLAN

Actions Complete

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

Actions Planned

- 1 - Review the manner in which data is used to calculate cycle time with FIS to ensure no negative numbers and improve accuracy.
- 2 - Re-emphasize Policy II-16 for Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
Housekeeping

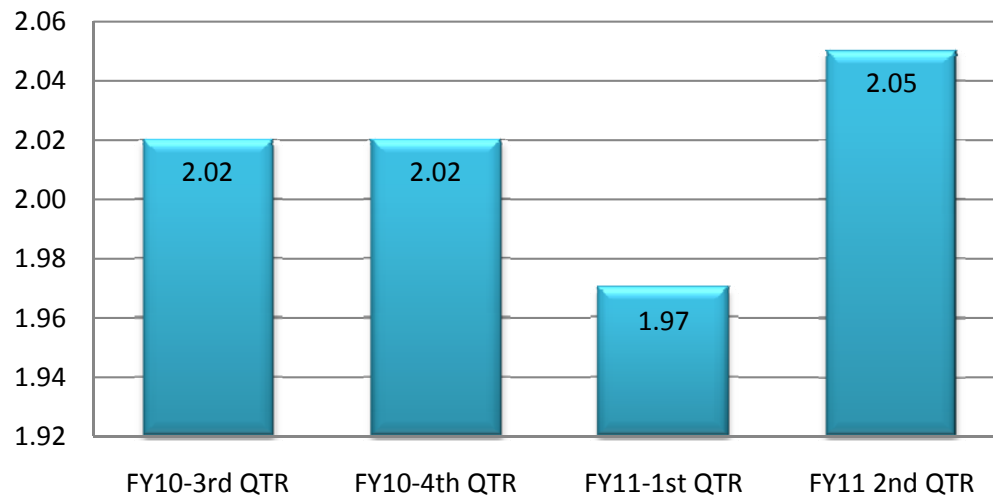
GOAL #1 – Improve Maintenance and Operations of the Campus

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: Customer Perspective

APPA LEVELS



28 of 31
buildings were at
Level 2 or below
(90%)

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 2011

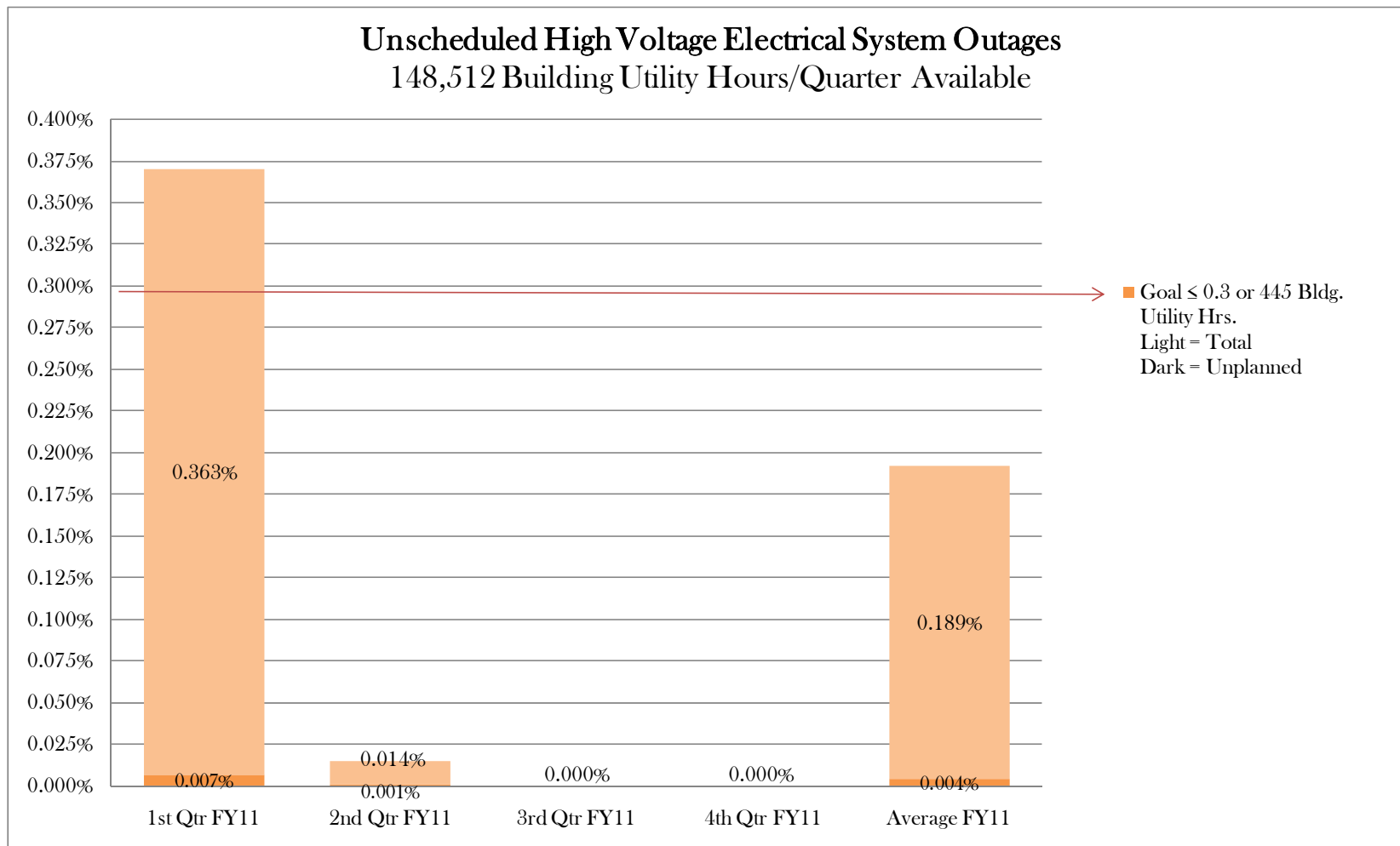
Lead
F. O.

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)

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Completed PM's as scheduled.
 - 2 – 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.
 - 4 – Repaired terminations in Colvard South switch 22-B.
- 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.
 - 4 – Preparing estimates for replacement of switches 42A-B and 42B-B.

Facilities Management Strategic Planning Session – Second Quarter FY 2011

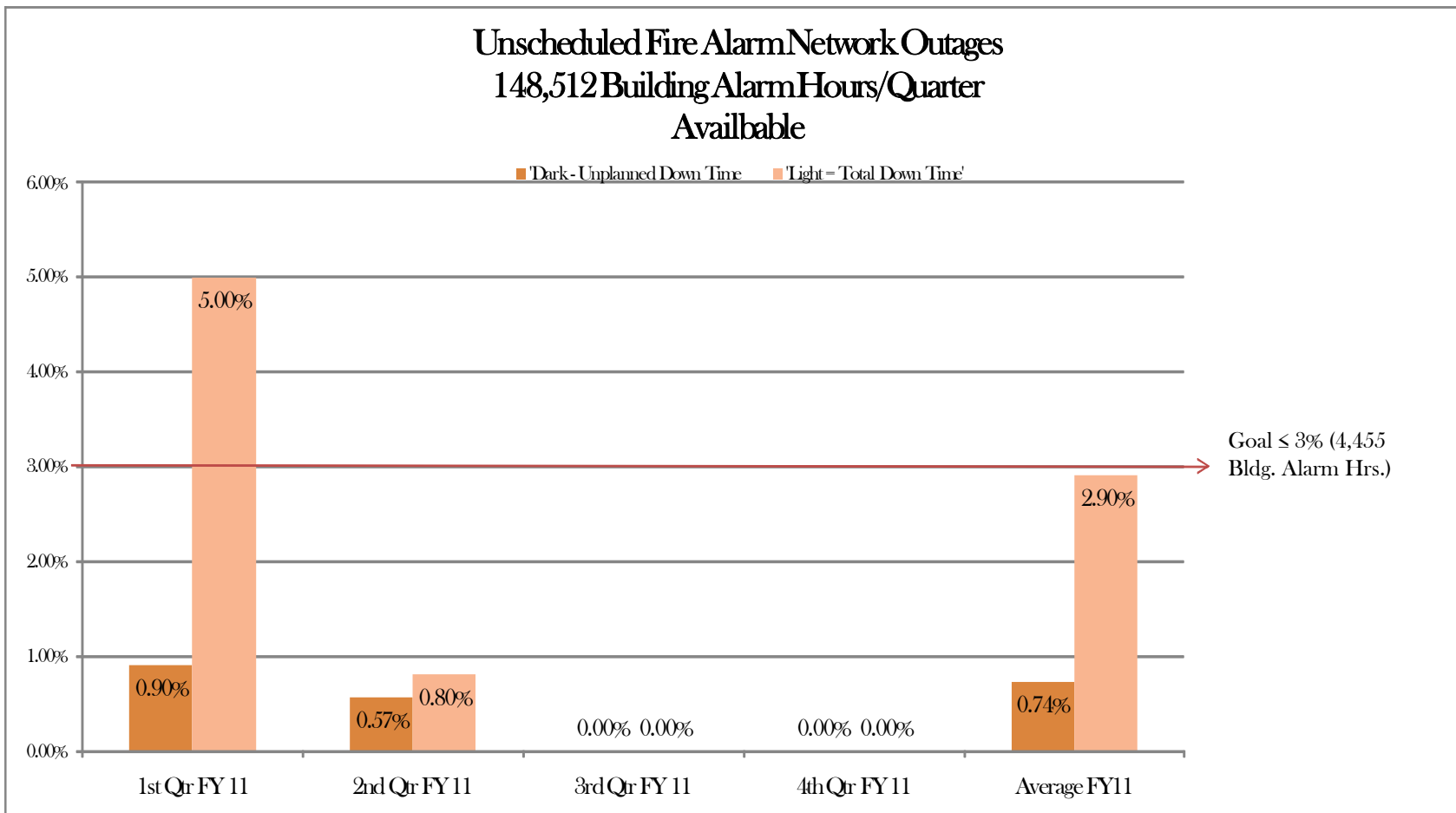
Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

Actions Complete

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

Actions Planned

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

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

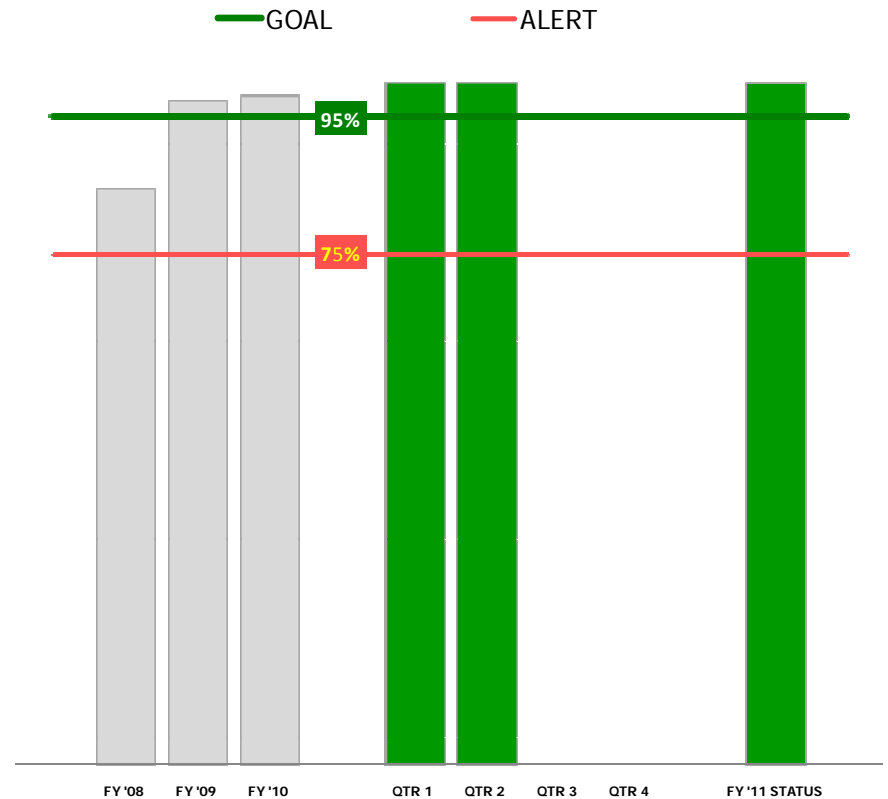
Strategy Objective 2.2 Improve Informal Project Design and Construction Process
 2.2.1 **95% of Projects Designed on Time**

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

Balanced Scorecard Category: Customer Perspective

95% of Projects Designed on Time

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not Completed On Time	Designed On Time
FY '08	65	55	10	84.6%
FY '09	115	112	3	97.4%
FY '10	173	170	3	98.3%
QTR 1	49	49	0	100.0%
QTR 2	64	64	0	100.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '11 STATUS	113	113	0	100.0%



GOAL
95.0%

STATUS
100.0%

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

Lead
Design
Services

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

ACTION PLAN

2.2.1 - Actions Completed:

- Project Priority List upgrades.

2.2.1 - Actions Planned:

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

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

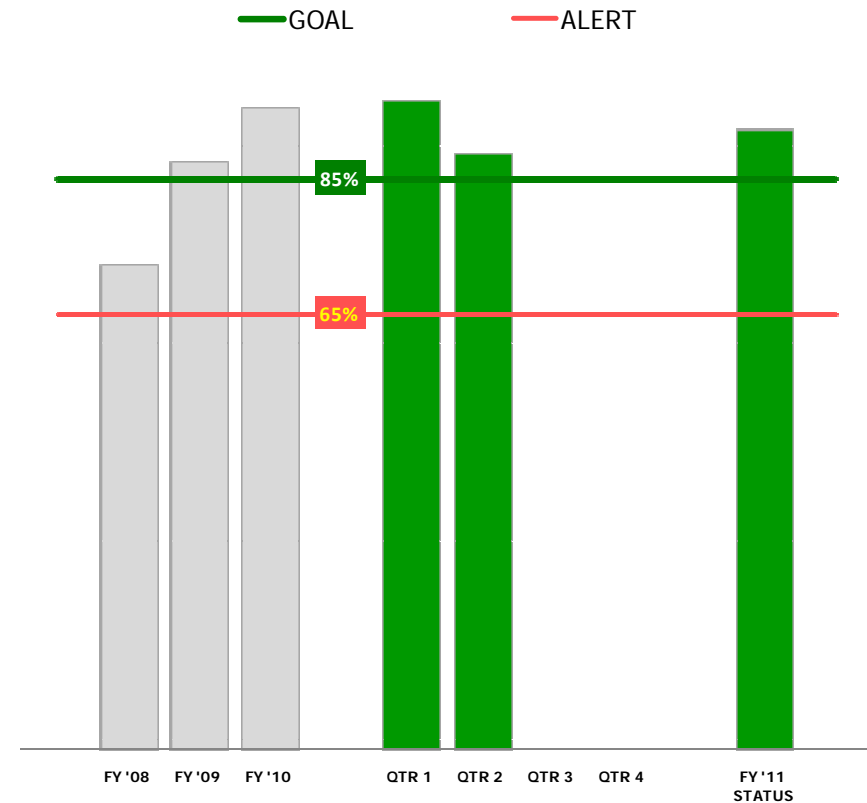
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 **85% of Estimates for All Construction within +/- 10% of Actual.**

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

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '08	65	47	18	72.3%
FY '09	115	101	14	87.8%
FY '10	255	244	11	95.7%
QTR 1	31	30	1	96.8%
QTR 2	36	32	4	88.9%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '11 STATUS	67	62	5	92.5%



GOAL 85.0%	STATUS 92.5%
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GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Lead
Design
Services

ACTION PLAN

2.2.2 - Actions Completed:

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

2.2.2 - Actions Planned:

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

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

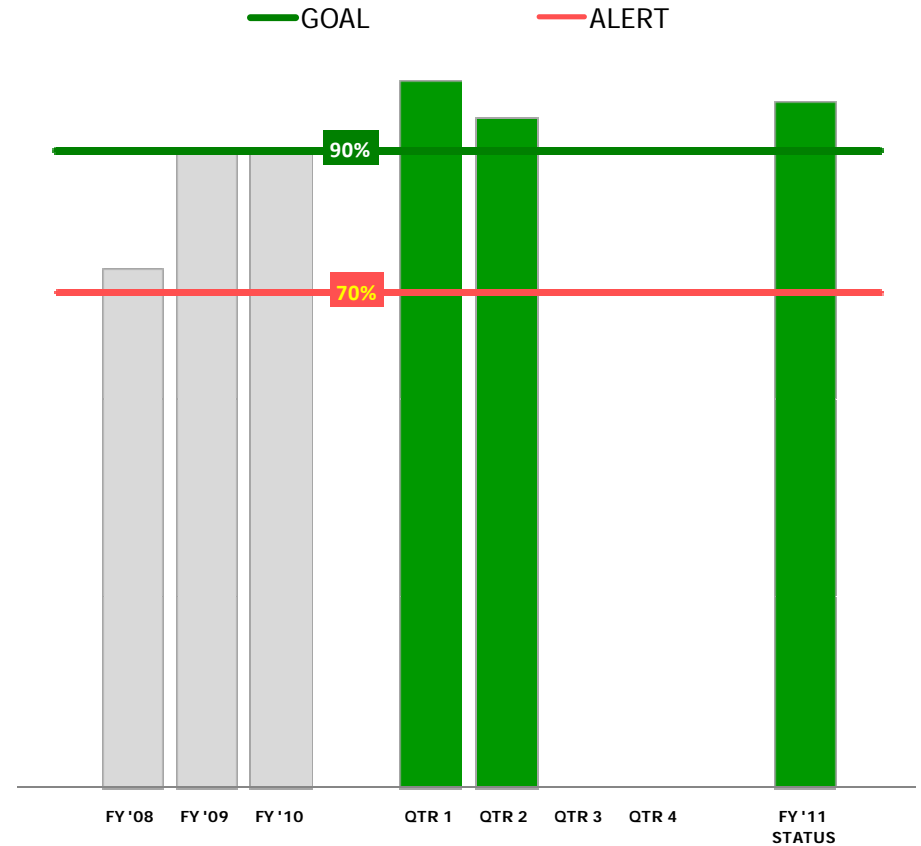
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 **90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

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

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY REVIEW	No. of Projects	No. of met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '08	190	139	51	73.2%
FY '09	116	104	12	89.7%
FY '10	182	164	18	90.1%
QTR 1	31	31	0	100.0%
QTR 2	36	34	2	94.4%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '11 STATUS	67	65	2	97.0%



GOAL 90.0%	STATUS 97.0%
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GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Lead
Design
Services

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

ACTION PLAN

2.2.4 - Actions Completed:

- Project schedules from Scope & Budget, Design and Construction through Closeout.

2.2.4 - Actions Planned:

- Continue to establish proven steps to beneficial occupancy via departmental meetings - on going.
- New "Wildly Important Goal" - Customer involvement with project Punch List process.
- Post construction schedules on website to increase awareness of project timelines.

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead Design Services

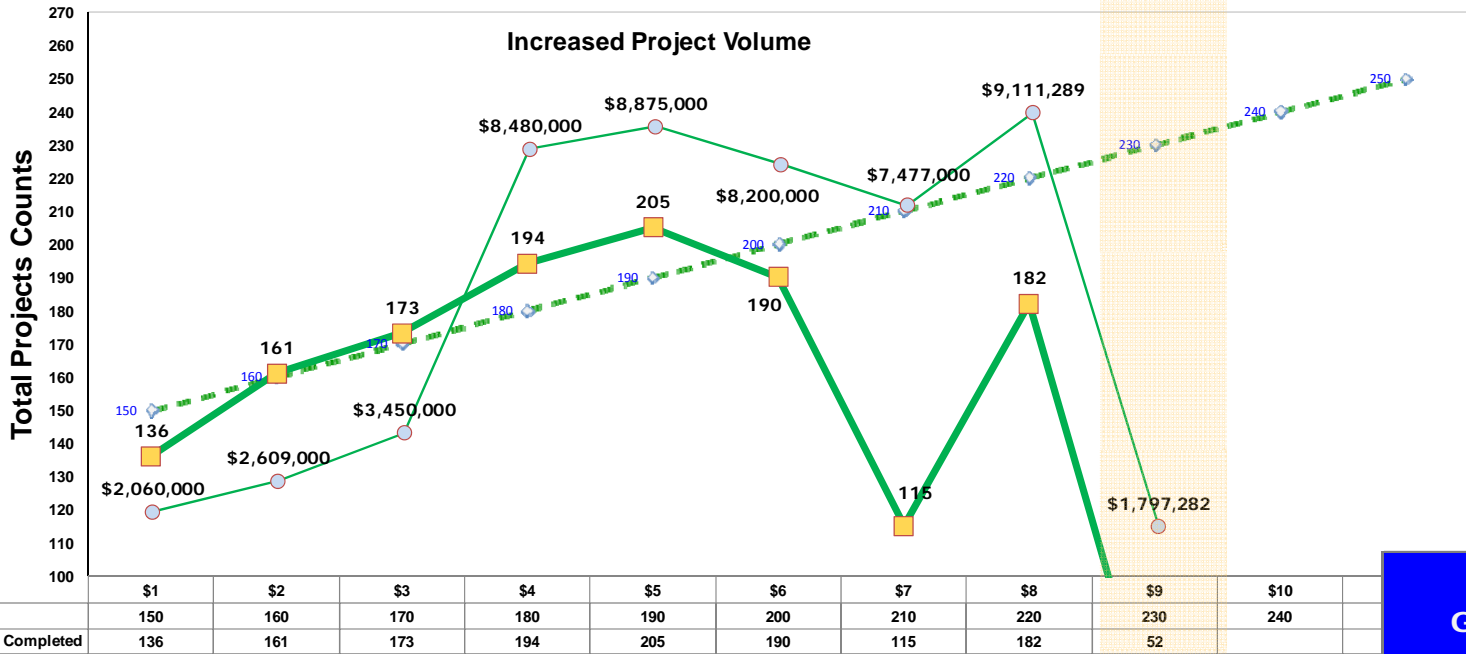
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Perspective

Increase Project Volume by 10 Projects per year - Project Counts by Phase											
GOAL	1	2	3	4	5	6	7	8	9	10	11
	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
	136	161	173	194	205	190	115	182	52		
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,289	\$1,797,282		
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$34,563		



GOAL
100%

STATUS
22.6%

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

Lead
Design
Services

ACTION PLAN

2.2.6 - Actions Completed:

- Project Priority List upgrades.
- Project schedules from Scope & Budget, Design and Construction through Closeout.

2.2.6 - Actions Planned:

- Complete Classroom Capacity info and egress data by developing Building Capacity standards - on going.
- Embrace new SCO procedural steps and secure project approvals and inspections - on going.
- New "Wildly Important Goal" - handout guiding Customers through Design Services' project processes and Archibus.
- New "Wildly Important Goal" - Customer involvement with project Punch List process.
- Post construction schedules on website to increase awareness of project timelines.

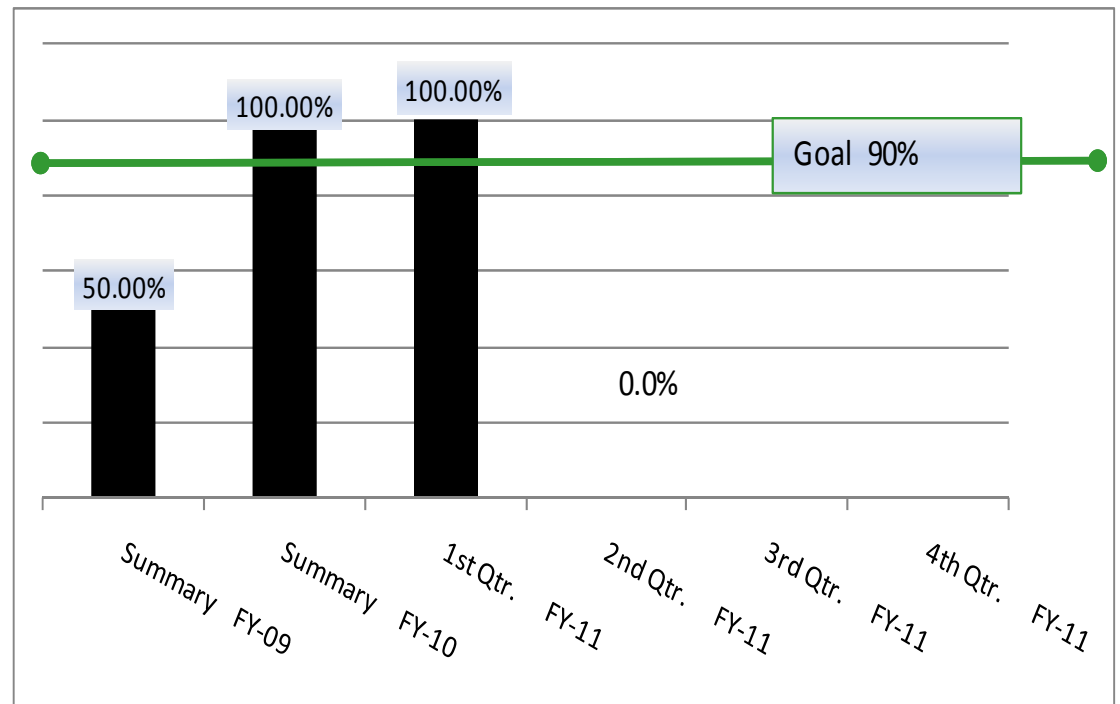
GOAL #3 – Deliver New Facilities that Support the University's Mission

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: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-09	4	2	50.0%
Summary FY-10	6	0	100.0%
1st Qtr. FY-11	4	0	100.0%
2nd Qtr. FY-11	0	1	0.0%
3rd Qtr. FY-11			
4th Qtr. FY-11			



Objective for 2nd Quarter is 0%
 Year to date is 50%

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

Strategy 3.4 Improve Administration of the Capital Construction Process
Objective 3.4.1 90% of Capital Construction Projects completed on Schedule

Lead
Capital

ACTION PLAN

- Actions Complete
 - 1. Obtained close-out documents for Student Union

Actions Planned

- 1. Complete BSL Lab in Bioinformatics and obtain close-out documents
- 2. Complete punch list for Tennis Phase I
- 3. Complete construction of New Outdoor Recreational Fields & Prospector Phase II
- 4. Complete construction of Residence Hall Phase 10 & Center City Classroom
- 5. Begin construction of Tennis Phase II, Motorsports and Parking Deck I

GOAL #4 – Perfect a Customer Focused Organization

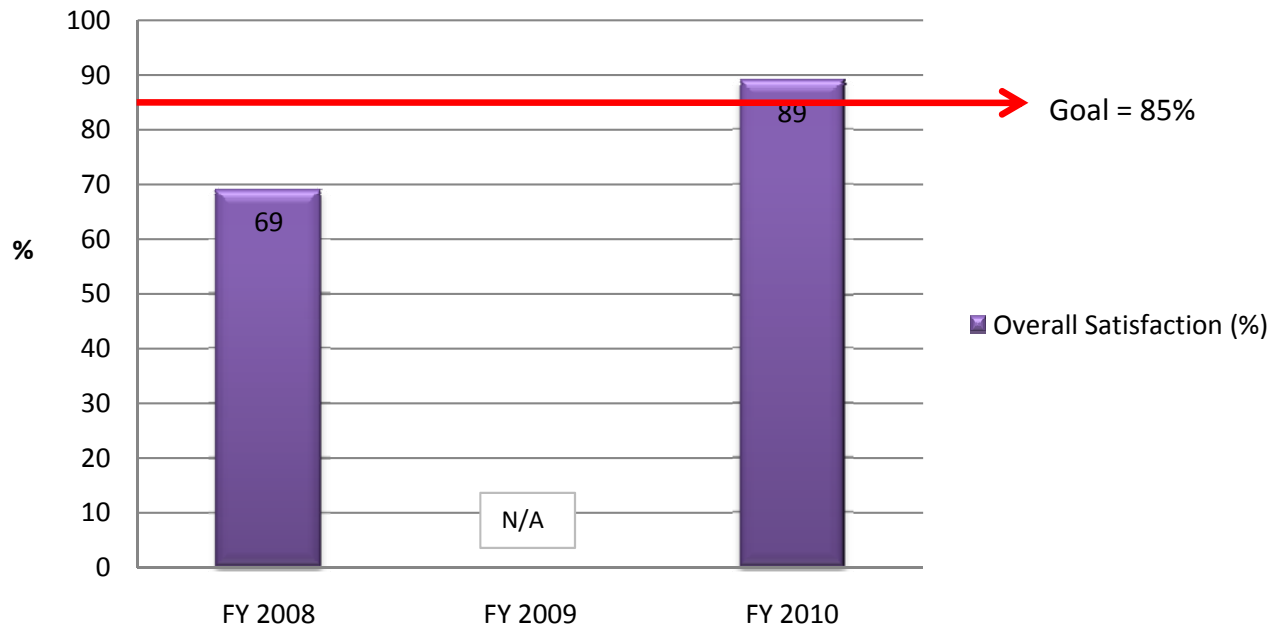
Strategy Objective **4.1** Continually Improve Customer Service/Satisfaction
4.1.1 Achieve Overall FM Customer Satisfaction of 85%

Annual objective

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

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
FBO

ACTION PLAN

- Actions Complete
 - ✓ Leadership Team to review results on July 27th.
 - ✓ Focused strategic planning session to be held on July 30th, 2010 with consultant, Juanita Coston.

- Actions Planned

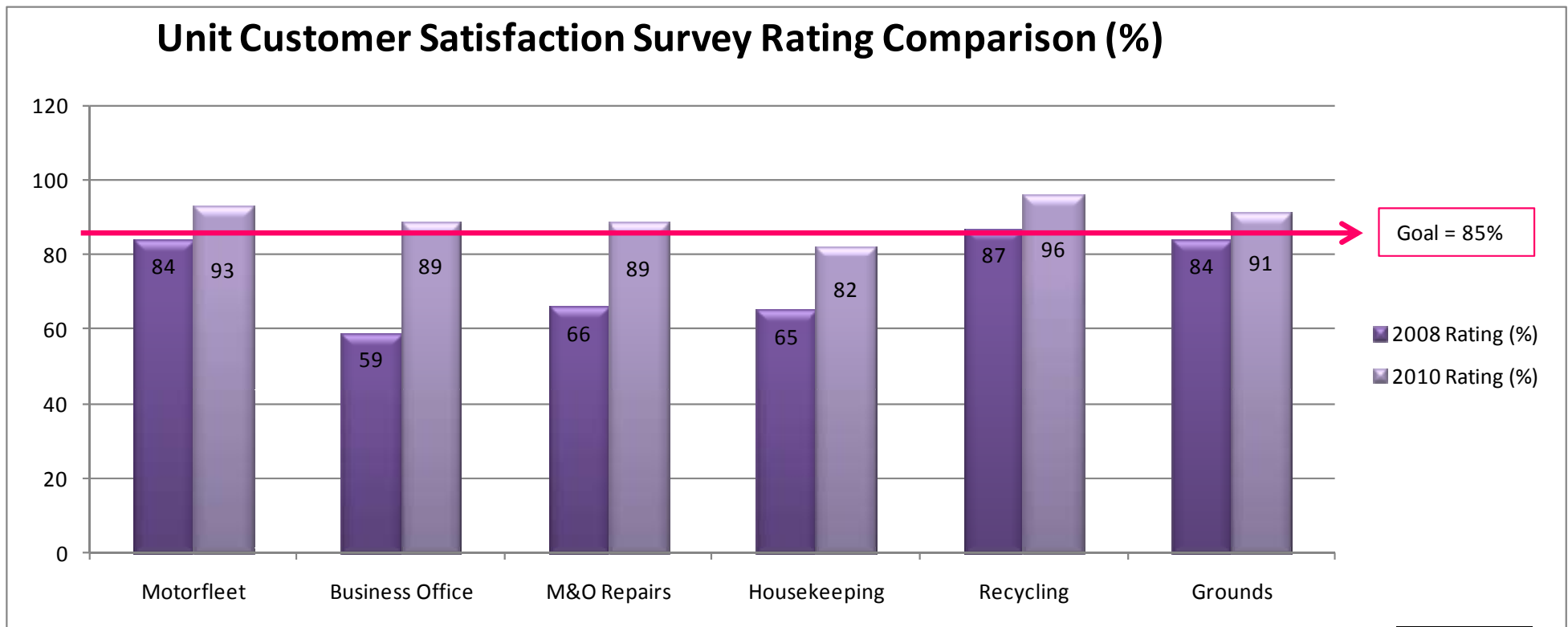
GOAL #4 – Perfect a Customer Focused Organization

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

Annual objective

Measure: Annual Customer Survey Results

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
FBO

ACTION PLAN

- Actions Planned
 - ✓ Facilities Business Office:
 - ✓ Development of new Customer Information page on FBO website; Work pre-empted by 49er Mart go-live;
 - ✓ Requested communication officer position. This position is becoming more common amongst Facilities organizations across the country. Request on hold due to current budget climate, funding constraints and hiring freeze.

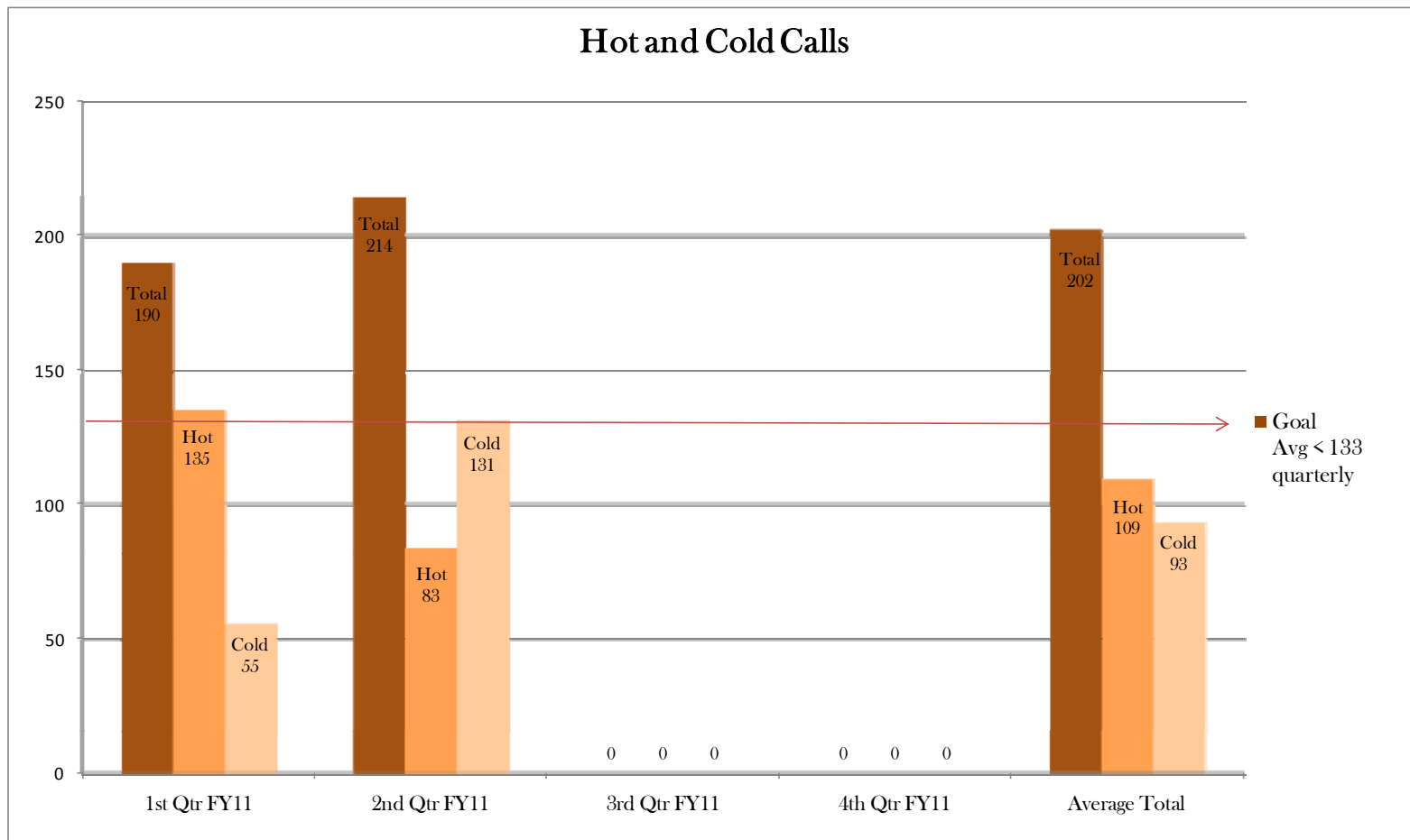
GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
Objective 4.1.3 Decrease the Number of Hot/Cold Calls by 10% from FY10 Average of 148 (Goal = 133)

Measure: Number of hot/cold calls submitted on work requests. (Cold-131 vs 108 last fiscal year; Hot-83 vs 76 last fiscal year)

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Created new problem type “HVAC-TEMPOK” for editing work requests that have requested a too hot or too cold that are found within the proposed standards.
- Actions Planned
 - 1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
 - 2 – See what ESCO’s might recommend that would improve comfort and seek wider application.

GOAL #4 – Perfect a Customer Focused Organization

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

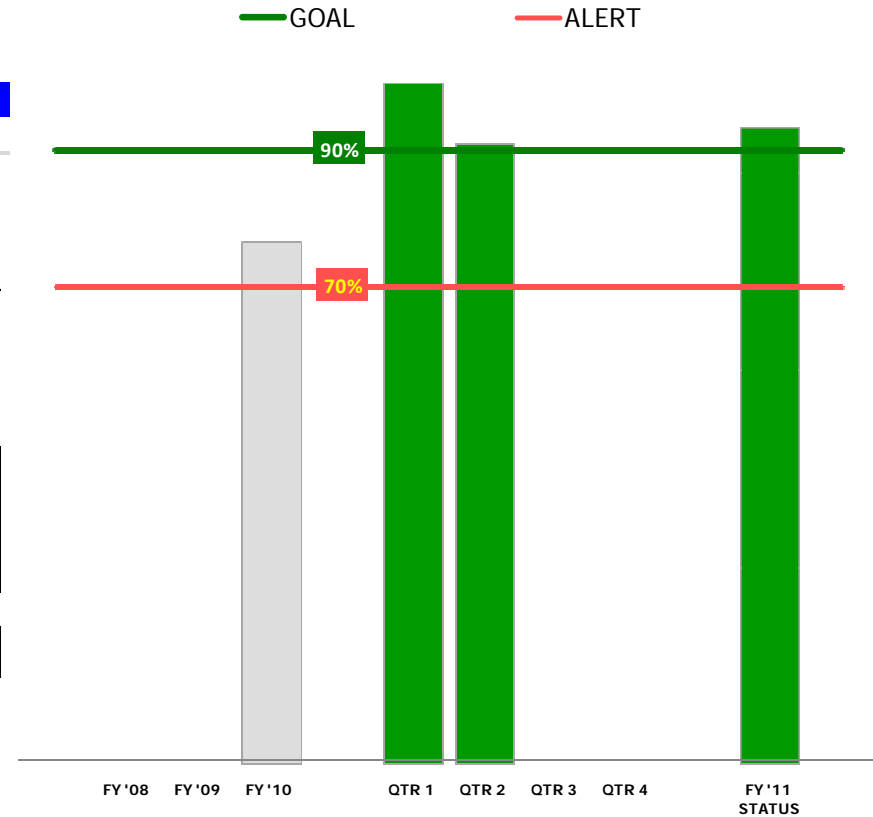
Measure: Results from Interactive Web-based Customer Questionnaire. (Process automated through Archibus)

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY SURVEY	Number of Projects Surveyed	Very Satisfied 4	Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied
FY '08	0	0	0	0	0	0	0.0%
FY '09	0	0	0	0	0	0	0.0%
FY '10	30	18	5	6	1	0	76.7%
QTR 1	4	3	1	0	0	0	100.0%
QTR 2	11	8	2	0	1	0	90.9%
QTR 3	0	0	0	0	0	0	0.0%
QTR 4	0	0	0	0	0	0	0.0%
FY '11 STATUS	15	11	3	0	1	0	93.3%

GOAL: 90.0%



GOAL
90.0%

STATUS
90.9%

GOAL #4 – Perfect a Customer Focused Organization

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

ACTION PLAN

4.1.1 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys

4.1.1 - Actions Planned:

- Review Customer Satisfaction Survey responses and implement appropriate actions.

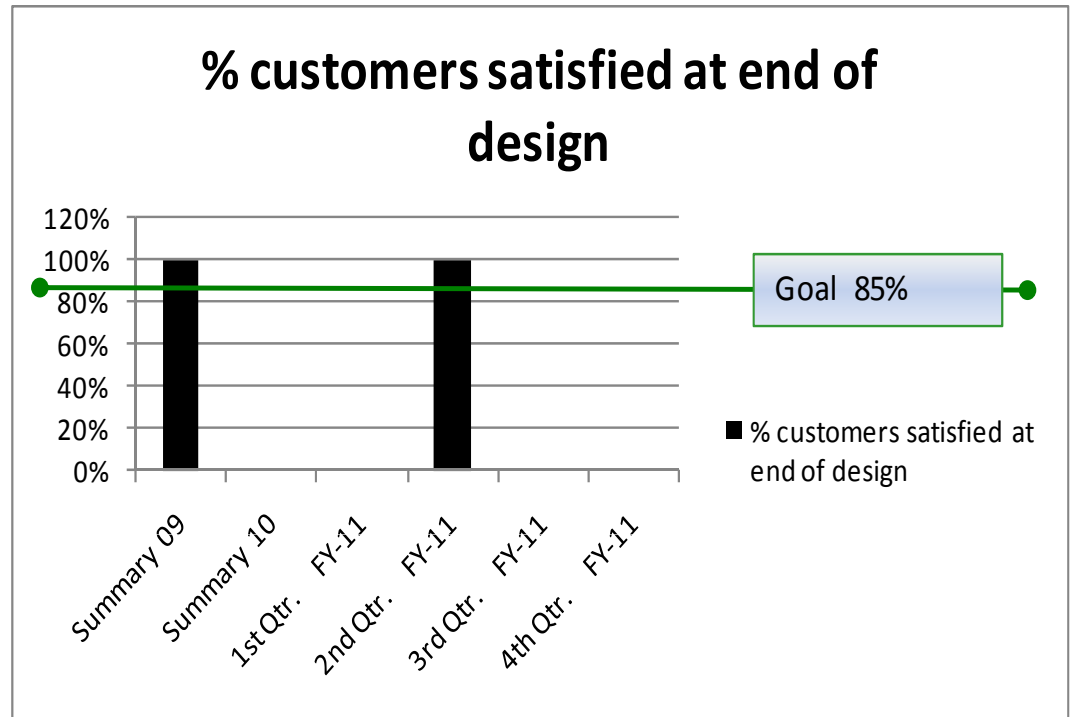
GOAL #4 – Perfect a Customer Focused Organization

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 FY-09	2	1	0	100%
Summary FY-10	9	0	0	No Data
1st Qtr. FY-11	0	0	0	No Data
2nd Qtr. FY-11	4	2	0	100%
3rd Qtr. FY-11		0	0	
4th Qtr. FY-11		0	0	



No data is a result of customer not answering questionnaire

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
Capital

ACTION PLAN

- Actions Complete
 - 1. Submitted surveys to customers for Parking Deck H, Motorsports II, Pedestrian Bridge, Tennis Courts. Responses from two customers only.
- Actions Planned
 - 1. Need to submit satisfaction survey to customers on:
Parking Deck I, Residence Hall Fire Moore & Sanford

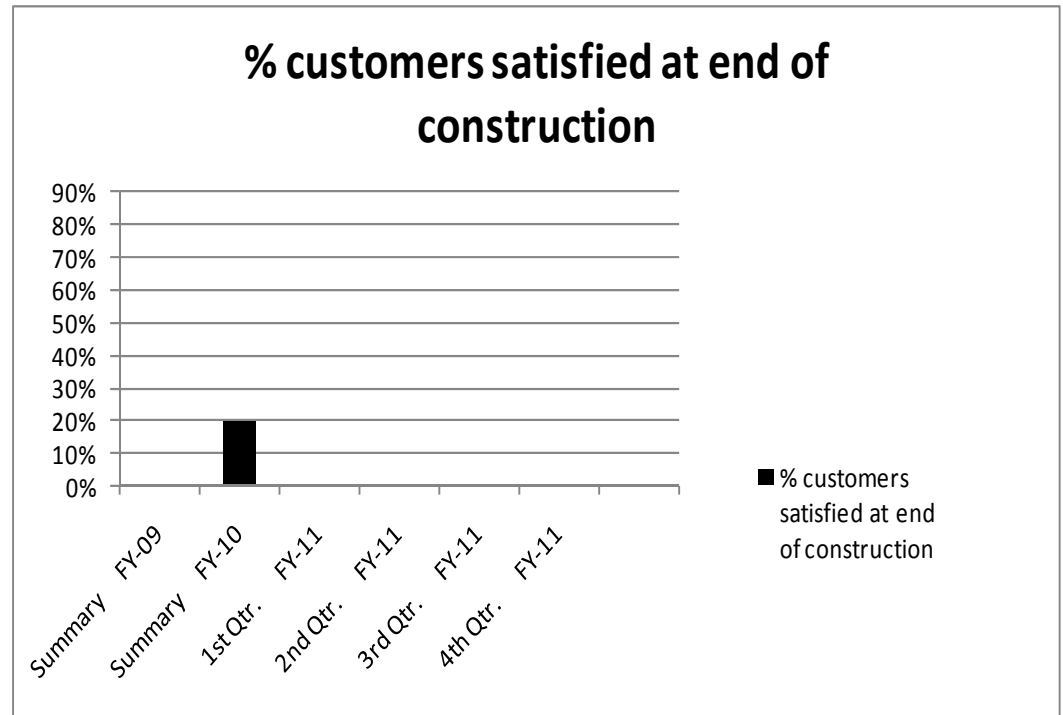
GOAL #4 – Perfect a Customer Focused Organization

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 FY-09	no data	0	0	0.0%
Summary FY-10	5	1	0	20.0%
1st Qtr. FY-11	0	0	0	0.0%
2nd Qtr. FY-11	1	0	0	0.0%
3rd Qtr. FY-11				
4th Qtr. FY-11				



No data for 2nd Qtr.

Status

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
Capital

ACTION PLAN

- Actions Complete
 - 1. Administered satisfaction survey to Pedestrian Bridge customers. No response received resulting in no data
- Actions Planned
 - 1. Administer satisfaction survey to Tennis Phase I customers

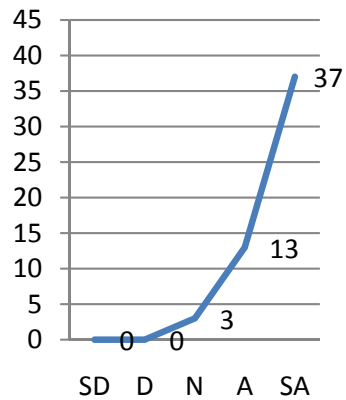
NEW Customer Work Request Satisfaction

Strategy Objective Improve Customer Satisfaction with Work Request System
Provide a Positive Customer Experience

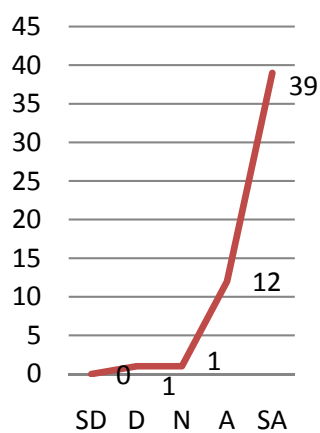
Measure: Archibus Survey Results – Survey is open for the year and results will be reported as the year progresses.

Goal: All measures on survey positive. Less than 2% Strongly Disagree and 5% Disagree or Neutral.

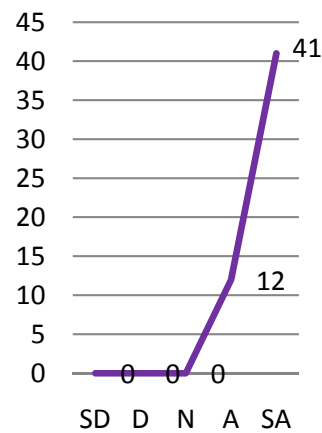
Balanced Scorecard Category: Customer Perspective



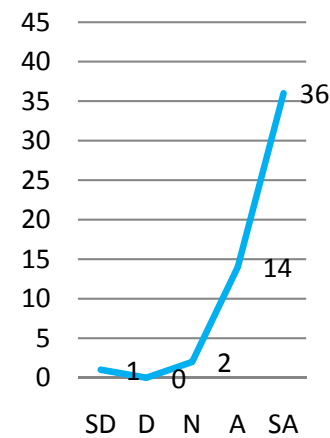
Worksite left Satisfactory



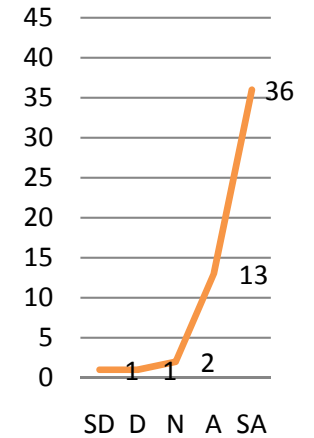
Work Satisfactory



Treated Courteously



Response was Timely



Easy to get Service

STATUS

ACTION PLAN

- Actions Complete
 - 1 - Reopened survey
 - 2 - Continued monitoring of active work requests by Supervisors and Managers.
- Actions Planned
 - 1 - Review ease of use with building liaisons and other customers.
 - 2 - Open more information on work requests for customer's viewing to allow them to see craftsperson notes and status of their work requests.



Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter
Customer <i>To achieve our vision, how must we view & treat our customers?</i>	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%	57.6%		
		1.3.2	Decrease Work Request Cycle Time by 25%	<300 hrs	202		
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	90%		
	Improve Process Reliability	1.5.3	Reduce Unscheduled HV outages by 10%	<=0.3%	0.19%		
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%	2.9%		
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	100%		
	Informal Project Administration	2.2.2	All IP construction estimates	85% w/in 10% actuals	92.5%		
		2.2.3	Combined with 2.2.2				
		2.2.4	All IP construction meets BOD	90%	97%		
		2.2.5	Combined with 2.2.4				
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 210	22.6%	Annual	Annual
		3.4.1	90% Cap Construction Projects on Schedule	90%	0%		
	Enhance customer satisfaction	4.1.1	Improve: Overall satisfaction rating	85%	89.0%	Annual	
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%	85.0%	Annual	
		4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-15% or <133	202		
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	90.9%		
	4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	100.0%			
	4.1.6	Improve: Capital Projects rating (sat./very sat.) - constr	85%	no data			
	NEW	All measures positive on customer sat survey	<2% S Dis; < 5% Dis or Neu	multiple			



UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Strategic Objectives:

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



GOAL #6 – Promote Good Stewardship

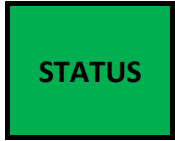
Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.1 Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT OPERATIONS thru December 31, 2010

ACCOUNT DESCRIPTION	2010-11 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 90,000	3%	\$ 15,669	\$ -	\$ 15,669	\$ 74,331	\$ 74,331 F
PERSONAL SERVICE CONTRACTS	\$ 109,650	3%	\$ 56,427	\$ 45,796	\$ 102,223	\$ 7,427	\$ 7,427 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 860,115	26%	\$ 344,524	\$ 185,956	\$ 530,479	\$ 329,636	\$ 329,636 F
OTHER ADMINISTRATIVE EXPENSES	\$ 51,500	2%	\$ 27,609	\$ 19,592	\$ 47,201	\$ 4,299	\$ 4,299 F
DOMESTIC TRAVEL/TRAINING	\$ 67,500	2%	\$ 39,803	\$ 300	\$ 40,103	\$ 27,397	\$ 27,397 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 277,020	8%	\$ 137,583	\$ 72,754	\$ 210,337	\$ 66,683	\$ 66,683 F
OTHER PURCHASED SERVICES	\$ 466,100	14%	\$ 165,210	\$ 218,354	\$ 383,564	\$ 82,536	\$ 82,536 F
SUPPLIES	\$ 1,102,001	34%	\$ 619,298	\$ 128,818	\$ 748,116	\$ 353,885	\$ 353,885 F
EQUIPMENT	\$ 146,827	4%	\$ 5,029	\$ -	\$ 5,029	\$ 141,798	\$ 141,798 F
CAPITAL OUTLAY	\$ 26,750	1%	\$ 457	\$ 22,485	\$ 22,941	\$ 3,809	\$ 3,809 F
FIXED CHARGES	\$ 32,200	1%	\$ 21,216	\$ -	\$ 21,216	\$ 10,984	\$ 10,984 F
RECYCLING	\$ 37,515	1%	\$ 16,668	\$ 200	\$ 16,868	\$ 20,647	\$ 20,647 F
FACILITIES MANAGEMENT Main Operating Funds	3,267,178		1,449,493.64	694,253.78	2,143,747.42	1,123,430.23	\$ 1,123,430



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;
- Mapping of Motor Fleet procurement/fiscal processes complete; Report of findings presented in November/December 2010.

- **Actions Planned**

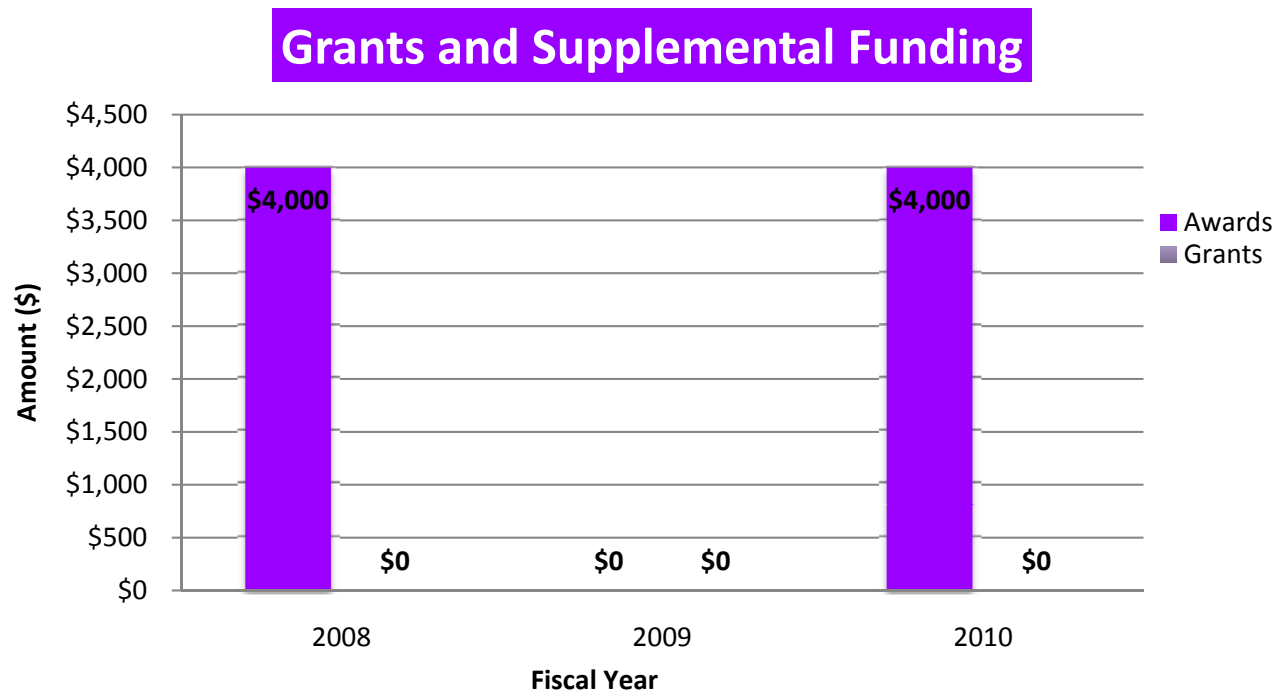
- As part of Leadership Development Training Program, create training course - FM Budgeting 101 - which will focus on budget management skills. Anticipated development completion date has been pushed back to early 2011 due to e-procurement;

GOAL #6 – Promote Good Stewardship

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

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ Determined best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Worked with Sponsored Programs, Budget Office and Development to determine viable, legal solution
- **Actions Planned**
 1. Encourage individuals to participate in proposal development; Suggest that brief paragraphs on conceptual ideas for grants be developed for future use by Grants Management Specialist.
 2. Boast effort to locate external funding opportunities that align with FM's strategic vision, mission and goals.
 3. Provide assistance in developing a strong proposal response to external funding collaboration within FM.

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
F. O.

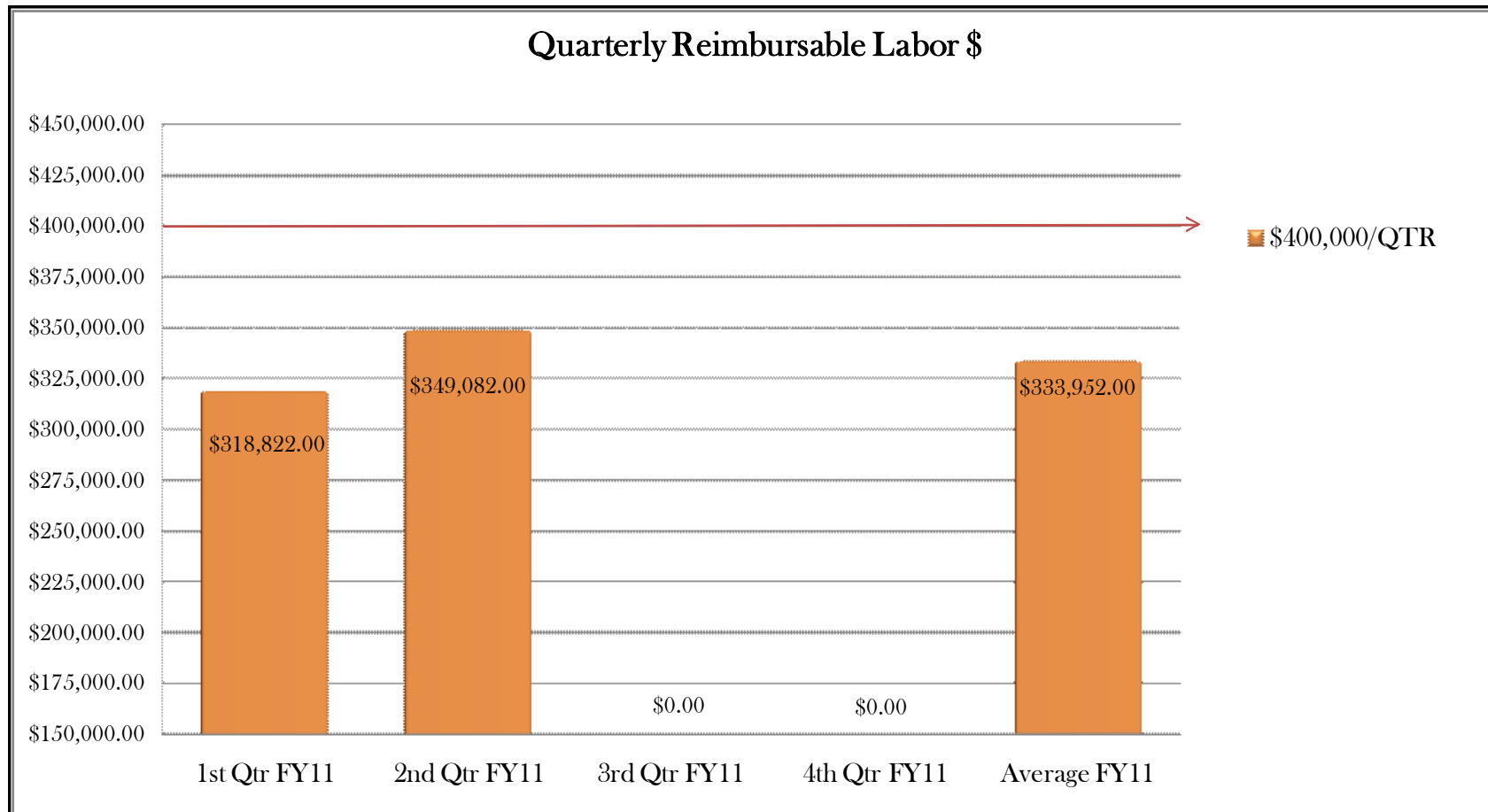
GOAL #6 – Promote Good Stewardship

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

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

Goal: \$400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Utilized in-house staffing from other areas of Facilities Operations on projects rather than going to outside resources.
 - 2- Added reimbursable positions for Grounds in order to accomplish more billable work.
- Actions Planned
 - 1 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
 - 2 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.



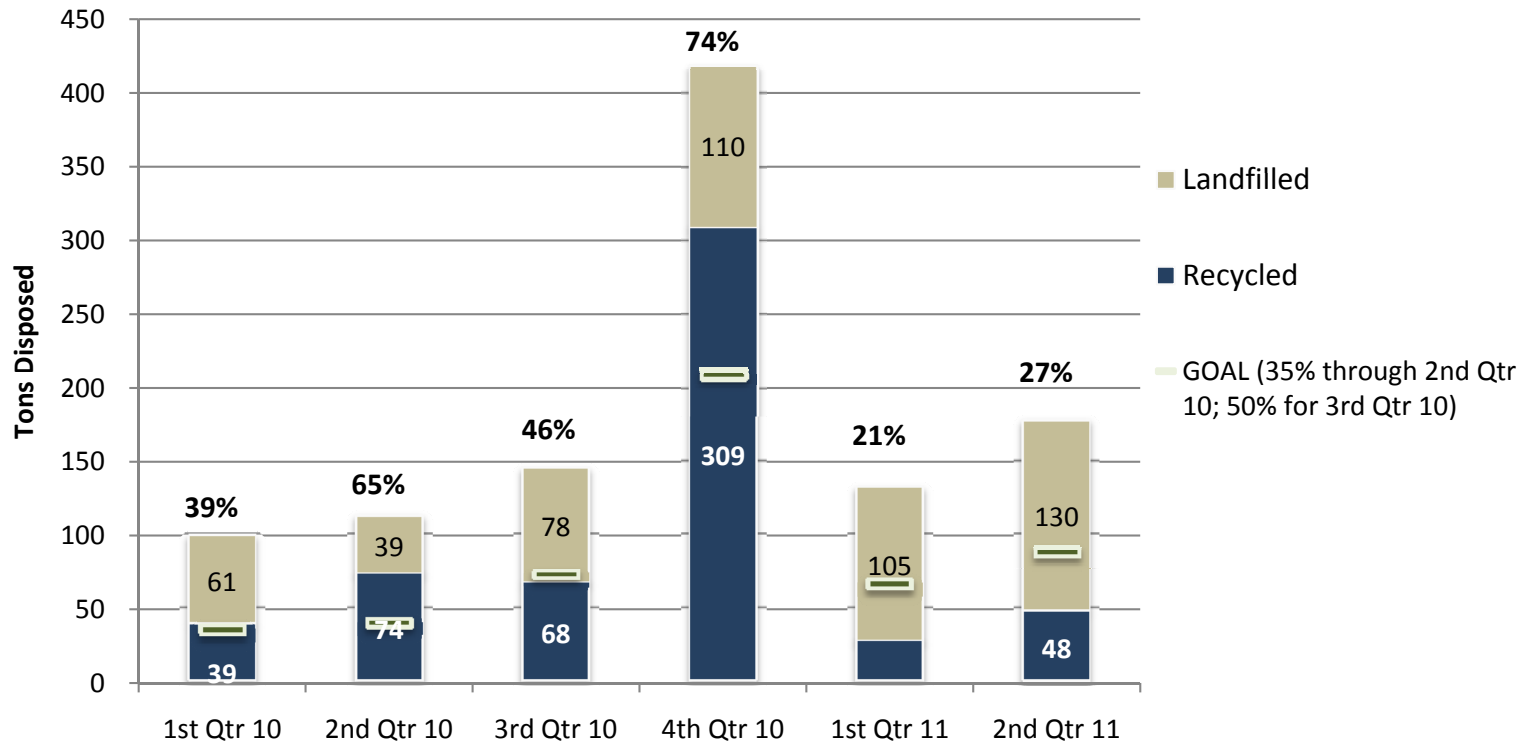
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus
Objective 6.2.1 Increase Recycling of Construction and Demolition Materials on Renovations to 50% of Total C&D Waste

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

Balanced Scorecard Category: Financial Perspective

**Informal Projects - Materials Disposed
2nd Qtr FY11**



GOAL #6 – Promote Good Stewardship

Strategy	6.2	Develop a Sustainable Campus
Objective	6.2.1	Increase Recycling of Construction and Demolition Materials on Informal Projects and Renovations to 50% of Total C&D Waste



ACTION PLAN

- Actions Complete
- Actions Planned
 - Closer monitoring on design projects to ensure weight tickets received from contractors.
 - Pursue partnerships that allow for alternative disposal methods.



GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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



GOAL #6 – Promote Good Stewardship

Strategy

6.2 Develop a Sustainable Campus

Objective

6.2.2 Increase Recycling of Construction and Demolition Materials on Capital/Formal Projects to 50% of Total C&D Waste



ACTION PLAN

- Actions Complete
 - All rates are 85%+ for Capital projects.
- Actions Planned
 - Continue monitoring projects and acting as resource for contractors.

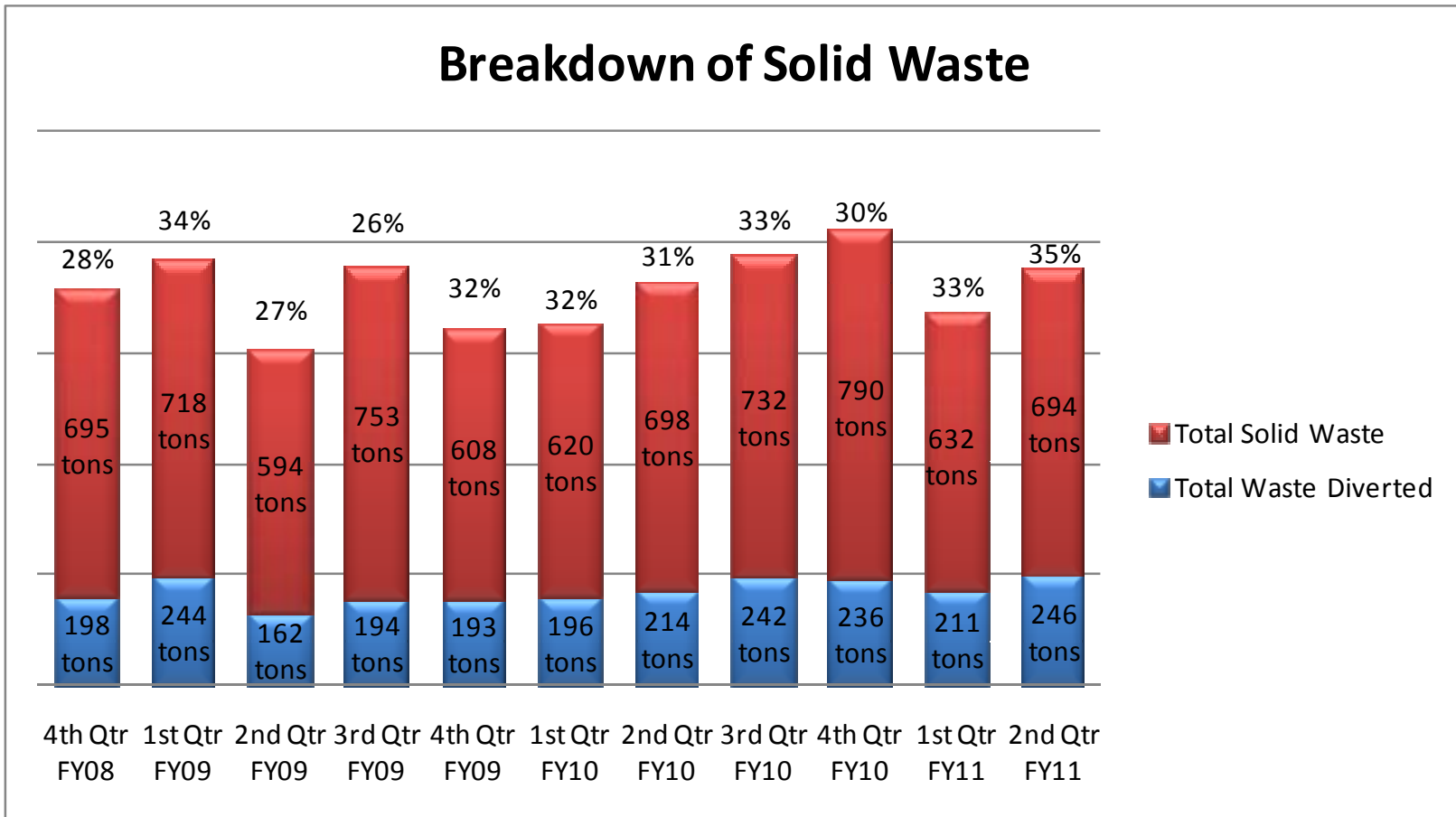


GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship

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



ACTION PLAN

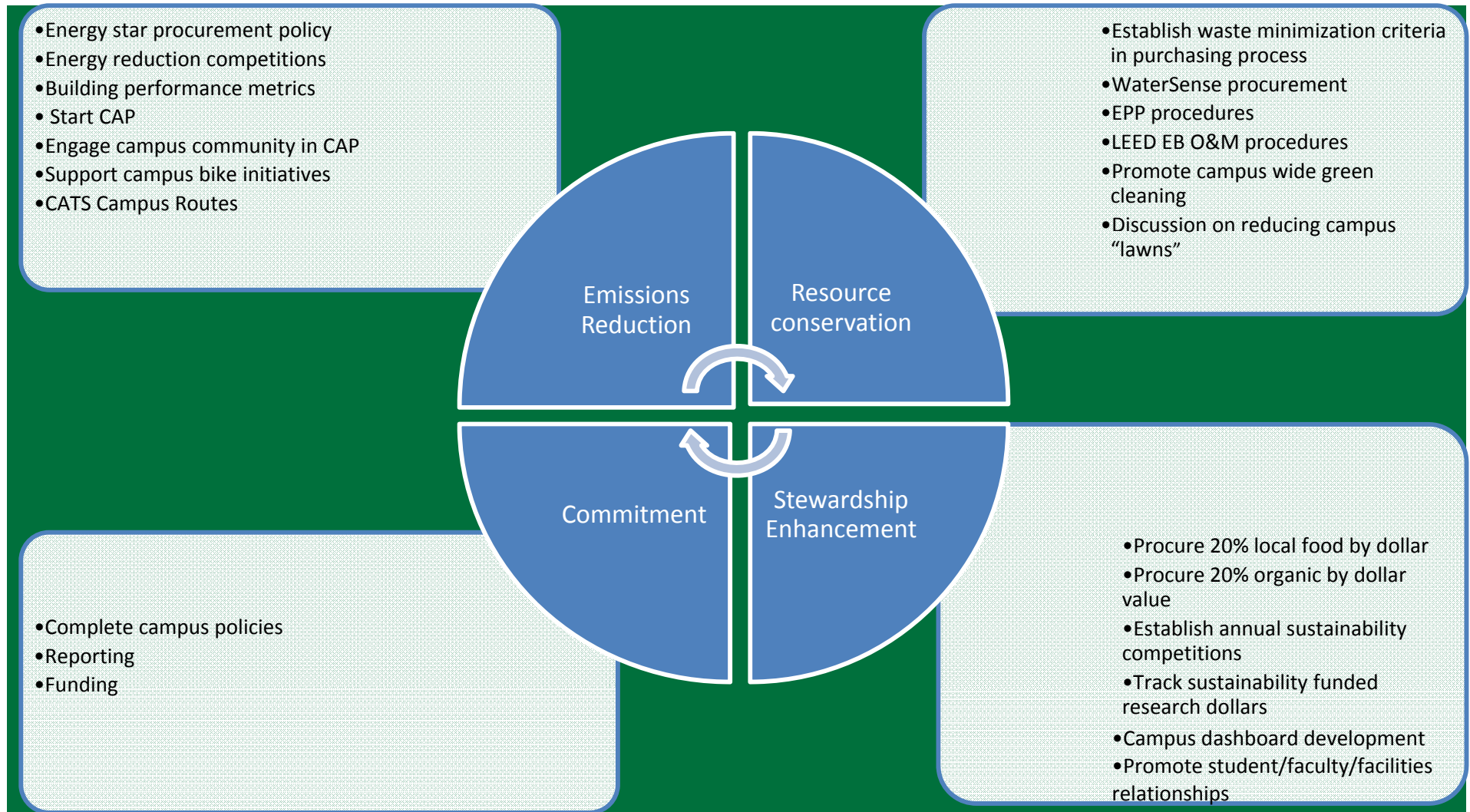
- **Actions Complete - TOTAL recycling for quarter 35%**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
 - Completed inventory of all indoor recycling bins on campus
 - Working on inventory all outdoor recycling bins
 - Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
 - Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**
 - Partnered with Housekeeping –pilot office trash can reduction program at GRIGG in October
 - working on designs for a comprehensive composting program, food audit conducted in October
- **2nd Quarter 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, especially paper
 - barcode all indoor recycling bins this quarter
 - inventory all outdoor recycling bins
 - Continue educational outreach and promotion
 - eARTh Day poster contest
 - working with 2012 NCAPPA conference committee
 - Will present at 2012 NCAPPA conference March 2-3
 - present at 2012 CRA conference in March 30-31
 - Designing comprehensive food composting program
 - Designing Zero Waste Options for FOOTBALL
 - Need comprehensive resource management action for all staff at UNC Charlotte

GOAL #6 – Promote Good Stewardship

Lead
RELU

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions



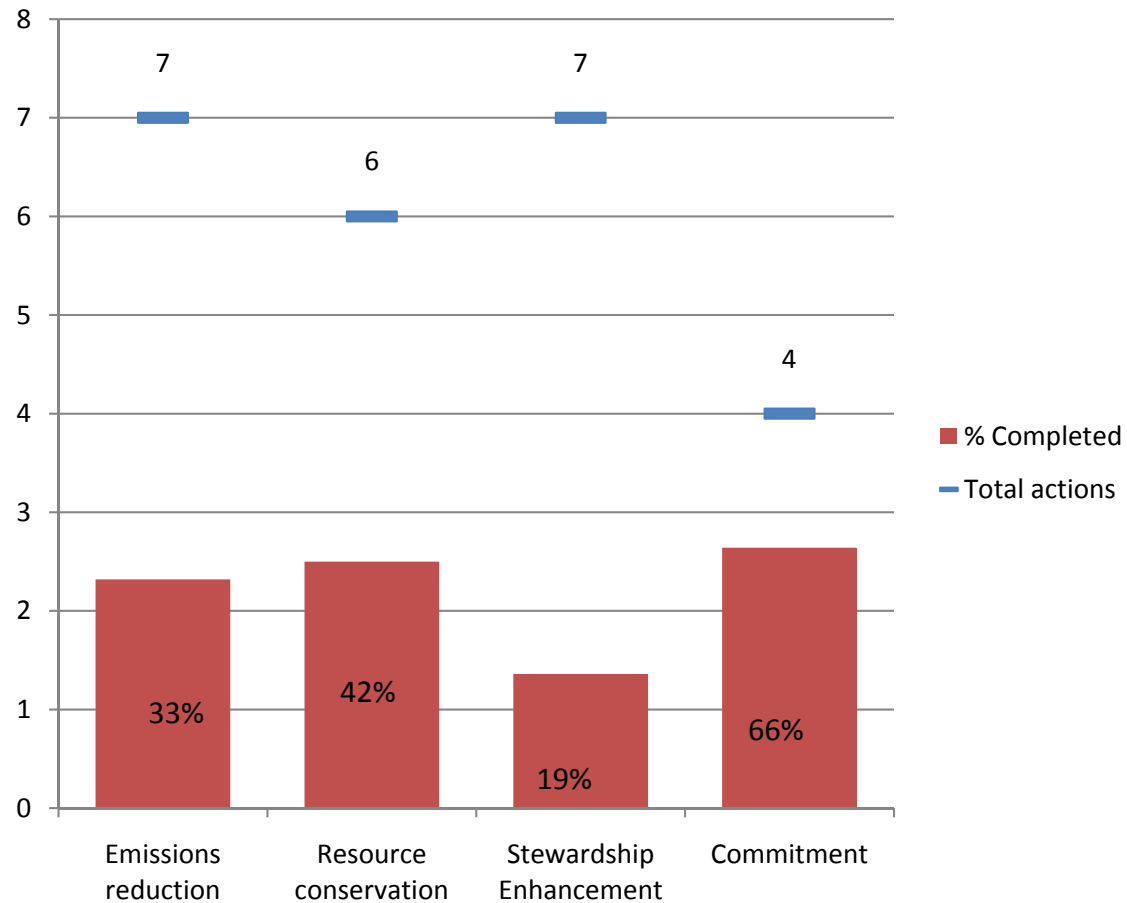
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implement 50% of the phase 1 sustainability plan actions in each focus area by end of FY 2011

Measure: Number of actions completed in each category

Balanced Scorecard Category: Financial Perspective



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

- Sustainability Curriculum Progress
 - QEP meeting
 - Faculty Committee
 - Defining sustainability
- Completed GHG Inventory
- 1st GHG Workshop
- Campus Sustainability Policy Completed draft
- Sustainability Plan completed draft
- Levine Scholars involvement

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

Lead
RELU

ACTION PLAN

- **Actions Planned**

- Emissions reduction:

- Campus GHG workshops
 - Climate Action Planning
 - Establish Planning Charette
 - Identify strategies
 - Establish goals
 - Emissions reduction competitions

- Resource Conservation

- Complete LEED EB O&M pilot
 - Identify current environmental procurement policies in different purchasing categories.

GOAL #6 – Promote Good Stewardship

Strategy 6.2 **Develop a Sustainable Campus**

Objective 6.2.4 Implementation of Sustainability plan actions

Lead
RELU

ACTION PLAN

Actions Planned

- Stewardship Enhancement
 - Develop campus dashboard
 - Track % of dollar spent on local/organic food
 - Track % of dollar spent on sustainability based research
 - Sustainability curriculum offerings inventory
- Commitment
 - Secure sustainability program funding
 - Hire sustainability intern
 - On campus sustainability marketing
 - Campus speakers

Lead
Capital

GOAL #6 – Promote Good Stewardship

Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 30% by FY2015 (State Guideline)

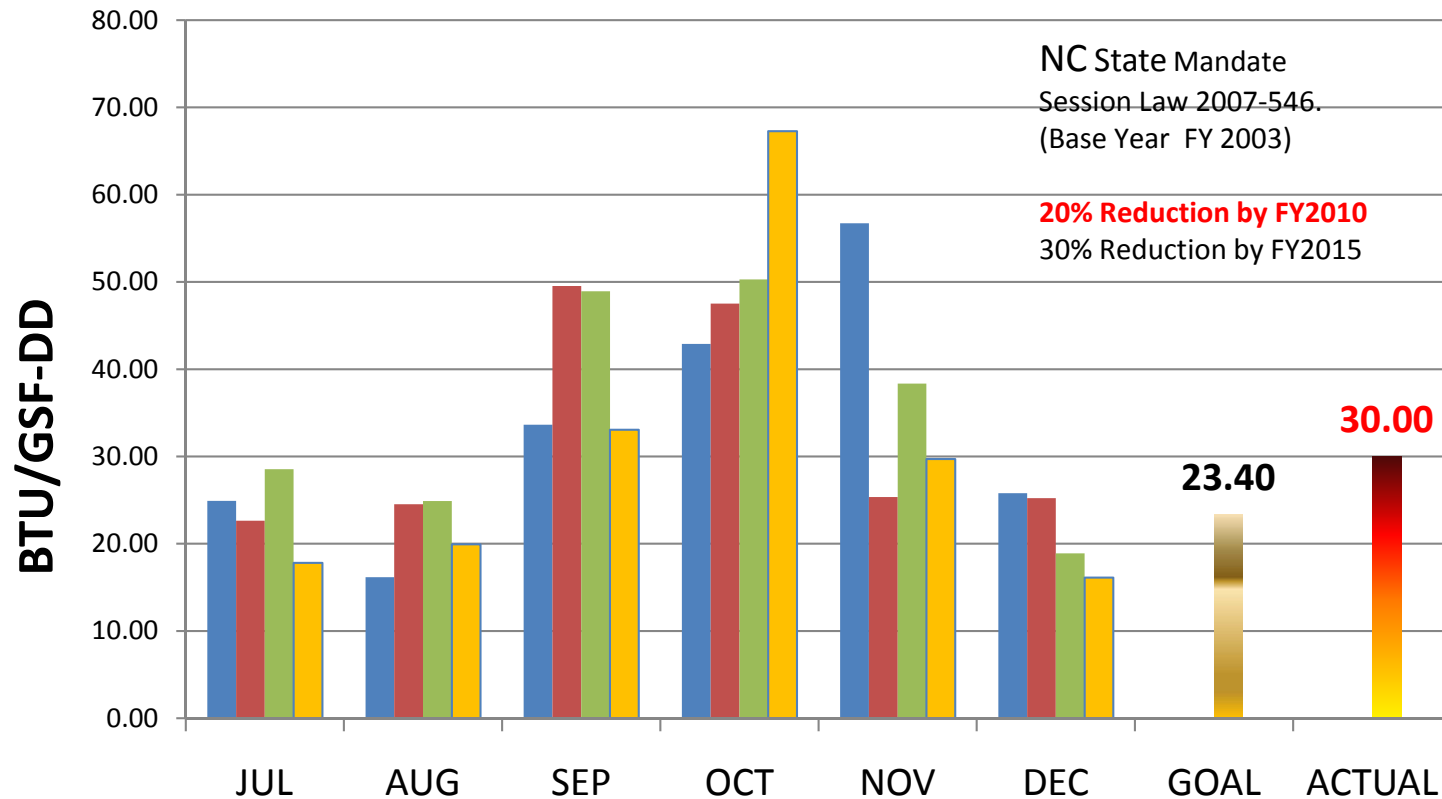
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE
BTU/GSF-DD

■ FY08 ■ FY09 ■ FY10 ■ FY11



Goal and Actual are Based on FY10

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN -ENERGY

STATUS

- **Actions Complete**
 - Performance contract progressing.
 - Updated Design Manual MEP to reflect energy Best Practices.

- **Actions Planned**
 - Hire New Energy Manager
 - Complete Engineering and Zone coordination for energy operation.
 - Finalize space temperature guidelines.

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - ESPC

STATUS

Energy Savings Performance Contract

- **Actions Complete**
 - ESCO (Ameresco) completed 30% IGA. 60% IGA projected 1st of February.
 - 3rd Party consultant, Celtic Energy, provides support and evaluation of IGA.

- **Actions Planned**
 - Investment Grade Audit (IGA) 90% submit March 1, 2011
 - Finalize acceptable ECMs.
 - Energy Services Agreement (ESA) signed (August 2011)

GOAL #6 – Promote Good Stewardship

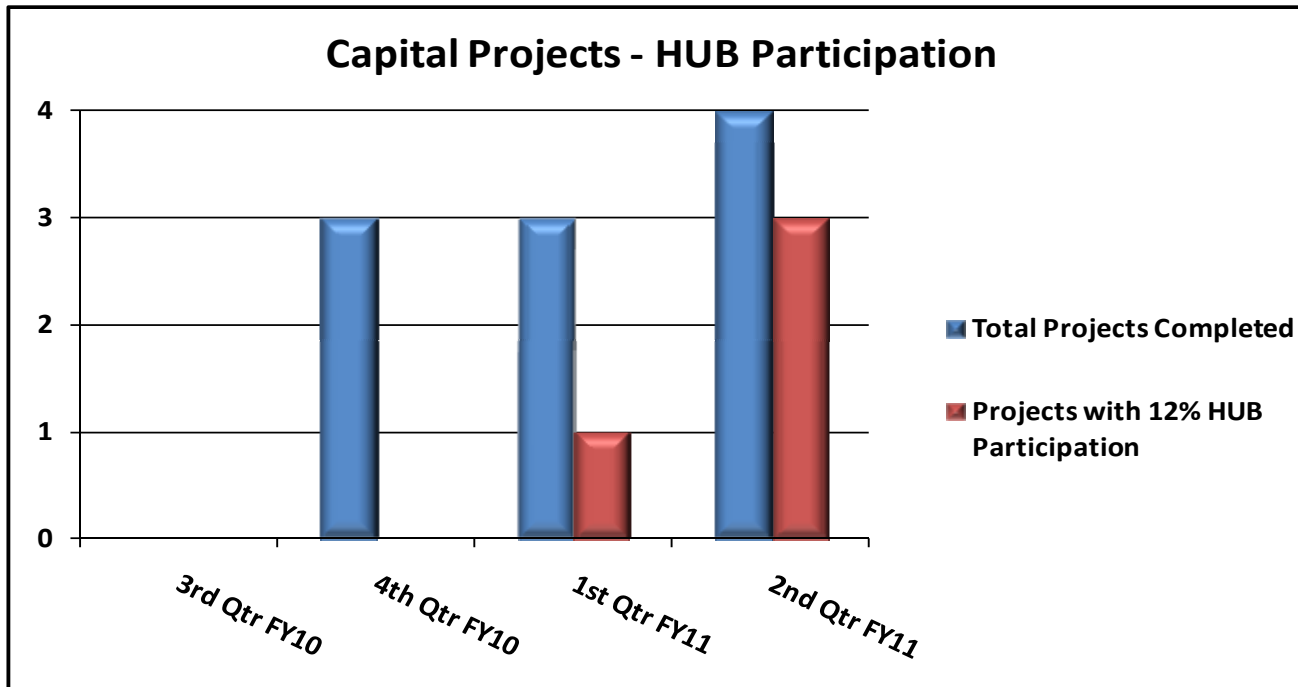
Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.1 12% HUB participation on 80% of Capital Projects

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

Balanced Scorecard Category: Financial Perspective

	Total Projects Completed	Projects with 12% HUB Participation	Percentage of Total Projects with 12% HUB Participation 80% GOAL
Strategic Review			
3rd Qtr FY10	0	0	0%
4th Qtr FY10	3	0	0%
1st Qtr FY11	3	1	33%
2nd Qtr FY11	4	3	75%

Harris Alumni Parking Lot – 22.51%
 New Tennis Courts Phase 1 – 27.52%
 Reese Envelope – 100%
 Boiler Replacement–Scott/Holshouser – 0%



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN

- **Actions Planned**

1. Conduct “Meet & Greet” for professional services – March 2011
2. Conduct Bonding workshop with Swimmer Insurance Agency
3. Continue –
 - Encourage GCs to exceed 10% HUB participation goal
 - Work with GC/CMs to identify HUB subcontractors/partners
 - Promote mentor-protégé/partnerships/joint venture relationships at 1st tier subcontractor level
 - Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
 - Monitor Pay Applications/Good Faith Efforts
 - Provide project/event information to the public
 - Educate business community on the process
 - Community outreach efforts

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
Capital

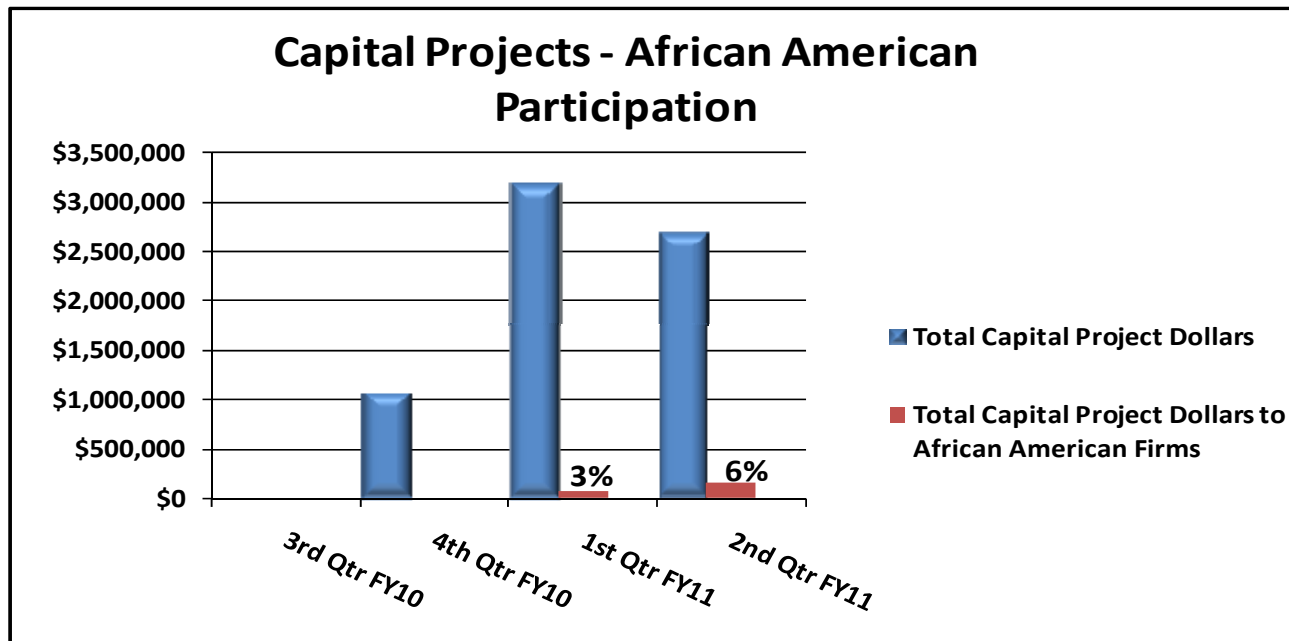
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve African American Participation on Capital Projects
Objective 6.5.2 3% African American Participation on Capital Projects

Measure: Percentage of Capital Dollars awarded to African American Firms

Balanced Scorecard Category: Financial Perspective

Strategic Review	Total Capital Project Dollars	Total Capital Project Dollars to African American Firms	Percentage of Capital Project Dollars to African American Firms 3% Goal
3rd Qtr FY10	\$0	0	0%
4th Qtr FY10	\$1,081,641	0	0%
1st Qtr FY11	\$3,190,214	\$80,864	3%
2nd Qtr FY11	\$2,677,018	\$165,262	6%



STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.5	Improve African American Participation on Capital Projects
Objective	6.5.2	3% African American Participation on Capital Projects

Lead
Capital

ACTION PLAN

- **Actions Planned**

- Conduct Bonding workshop with Swimmer Insurance Agency

Continue –

- Educate HUB firms on the process
- Encourage HUB firms to bid university projects
- Promote mentor-protégé/partnerships/joint venture relationships between minority/non-minority firms
- Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
Capital

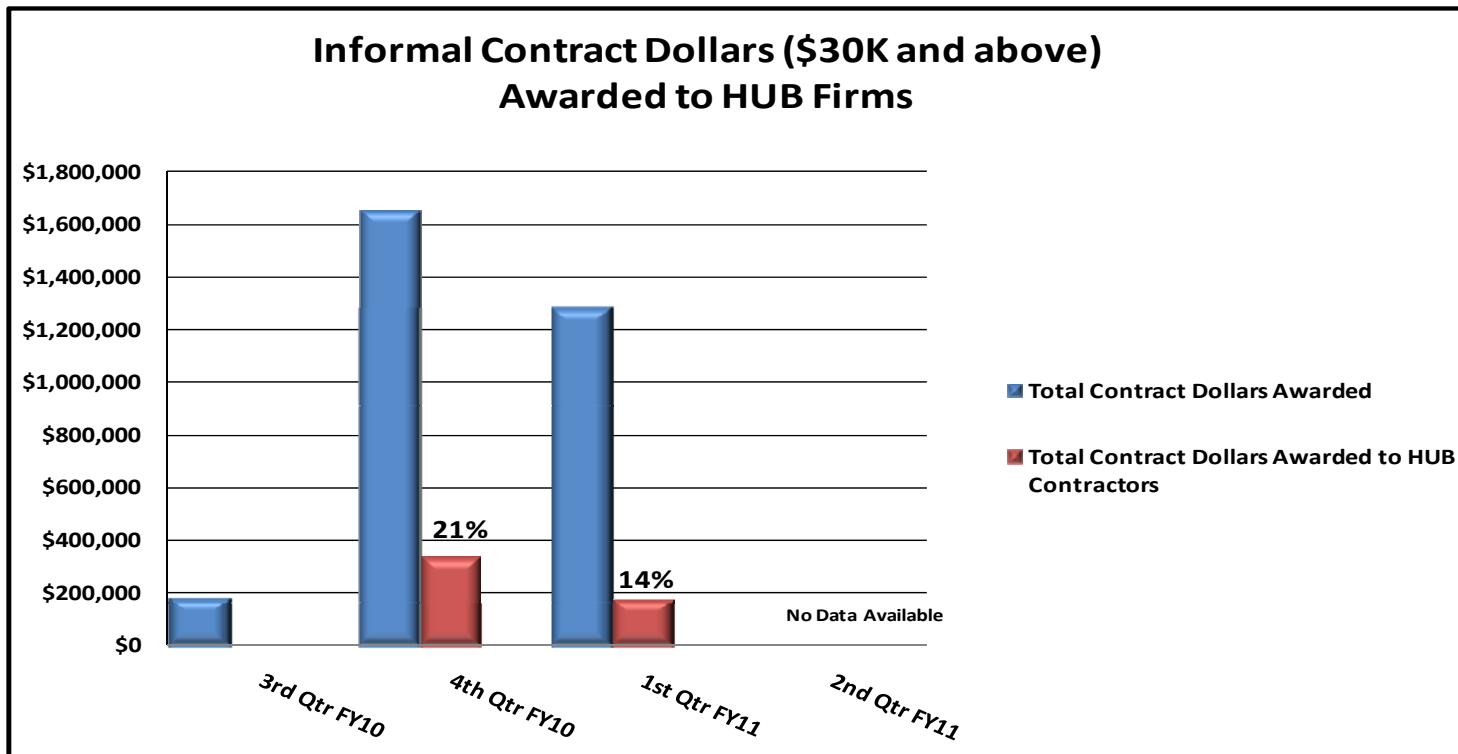
GOAL #6 – Promote Good Stewardship

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

Measure: Percentage of Informal Contract Dollars awarded to HUB Contractors

Balanced Scorecard Category: Financial Perspective

Strategic Review	Total Contract Dollars Awarded	Total Contract Dollars Awarded to HUB Contractors	Dollars Awarded to HUB Contractors 13% GOAL
3rd Qtr FY10	\$185,200	\$0	0%
4th Qtr FY10	\$1,657,110	\$340,024	21%
1st Qtr FY11	\$1,282,661	\$176,569	14%
2nd Qtr FY11	No Data Available		



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN

- **Actions Complete**

- ✓ Participated in prequalification of GCs, Electrical and Paving Contractors for Informal projects

- **Actions Planned**

Continue –

- Encourage/Invite HUB firms to bid Informal Projects
- Assist Materials Management/Design Services identify HUB firms to bid projects
- Educate business community on the process
- Provide project/event information to the public
- Community outreach efforts

GOAL # 6 – Promote Good Stewardship

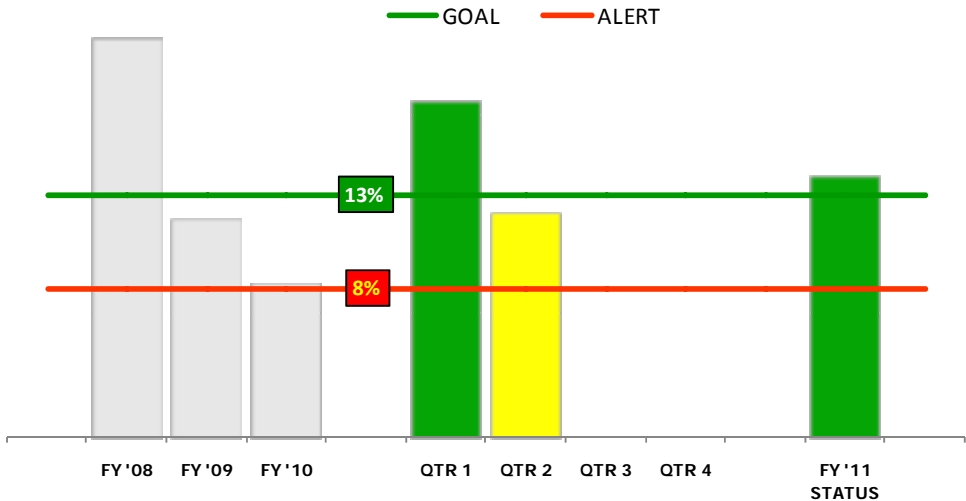
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Financial Perspective

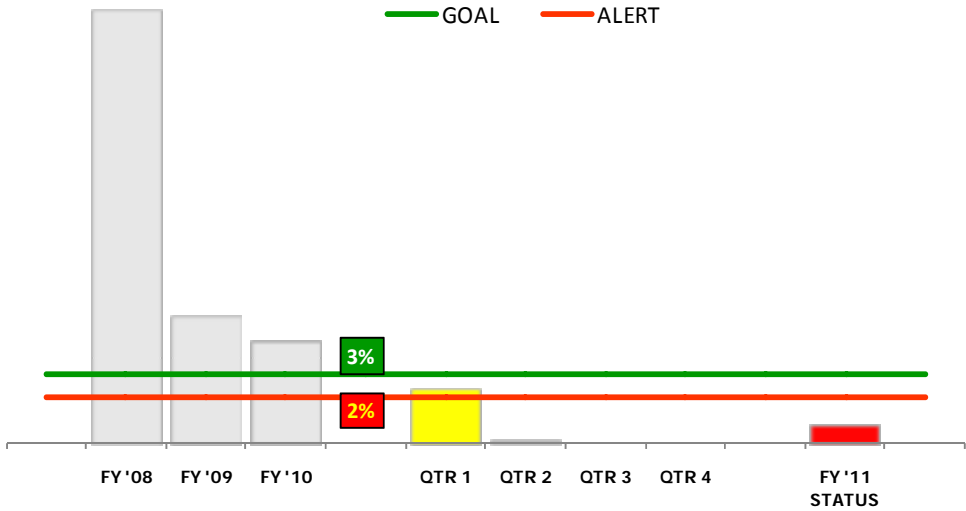
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

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%
FY '10	\$ 2,626,647	\$ 214,381	8.2%
QTR 1	\$ 684,520	\$ 122,224	17.9%
QTR 2	\$ 1,400,523	\$ 167,415	12.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '11 STATUS	\$ 2,085,043	\$ 289,639	13.9%



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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
FY '10	\$ 2,626,647	\$ 113,196	4.3%
QTR 1	\$ 684,520	\$ 15,750	2.3%
QTR 2	\$ 1,400,523	\$ 625	0.0%
QTR 3	\$ -	\$ -	0.0%
QTR 4	\$ -	\$ -	0.0%
FY '11 STATUS	\$ 2,085,043	\$ 16,375	0.8%



GOAL # 6 – Promote Good Stewardship

Lead
Design
Services

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

ACTION PLAN

6.5.3 - Actions Completed:

N/A

6.5.4 - Actions Planned:

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

Balance Score Card

DISCUSSION

FINANCIAL PERSPECTIVE

	Manage Budget	6.1.1	Balanced Budget @ End of Year	100%		Annual FY 10	
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%		Annual FY 11	
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5%"		Awaiting APPA 2010 Survey Results	
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results	
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results	
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results	
		6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	\$333,952		
Financial <i>To financially sustain our mission, what must we focus on?</i>	Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	27%		
		6.2.2	C&D Recycling Capital Projects	50%	85%		
		6.2.3	Increase % Solid Waste Recycled (Baseline 2007)	5% (25.27%)	35%		
		6.2.4	Implement 50% of each 2008 Sustainability goals	50%	40%		
	Conserve Natural Resources	6.3.1	Energy Usage by 2015	-30%	0%		
	Improve HUB Participation	6.5.1	12% HUB participation on 80% of Capital Projects	80%	75%		
		6.5.2	3% African American Participation on Capital Projects	3%	6%		
	6.5.3	13% HUB participation on Informal Proj \$30K and above	13%	no data			
	6.5.4	13% HUB for Informal Proj below \$30,000 inc. 3% AA	13%/3%	12%/0%			



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

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



UNC CHARLOTTE

"In business, words are words, explanations are explanations, promises are promises, but only performance is reality."

-- Harold Geneen, industrialist

GOAL # 1

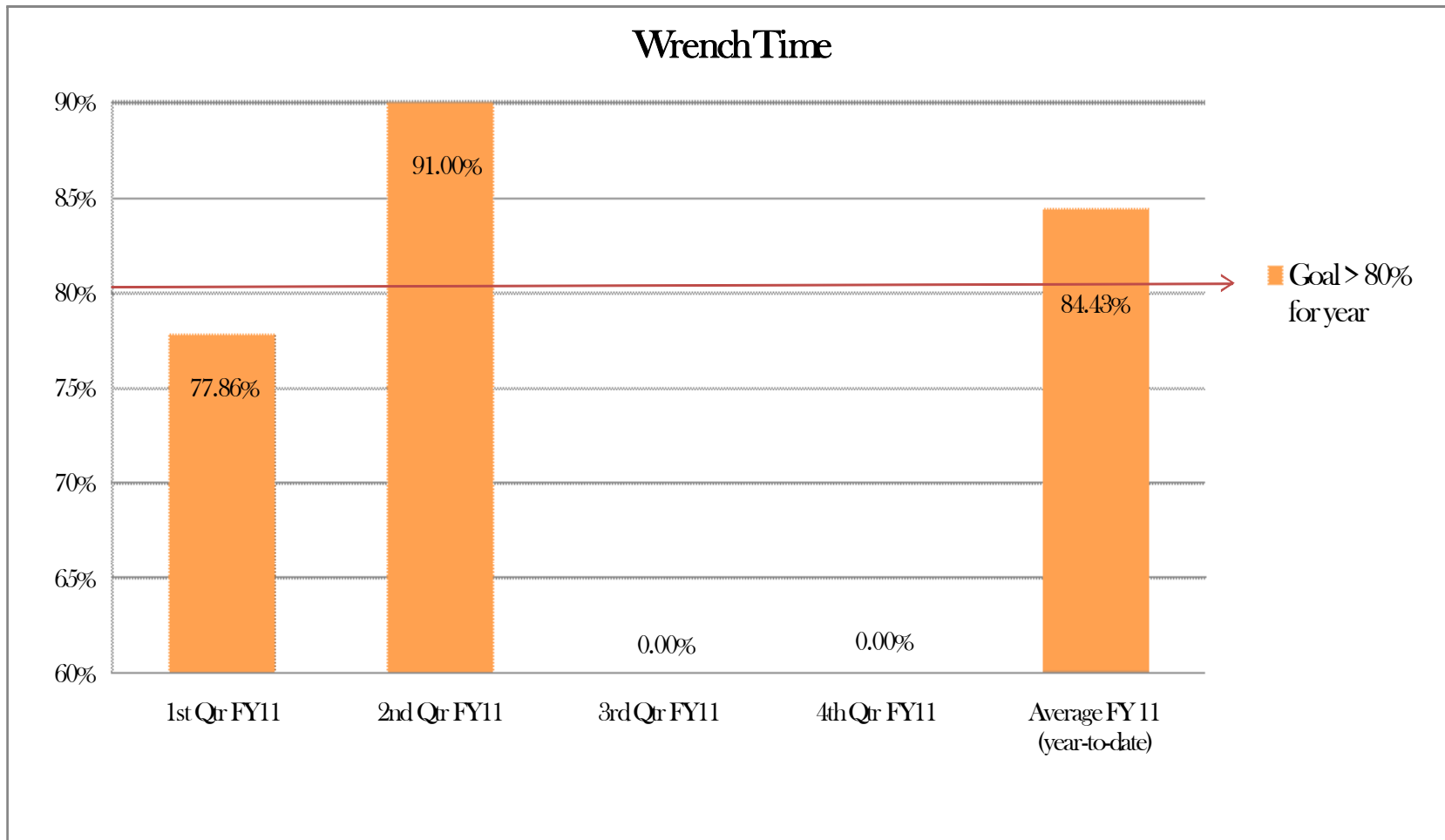
Improve Maintenance and
Operation on the Campus

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Continued improvement of accounting practices for time applied to WR’s. “Total Hours Recorded” increased this period from 73.47% of “Available Hours” last quarter to 91% of “Available Hours” this quarter.
 - 2 – Continued development of the PM program.

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

Facilities Management Strategic Planning Session – Second Quarter FY 2011

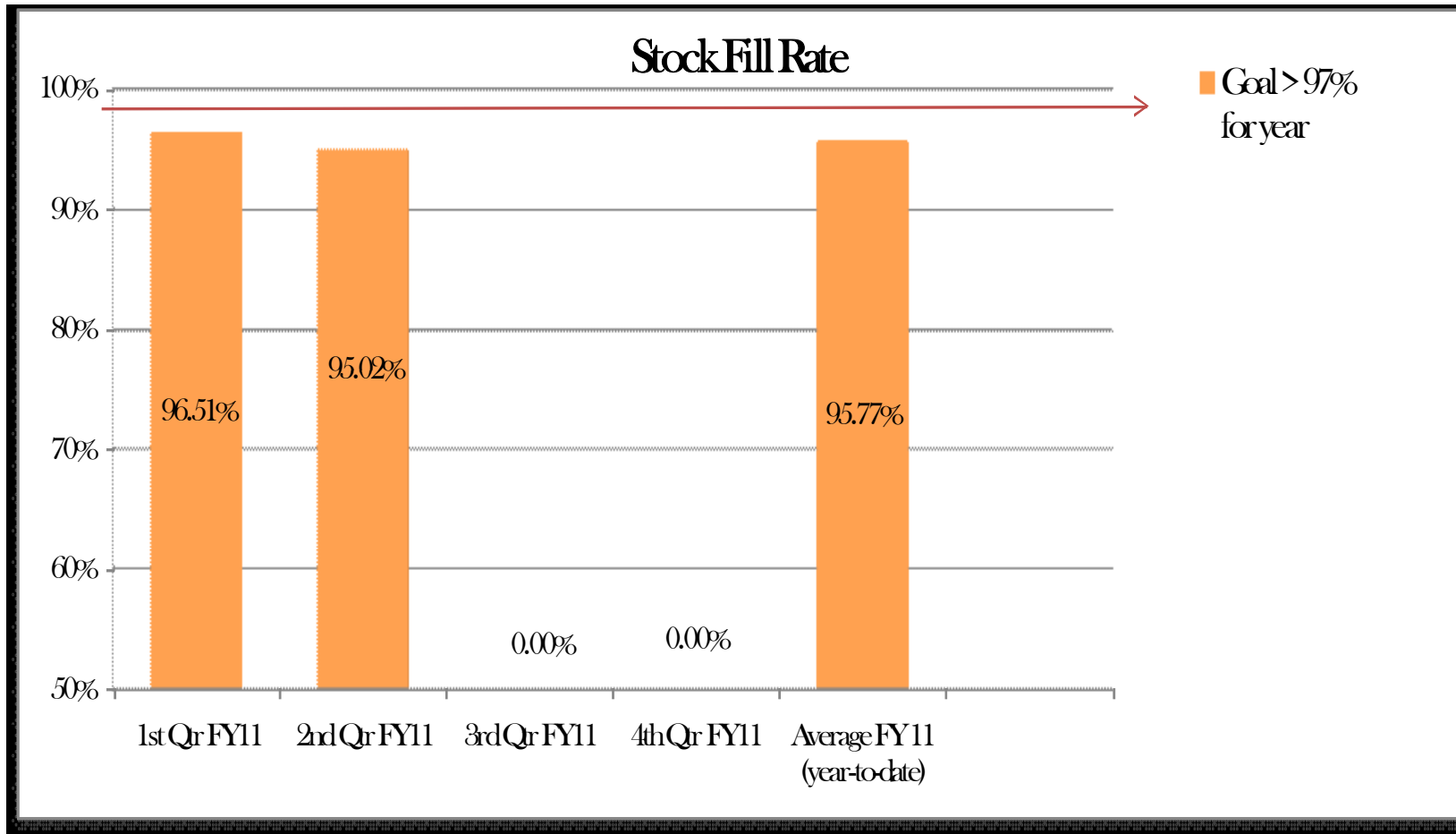
Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – No actions taken. Restocking being controlled by SDI’s automated system.
- Actions Planned
 - 1 - Continue to let automated system control and see how it works.
 - 2 - Adding items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of “zero” but pre-sourced for faster ordering and delivery).
 - 3 - Late deliveries and spikes in usage were the main causes for inability to fill.

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Lead
F. O.

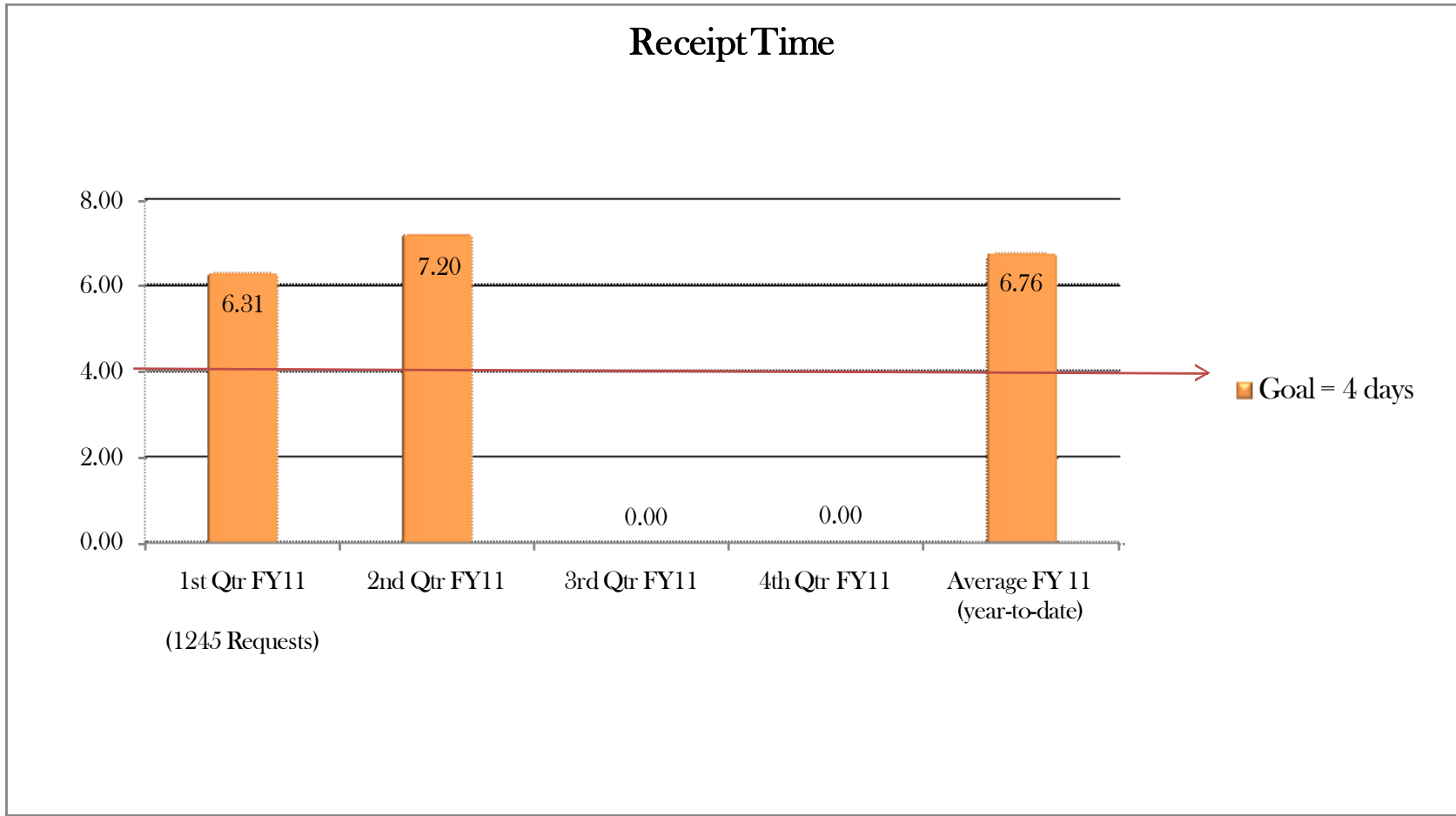
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Supervisors average approval time decreased from 11.28 hrs. in 1st Qtr to 10.6 hrs. in 2nd Qtr of this year.
 - 2 – Orders requiring more information rose to 2.4% of orders.
 - 3 – Monthly non-stock orders averaged 292 for all of FY09. Monthly non-stock orders averaged 366 for all of FY10, a 25% increase. First half FY11 averaged 345 a month; a 10% decrease over FY10's average.
- Actions Planned
 - 1 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).

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Lead
F. O.

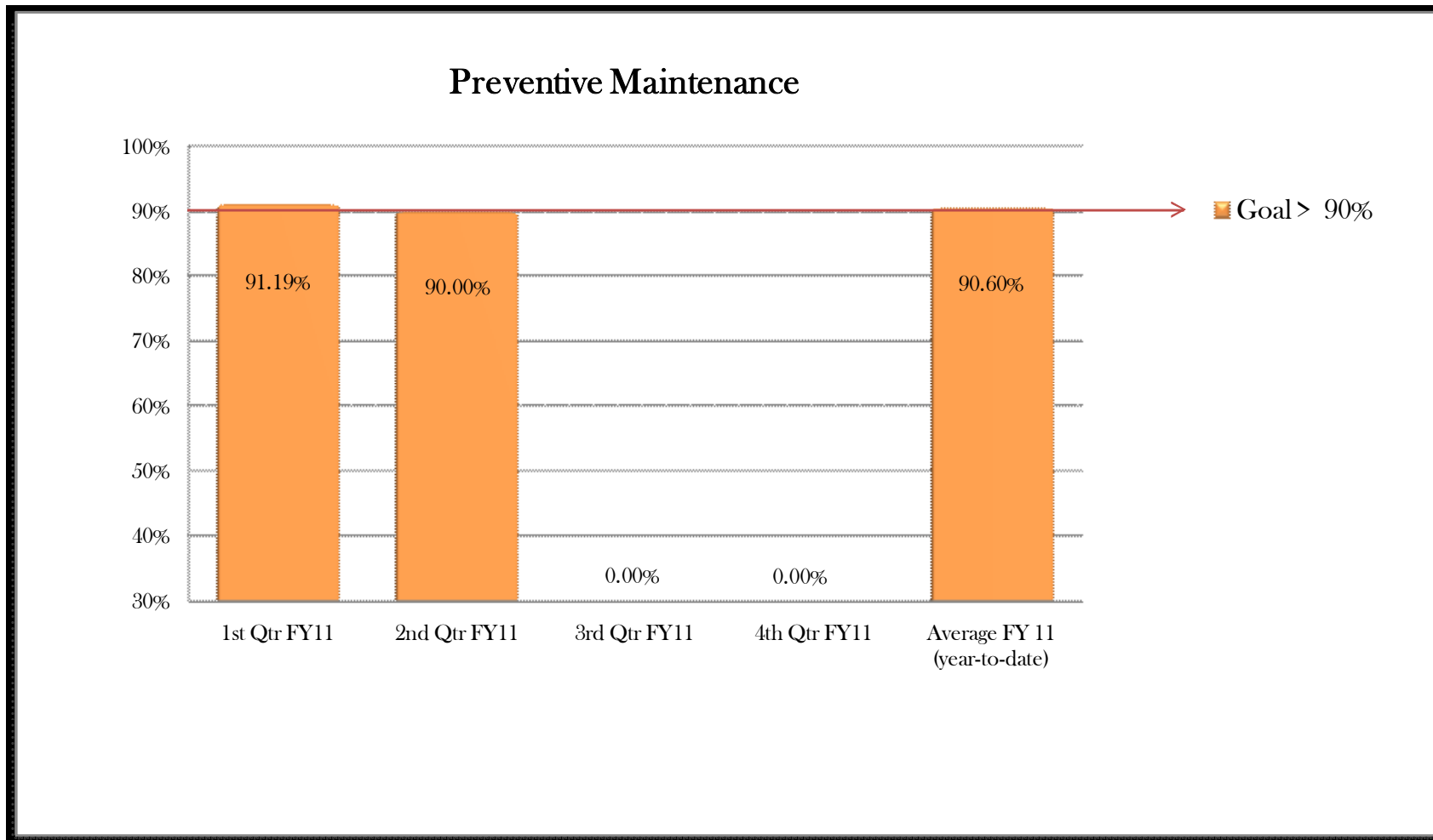
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability

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

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

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Strategy: 1.5 Improve Reliability

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

Lead
F. O.

ACTION PLAN

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

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability

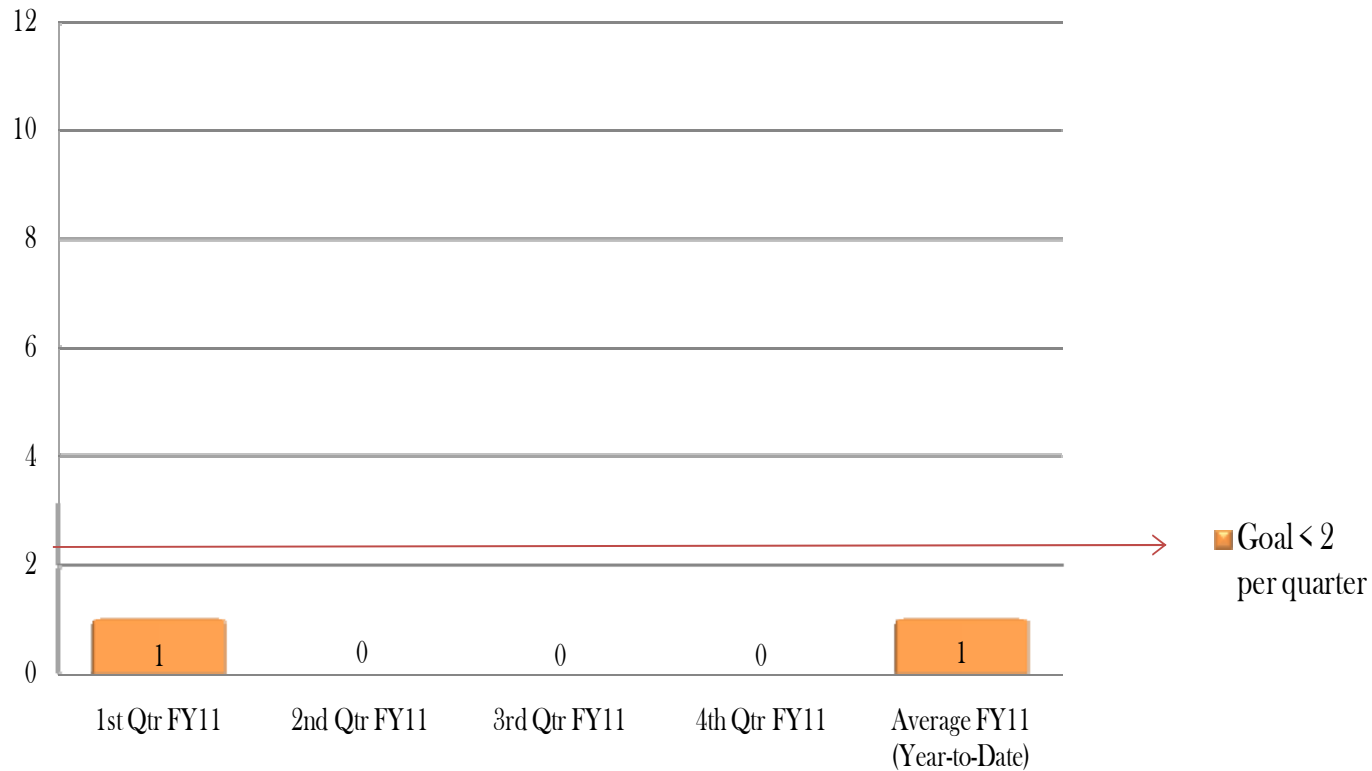
Objective: 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

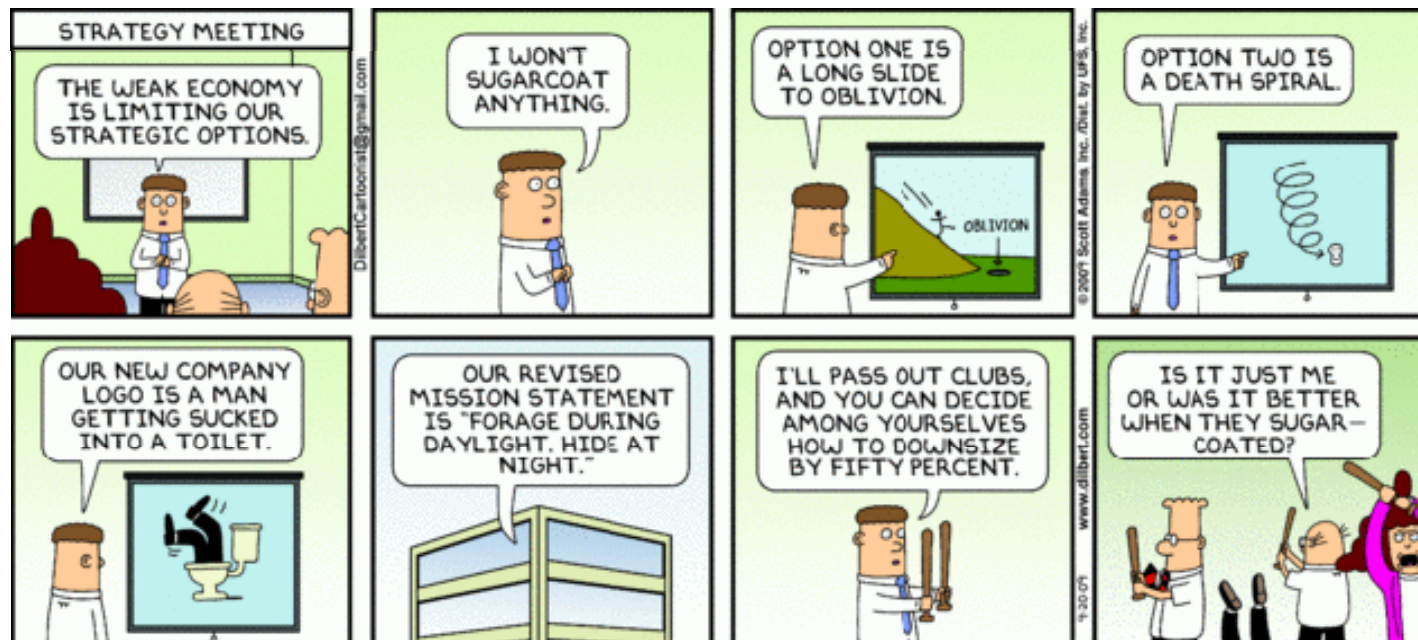
ACTION PLAN

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

Note: Major equipment replacement this period one VFD.

FM 5YP Prioritized Projects – FY11

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



Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
FIS

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

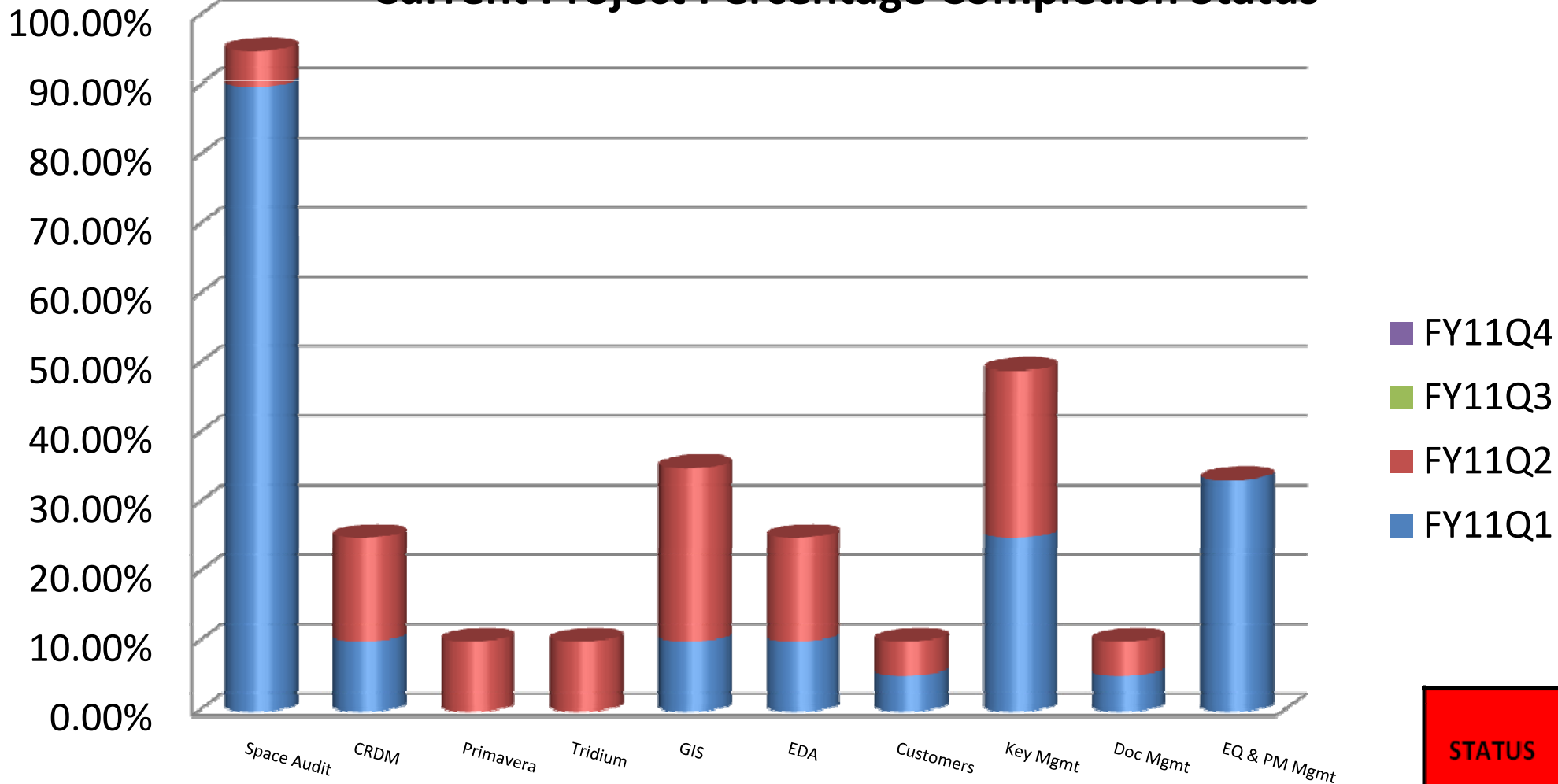
Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

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

Balanced Scorecard Category: Internal Processes

Current Project Percentage Completion Status



STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
FIS

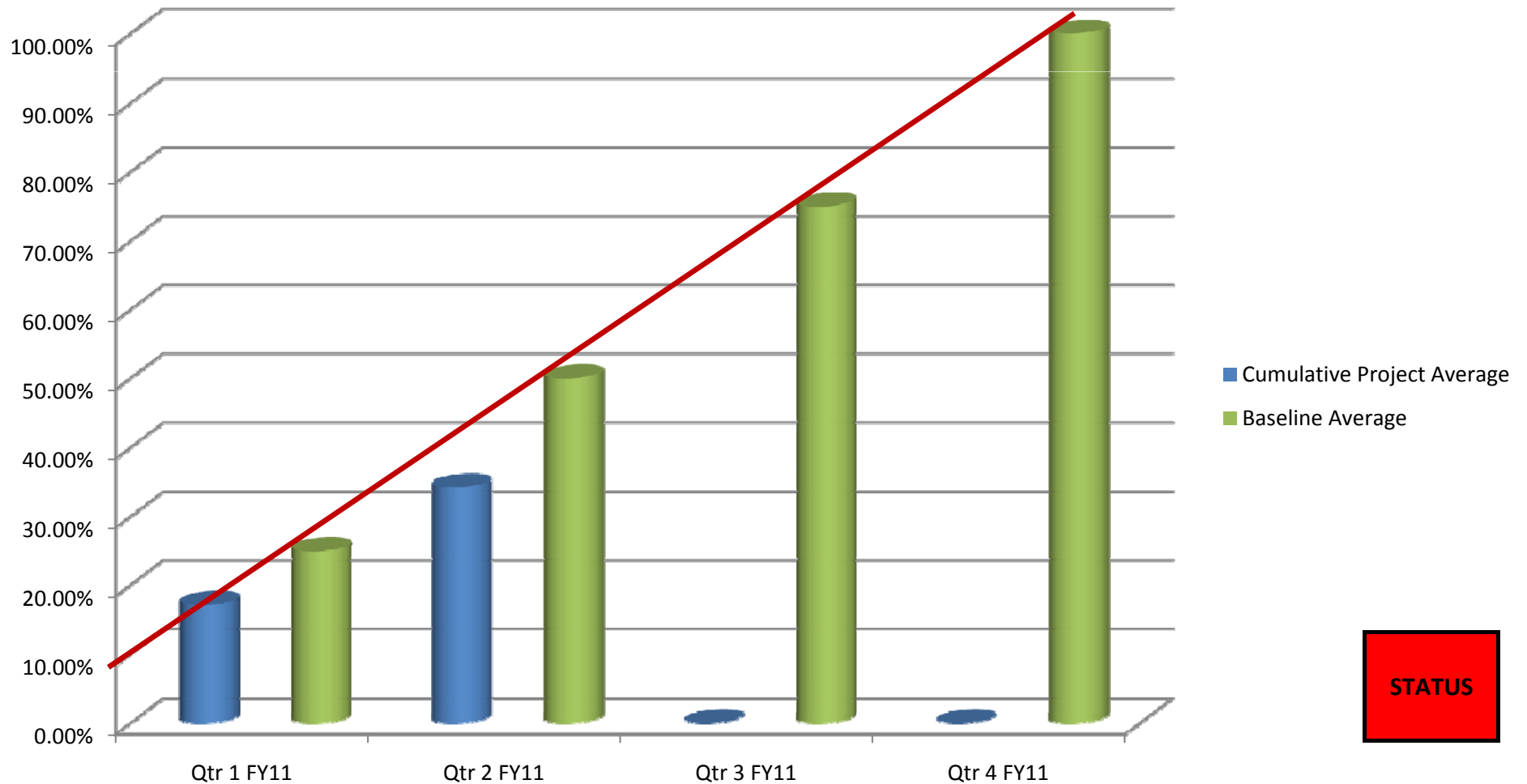
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

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

Balanced Scorecard Category: Internal Processes



STATUS

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

Lead
FIS

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

ACTION PLAN

Actions Completed:

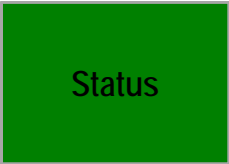
1. Completed Space Audit open training sessions in November and finalize reports.
2. Completed Capital Renewal/Deferred Maintenance (CRDM) Process Reengineering Project Brainstorming session, developed Charter, Initial WF and schedule of workshops/Steering committee.
3. BAS/Tridium – David Champion started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

Actions Planned:

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

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

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



Strategy 2.3: Improve repair and renovation planning; prioritization process and Implementation
Objective 2.3.1. Identify priority R & R projects and coordinate estimates

Measure: % of approved annual R & R projects identified and estimated.
Lead: **Architectural Planning Dept**

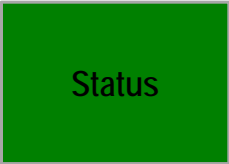
GOAL #3 – Deliver New Facilities that Support the University’s Mission



Objective 3.2.1
80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs by January 2011

Measure: % of Projects with completed Pre-Programs

Lead: **Architectural Planning Dept**



Objective 3.2.2
80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs and estimates by January 2011

Measure: % of projects with completed pre-programs with OC25s.

Lead: **Architectural Planning Dept**

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

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



Status

Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. Integrate infrastructure projects into Capital Construction Project Scopes

Measure: % of projects on the 6 year plan (appropriated and non-appropriated) with integrated Infrastructure projects included and estimated.

Lead: **Architectural Planning Dept**



Status

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

Objective 3.6.1. Integrate Master Plan Design Guidelines into a useable on-line document and conduct periodic review and updates.

Measure: New Design guidelines posted and annual review with updates conducted; % of sections updated and posted.

Lead: **“Architectural Planning Dept”**

Facilities Management Strategic Planning Session – Second Quarter FY 2011

Lead
Architectural
Planning

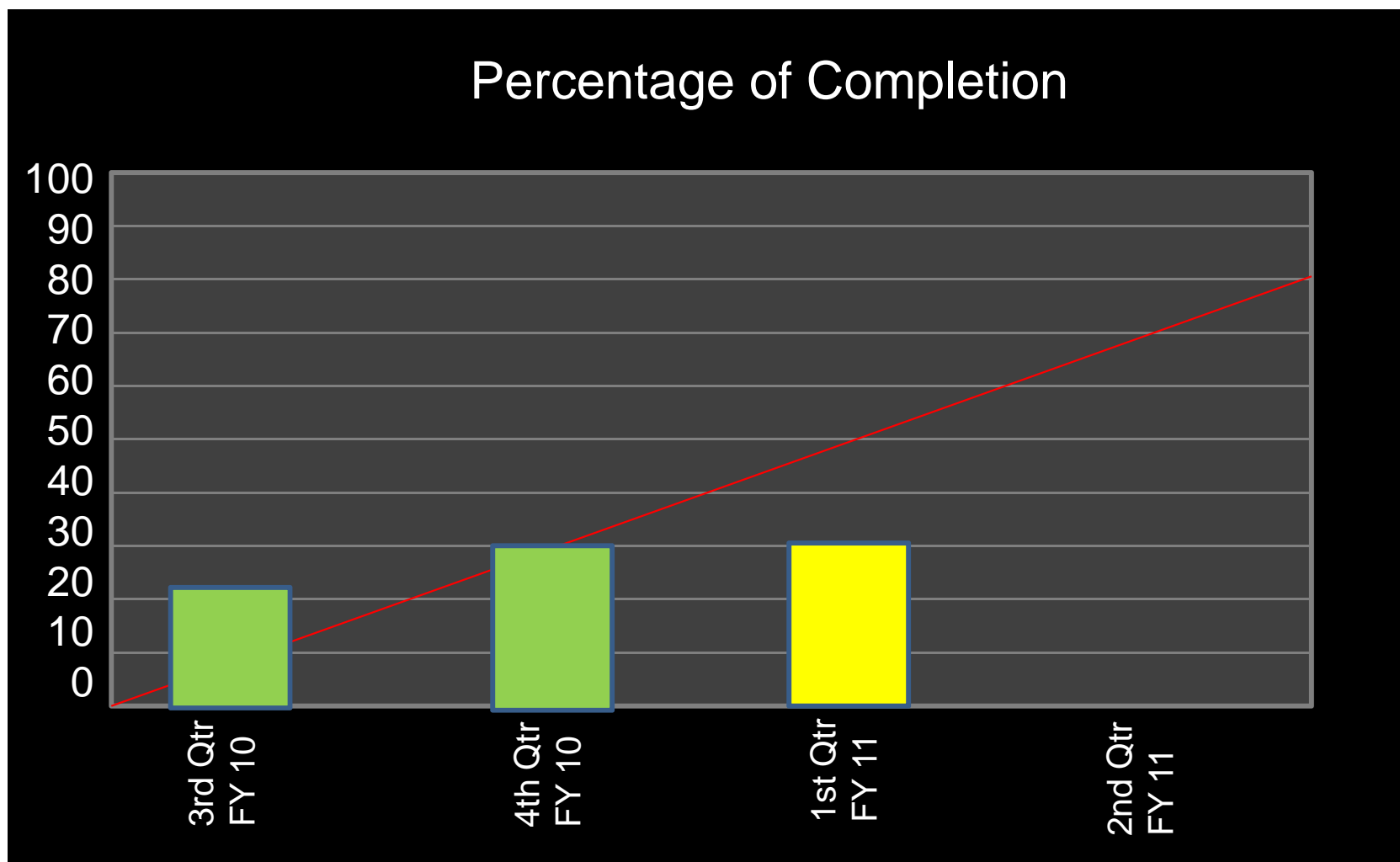
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 80% of Projects on the Appropriated Six Year Capital Improvements Plan have completed pre-programs and OC25s for hand-off to Capital by the end of 2nd quarter FY 2011

Measure: % of Projects completed for transfer to Capital Dept.

Balanced Scorecard Category: Internal Business Process



Status

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

ACTION PLAN

Appropriated Projects

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

*** Pending AA review , changes, and approval**

- Actions Complete
 - Appropriated List submitted
- Actions Planned: Validating Programs
 - Science Building: Pending meeting with AA
 - Burson: Pending meeting with AA
 - Student Academic Success and Retention Center: Pending meeting with AA
 - Atkins Library: Pending meeting with new University Librarian
- Actions Planned: Pre-programming
 - Continue to work down the list
 - We are told by Jay Raja that we can begin preprogramming in earnest this Fall.

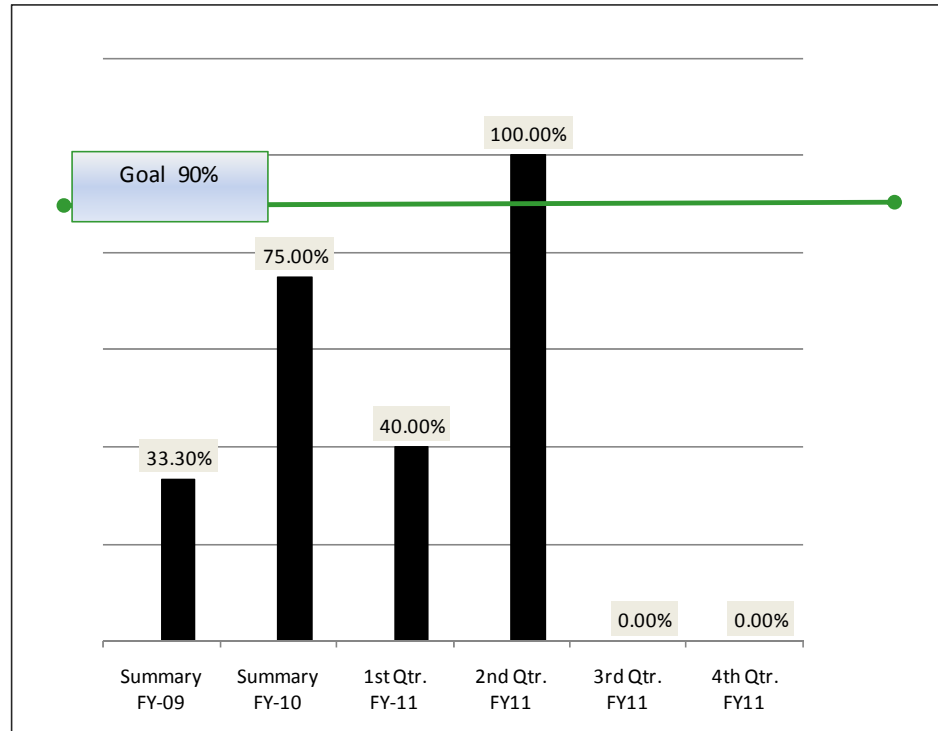
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy Objective **3.3** Improve the Capital Design Process
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	% Designers under contract w/in
Summary FY-09	9	3	4	33.30%
Summary FY-10	10	9	3	75.0%
1st Qtr. FY-11	5	0	2	40.0%
2nd Qtr. FY-11	4	1	0	100.0%
3rd Qtr. FY-11				
4th Qtr. FY-11				



Objective for 2nd Quarter is **100%**
 Year to date is **70%**

Status

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. Residence Hall Phase XI posted in CAPSTAT (Oct.)
 - 2. Student Housing Demolition posted in CAPSTAT (Dec.)
 - 3. Residence Hall Phase X design fee negotiated
- Actions Planned
 - 1. Negotiate and execute contracts for Phase XI
 - 2. Advertise for Parking Deck J and demo Student Housing
 - 3. Select designer for RDH and initiate advance planning

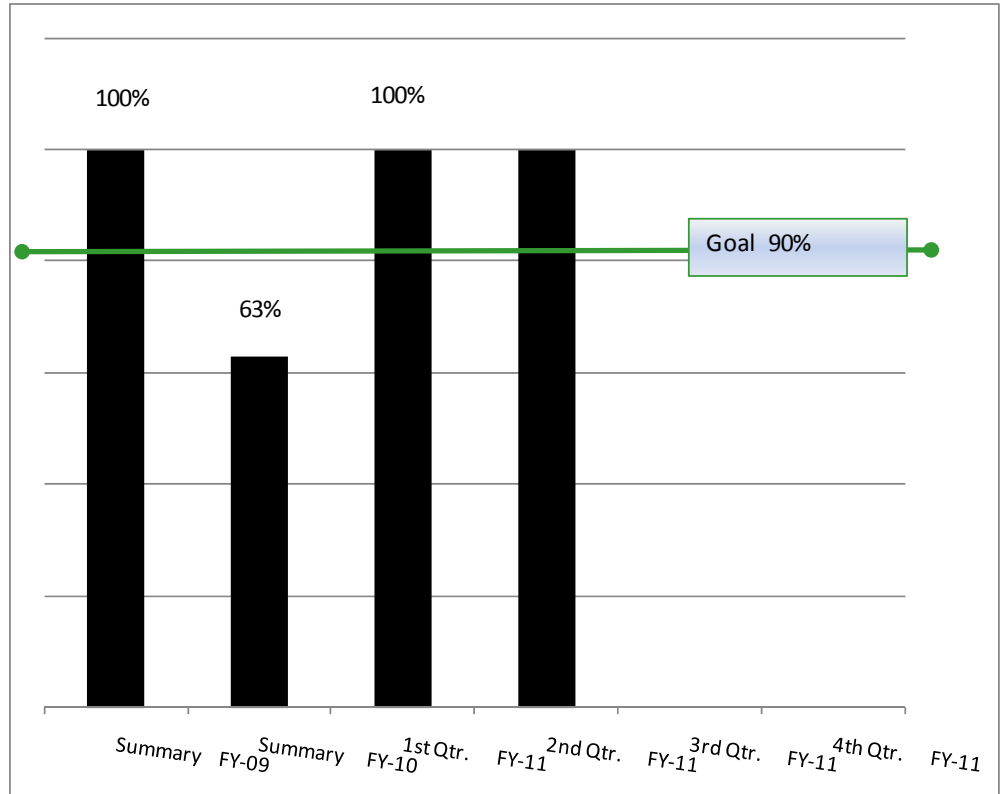
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	# not completed by scheduled time	% Designs complete by completion time
Summary FY-09	4	0	100.00%
Summary FY-10	9	5	63.00%
1st Qtr. FY-11	2	0	100.00%
2nd Qtr. FY-11	1	0	100.00%
3rd Qtr. FY-11	0	0	
4th Qtr. FY-11	0	0	



Objective for 2nd Quarter is 100%
 Year to date is 100%

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. Parking Deck I cd's completed and approved by SCO

- Actions Planned
 - 1. Final PORTAL cd's
 - 2. Complete advance planning for Residence Hall X & XI
 - 3. Complete advance planning for RDH

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

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 &	Percent Difference Between Initial & Final	Completed Within Design Budget
Football/Sports	\$3,950,000	\$2,739,800	\$3,224,472	-30.6%	17.7%	0
Motorsports II	\$399,000	\$303,000	\$303,700	-24.1%	0.2%	0
Parking Deck I	\$1,701,000	\$1,044,000	\$802,869	-38.6%	-23.1%	1
Parking Deck J	\$2,211,057	\$0	\$0	0.0%	0.0%	0
RDH Renovation	\$1,742,048	\$0	\$0	0.0%	0.0%	0
Res. Hall Ph. X	\$2,809,632	\$0	\$0	0.0%	0.0%	0
Res. Hall Ph. XI	\$3,695,657	\$0	\$0	0.0%	0.0%	0
Res. Hall Moore & Sanford	\$503,000	\$435,000	\$435,000	-13.5%	0.0%	1
Tennis Courts	\$292,972	\$275,000	\$275,000	-6.1%	0.0%	1
Percentage of Projects						30.0%

*Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.
Objective is 30%

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. Complete design of Tennis (Ph. II)

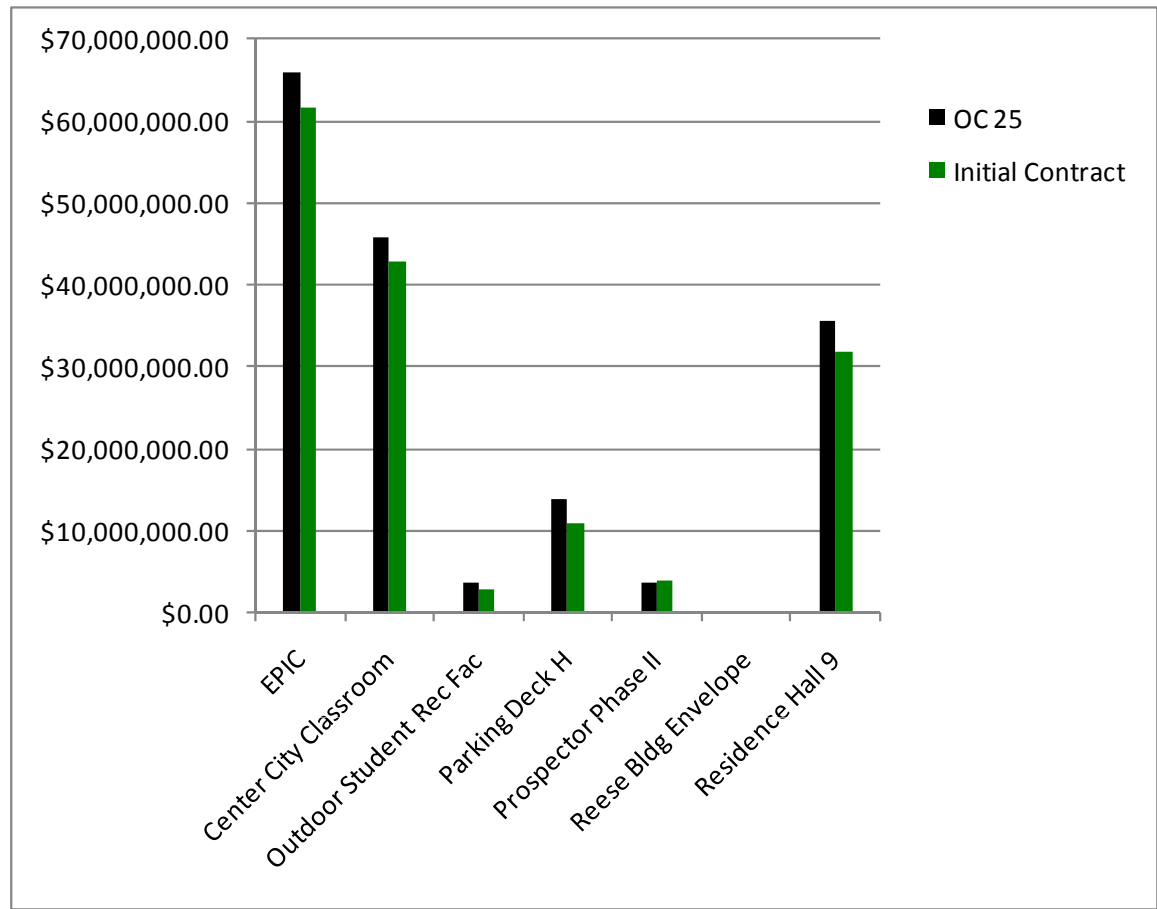
- Actions Planned
 - 1. Monitor designs of Residence Hall, RDH, Heck Dam

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



Projects listed are not complete

Status

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

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. N/A
- Actions Planned
 - 1. Close-out Tennis Phase I
 - 2. Close-out Bioinformatics

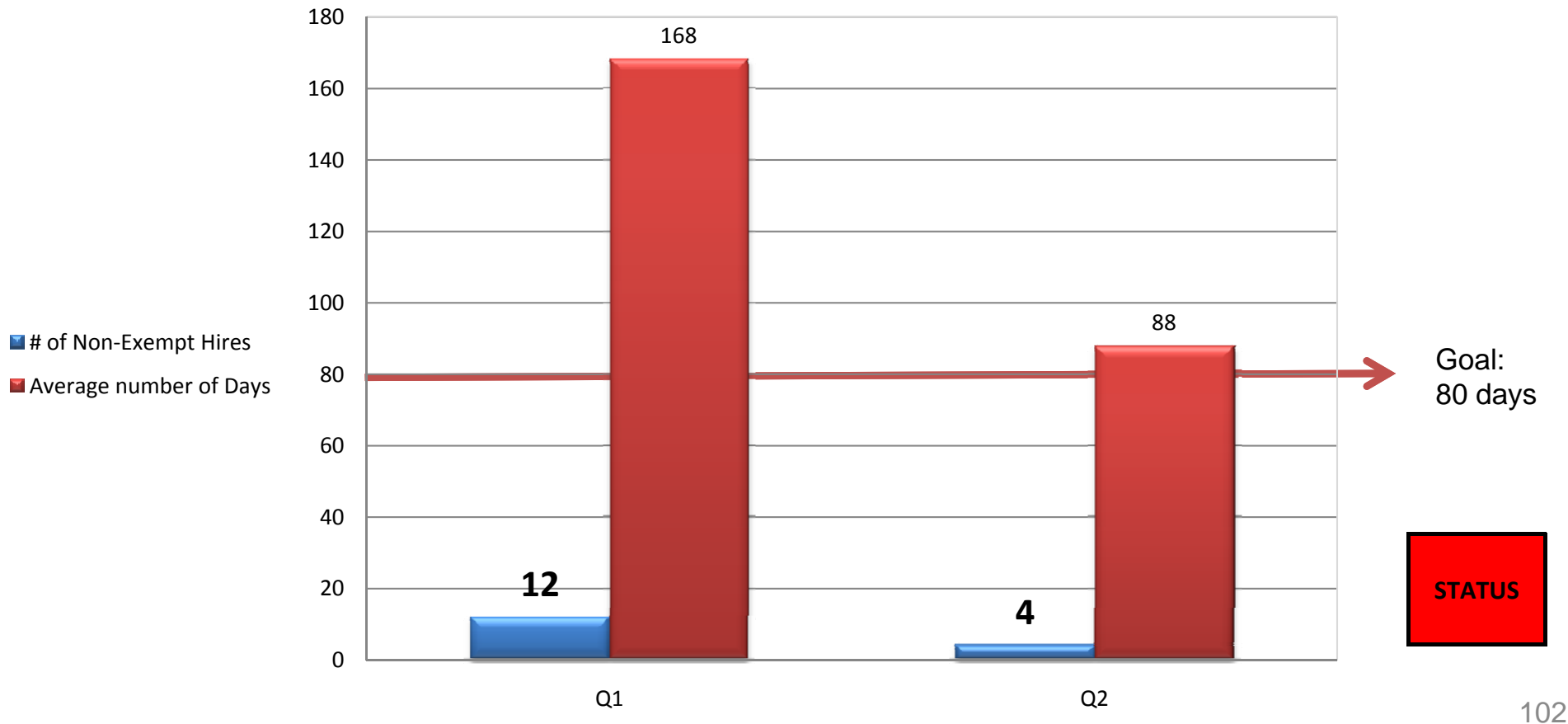
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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: Internal Processes

Average Number of Days to Fill Nonexempt (Hourly) Vacancies



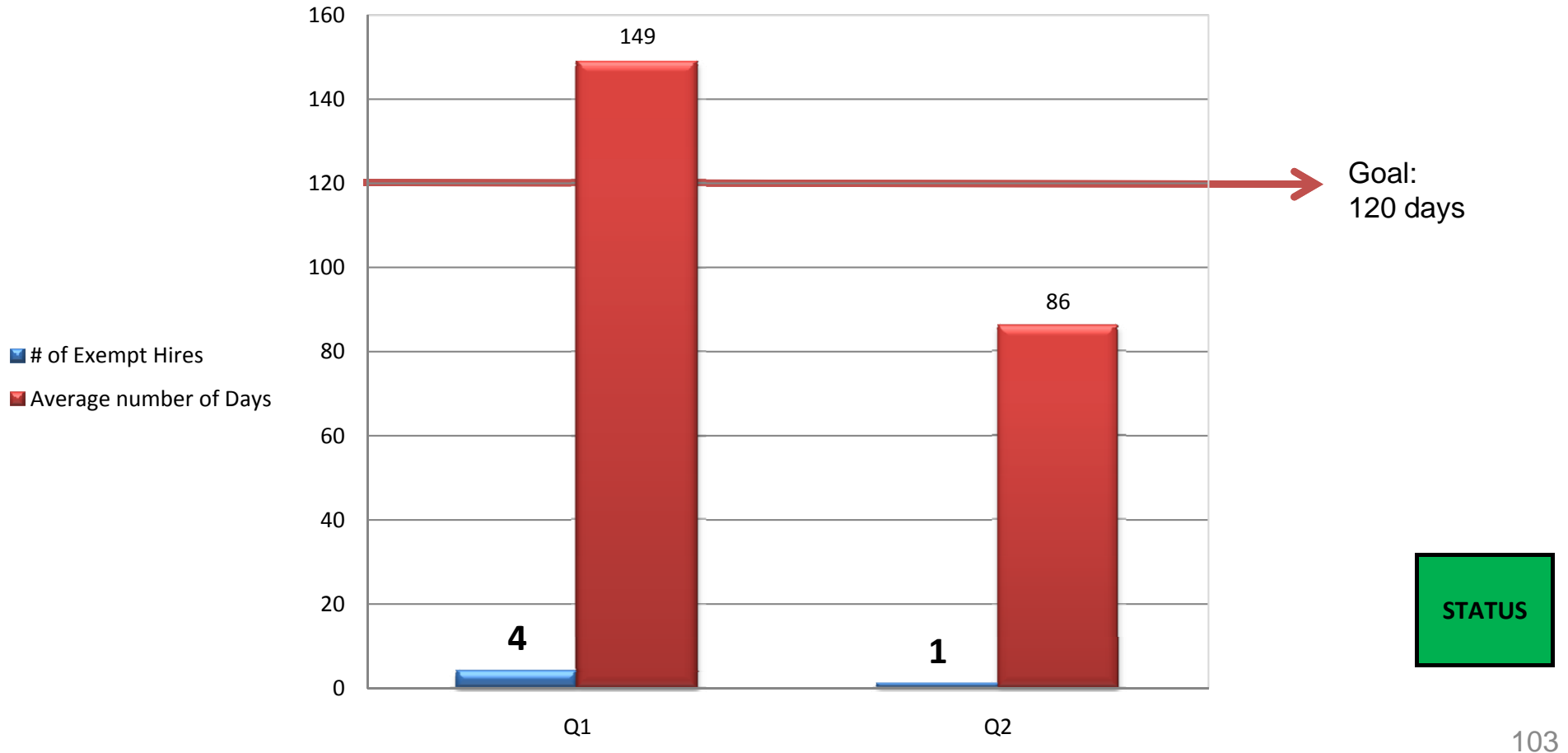
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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: Internal Processes

Average Number of Days to Fill Exempt (Salaried) Vacancies



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

Lead
FBO

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
- ✓ Purchased new HRIS for FM HR
- ✓ Redefine process measured (active recruitment)
- ✓ Implement revamped Hiring Process in FY 2010

• Actions Planned

1. Continue aggressive implementation of new hire process
2. Develop process reinforcement communication for managers and supervisors
3. Implementation of new HRIS for FM HR
 - a. Input data
 - b. Report development



Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

Internal Processes
To satisfy and delight our customers, which operational processes must we excel in?

Labor Availability	1.1.1	Increase Wrench Time	>80%	84.40%		
Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	95.70%		
Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	6.76		
Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	90.6%		
	1.5.2	Reduce Unscheduled equipment repl projects	<2	1		
Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	34%		
Master/Project Planning Process	2.3.1	Identify priority R & R projects and coordinate estimates	80%	100%		
	3.2.1	Projects on the Appropriated Six Year Plan have completed pre-programs	ON HOLD	On Hold		
	3.2.2	Projects on the Non-appropriated Six Year Plan have completed pre-programs	80%	80%		
	3.5.1	Integrate Infrastructure projects into Capital Construction Project scopes	80%	80%		
	3.6.1	Integrate Design Guidelines into a useable on-line document and conduct periodic review and updates	80%	80%		
Capital Project Administration	3.3.1	Designers under contract w/in 120 days of posting in CAPSTAT	90% w/in 120	60%		
	3.3.2	90% of designs complete by scheduled comp. date	90%	100%		
	3.3.3	90% of designs w/in design budgeted fee	90%	100%		
	3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%	100%		
Develop high-quality staff	5.1.1	Reduce Vacancy Time Calendar Days	80 days/120 days	84 / 86		



UNC CHARLOTTE

Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

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

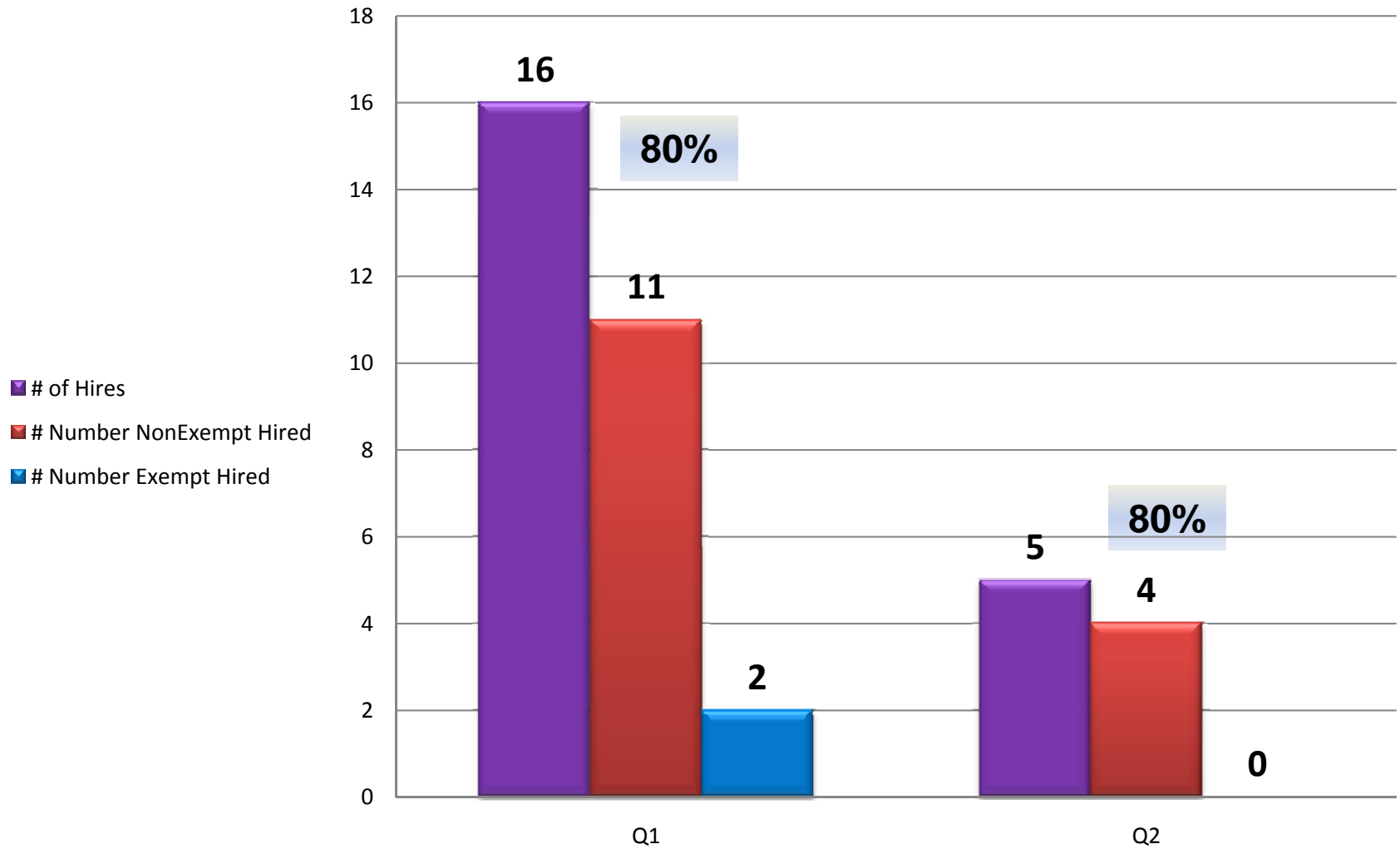
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
Objective 5.1.2 100% 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 (97%)
 - ✓ Behavioral Targeted Selection Training for all FM managers and supervisors Feb and Apr 2010
 - ✓ Implementation of full Targeted Selection process 02/28/10

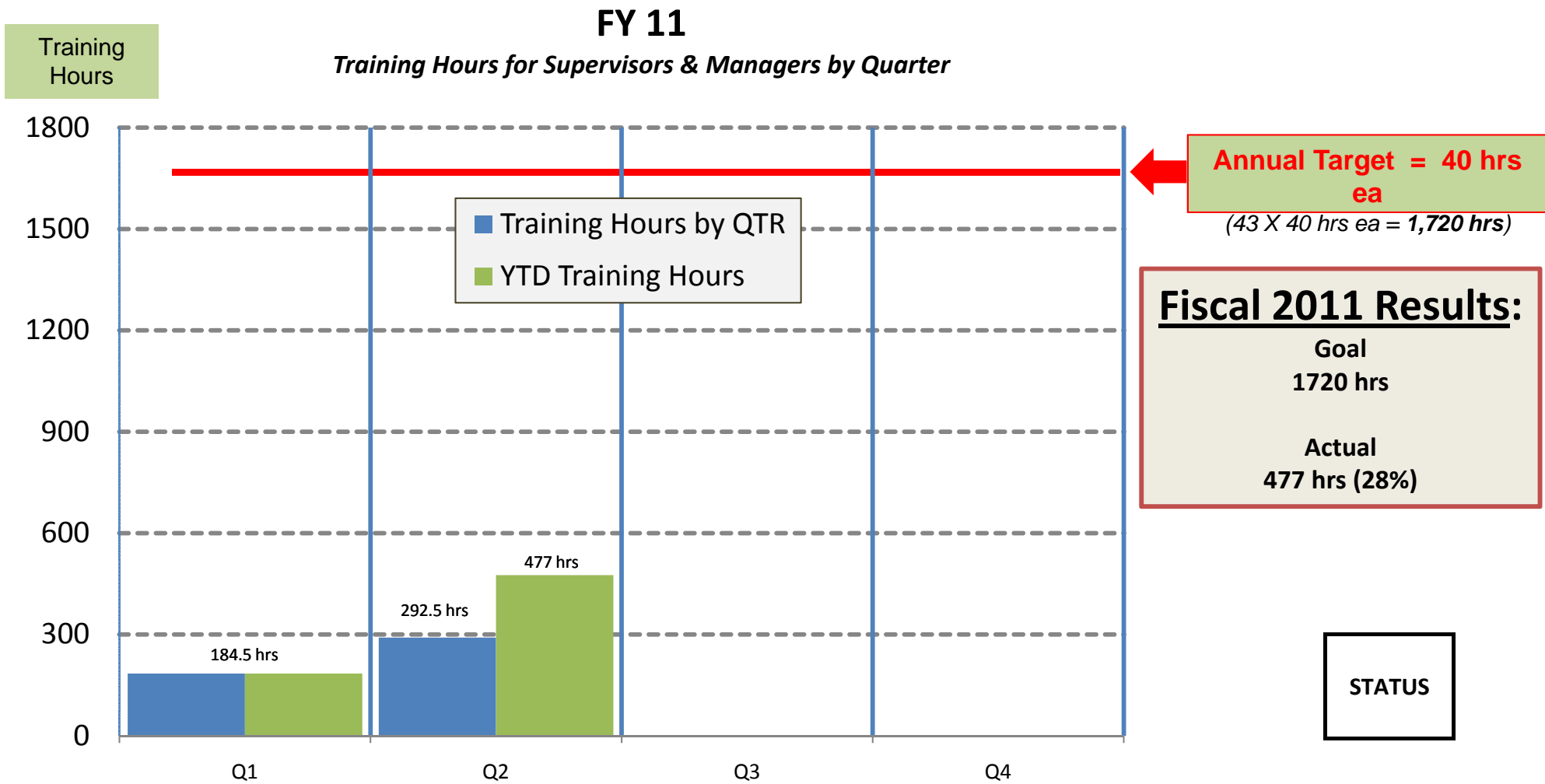
- Actions Planned
 1. Communication to Managers and Supervisors – more guidance on process
 2. Develop Targeted Selection on-line training session

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

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

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

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



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
 - ✓ MECC II training and coaching

- **Actions Planned**
 1. Continue matrix updates
 2. Reassess target
 3. Develop compliance training and mission specific training metrics

Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

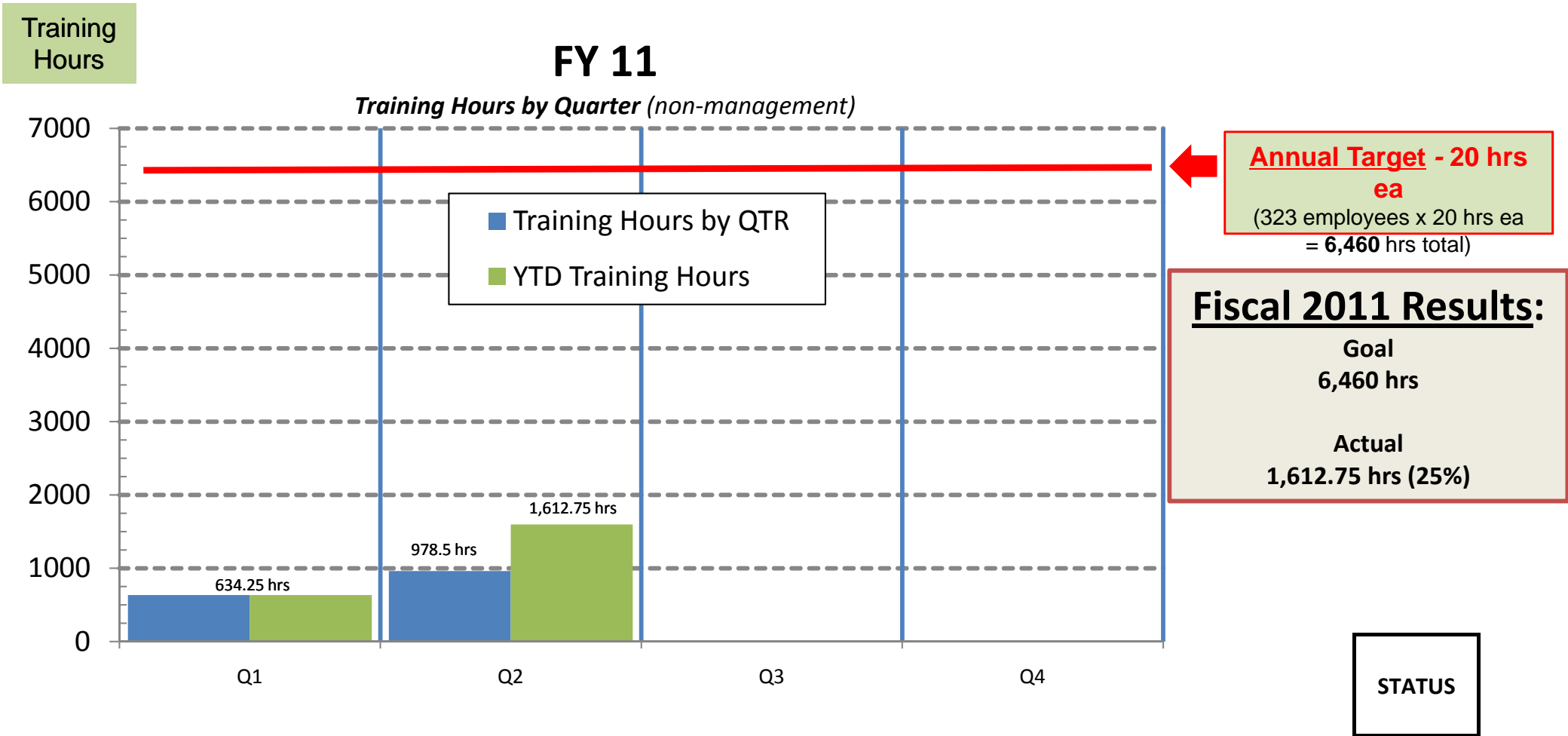
Lead
FBO

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



2010~11 YTD Training Hours - Percentage of Target

Unit/Zone	YTD (2 qtrs)
Design Services	79%
Grounds	6%
FIS	149%
Steam Plant	0%
Zone 7	0%
Capital Projects	79%
Housekeeping	28%
Lock Shop	11%
Zone 5	18%
High Voltage & Fire Alarms	9%
Zone 1	21%
Zone 6	21%
Zone 2	12%

Unit/Zone	YTD (2 qtrs)
Facilities Operations Admin	71%
Zone 4	37%
Central Operations	39%
Auto	68%
Recycling	87%
Planning/Architectural	149%
Planning /Real Estate	150%
Business Office	102%

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 EH&S Dept.
 - ✓ Assess current FM employee training tracking system
 - ✓ ESL training pilot
 - ✓ Purchase new HRIS for FM HR
 - ✓ Posted communication link to EH&S training schedule

- Actions Planned
 1. Reassess targets
 2. Continue development of training matrix for trades positions
 3. PC skills training for infrequent users in preparation for Web Time entry
 4. Implementation of new HRIS for FM HR

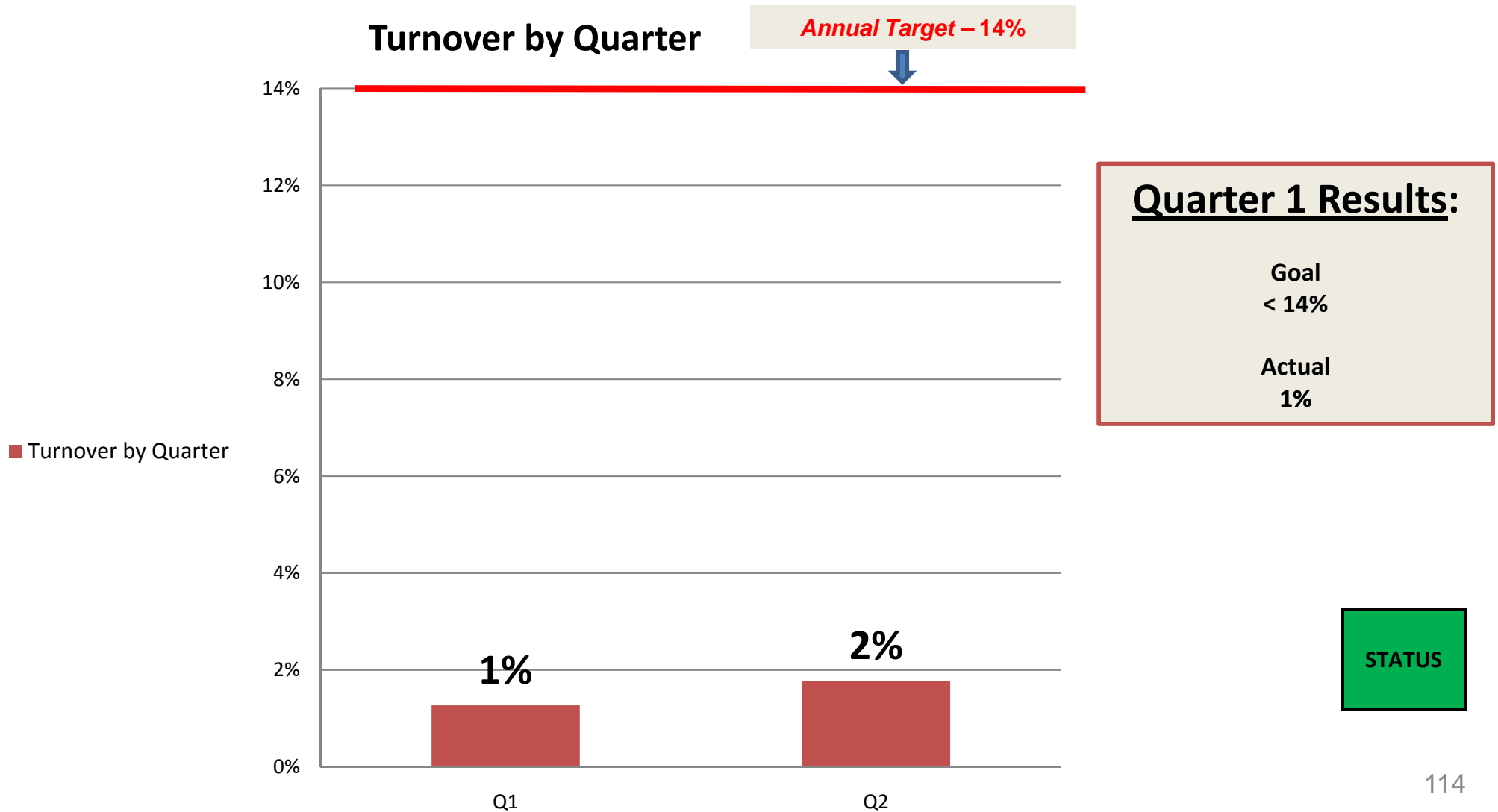
Lead
FBO

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

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

Measure: Annual Employee Turn-over Rate

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



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

Lead
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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. Develop succession management program

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

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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 26th.

- **Actions Planned**
 1. Look for common themes within both customer and employee satisfaction surveys.
 2. Develop action plan to address survey issues
 3. Determine date for next survey

Lead
F. O.

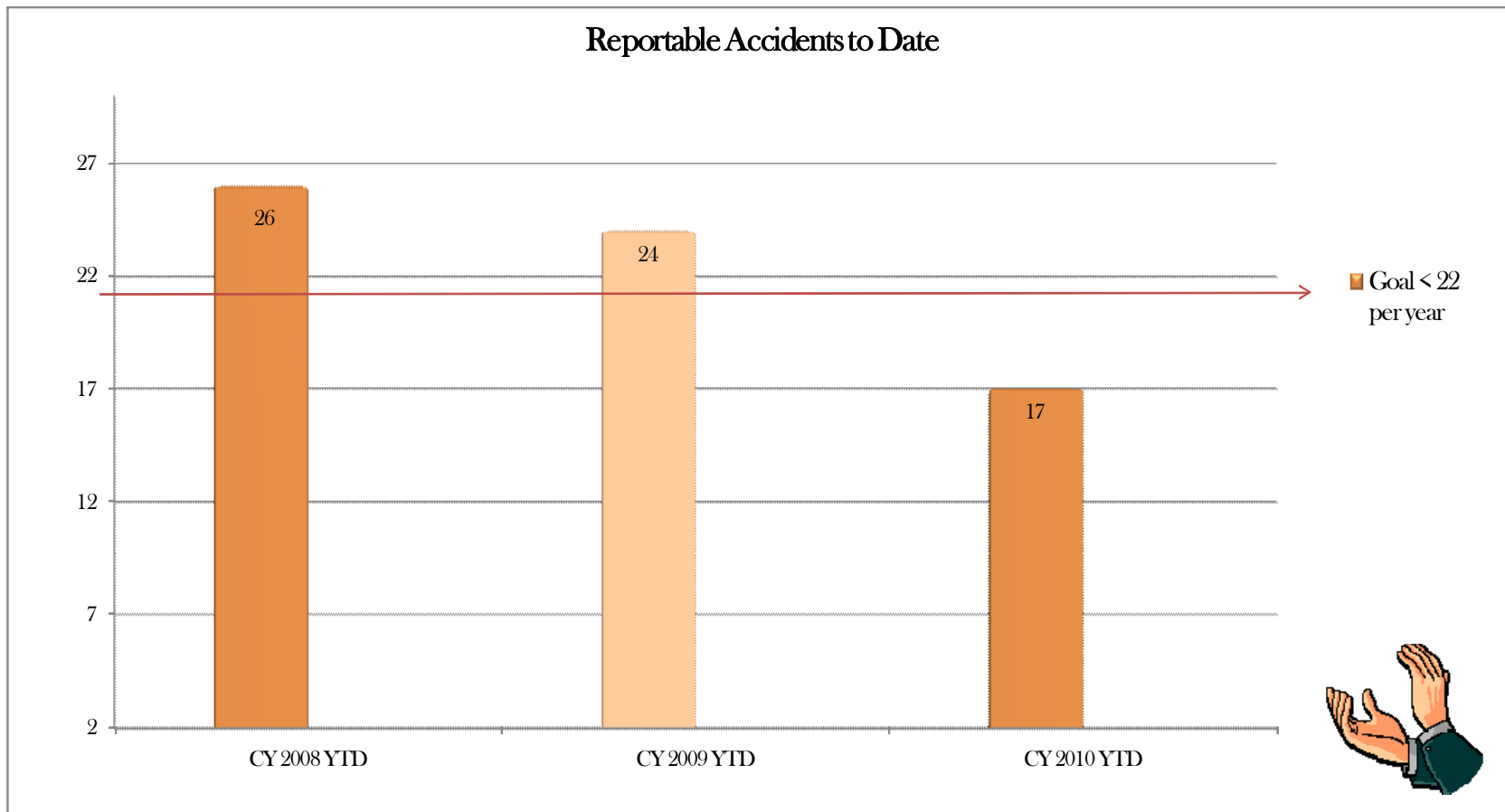
GOAL #6 – Promote Good Stewardship

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
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Continued to emphasize safety through safety meetings, safety training and safety audits.
- Actions Planned
 - 1 – Zone supervisors to continue safety training and audits to improve overall OSHA compliance.



Balance Score Card

DISCUSSION

LEARNING & GROWTH PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter
Learning & Growth <i>How will we sustain our ability to change and improve?</i>	Develop high-quality staff	5.1.2	Targeted Selection/Recruitment Training	100%	80%		
		5.2.1	Supervisor (all levels of supervision) training hours	1720 hrs	477	Annual	
		5.2.2	Staff (non supervisory) training hours	6460 hrs	1612.75	Annual	
	Retain high quality staff	5.3.1	Reduce annual turnover rate	<14%	1.5%		
	Develop positive culture	5.3.2	Overall Annual Employee satisfaction (No survey in 2010)	85%	No data	Annual	
	Improve Employee Safety	6.4.1	Reduce Accidents by 10% annually (CY) - goal 22 or less	<22	17		