Strategic Planning Session

Second Quarter – Fiscal Year 2013
October – December 2012

UNC CHARLOTTE

GOAL #1

Improve Maintenance and Operation on the Campus

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

-- Earl Nightingale, Motivational Speaker

GOAL #2

Successfully Adapt Existing Facilities to Meet New Requirements

"Fix your eyes forward on what you can do, not back on what you cannot change."

—Tom Clancy

GOAL #3

Deliver New Facilities that Support the University's Mission

"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

THINK
OUR GOAL IS CUSTOMER SATISFACTION

"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

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

GOAL #1 – Improve Facilities Operations

Strategy:	**1.3**	Improve Work Request Process
Objective:	**1.3.1**	Decrease Percentage of Reactive Work Requests to < 58%
	1.3.2	Decrease Work Request Cycle Time by 5%

**Lead
F. O.**

ACTION PLAN

- Actions Planned

  1 – Old and New PM Modules are not connecting so the data is not a true count; data shown is not accurate.

  2 – EDA's; we are working through challenges with the new status' they are opened up (completed not verified is not completed and taken to history).

  3 - Continue to build PM program to cover all equipment and buildings.

  4 – Continue increasing predictive maintenance measures as funds permit.

  5 – Continue review of reactive work requests for routine services that should be moved to "scheduled services," or PM.

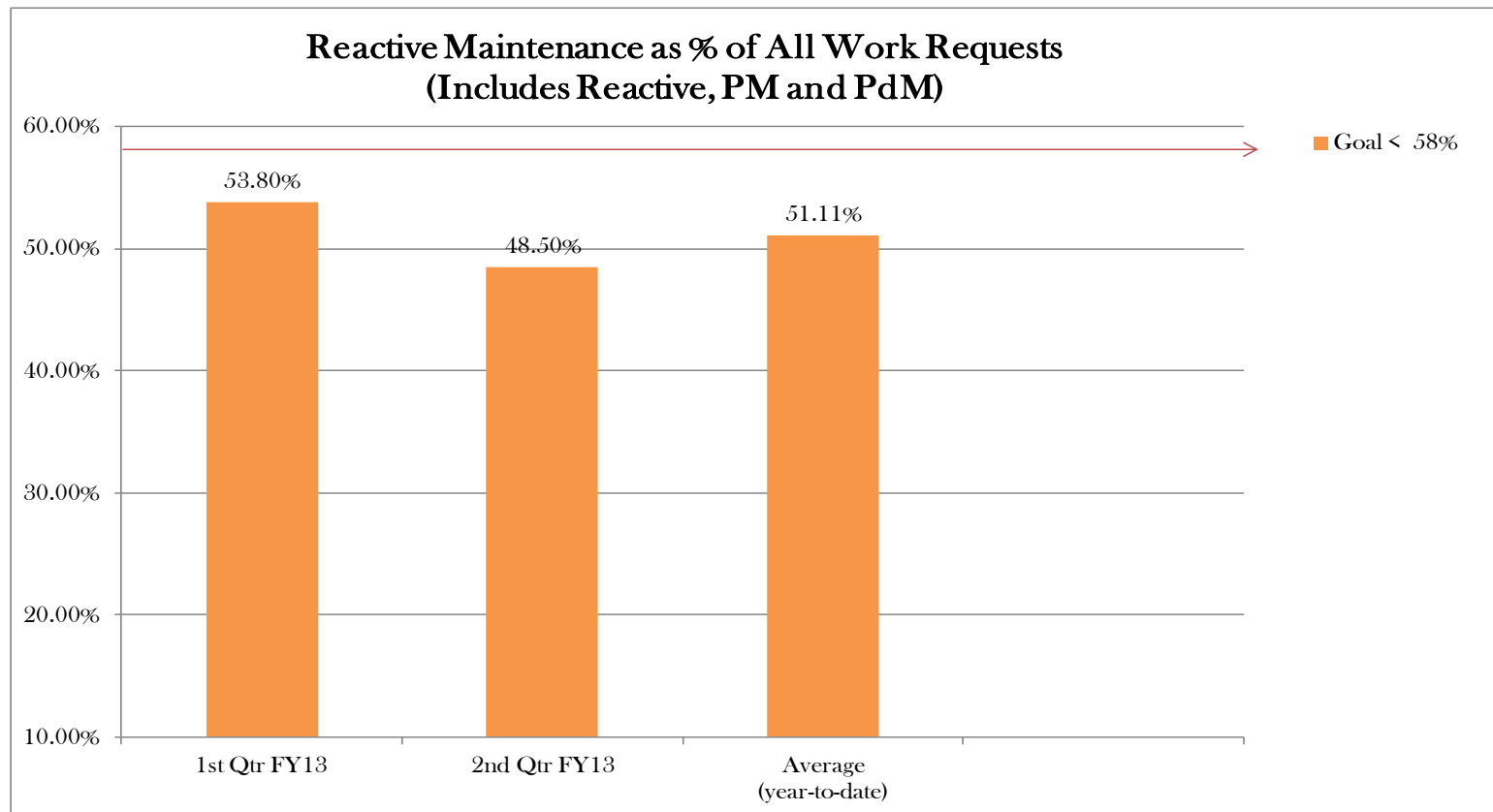 6 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Percentage to average < 58% for year.

Balanced Scorecard Category: Customer Perspective

<div style="text-align:right">Lead
F. O.</div>

Reactive Maintenance as % of All Work Requests
(Includes Reactive, PM and PdM)

- 1st Qtr FY13: 53.80%
- 2nd Qtr FY13: 48.50%
- Average (year-to-date): 51.11%
- Goal < 58%

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2013
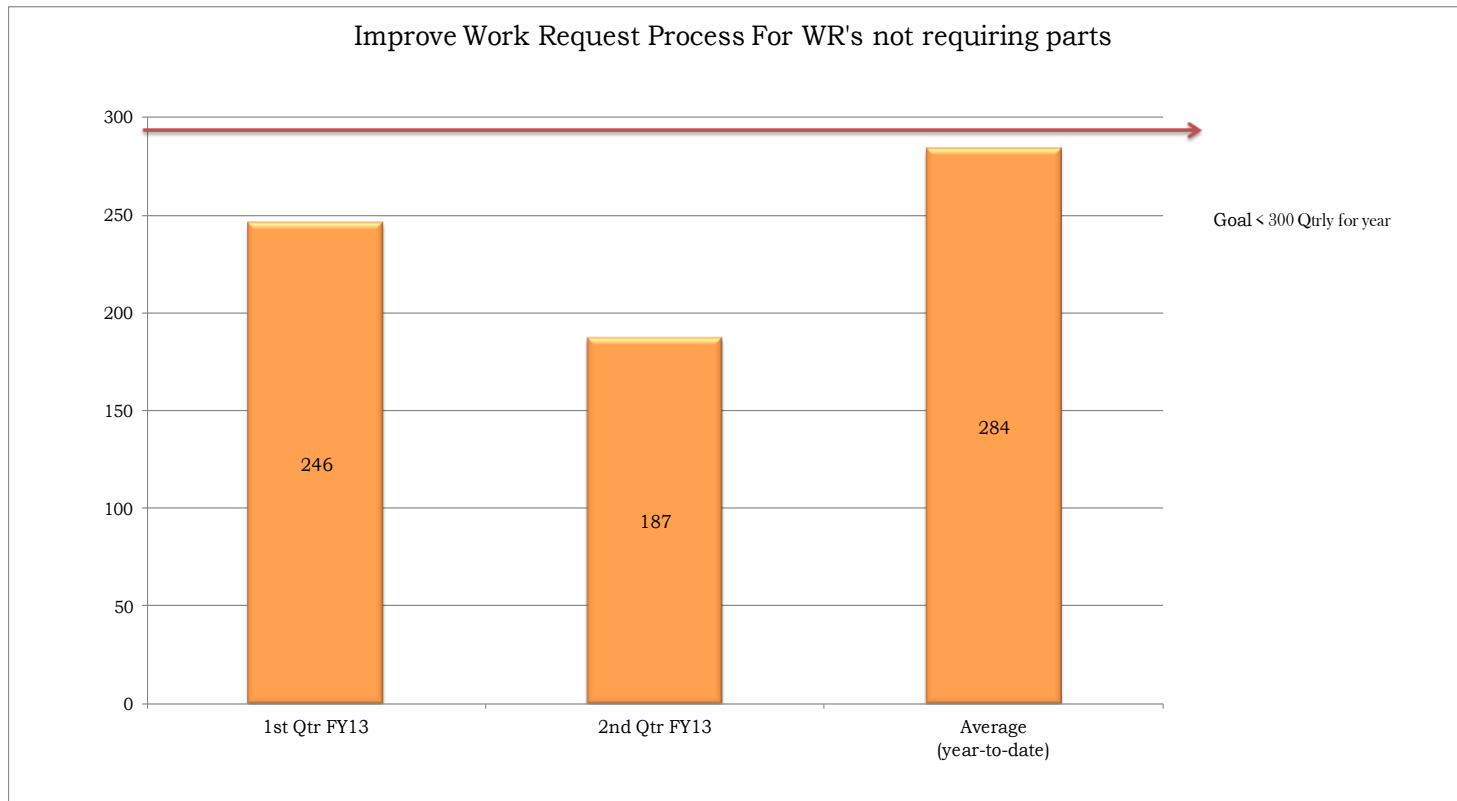
GOAL #1 – Improve maintenance and operations of the Campus

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 300 quarterly average for the year

Balanced Scorecard Category: Customer Perspective

Improve Work Request Process For WR's not requiring parts

Goal < 300 Qtrly for year

	1st Qtr FY13	2nd Qtr FY13	Average (year-to-date)
	246	187	284

Lead
F. O.

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%
	1.5.2	Decrease number of Unscheduled Equipment Replacement Projects by 15%
	1.5.3	Reduce Unscheduled High Voltage Electrical System Outages by 10%
	1.5.4	Reduce Unscheduled Fire Alarm Network Outages by 10%

Lead
F. O.

ACTION PLAN

- Actions Planned

> 1 – Complete development of PM Program converting from old PM Module to new PM Module. Focus on new buildings (CCB and EPIC)
>
> 2 – Closer monitoring of PM completions by Supervisors and Managers.
>
> 3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.
>
> 4 – Prepare program for major equipment repairs and replacement.
>
> 5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.
>
> 6 – Continue working with Simplex/Siemens to bring the new buildings online with the network.

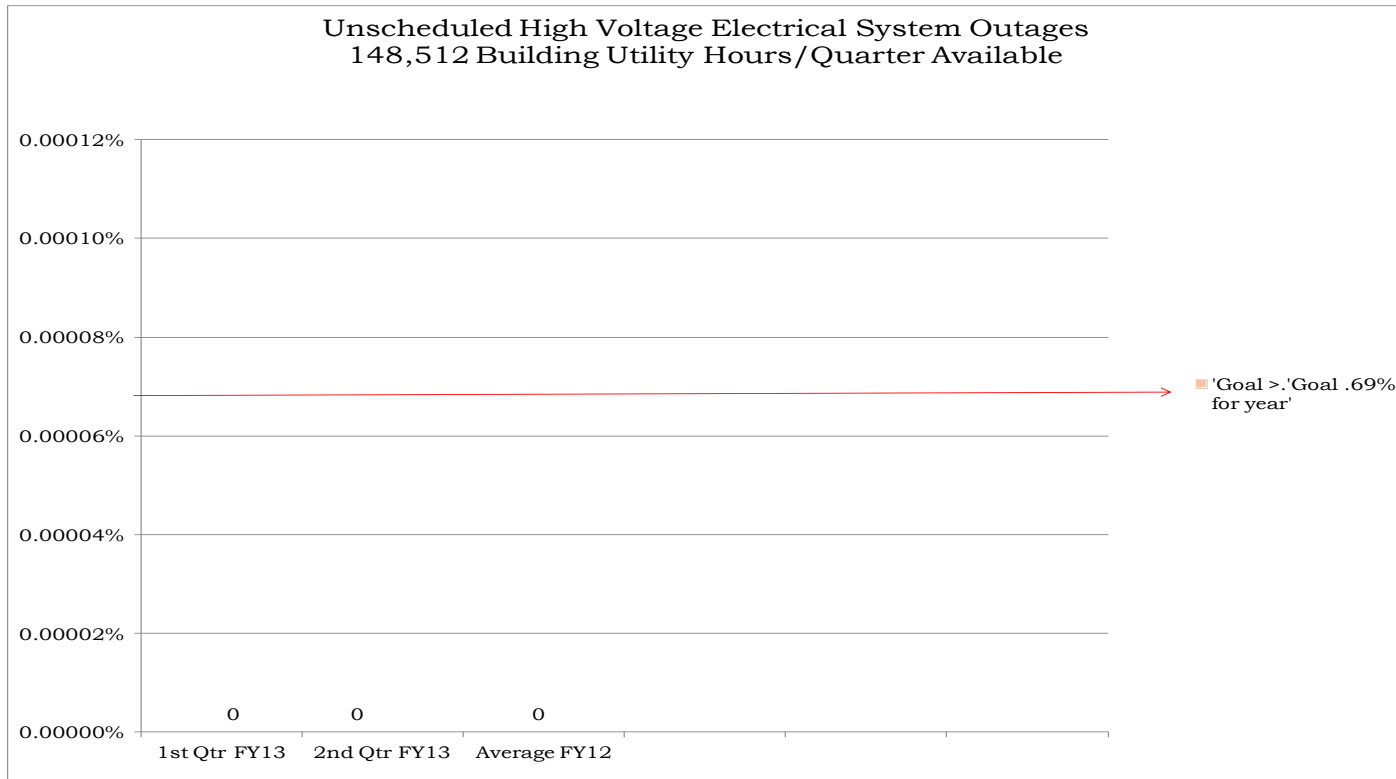**Facilities Management Strategic Planning Session – Second Quarter FY 2013**

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 .69% for year.

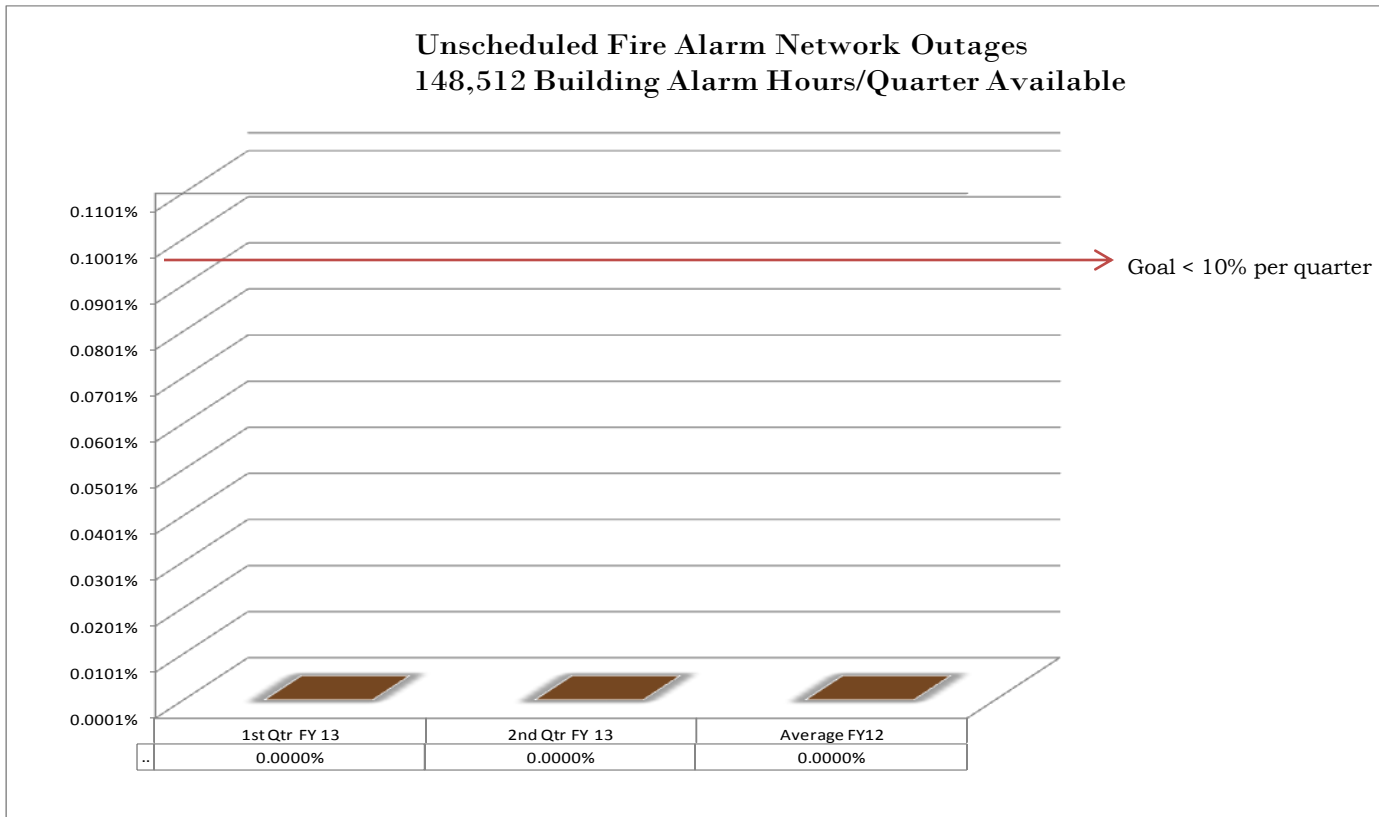**Balanced Scorecard Category:** Customer Perspective

Unscheduled High Voltage Electrical System Outages
148,512 Building Utility Hours/Quarter Available

Lead F. O.

STATUS

13

Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective

Unscheduled Fire Alarm Network Outages
148,512 Building Alarm Hours/Quarter Available

Goal < 10% per quarter

	1st Qtr FY 13	2nd Qtr FY 13	Average FY12
..	0.0000%	0.0000%	0.0000%

STATUS

14

Facilities Management Strategic Planning - Second Quarter FY 2013

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

Strategy   2.2   Improve Informal Project Design and Construction Process

Objective   2.2.1   95% of Projects Designed on Time
97.0% achieved for FY12 with 94.0% in the 4th Quarter

Objective   2.2.2   85% of Estimates for Informal Projects within +/- 10% of Actual
97.2% achieved for FY12 with 96.6% in the 4th Quarter

Objective   2.2.4   90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date
95.9% achieved for FY12 with 94.4% in the 4th Quarter

Objective   2.2.6   Increase Project Volume by 10 projects per year - Project Counts by Phase
100% achieved for FY12 (yearly goal only)

ACTION PLAN FOR IMPROVEMENT

Review and Implement process improvement updates based upon
four committee recommendations:

☐ Eliminate or Streamline Design Services Processes

☐ Improve Customer Surveys

☐ Improve Customer Meetings

☐ Improve HUB Usage - Increase African American Percentage

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

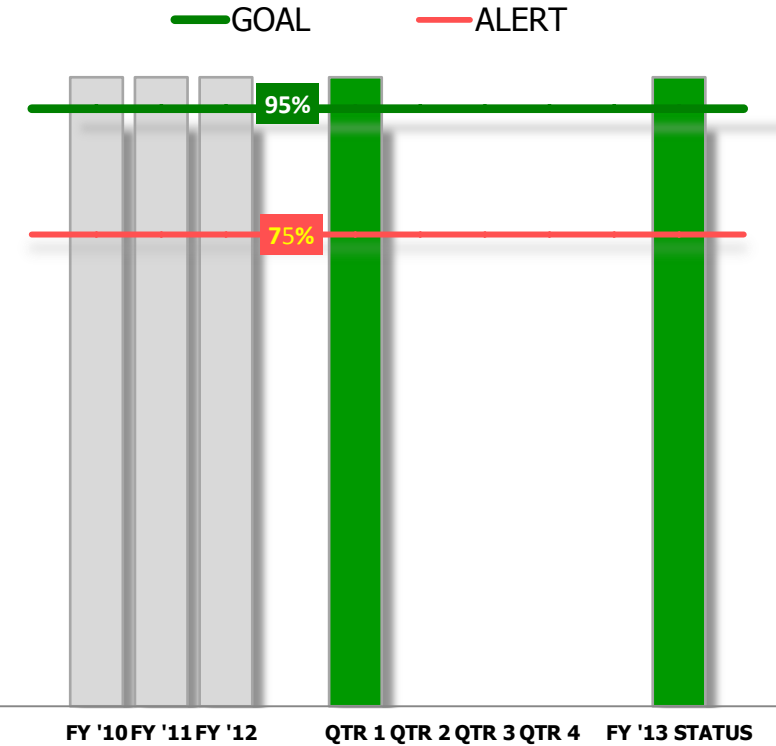| Strategy	2.2	Improve Informal Project Design and Construction Process
Objective	2.2.1	**95% of Projects Designed on Time**

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

Balanced Scorecard Category: Customer Perspective

Lead Design Services

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 '10	173	170	3	98.3%
FY '11	300	298	2	99.3%
FY '12	240	228	12	95.0%
QTR 1	29	29	0	**100.0%**
QTR 2	38	37	1	**97.4%**
QTR 3	0	0	0	**0.0%**
QTR 4	0	0	0	**0.0%**
FY '13 STATUS	67	66	1	**98.5%**
			GOAL:	**95.0%**

GOAL — ALERT

95%

75%

FY '10 FY '11 FY '12   QTR 1 QTR 2 QTR 3 QTR 4   FY '13 STATUS

GOAL 95.0%   **STATUS 100.0%**

16

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

Lead Design Services

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 '10	255	244	11	95.7%
FY '11	297	284	13	95.6%
FY '12	218	212	6	97.2%
QTR 1	32	32	0	**100.0%**
QTR 2	30	29	1	**96.7%**
QTR 3	0	0	0	**0.0%**
QTR 4	0	0	0	**0.0%**
FY '13 STATUS	62	61	1	**98.4%**

One project less 15% of estimate

GOAL: **85.0%**
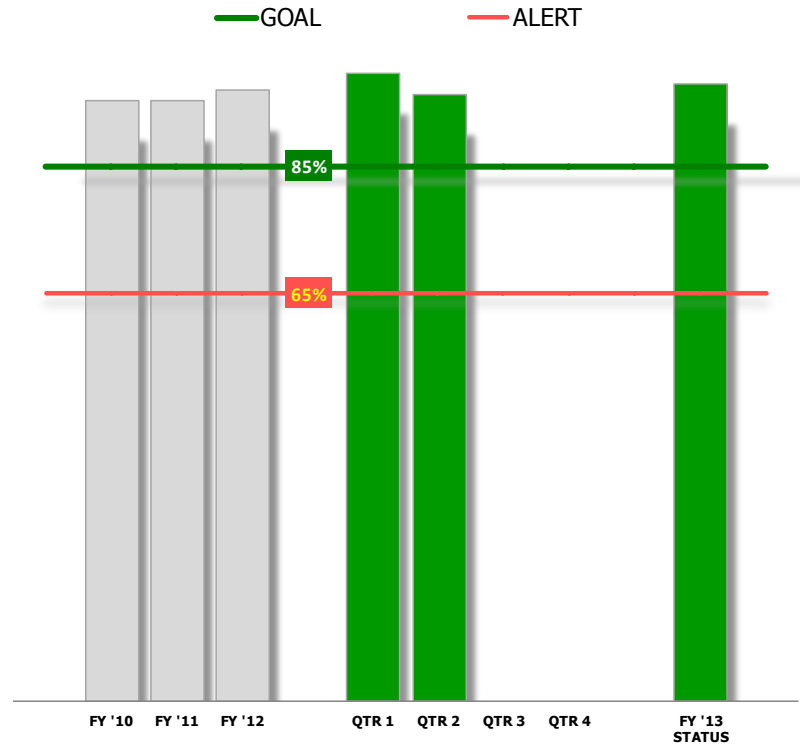
GOAL 85.0%

STATUS 100.0%

17

Facilities Management Strategic Planning Session – First Quarter FY 2013

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

Lead Design Services

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

QUARTERLY REVIEW	No. of Projects	No. that met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '10	182	164	18	90.1%
FY '11	297	289	8	97.3%
FY '12	240	216	24	90.0%
QTR 1	32	32	0	100.0%
QTR 2	45	45	0	100.0%
QTR 3	0	0	0	0.0%
QTR 4	0	0	0	0.0%
FY '12 STATUS	77	77	0	100.0%

GOAL: **90.0%**

GOAL — ALERT

90%

70%
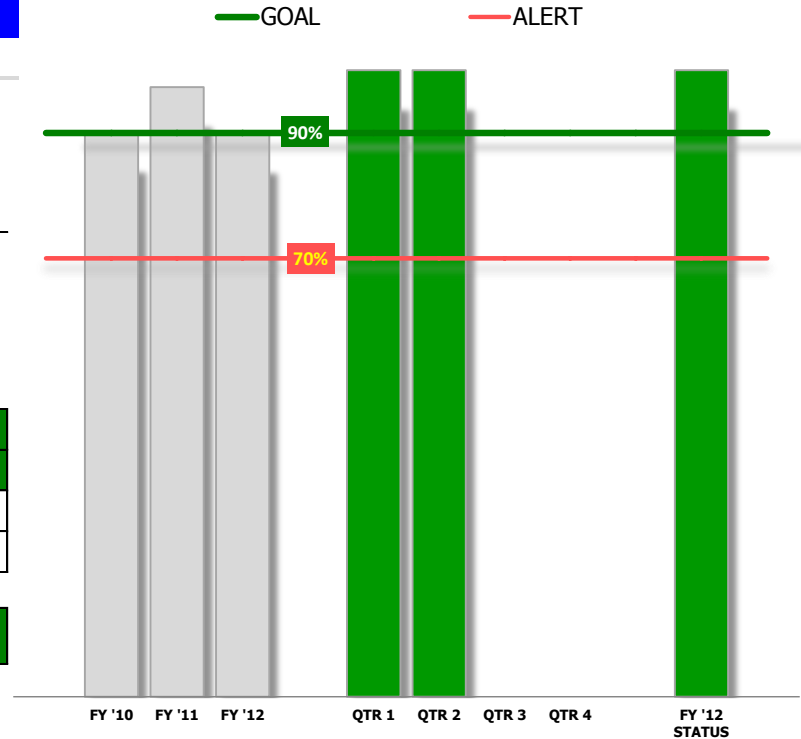
GOAL 90.0%	STATUS 100.0%

18

This slide reserved for 2.2.6 annual graph report

Increase Project Volume by 10 Projects Per Year

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

<div style="text-align:right">

**Lead
FBO**

</div>

ACTION PLAN

❑ Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers.

❑ Development of a Communications Strategy recommendation underway.
    ❑ Web Advisory Group (WAG) has been formed to address customer usability, design and university compliance of FM entire website.
    ❑ Research and visitations of other peer institution Communication Offices for learning opportunities, processes, challenges, pitfalls, etc.
    ❑ External customer and internal employee Environmental Scan underway. Summary to be presented within next several weeks.
    ❑ Increase external publicity (i.e. UNC Charlotte Magazine, Observer)

❑ Review processes and procedures from the Business and HR side
    ❑ Concerns continue to surface regarding the impact of new technology on processes/procedures. Examples are People Admin and 49er Mart.
    ❑ Review (lean) Time Sheet Processing. Processes have been mapped. **Project on hold** due to new university initiative?

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 Planned

    1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.

    2 – Ensure that Zones are checking BAS and monitoring conditions

    3 – Continue to develop controls section and cross train with Zones.

    4 – Continue to work with Capital to get buildings commissioned and retro commissioned.

    5 – Ensure that we are following UNCC Temperature Control Policy

**Facilities Management Strategic Planning Session – Second Quarter FY 2013**

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 FY12 Average of 174 (Goal < 133)

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

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective
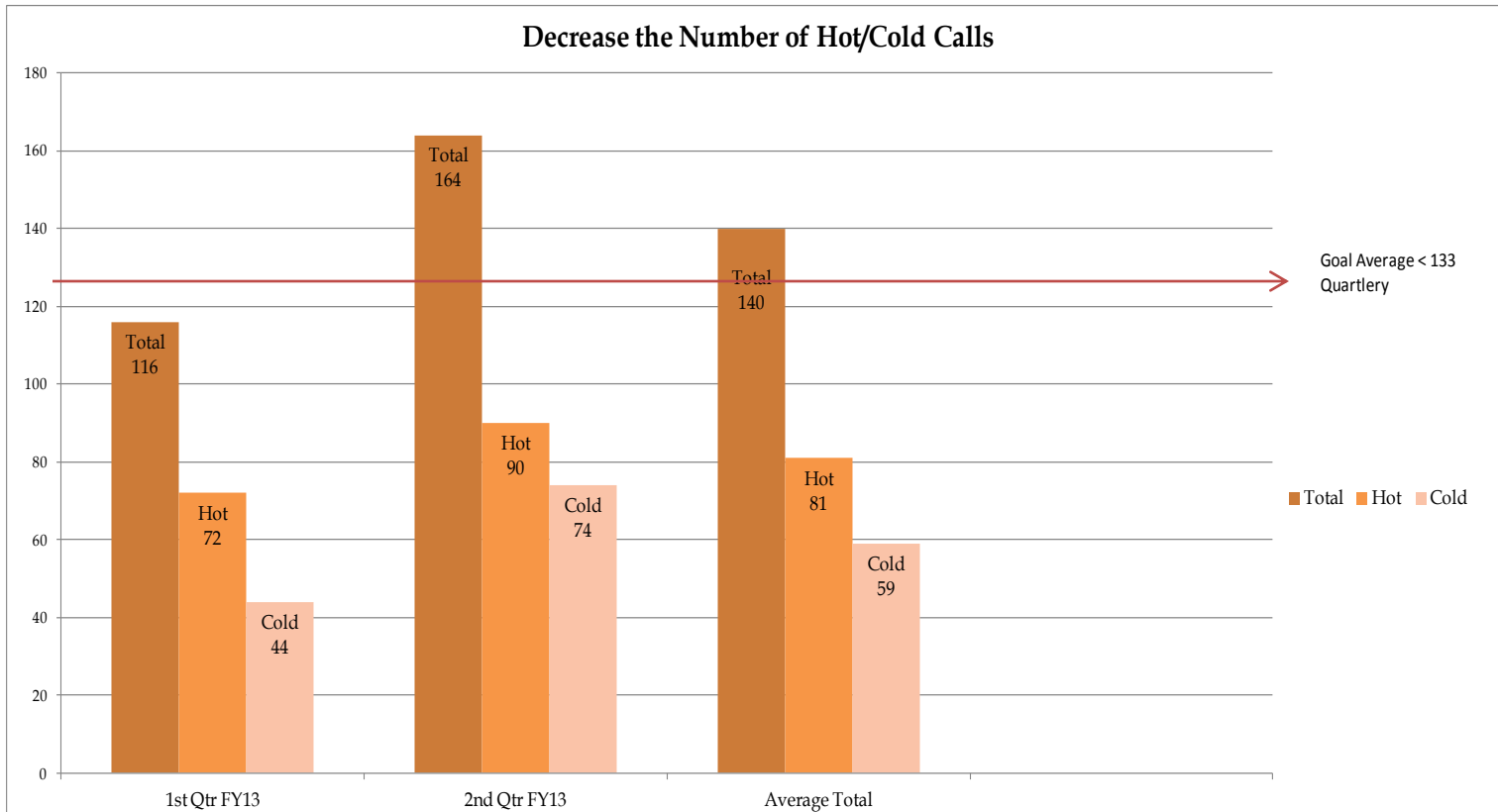
This slide reserved for 4.1.4 Informal Projects
Customer Satisfaction Survey

Customer Surveys are under review for improvement.
(see Action Plan for Improvement – Goal #2)

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.
Objective 6.1.2	Increase Grants and Supplemental Funding to the Department by 25%
Objective 6.1.3	Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

❑ Budget for Facilities Management will not be received until October 2012. Upon receipt, allocation plan will be created for review and approval by AVC-FM. A major challenger this year will be how to fund the $150,000 request for training. FBO is reviewing potential strategies to obtain a solution.

❑ The Labor Services fund balance continues to be negative. Business Office is working with FO to identify potential leaks;

❑ The development of a FM Budgeting Basics Training program is underway. Section 1 (FM Budgeting 101) is complete. Program skeleton is under development; It is expected that there will be several sections, each targeted to specific areas, actions, etc. For example, Sherry Ceallaigh will create the section for Capital Finance. The entire training program will not be completed until at least August 2013.

❑ Continue to work through accounting issues such as use of account codes, receiving, after the fact vs. non-compliant requisitions, etc. Send reminders to responsible parties. Review cost accounting centers in preparation for future reporting requirements.

❑ Improve communication with the Controller's Office, the Budget Office and FM (Capital, Design Services and Real Estate/Land Use). Meetings are underway to develop guidelines for Financial Statement reporting and Fixed Assets concerns.

❑ Boast effort to locate external funding opportunities that align with FM's strategic vision, mission and goals;

25

Facilities Management Strategic Planning Session – Second Quarter FY 2013
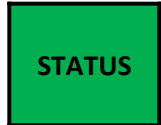
GOAL #6 – Promote Good Stewardship

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:

ACCOUNT DESCRIPTION	2012-13 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F	
OVERTIME AND PREMIUM PAY	$ 300,000	7%	$ 148,661	$ 151,339	$ 300,000	$ -	$ -	F
STUDENT AND TEMPORARY WAGES	$ 130,000	3%	$ 19,141	$ -	$ 19,141	$ 110,859	$ 110,859	F
PERSONAL SERVICE CONTRACTS	$ 100,750	2%	$ 652	$ 1,514	$ 2,166	$ 98,584	$ 98,584	F
CORPORATE SERVICES CONTRACTS (Srv Agr)	$ 870,693	21%	$ 333,040	$ 361,060	$ 694,100	$ 176,593	$ 176,593	F
OTHER ADMINISTRATIVE EXPENSES	$ 81,500	2%	$ 99	$ 18,700	$ 18,799	$ 62,701	$ 62,701	F
DOMESTIC TRAVEL/TRAINING	$ 100,000	2%	$ 44,151	$ 1,262	$ 45,413	$ 54,587	$ 54,587	F
FIXED PURCHASED SERVICES (Maint Agr)	$ 266,168	7%	$ 105,809	$ 91,692	$ 197,501	$ 68,666	$ 68,666	F
OTHER PURCHASED SERVICES	$ 272,000	7%	$ 100,225	$ 28,531	$ 128,756	$ 143,244	$ 143,244	F
SUPPLIES	$ 1,526,978	37%	$ 782,395	$ 103,953	$ 886,348	$ 640,630	$ 640,630	F
EQUIPMENT/IT	$ 352,497	9%	$ 106,787	$ 49,051	$ 155,838	$ 196,659	$ 196,659	F
CAPITAL OUTLAY	$ 5,000	0%	$ -	$ -	$ -	$ 5,000	$ 5,000	F
FIXED CHARGES	$ 29,181	1%	$ 12,602	$ -	$ 12,602	$ 16,579	$ 16,579	F
RECYCLING	$ 37,515	1%	$ 26,413	$ 24	$ 26,437	$ 11,078	$ 11,078	F
FACILITIES MANAGEMENT Main Operating Funds	4,072,281		1,679,975.55	807,125.18	2,487,100.73	1,585,180.17	$ 1,585,180	

<div style="background:green; color:white;">STATUS</div>

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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
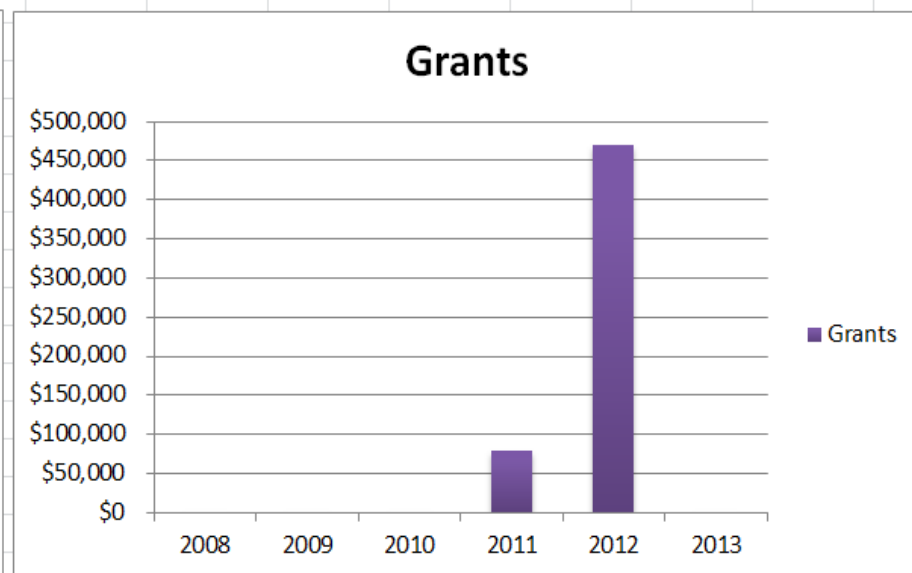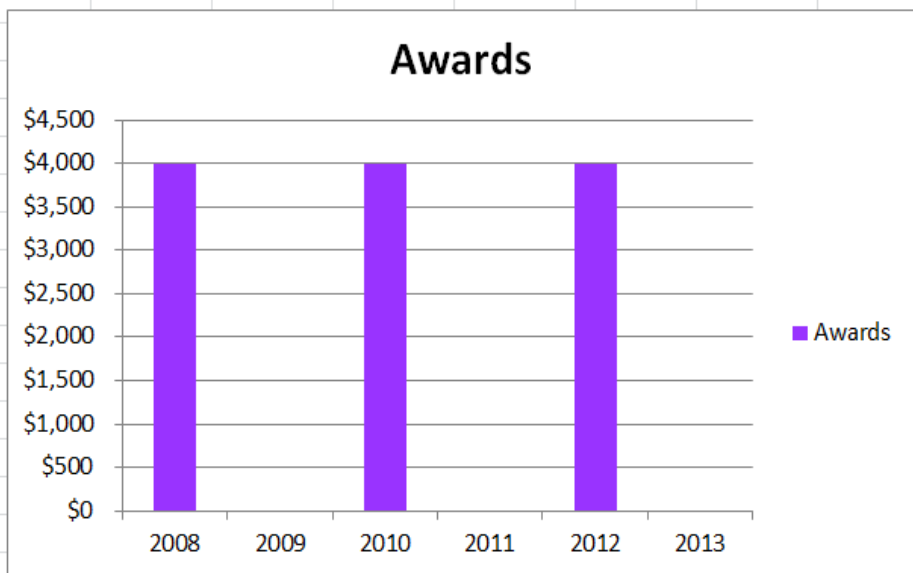
Lead
FBO

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead FBO

STATUS - HOLD

28
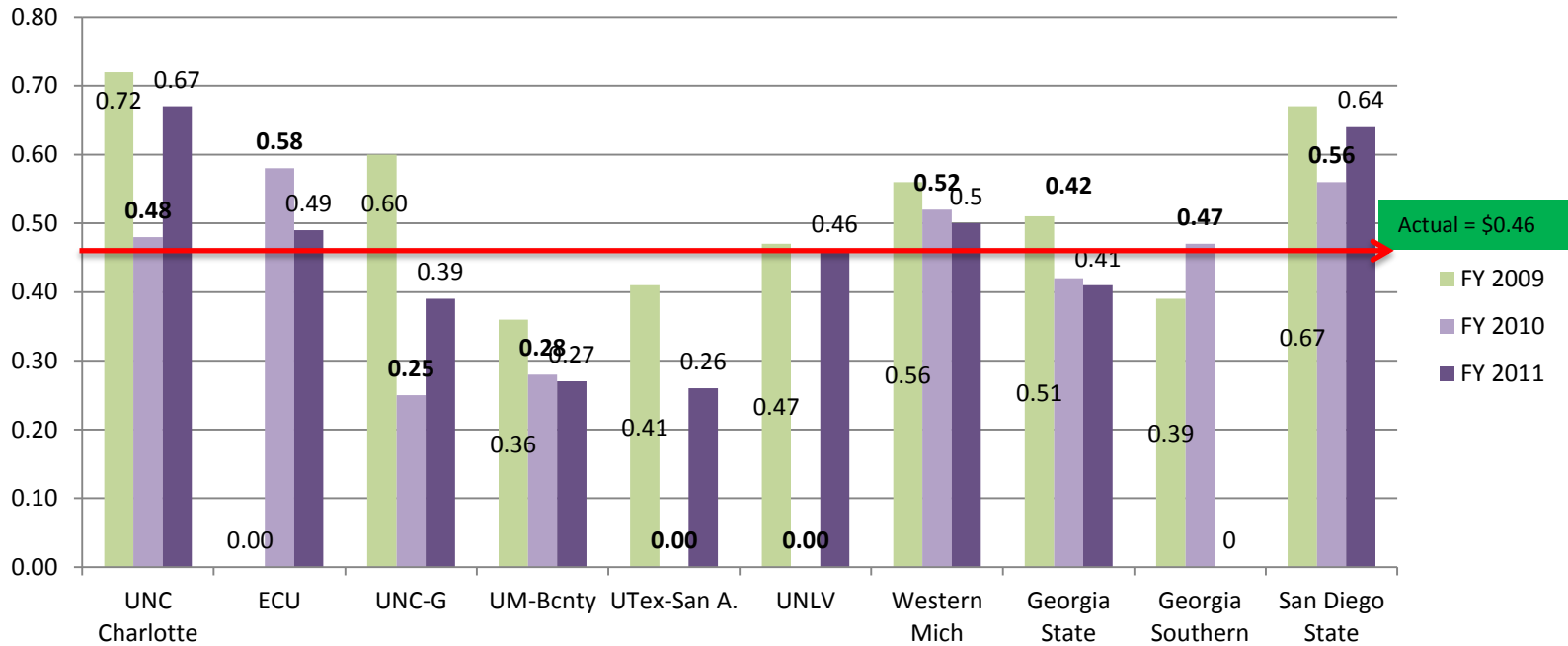
GOAL #6 – Promote Good Stewardship

Strategy	**6.1**	Promote Fiscal Responsibility
Objective	**6.1.5**	Achieve Total Maintenance Cost/GSF to 5% below the APPA Southeast Region Average
	6.1.6	Achieve Total Landscape Cost/Acre 5% below the APPA Southeast Region Average
	6.1.7	Exceed Labor Services Payroll requirements by 10%

ACTION PLAN

- Actions Planned

  1 – Make sure that data submitted is correct.

  2 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.

  3 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.

  4 – Utilize UPA to help identify when falling behind in data entry

Facilities Management Strategic Planning Session – Second Quarter FY 2013

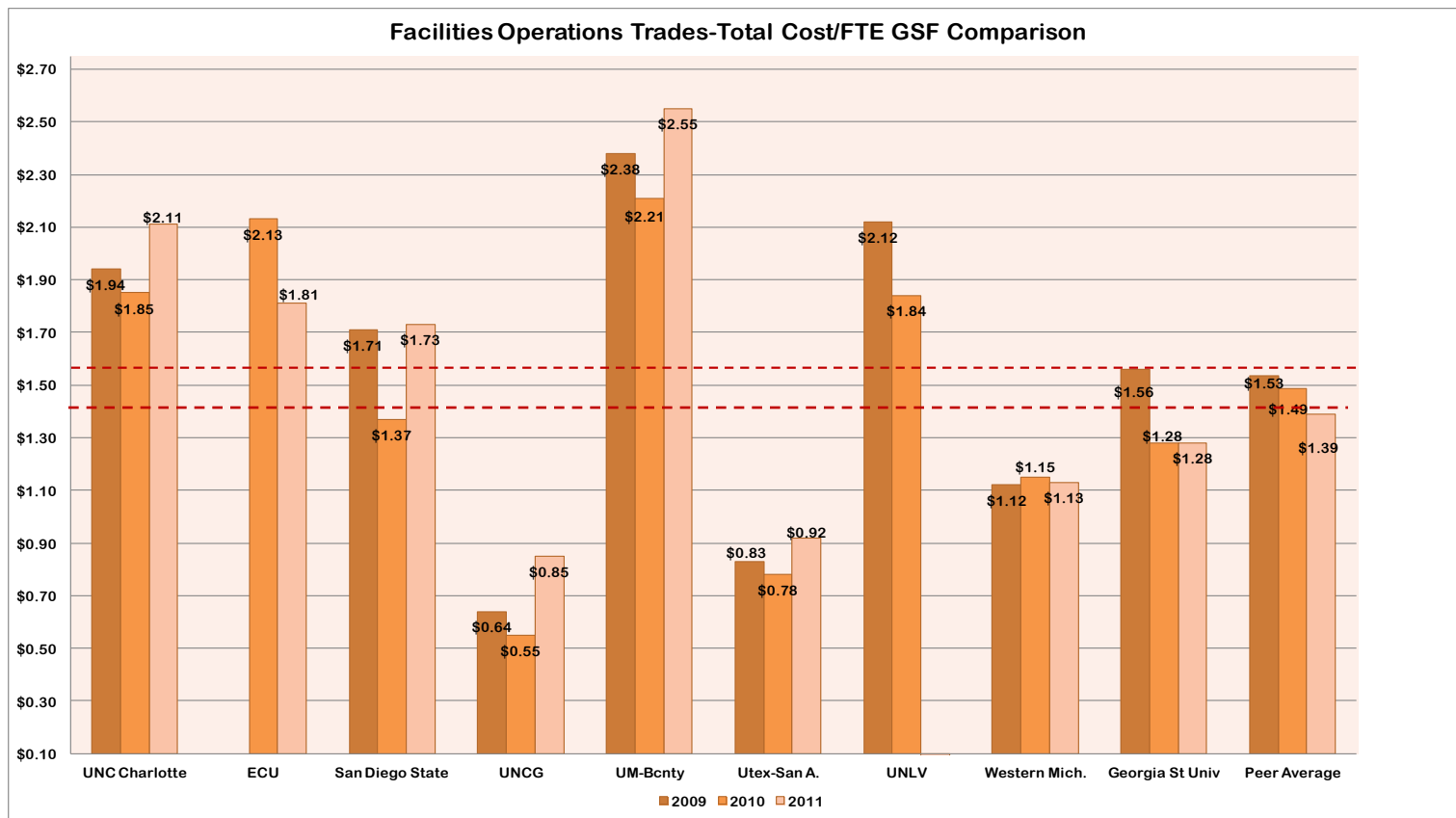**GOAL #6 – Promote Good Stewardship**

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

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

Balanced Scorecard Category: Financial Perspective

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

Lead F. O.

STATUS

Facilities Operations Trades-Total Cost/FTE GSF Comparison

30

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #6 – Promote Good Stewardship

Strategy	**6.1**	Promote Fiscal Responsibility
Objective	**6.1.6**	Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group

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

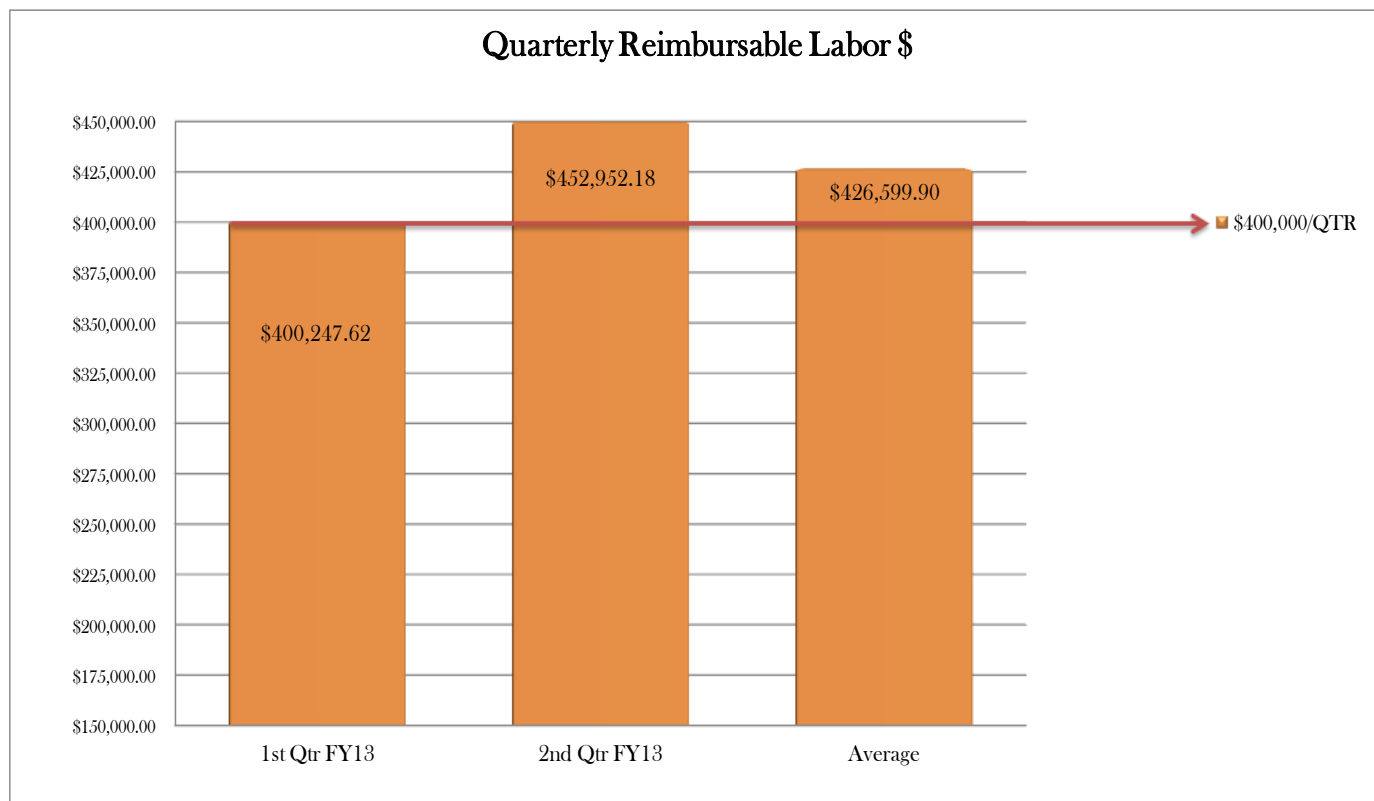**Balanced Scorecard Category:** Financial Perspective

Lead F. O.

STATUS

31
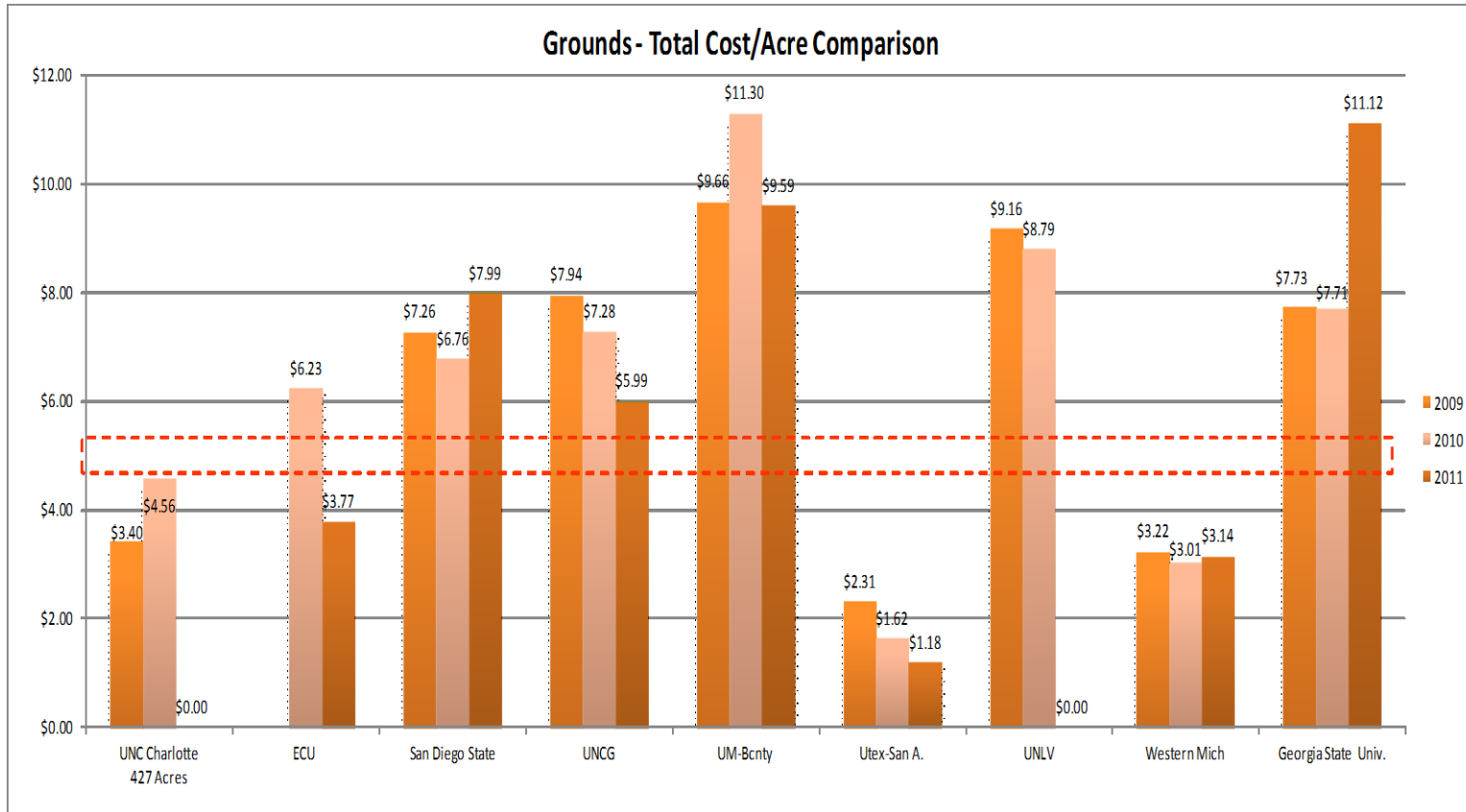
GOAL #6 – Promote Good Stewardship

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

Lead F. O.

STATUS

Quarterly Reimbursable Labor $

- 1st Qtr FY13: $400,247.62
- 2nd Qtr FY13: $452,952.18
- Average: $426,599.90
- $400,000/QTR

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

Lead Recycling

ACTION PLAN

- Actions Complete

  - New waste contract is in effect – under this contract, our C&D rolloffs will be hauled to a facility that will try to sort materials.

  - All campus buildings built after 1984 have been approved for ceiling tile recycling through Armstrong's program

  - Residence Life has signed contract with Mattress Go Round – this should help keep mattresses from being put in our C&D bins.

- Actions Planned

  - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.

  - Continue working on ceiling tile recycling – get approval for older buildings that have been abated and work on a roll-off option for recycling smaller projects.
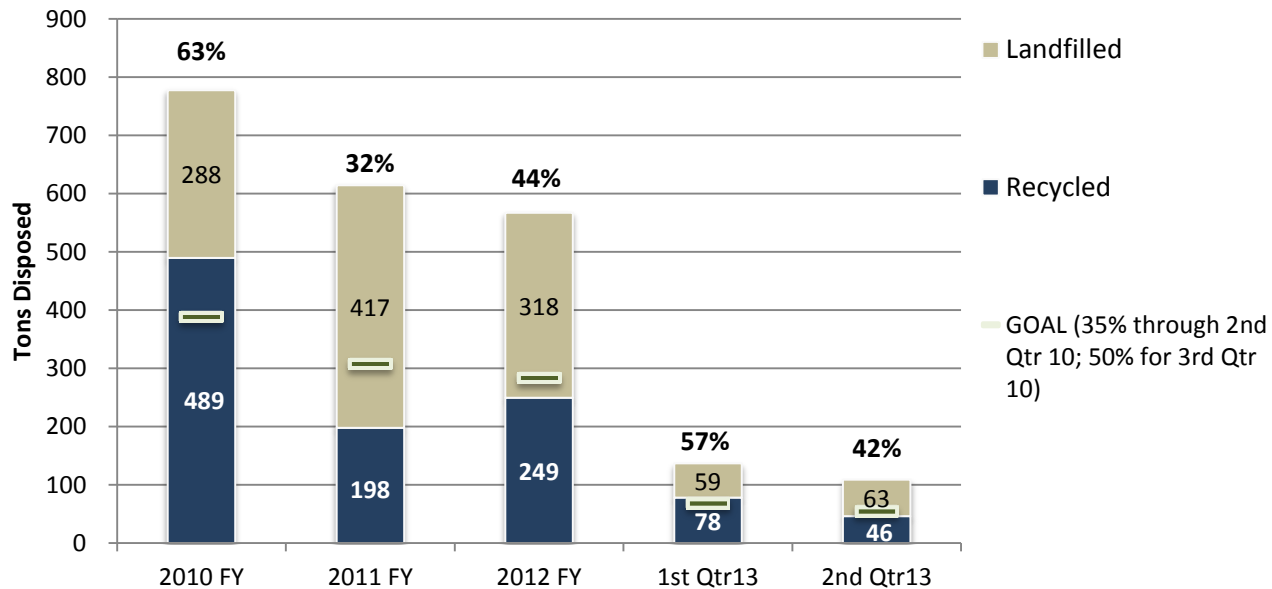
GOAL #6 – Promote Good Stewardship

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

Lead
Recycling

Informal Projects - Materials Disposed
2nd Qtr FY13

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

Lead Recycling

ACTION PLAN

- Actions Complete
  - 50% recycling standard is in the Design Manual as a requirement.

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

GOAL #6 – Promote Good Stewardship

Strategy	**6.2**	Develop a Sustainable Campus
Objective	**6.2.2**	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

Lead
Recycling

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 33% (all totals are not in)** , 36% (all totals are not in) **for the year**
    - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
        - Fall Campus Clean UP, Sustainability Week, provide tours and presentations across campus, presented at conferences
        - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees

- **2nd Quarter Actions Planned**
    - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
        - Spring Campus Clean UP, EARTH DAY Festival, provide tours and presentations across campus
        - Waste audits for campus to determine amount of recyclables in waste stream
    - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees
    - Assist Brian Guns and NC APPA for the 2013 NC APPA conference at UNC Greensboro
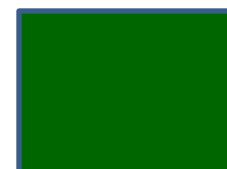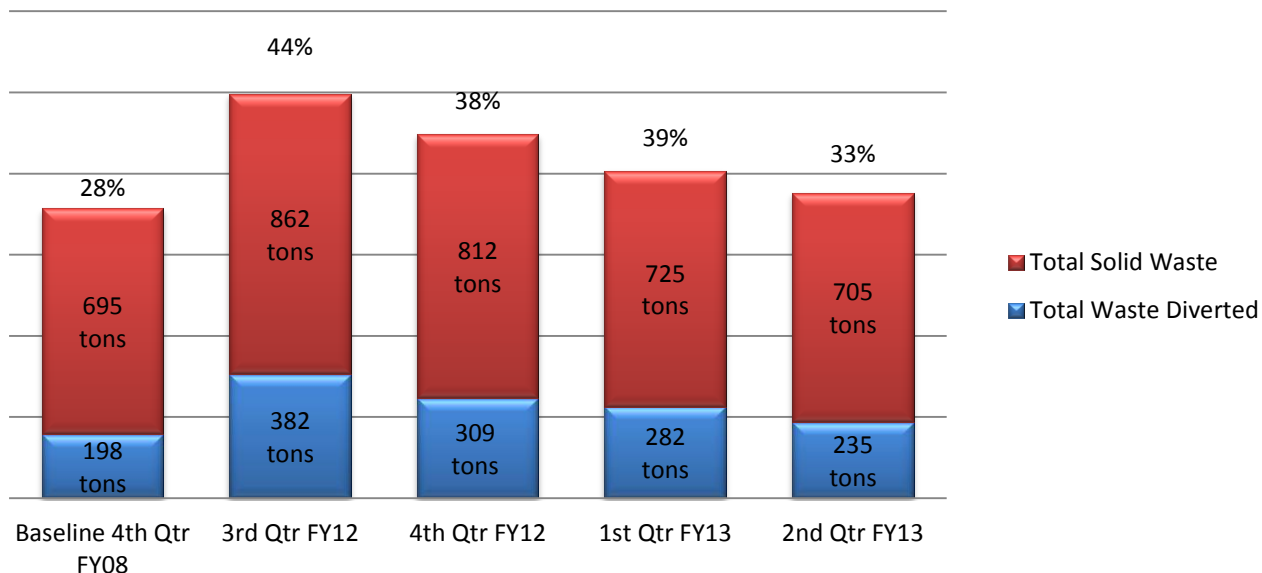
GOAL #6 – Promote Good Stewardship

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

Lead Recycling

Breakdown of Solid Waste

Quarter	Total Solid Waste	Total Waste Diverted	Percent
Baseline 4th Qtr FY08	695 tons	198 tons	28%
3rd Qtr FY12	862 tons	382 tons	44%
4th Qtr FY12	812 tons	309 tons	38%
1st Qtr FY13	725 tons	282 tons	39%
2nd Qtr FY13	705 tons	235 tons	33%

■ Total Solid Waste
■ Total Waste Diverted

GOAL #6 – Promote Good Stewardship

Strategy   6.2   Develop a Sustainable Campus

Objective   6.2.4   Implementation of sustainability plan actions

ACTION PLAN

STARS Focus Areas

- Category 1: Education & Research (ER)
  – Co-Curricular Education
  – Curriculum
  – Research
- Category 2: Operations (OP)
  – Buildings
  – Climate
  – Dining Services
  – Energy
  – Grounds
  – Purchasing
  – Transportation
  – Waste
  – Water

- Category 3: Planning, Admin. & Engagement (PAE)
  – Coordination and Planning
  – Diversity and Affordability
  – Human Resources
  – Investment
  – Public Engagement
- Category 4: Innovation (IN)

GOAL #6 – Promote Good Stewardship

Strategy   6.2   Develop a Sustainable Campus

Objective   6.2.4   Implementation of sustainability plan actions

ACTION PLAN

- Campus Sustainability Report
- CAP implementation
- Eco-reps
- Survey
- Revolving Loan
- Campus Energy summit planning
- Building performance paper

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #6 – Promote Good Stewardship
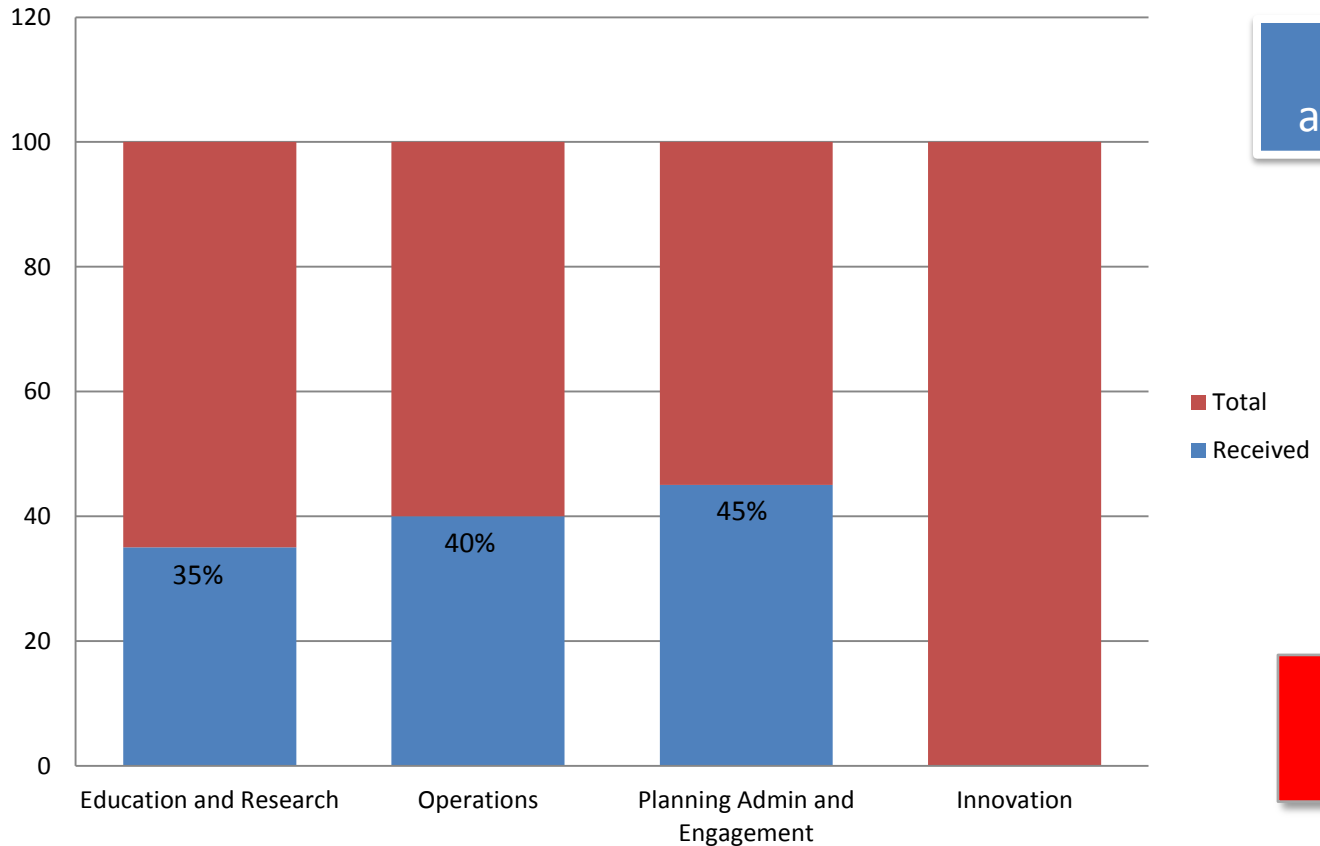
Strategy   6.2   Develop a Sustainable Campus

Objective   6.2.4   Achieve 60% of STARS credits

Measure: Number of points completed in each category.

Balanced Scorecard Category: Financial Perspective

STARS Credits

30%
average

- Total
- Received

Status

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

Lead Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

STATUS

- Pursue lighting retrofits in buildings that still have T-12's

  - GA goal to kick off lighting only PC Construction by calendar year end

- Continue retro-commissioning program

- Upgrade BAS to enable setbacks

- Energy efficient equipment upgrades

- Get Performance Contract into construction

- Exterior Lighting upgrades to LED

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #6 – Promote Good Stewardship

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

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Lead Capital

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF
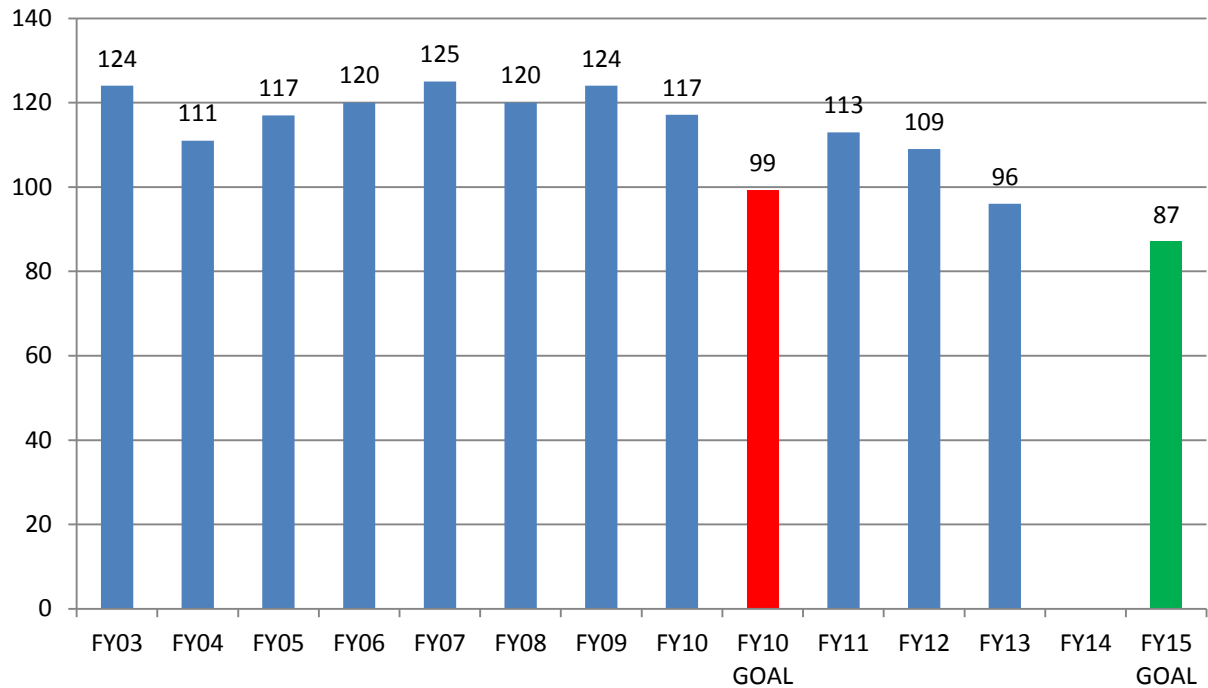
State Mandate
(Base Year FY 2003)

20% Reduction by FY 2010
30% Reduction by FY 2015

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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

Lead Capital

STATUS

Still need to reduce water usage to help preserve valuable resources

FY 10 Goal

FY03	FY04	FY05	FY06	FY07	FY08	FY09	FY10	GOAL	FY11	FY12	FY13
54	40	36	36	32	34	29	32	43	34	34	26

Strategy   **6.5**   Improve Historically Underutilized Business (HUB) Participation
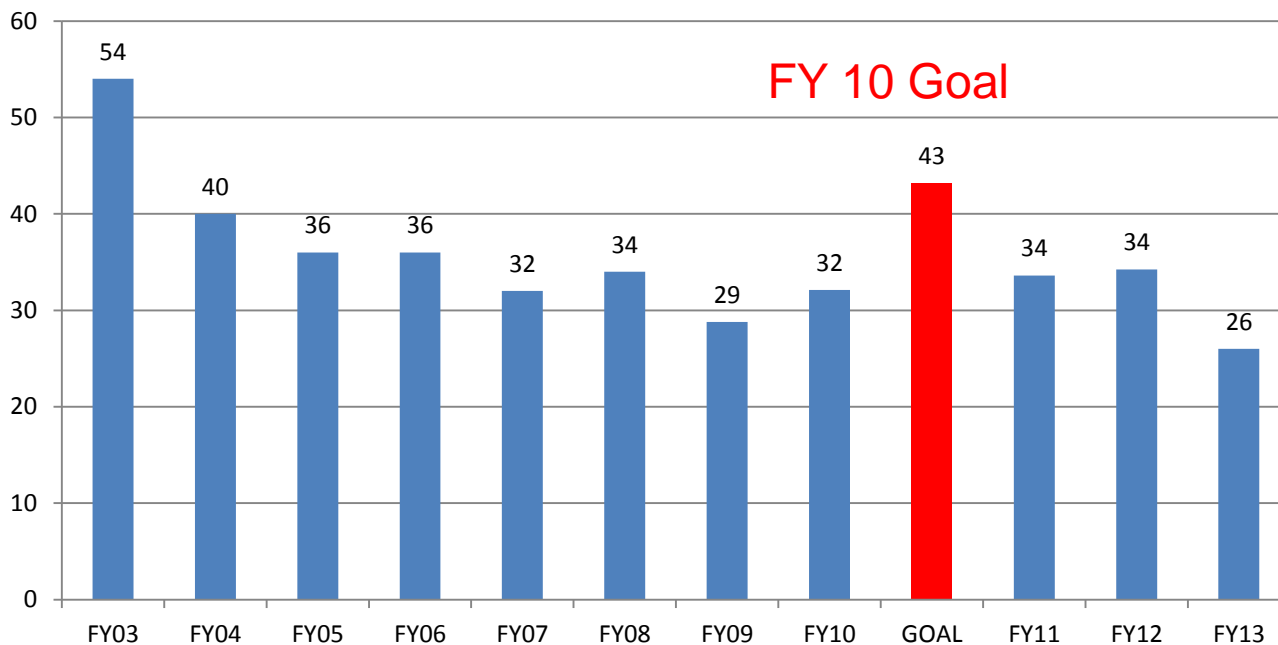
ACTION PLANS FOR IMPROVEMENT

Objective 6.5.3 – Encourage Purchasing to establish a goal for African American participation

Continue –

- Work with University staff/GCs/agencies/organizations, etc. to identify and promote utilization of HUB firms

- Encourage participation in all ethnic segments

- Work with CM firms in review of 1st Tier Subcontractors MBE Affidavits and "*Good Faith Effort*" documentation to ensure compliance. Hold CM firms accountable!
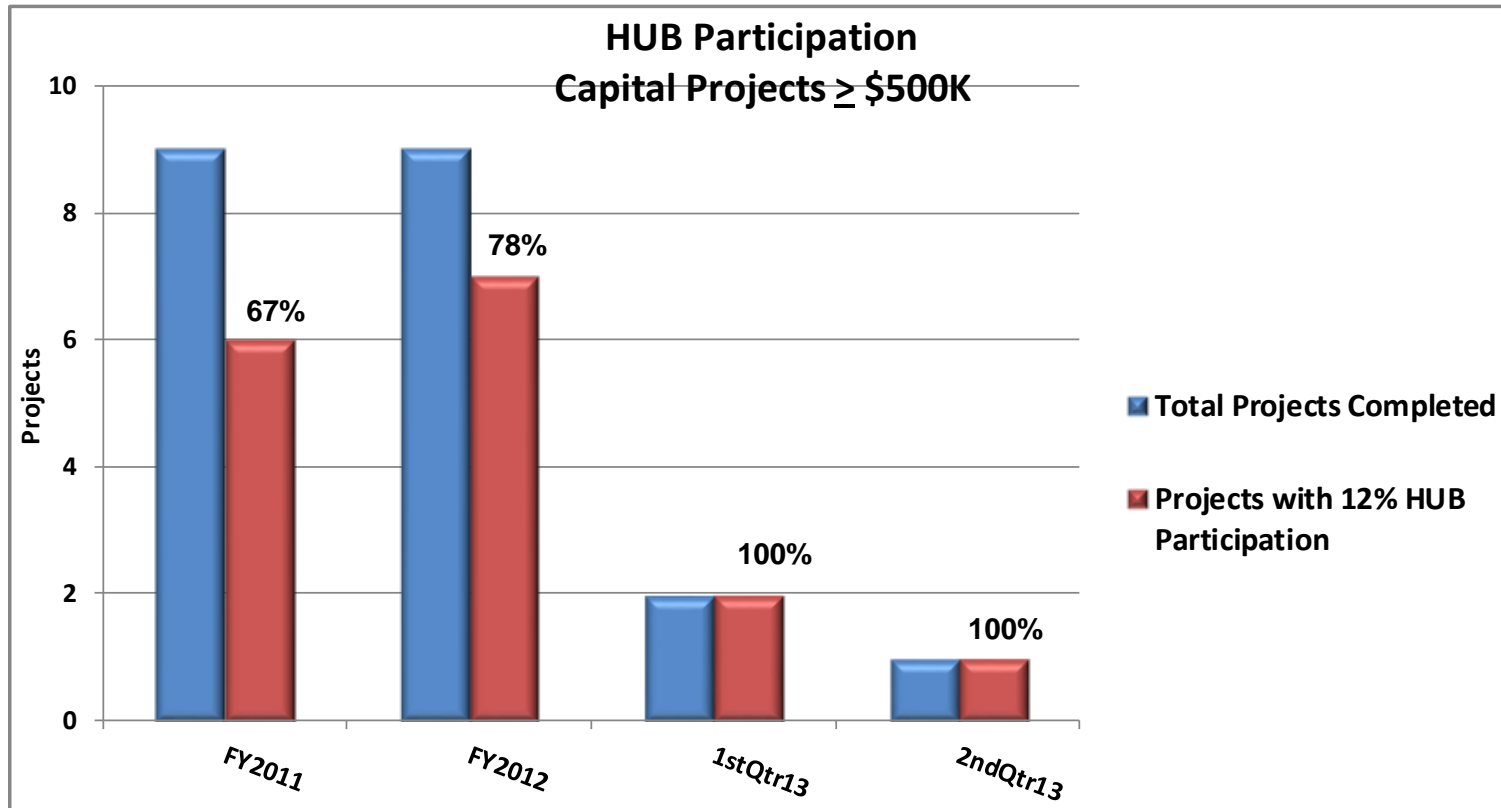
- Program Compliance

- Education & Outreach

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: Number of Individual Capital Projects achieving 12% HUB participation divided into Total Projects Completed

Balanced Scorecard Category: Financial Perspective

Lead Capital

Football Complex – 20.95%

2ndQtr STATUS

FY2013 STATUS

Lead Capital

GOAL #6 – Promote Good Stewardship

Strategy	**6.5**	Improve African American Participation on Capital Projects
Objective	**6.5.2**	3% overall African American Participation on Capital Projects $500K and above

Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars

**Balanced Scorecard Category:** Financial Perspective
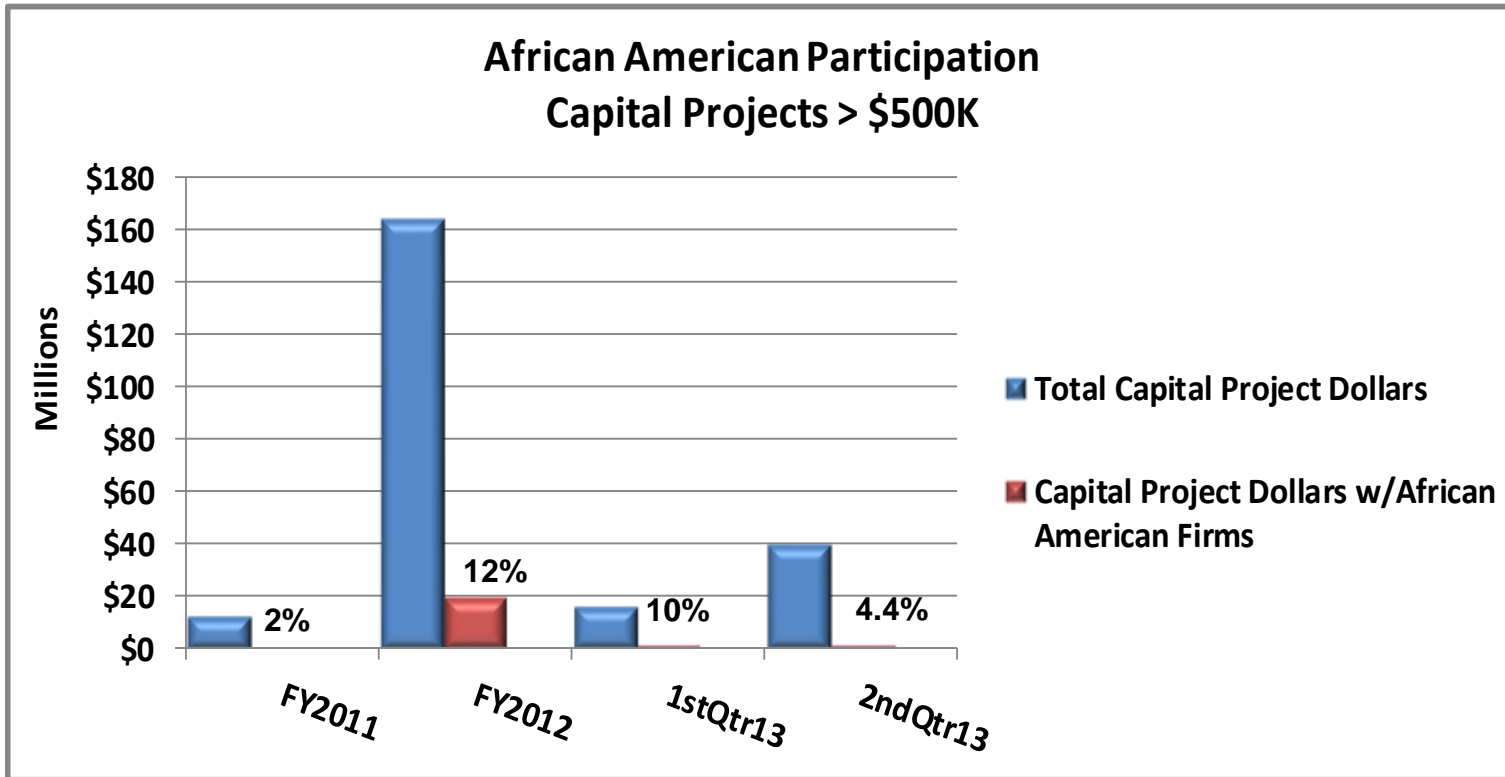
2ndQtr STATUS

FY2013 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 contracts $30,000 and above

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

Balanced Scorecard Category: Financial Perspective

Lead Capital
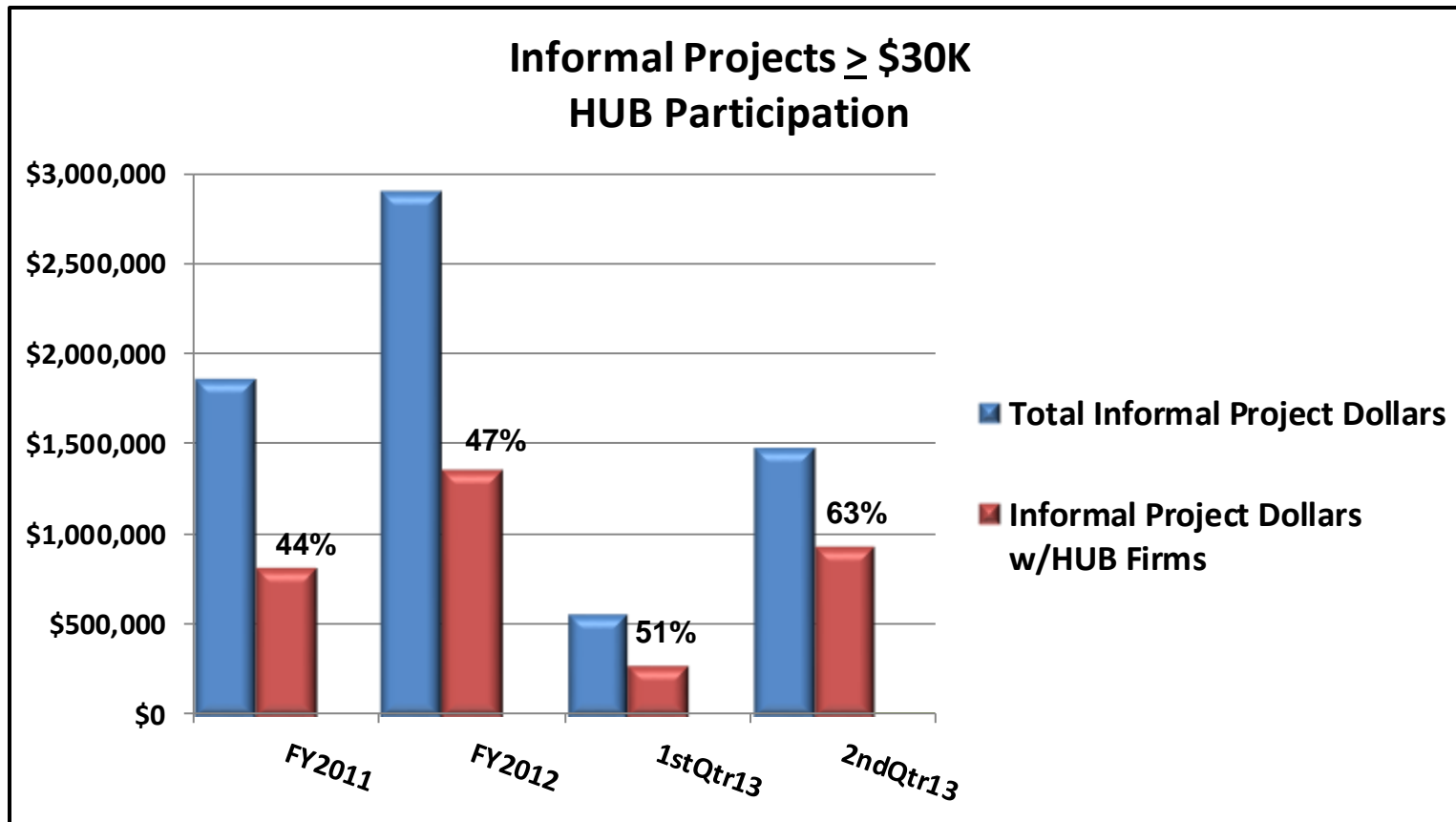
2ndQtr STATUS

FY2013 STATUS

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

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 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.

        c) Get supervisors to spot check employees and review white sheets in detail

    2 - Get employees out of the shop

    3 - Adjust goal to 70% (more realistic).

    4 - Utilize EDA's for more accurate data.

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process

Wrench Time

- 1st Qtr FY13: 74.4%
- 2nd Qtr FY13: 48.6%
- Average (year-to-date): 55.6%
- Goal > 80% for year
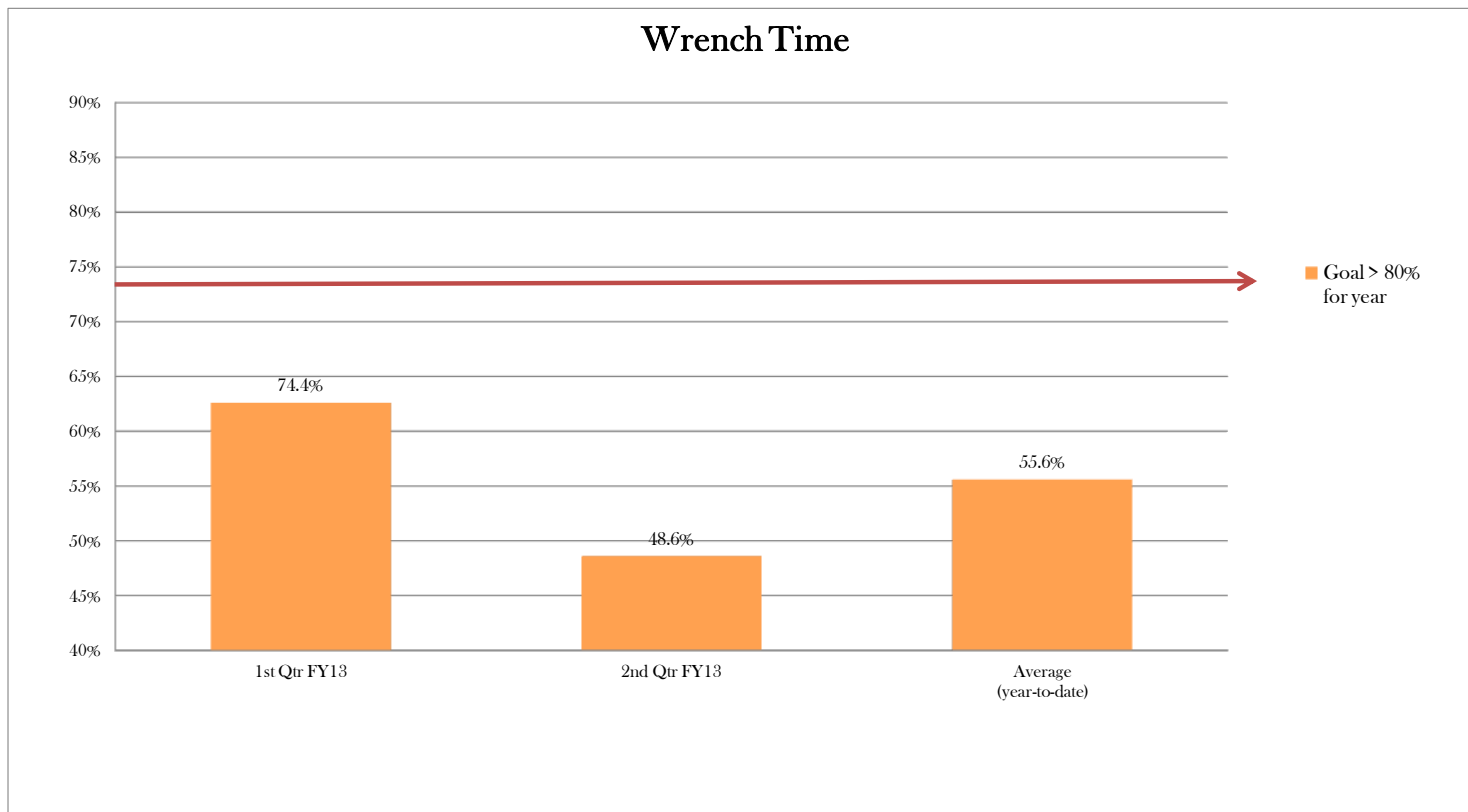
STATUS

GOAL #1 – Improve Facilities Operations

Strategy: **1.2** Improve Logistics Efficiency
Objective: **1.2.1** Improve Stock Fill Rate to 97%
Objective: **1.2.2** Reduce Average Non-stock Requisition to Receipt Time to 4.0 Days

Lead
F. O.

ACTION PLAN

- Actions Planned

    1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of "zero" but pre-sourced for faster ordering and delivery).

    2 – Specifically track long lead items and spikes in usage (historically the main causes for inability to fill).

    3 – Continue to monitor and reduce Req to PO processing time; send out daily reminders

    4 – Continue to send out daily reminders for approvals.

    5 – Understand challenges in working around holiday break.

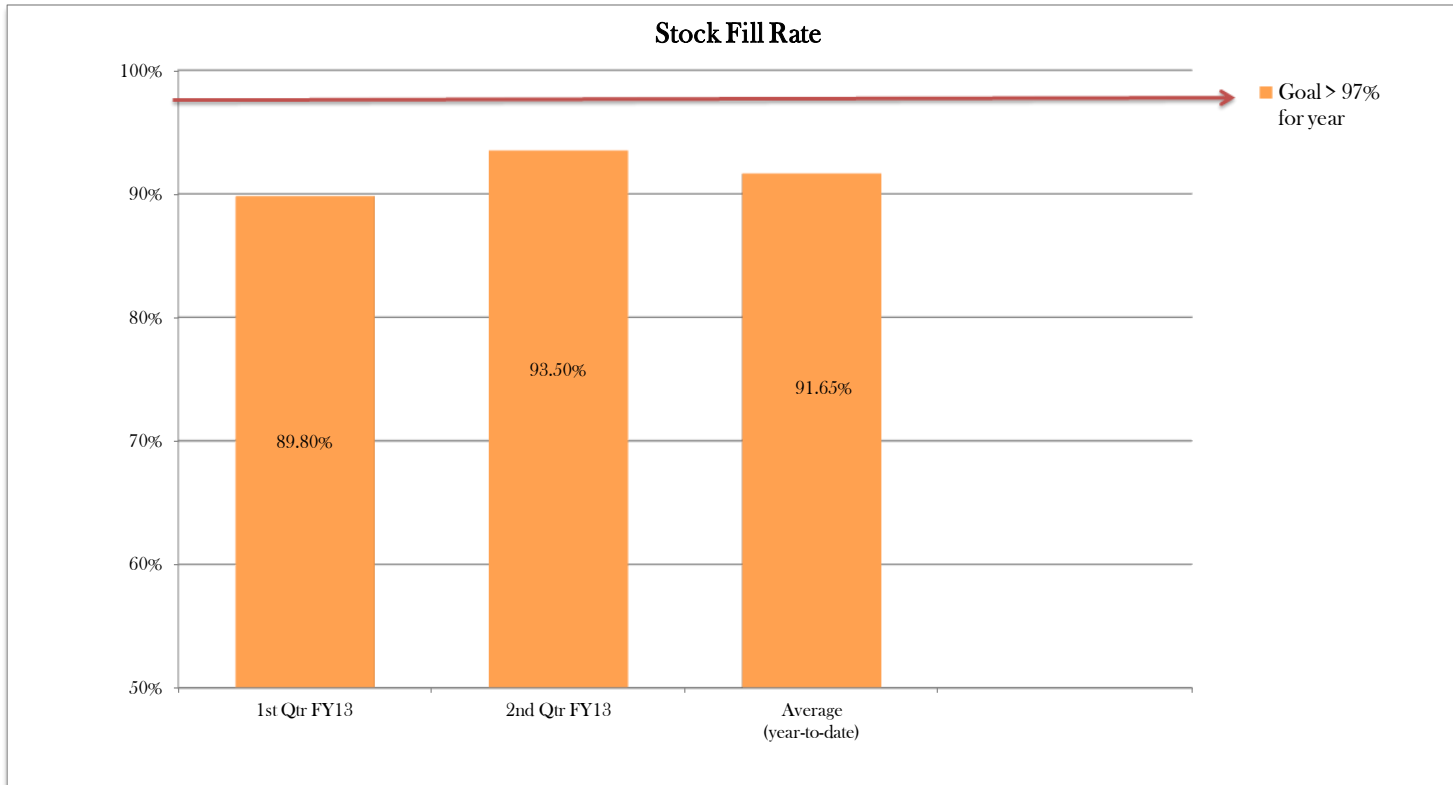**Facilities Management Strategic Planning Session – Second Quarter FY 2013**

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process

Lead F. O.

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2013

GOAL #1 – Improve maintenance and operations of the Campus
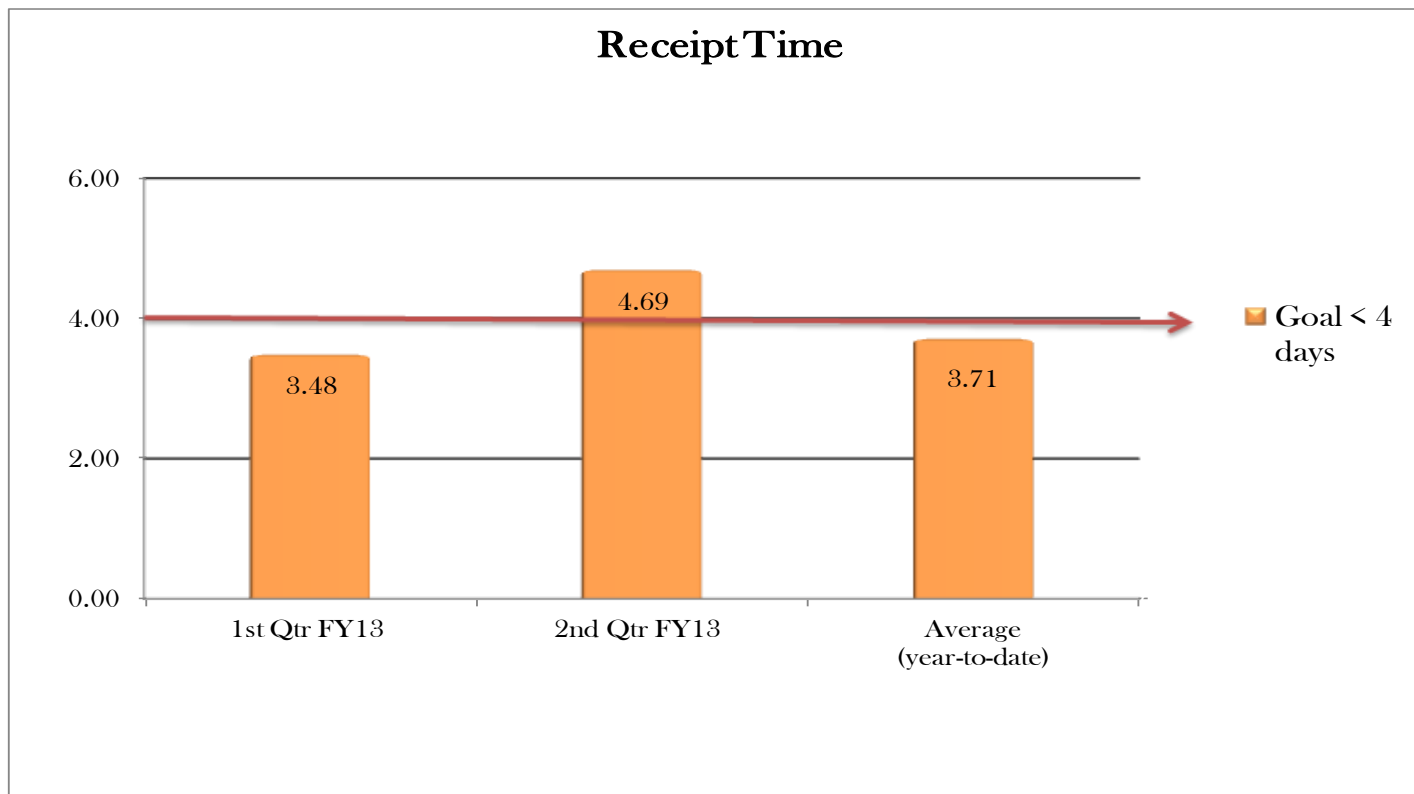
Strategy:　　　**1.2**　　　　　Improve Logistics Efficiency
Objective:　　　**1.2.2**　　　　Reduce Average Non-stock Requisition to Receipt Time to less than 4.0 Days

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

Lead
F. O.

STATUS

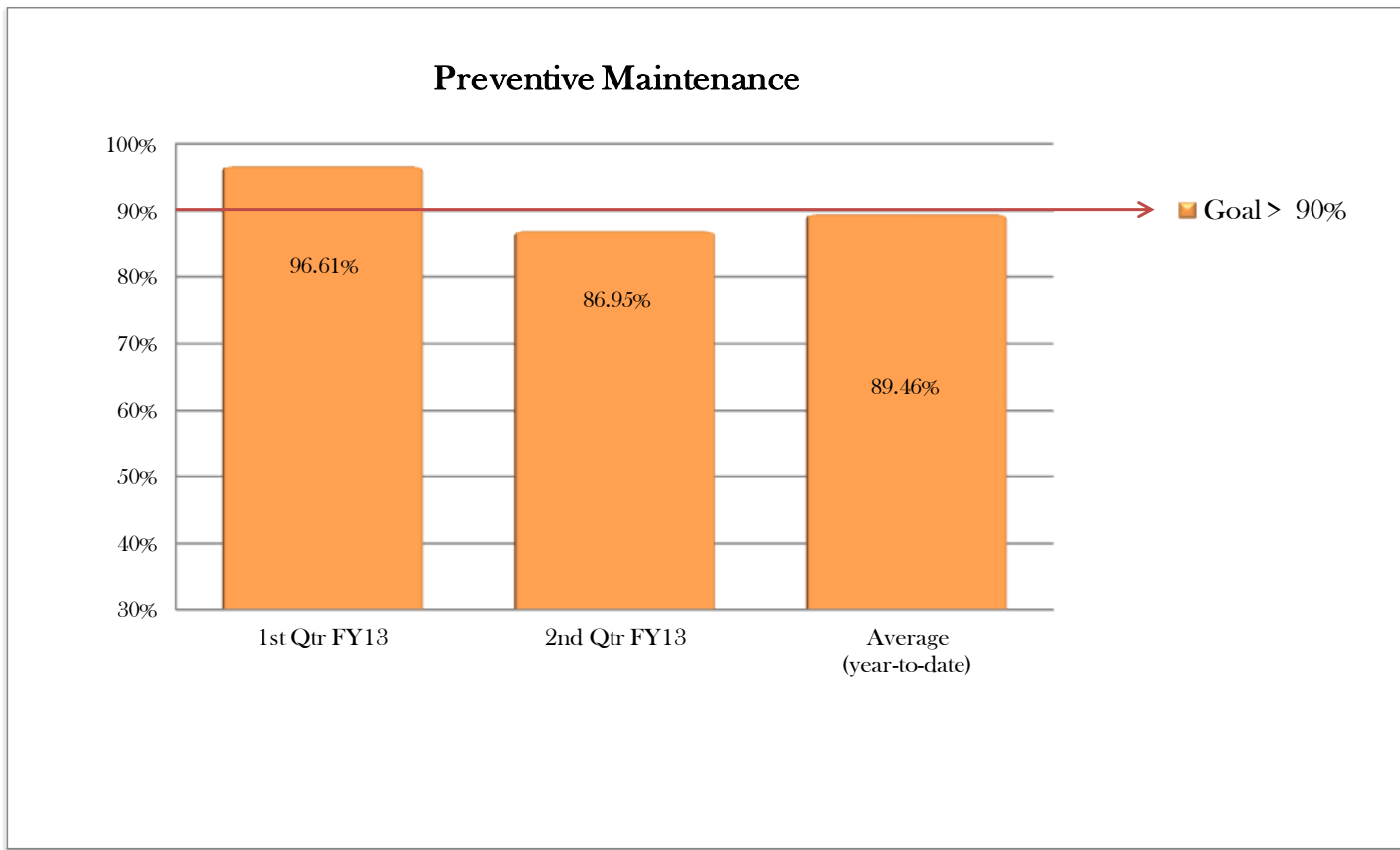**Facilities Management Strategic Planning Session – Second Quarter FY 2013**

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process

Preventive Maintenance chart: 1st Qtr FY13 = 96.61%, 2nd Qtr FY13 = 86.95%, Average (year-to-date) = 89.46%. Goal > 90%.

Lead
F. O.

STATUS

55

Facilities Management Strategic Planning Session – Second Quarter FY 2013
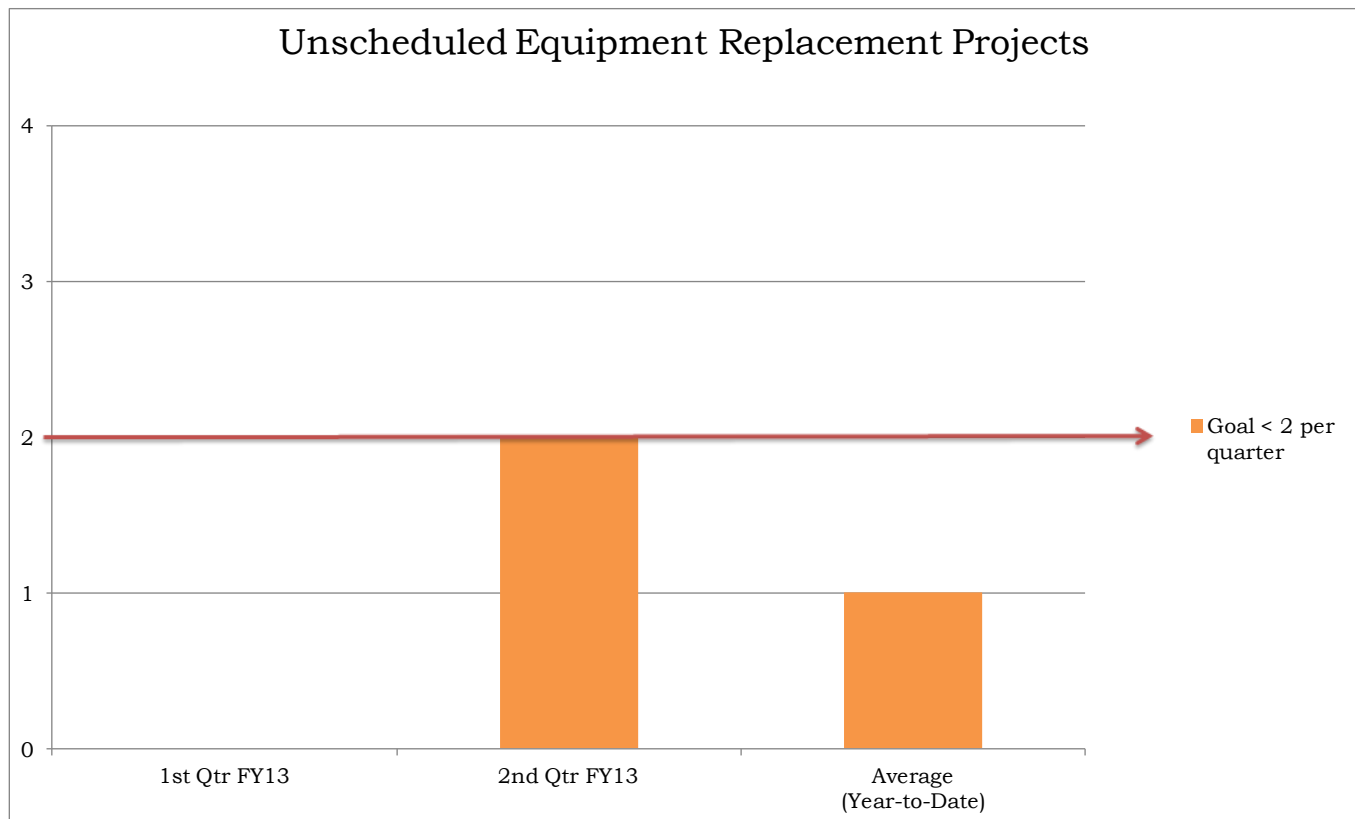
GOAL #1 – Improve maintenance and operations of the Campus

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

Lead
F. O.

STATUS

FM 5YP Prioritized Projects – FY13 - 14

1. Enterprise Data Assistant (EDA) FO-WR Project Zone Shops – Zones 2-4 EDA Issuing completed, Zone 1 - complete, Zone 5-6 – in process
2. Enterprise Data Assistant (EDA) FO-WR Project Core Shops- On Hold
3. Enterprise Data Assistant (EDA) Housekeeping Project - On Hold
4. ARCHIBUS - Equipment and PM Management – Development Complete
5. BAS Standards – Phase One - Completed
6. ARCHIBUS Key Management – Phase Two – Development Completed; Reports to be completed/moved to Production
7. Facilities Condition Assessment Program (FCAP2) – Pilot Pending (On Hold)
8. Asset Management – Working with AUX and COE
9. SDI Punch In Implementation – Planning Phase
10. Building Information Modeling (BIM) – Phase 1 (Standards)

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 FY 2015**

Lead FIS

ACTION PLAN

Actions Completed:

1. ARCHIBUS Equipment and PM Management – Development complete; F& O Transitioning Old PMs.

2. BAS Critical Alarms –Pilot was Finalized with Bioinformatics.

3. ARCHIBUS Key Management Phase Two – Communication and Training completed.

Actions Planned:

1. Equipment and PM Management – Continue transition; complete reports and SOP

2. SDI Punch In – Schedule / Conduct Requirements Sessions; Develop Project Documents and begin development

3. BIM –Schedule / Conduct Requirements Sessions; Develop Standards

4. Asset Mgmt – Add New Access Set Up Functionality; Update Documentation

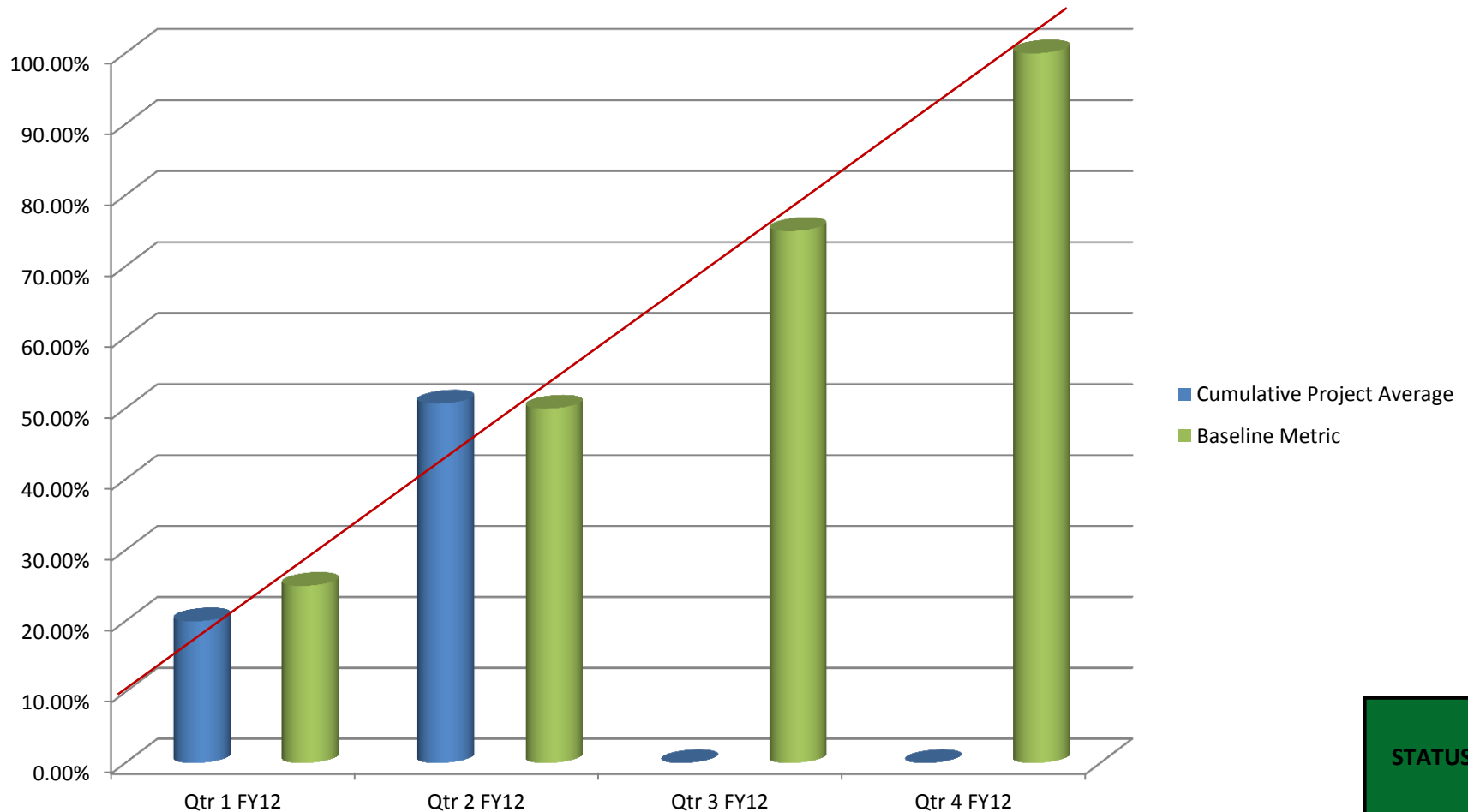**Facilities Management Strategic Planning Session – Second Quarter FY 2013**

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

Lead
FIS

STATUS

Legend:
- Cumulative Project Average (blue)
- Baseline Metric (green)

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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)

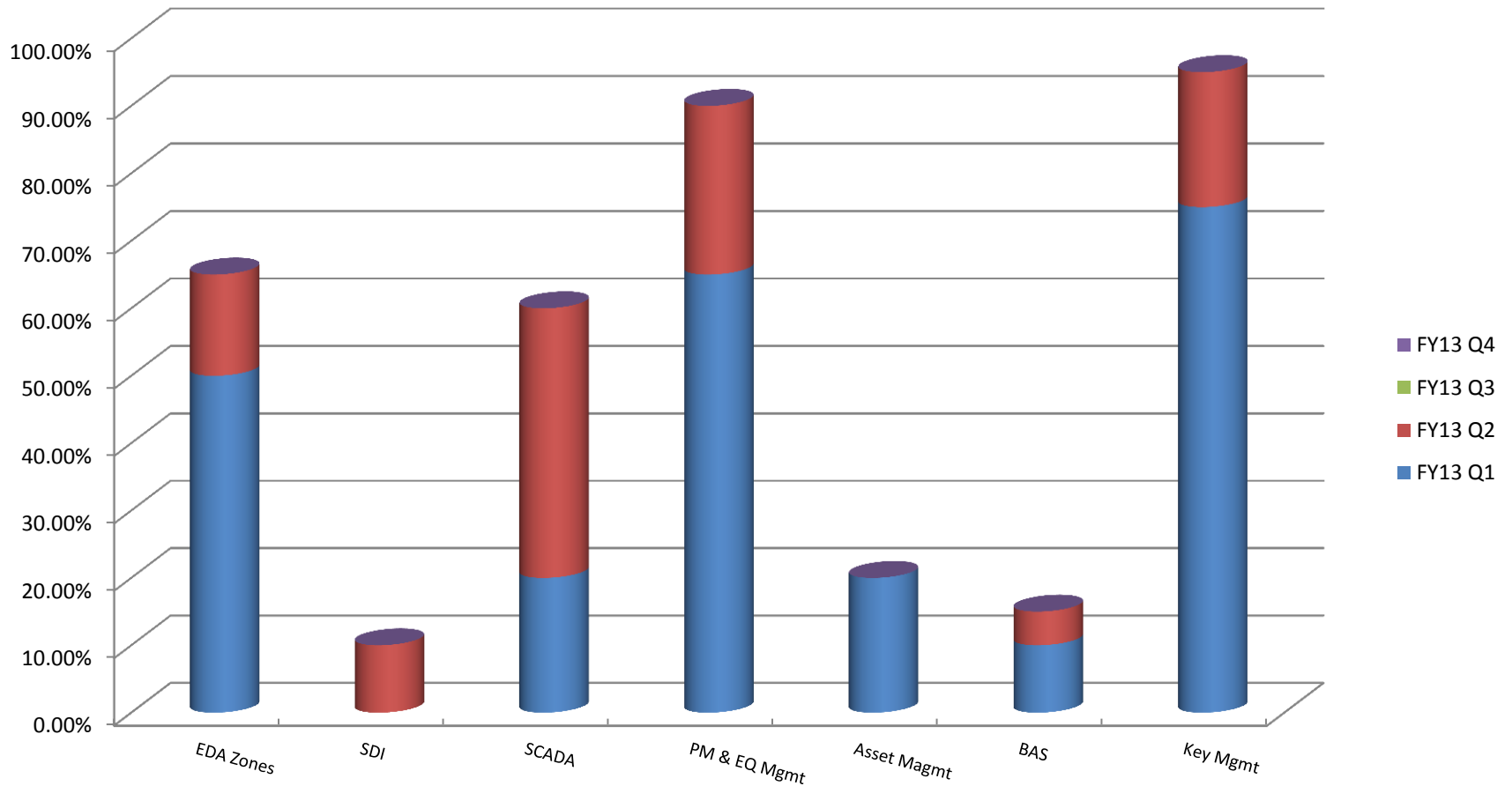**Balanced Scorecard Category: Internal Processes**

Lead
FIS

60

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

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

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

ACTION PLAN

- Actions Planned:
  - Amend the objective above to reflect phase 2
  - Work with other sections in FM on the process.
  - Work with FIS on the dashboard (incl. accuracy)

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

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

Lead
Architectural
Planning

ACTION PLAN

- **Actions Planned:**
    - o **Student Affairs Data audit complete for static spaces**
    - o **Academic Affairs Data Audit complete for static spaces**
    - o **Athletics data audit complete**
    - o **Athletics field verification underway**
    - o **Business Affairs data audit complete for static spaces**
    - o **General Counsel & Internal Audit data audit complete**
    - o **General Counsel & Internal Audit field verification underway**
    - o **University Advancement data audit complete**
    - o **University Advancement field verification underway**
    - o **Spot inspections & drawing updates for all Divisions continually being audited**
        - o **Initiate a visual audit of space occupancy that will help in validating the data in Archibus.**
        - o **All new construction & renovation spaces**

Facilities Management Strategic Planning Session – Second Quarter FY 2013

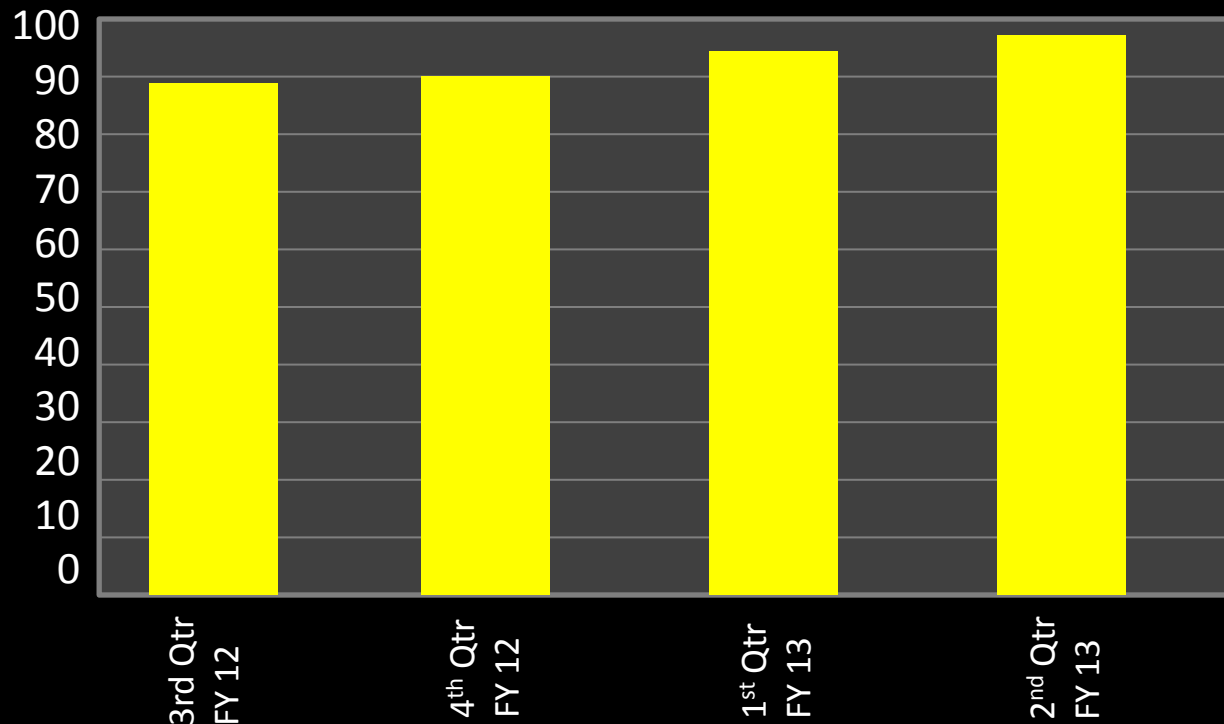**GOAL #3 – Deliver New Facilities that Support the University's Mission**

Strategy 3.1: Improve space utilization throughout the university.

Objective 3.1.1 100% of space audits by Division; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process

Lead Architectural Planning

Percentage of Completion

Quarter	Percentage
3rd Qtr FY 12	~89
4th Qtr FY 12	~90
1st Qtr FY 13	~95
2nd Qtr FY 13	~98

Status

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

Strategy 3.2 Improve the Six Year Plans for Appropriated & Non-appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2012

Lead Architectural Planning

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

ACTION PLAN

▪ **Actions Planned:**.

  o **Obtain guidance on direction of CID Phase II in order to determine next set of needs.**

  o **Continue work on CID projects for hand-off to Capital.**

Strategy	**3.3**	Improve the Capital Design Process
Objective	**3.3.1**	90% of designers under contract within 120 days of Project posting in CAPSTAT

Lead Capital

ACTION PLAN

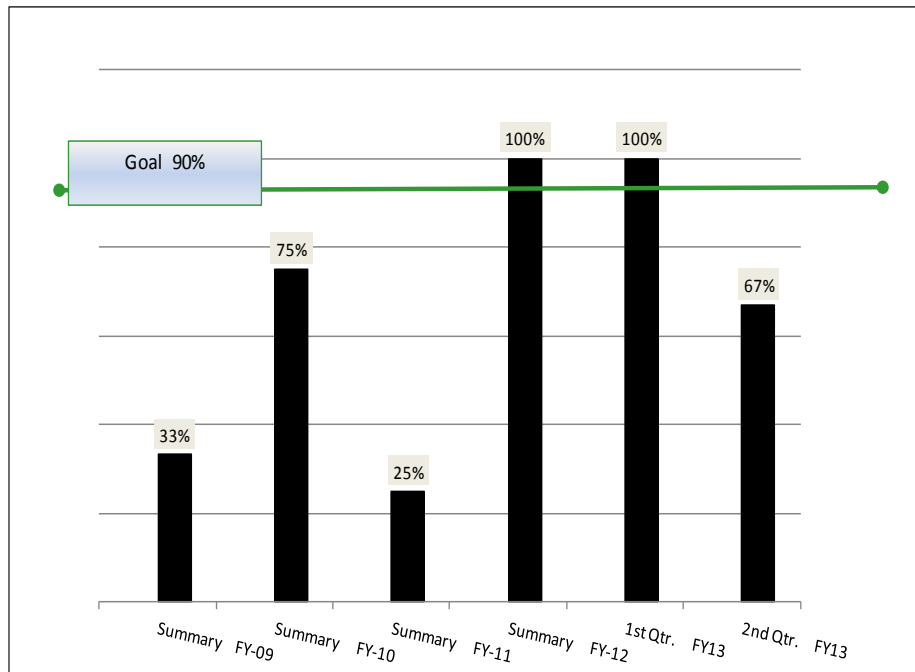- Actions Completed

  CID Infrastructure and Phase 13 contract under 120 days.

  Holshouser Renovation contract over 120 days.

- Actions Planned

  1. Baseline Schedules – Accurate

  2. Baseline Schedules – Refer to them

  3. Push Designers to stay on schedule.

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 the project advertisement being posted on the web
Measure:		Percentage of designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

Lead Capital

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%
Summary FY-10	10	9	3	75%
Summary FY-11	11	2	6	25%
Summary FY-12	6	2	0	100%
1st Qtr. FY-13	6	1	0	100%
2nd Qtr. FY-13	3	2	1	67%

Objective for 2nd Quarter is 67%
Year to date is 75%

Status

66

Strategy   **3.3**   Improve the Capital Design Process
Objective   **3.3.2**   90% of designs complete by the scheduled completion date

<div style="text-align:center">

**Lead
Capital**

</div>

<div style="text-align:center">

ACTION PLAN

</div>

- Actions Completed

    SV Dining (early site) was late.

- Actions Planned

    1. Baseline Schedules – Accurate

        a) Sherry, John & Jeanine to check

        b) Sherry to help PMs setup properly & maintain

    2. Keep end users up to date on overall schedule

        a) Update team at all scheduled design meetings

        b) Hold designer accountable

    3. Add milestones

        a) DD & CD Shops presentations & feedback
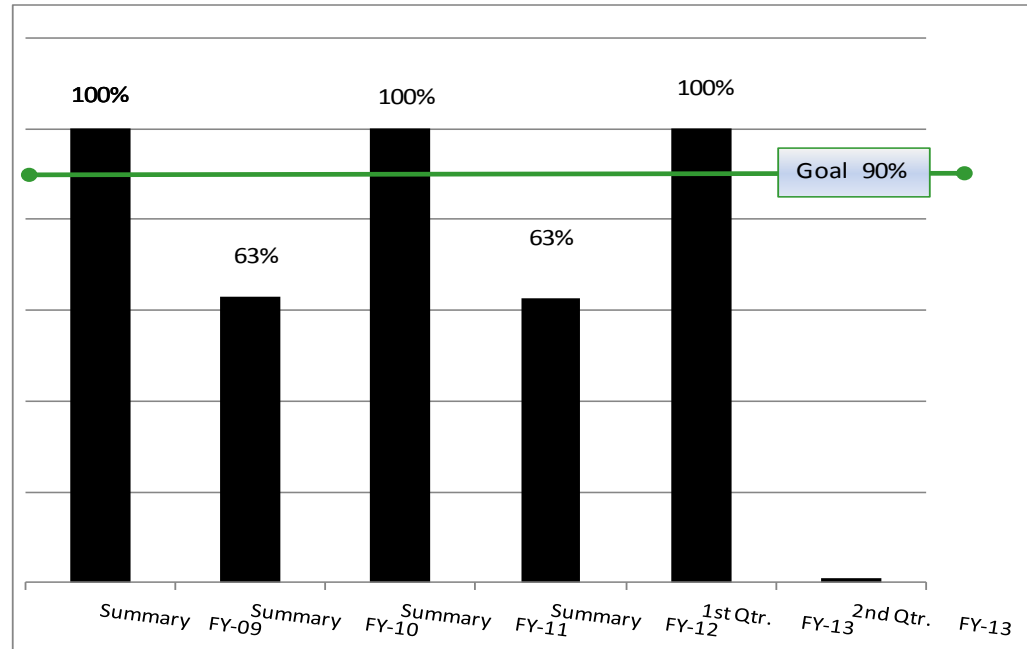
        b) Chancellor approvals (colors, exteriors, etc.)

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%
Summary FY-10	9	5	63%
Summary FY-11	6	0	100%
Summary FY-12	5	3	63%
1st Qtr. FY-13	1	0	100%
2nd Qtr. FY-13	0	1	0%

Lead Capital

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

Status

68

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

    N/A

- Actions Planned

    1. Print project budget / financial sheets & share with end users

    2. Monitor scope creep.

    3. Protect contingency

    4. Know project authorization

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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 & Initial Contract	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
Parking Deck I	$1,701,000	$1,044,000	$1,136,083	-38.6%	8.8%	1
Parking Deck J	$2,211,057	$946,200	$946,200	-57.2%	0.0%	1
PORTAL	$2,466,950	$2,200,000	$2,200,000	-10.8%	0.0%	1
RDH Renovation	$1,742,048	$1,981,410	$1,987,410	13.7%	0.3%	0
Res. Hall Ph. X	$2,809,632	$2,147,890	$2,147,890	-23.6%	0.0%	1
Res. Hall Ph. XI	$3,695,657	$2,078,598	$2,078,598	-43.8%	0.0%	1
Res. Hall Ph XII	$3,400,667			0.0%	0.0%	
Res. Hall Scott	$265,817	$210,000	$210,000		0.0%	1
RUP IV		$385,000	$385,000	0.0%	0.0%	1
Heck Dam	$190,000	$185,650	$185,650	-2.3%	0.0%	1
Demo Phase IV						
CRI Elect. Circuit	$77,636	$52,650	$62,250	-32.2%	18.2%	1
					Percentage of Projects within	75.0%

Objective is 90%   *Factors in budget fee changes: Owner changes scope, owner adds more scope, ADA compliances.

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 Planned
    1. Keep schedules <u>current</u> & refer to them monthly
    2. Discuss schedule (baseline & current) with end users
    3. Inform designer and CM of each other's contractual agreements
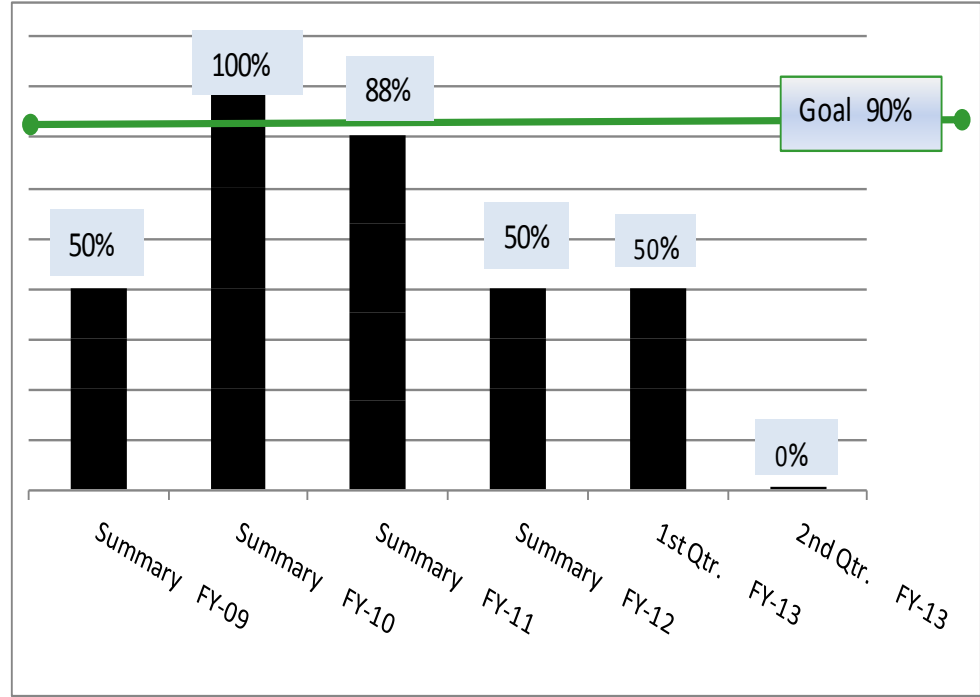
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy	**3.4**	Improve Administration of the Capital Construction Process	
Objective	**3.4.1**	90% of capital construction Projects completed on time	

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

Balanced Scorecard Category: Internal Business Process

Lead Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-09	4	2	50%
Summary FY-10	6	0	100%
Summary FY-11	7	1	88%
Summary FY-12	6	6	50%
1st Qtr. FY-13	1	1	50%
2nd Qtr. FY-13	0	1	0%

2nd Qtr. Objective is 0%
Year to date is 33%

Status

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 Complete
    1. Hech Dam completed.

- Actions Planned
    1. Maintain & Print project budgets & account reports monthly
    2. Share budgets with AVC and end users
    3. Hold contingency for unforeseen conditions & project requirements
    4. Manage scope creep
    5. Continue After Action Reviews to increase Customer Satisfaction
    6. Work with new CRI/FM liaison Chip Yensan to further improve Capital Construction Process

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% 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

Lead Capital

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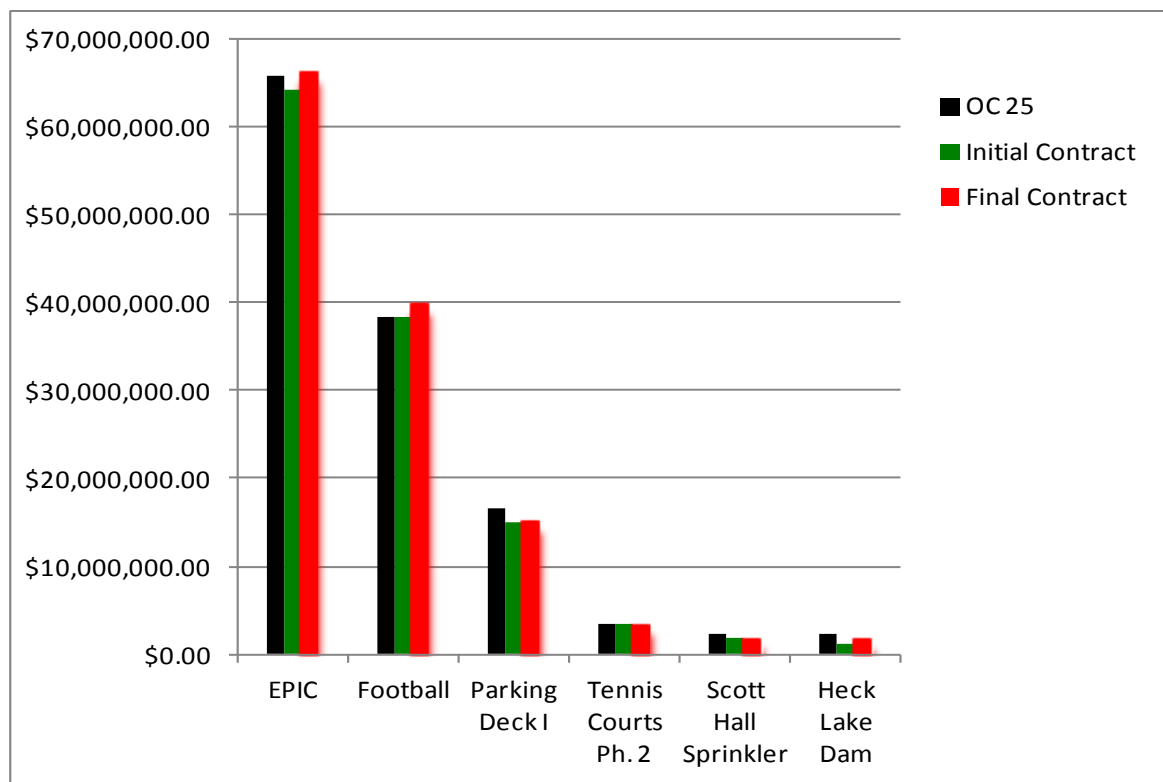
*Factors in contract $$ changes could include: Owner changes in construction, unforeseen conditions, design omissions.

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

Strategy 3.5: Improve Infrastructure improvement planning

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

Lead
Architectural
Planning

ACTION PLAN

- **Actions Planned:**
  - **Ensure projects in CRDM are appropriately listed – Parent/ Child relationships**
  - **Update and review projects based on updated information.**
  - **Integrate CID information – above and below the line. Move projects as applicable.**
  - **Incorporate CRDM process with Customers**

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

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

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

ACTION PLAN

- **Actions Planned:**
    - **Receive input from the Departments**
    - **Compile changes**
    - **Conduct next committee meeting and updates**

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 5.1.1   Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
                                        Benchmark vacancy time of no longer than 120 calendar days - Exempt
      Objective 5.1.2   100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

- ❑ Time-to-fill for both exempt and non-exempt positions are in the red.
- ❑ New vacancy reports have been established.
- ❑ The reports will be distributed to the appropriate FM units on a monthly basis.
- ❑ We will request a recruitment activity update for all vacancies from each FM unit.
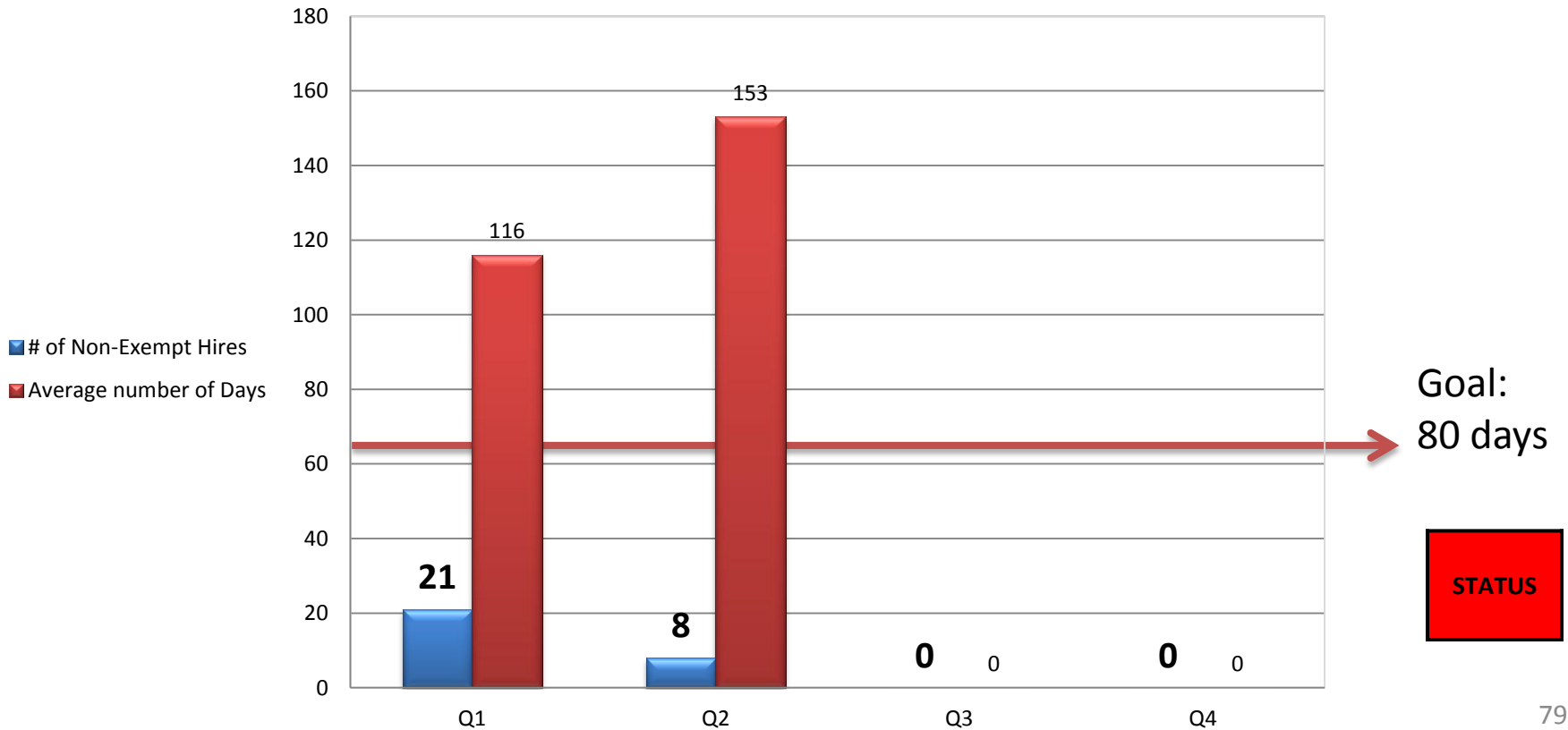
Facilities Management Strategic Planning Session – Second Quarter FY 2013

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

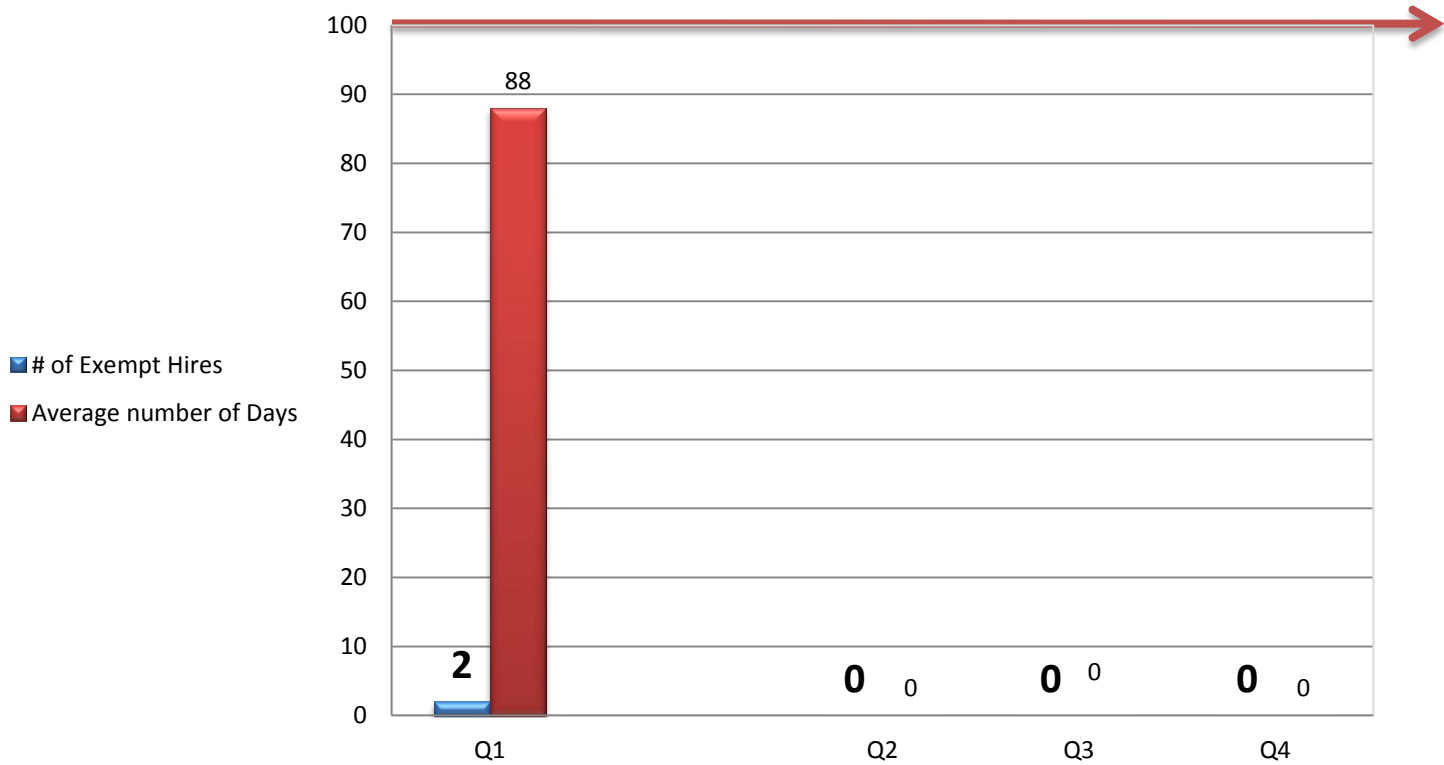Average Number of Days to Fill Nonexempt (Hourly) Vacancies

Goal: 80 days

STATUS

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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

Lead FBO

Average Number of Days to Fill Exempt (Salaried) Vacancies

Goal:
120 days

- # of Exempt Hires
- Average number of Days

STATUS

80

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

(22%)

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

Measure:　　　　　　**Completion of hiring checklist by hiring manager (including on-boarding)**

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

Lead
FBO

Positions Filled Using Targeted Selection

100%

- # of Hires
- # Number NonExempt Hired
- # Number Exempt Hired
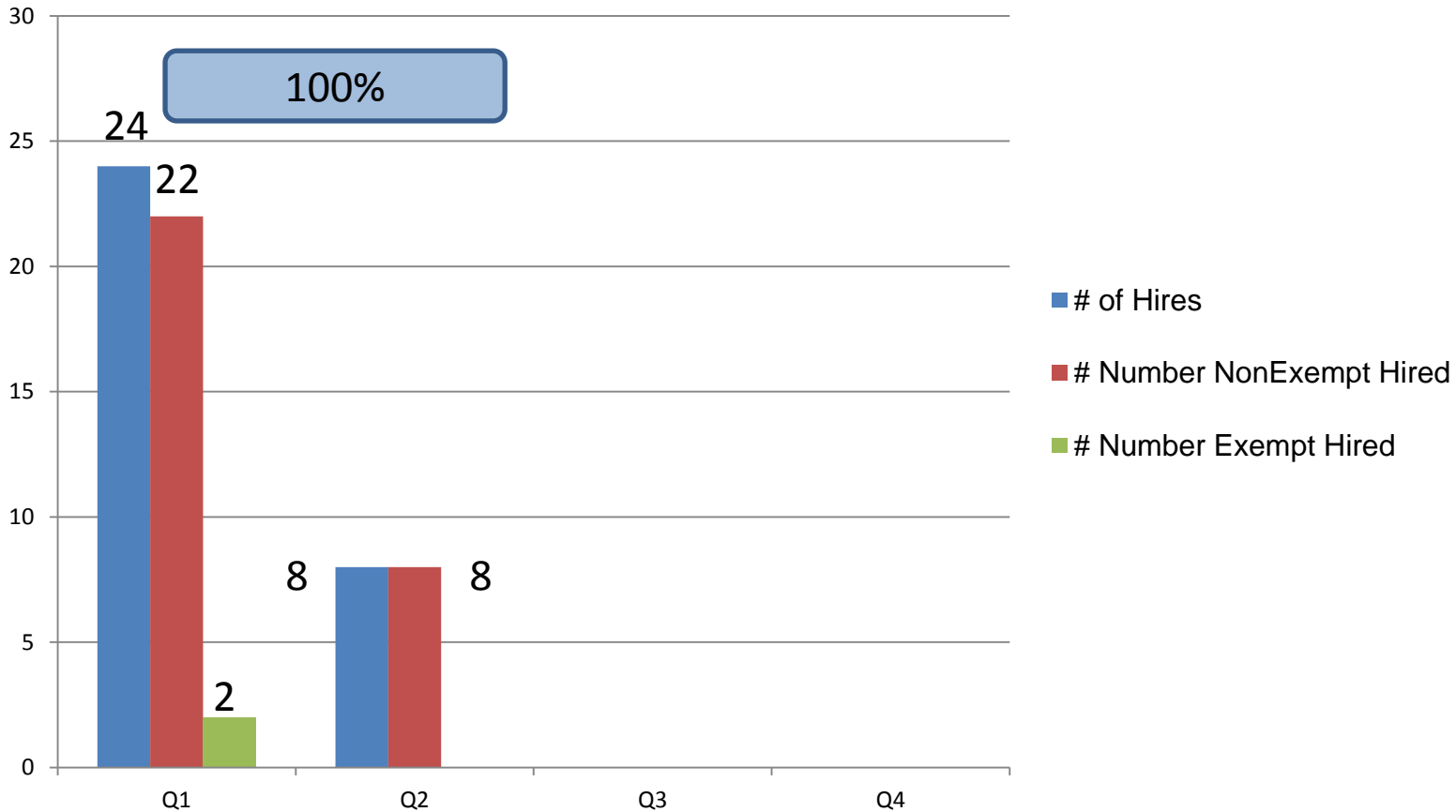
STATUS

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 of per year.
      Objective 5.2.2   Increase Employee training to 20 Hours per year.

ACTION PLAN

❑   Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas. Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best "bang for the buck" in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.

❑   W.I.G.– Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan; To date, have met with UNC Chapel Hill regarding their formula.

Facilities Management Strategic Planning Session – Second Quarter FY 2013

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

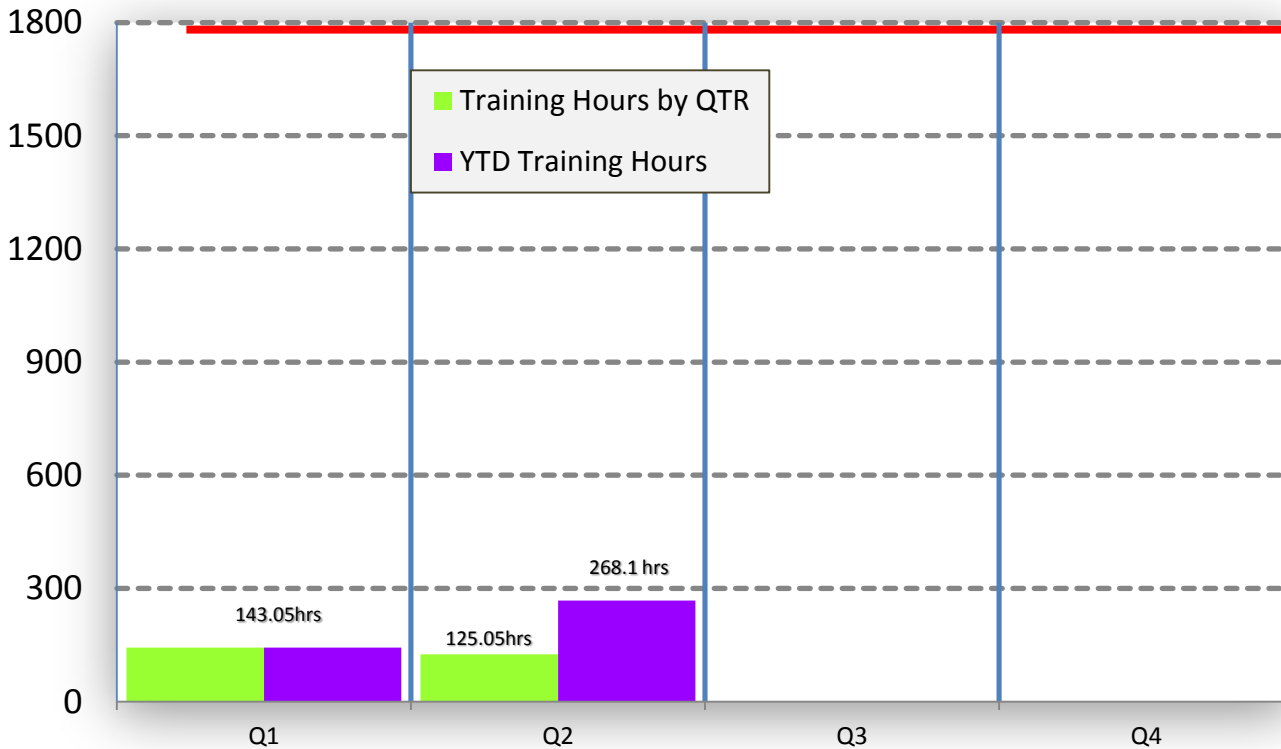|		
Strategy	**5.2**	Implement training system to enhance employee performance and provide career growth
Objective	**5.2.1**	Increase Supervisor/Manager Training to **40 Hours** per Year

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

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

Lead FBO

FY 13
Training Hours for Supervisors & Managers by Quarter

Training Hours

- Training Hours by QTR
- YTD Training Hours

Annual Target = 40 hrs ea
(45 X 40 hrs ea = 1,800 hrs)

Fiscal 2013 Results:
Goal
1800 hrs

Actual YTD
268.10 hrs (15.0 %)

STATUS

Q1: 143.05hrs
Q2: 125.05hrs, 268.1 hrs

Facilities Management Strategic Planning Session –Second Quarter FY 2013

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 13

Training Hours by Quarter (non-management)

- Training Hours by QTR
- YTD Training Hours

Q1: 399.05 hrs
Q2: 512.2 hrs / 911.25 hrs
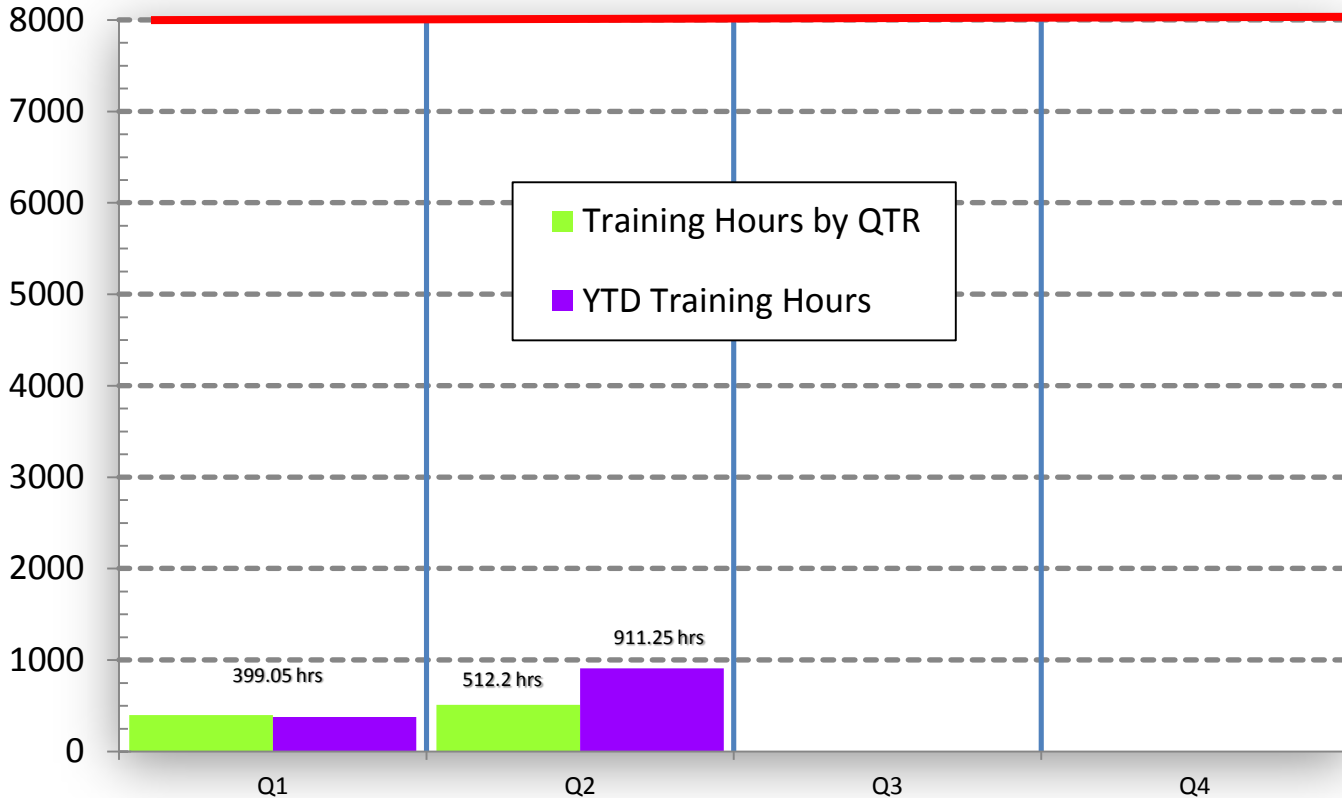
Annual Target - 20 hrs ea
(400 employees x 20 hrs ea
= **8,000** hrs total)

Fiscal 2013Results:
Goal
8,000 hrs

Actual YTD
911.25hrs (11.4%)

STATUS

FY13 YTD Training Hours - Percentage of Target

Unit/Zone	YTD-2nd Quarter	Unit/Zone	YTD – 2nd Quarter
Auto	12%	Steam Plant	0%
Business Environmental Services	13%	Zone 1	11%
Capital Projects	7%	Zone 2	11%
Central Operation	0%	Zone 3	12%
Design Services	2%	Zone 4	12%
Facilities Business Office	85%	Zone 5	9%
Facilities Information Systems	9%	Zone 6	10%
Facilities Operations Admin	12%	Zone 7	22%
Grounds	5%		
High Voltage & Fire Alarms	4%		
Lock Shop	10%		
Planning (Architect & Real Estate)	14%		
Recycling	38%		

* Building Environmental Services & Recycling combined = 16%

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

CONTINUOUS IMPROVEMENT ACTION PLAN

❑ Working with CPCC/Rowan Community College to determine feasibility of a Co-op program within FM (Trades). Met in September to review program requirements. Will meet with Rowan in February and continue initiative.

❑ Development of a FM Learning Library which can house "quick hit" training resources for employees. *In progress…*

❑ Investigate another "tier" in the Leadership Academy to keep "sharpening the saw". As referenced by Clyde in the previous training information.

❑ Production of NEO video. *In development...*

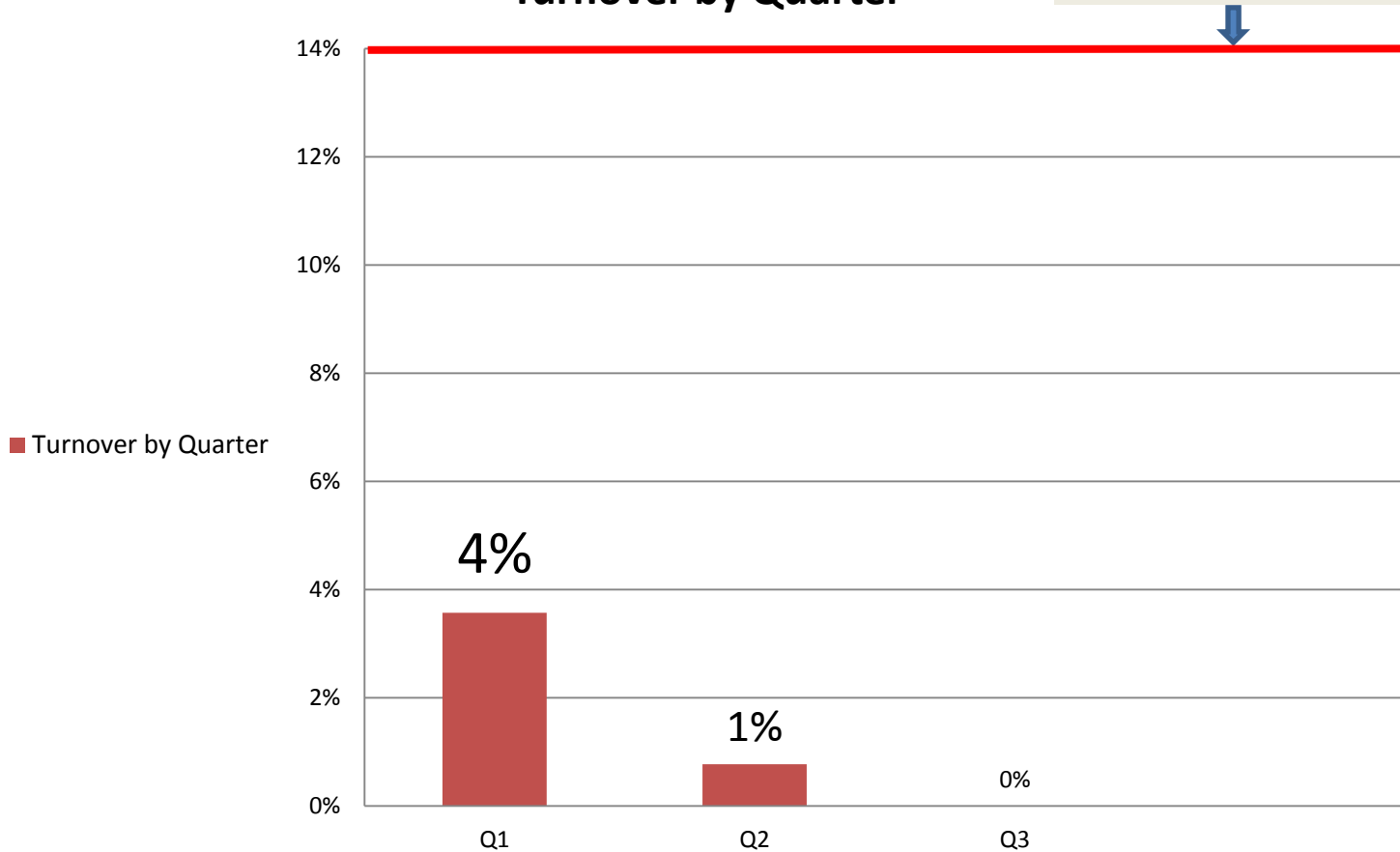**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

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

Lead FBO

STATUS

Turnover by Quarter

Annual Target < 14%

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

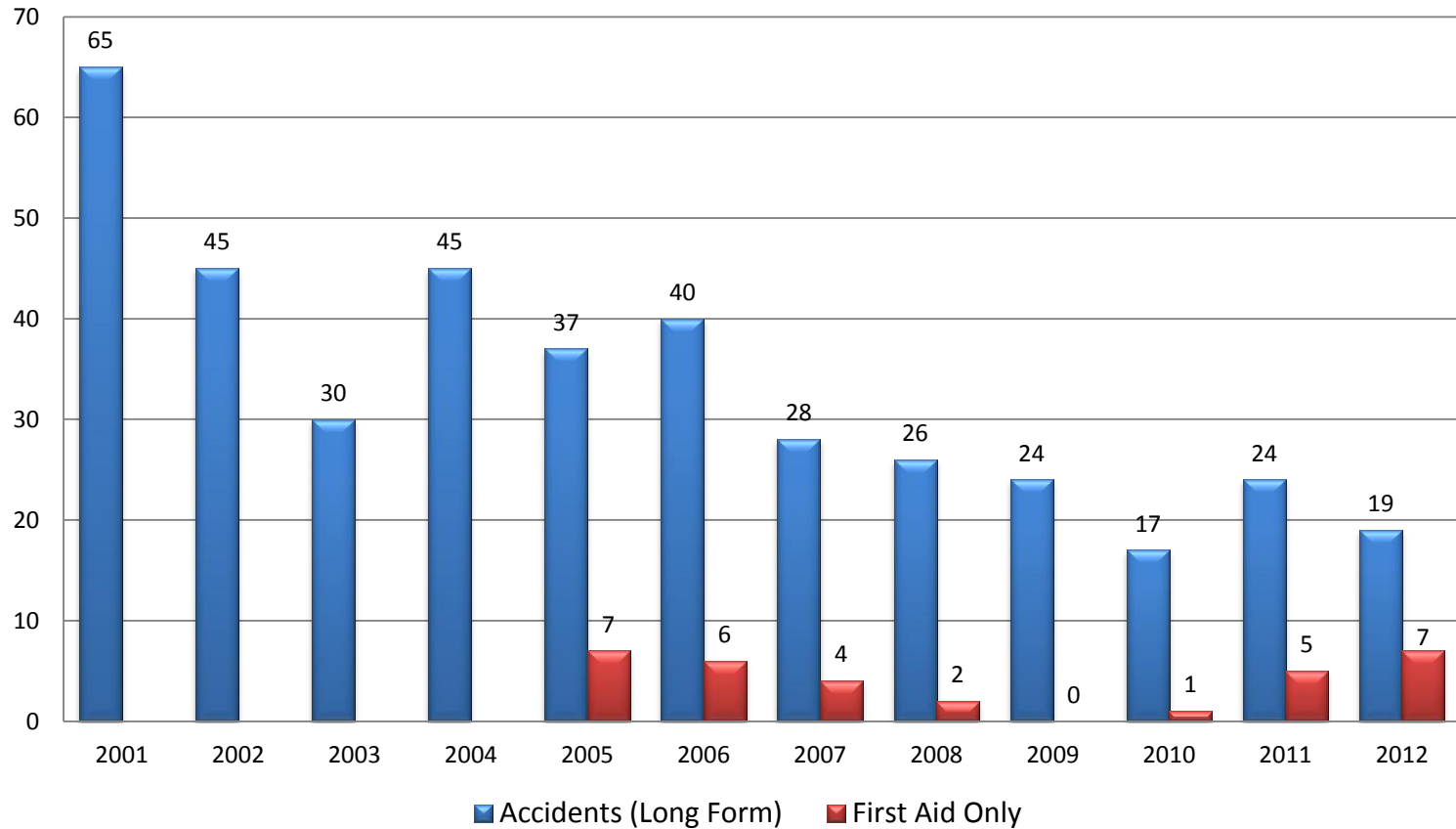| Strategy	5.3	Retain a Quality Workforce
Objective	5.3.1	Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

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

Lead
FBO
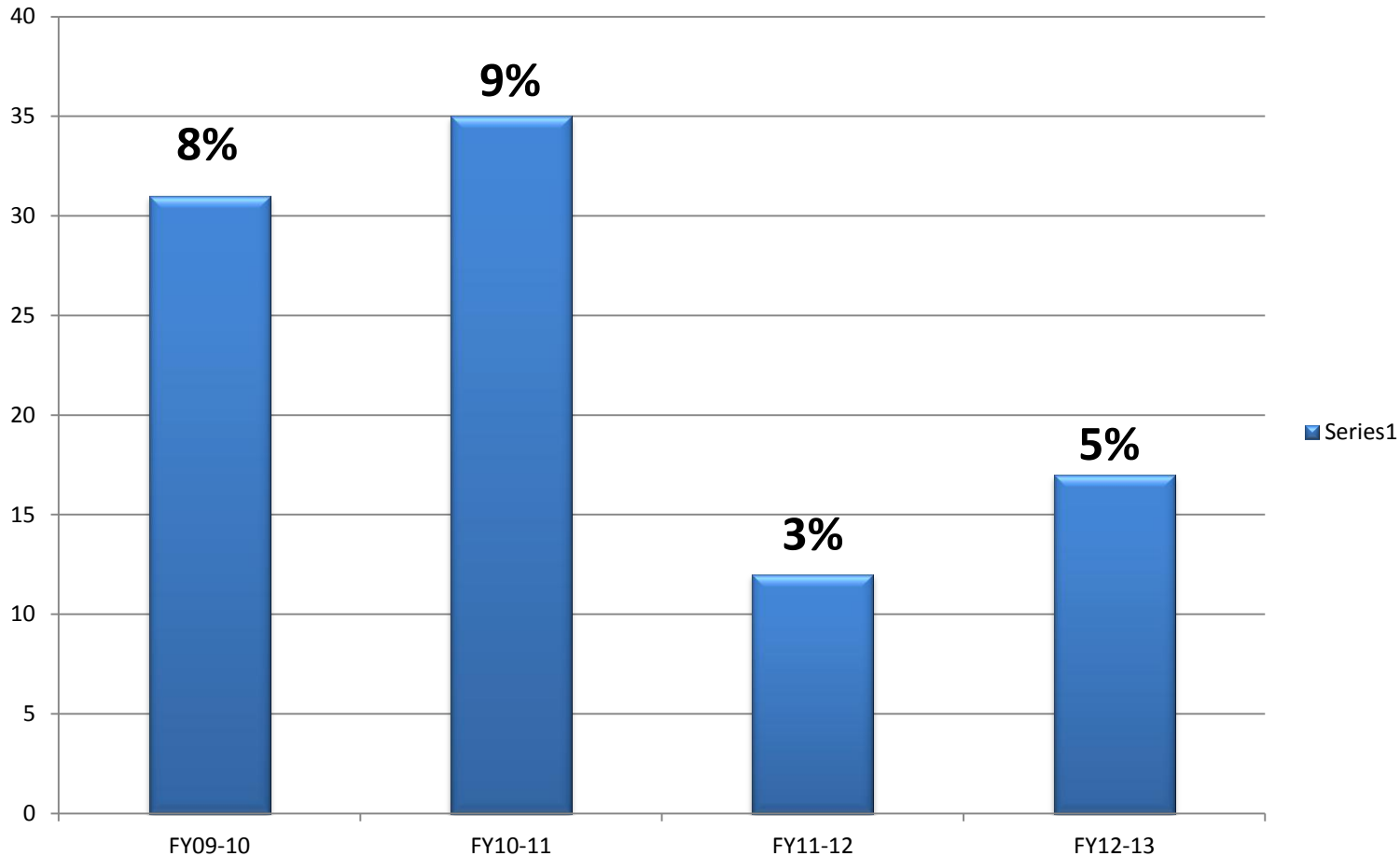
STATUS

SAFETY TRENDS

Accident Reports
January – December 2012

Bar chart: Accident Reports by year (2001–2012), with series "Accidents (Long Form)" (blue) and "First Aid Only" (red).

Year	Accidents (Long Form)	First Aid Only
2001	65	
2002	45	
2003	30	
2004	45	
2005	37	7
2006	40	6
2007	28	4
2008	26	2
2009	24	0
2010	17	1
2011	24	5
2012	19	7

Safety Isn't Expensive...
It's Priceless
Joseph Loder

2012 - 2013

GRAINGER FOR THE ONES WHO GET IT DONE

89