



**Facilities Management
Quarterly Strategic Planning Session**

**Second Quarter – Fiscal Year 2017
October – December 2016**

APPA Award for Excellence
UNC Charlotte
www.uncc.edu
AGENDA

Opening – Phil Jones

5-Year Plan After Action Review Continuation

Strategic Planning Metrics and Actions Plans

Wrap Up and Look Ahead – Phil Jones

...Creating a Campus of Distinction





Strategic Planning Session

Facilities Management's Goals

Goal 1 - Continuously Improve Operation of Campus Facilities

Goal 2 - Create a Reliable and Sustainable Physical Infrastructure

Goal 3 - Foster a Customer Focused Organization

Goal 4 - Recruit, Develop, and Retain Quality Employees

Goal 5 - Promote Good Stewardship

...Creating a Campus of Distinction



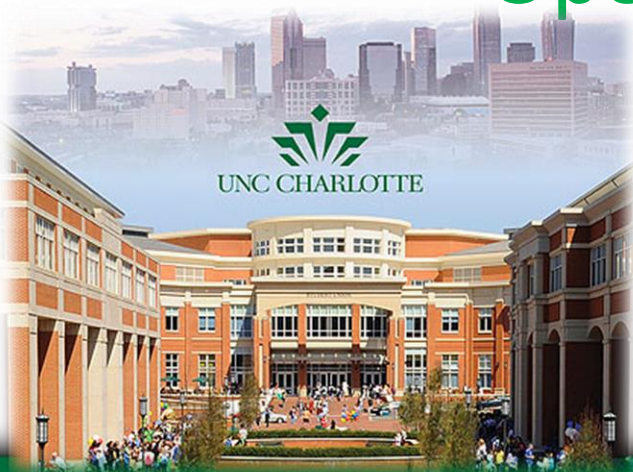
UNC CHARLOTTE

"When a team outgrows individual performance and learns team confidence, excellence becomes a reality.

-- Joe Paterno

GOAL #1

Continuously Improve
Operations of Campus



GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

Tactic: 1.1.1: Maintain “Wrench” Time at 70%

ACTION PLAN

Actions Planned

1. Daily assignment; coordinating and monitoring of work effort.
2. Continue assignment of lead technician in absence of supervisor.
3. FM to select company for the RFP “Work Order Process Improvement.” (February 2017)

Actions Completed

1. Weekly review of work order assignments.
2. Implemented the Craftsperson Work Request Board (November 2016)
3. Streamlined processes in Zones and Shops; realigned admin support. (December 2016)
4. Realigned Admin Support Group; phasing in processes
5. Hired Utility Manager, Lead Admin Support and other positions
6. Worked with FIS to develop snapshot of Work Order Status

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.1: Improve Labor Availability

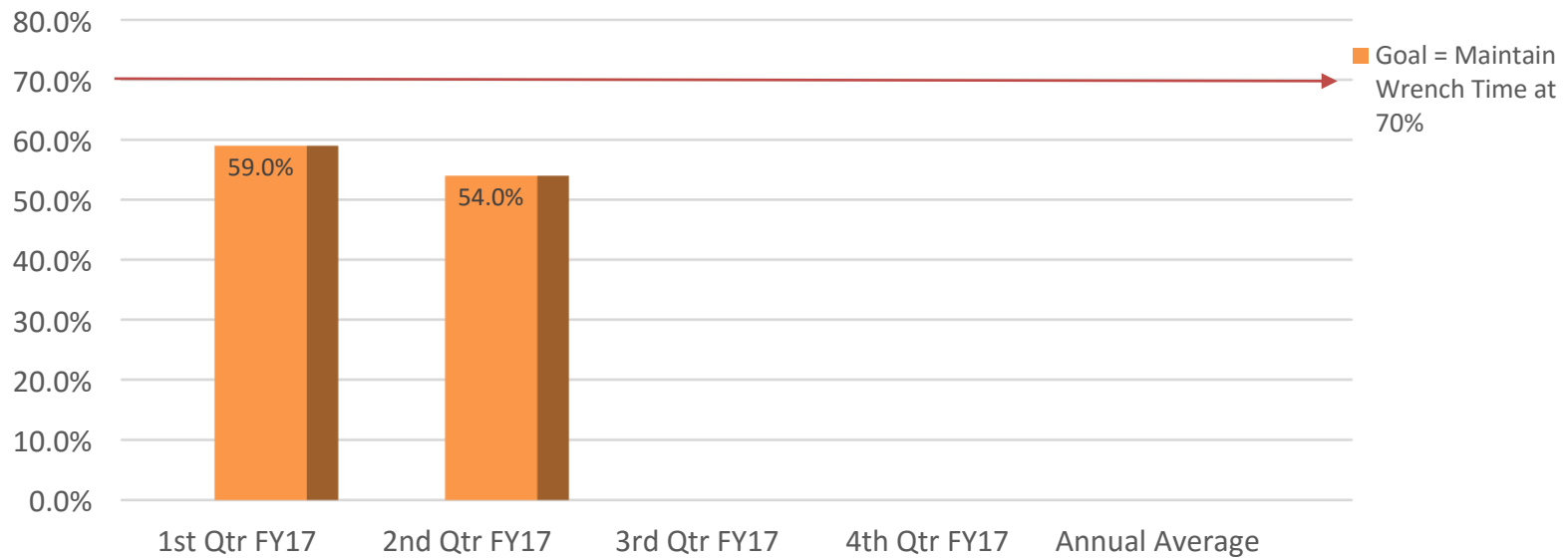
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

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

Lead: Facilities Operations

Balanced Scorecard Category: Internal Business Process

Wrench Time



STATUS
2nd Qtr

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

ACTION PLAN

Actions Planned

1. Continue to identify items that have been repeatedly ordered as non-stock items to become stock items; continue to streamline existing stock inventory.
2. Monitor daily tracking of long lead items and spikes in usage (historically the main causes for inability to fill).
3. Continue to send out daily email reminders for approvers (Supervisors, Admins and Managers).
4. Continue to monitor the requisition to PO processing time.

Actions Completed

1. Assigned additional approvers to help expedite the process.
2. Streamlined stock inventory
3. Implemented email notification process for SDI orders

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

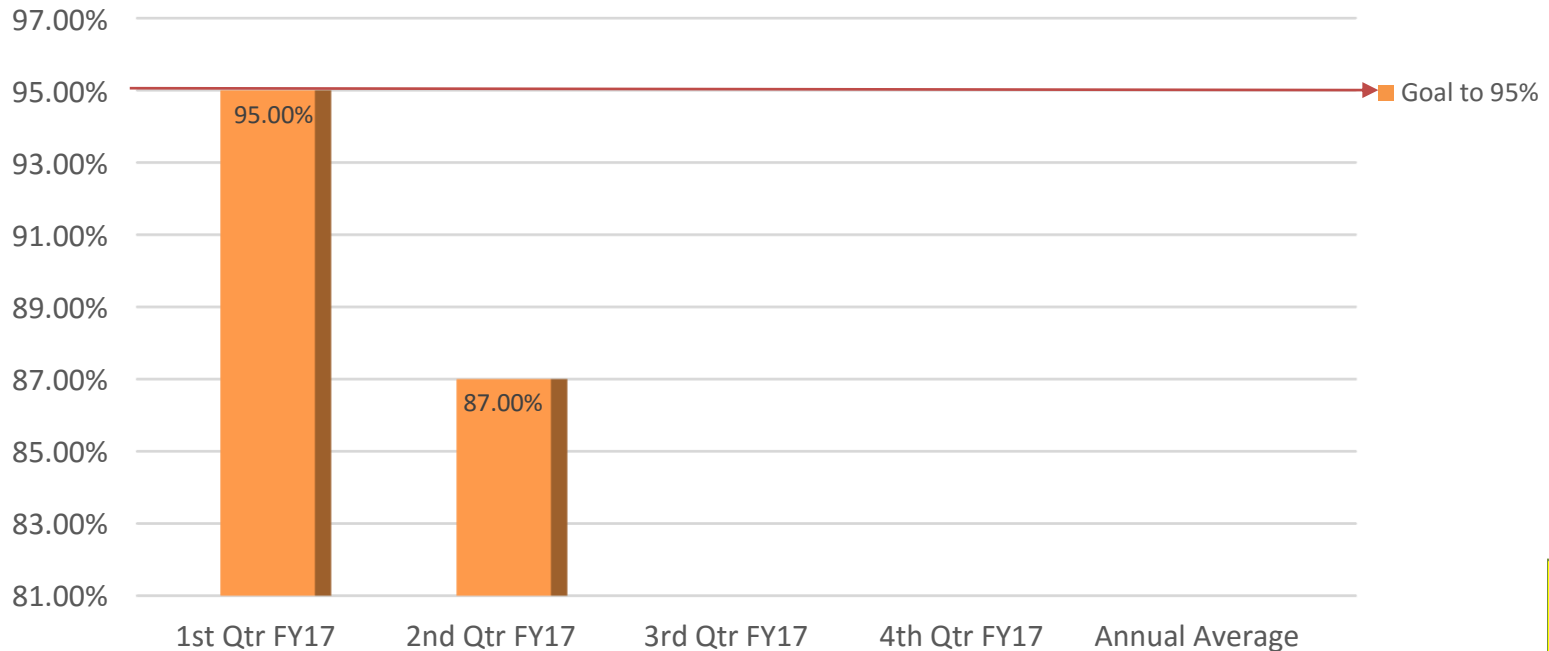
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%

Measure: Percent of non-stock orders received on or before delivery due date (SDI Key Performance Indicator (KPI))

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Non-stock on-time Delivery



STATUS
2nd Qtr

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.2: Improve Logistics Efficiency

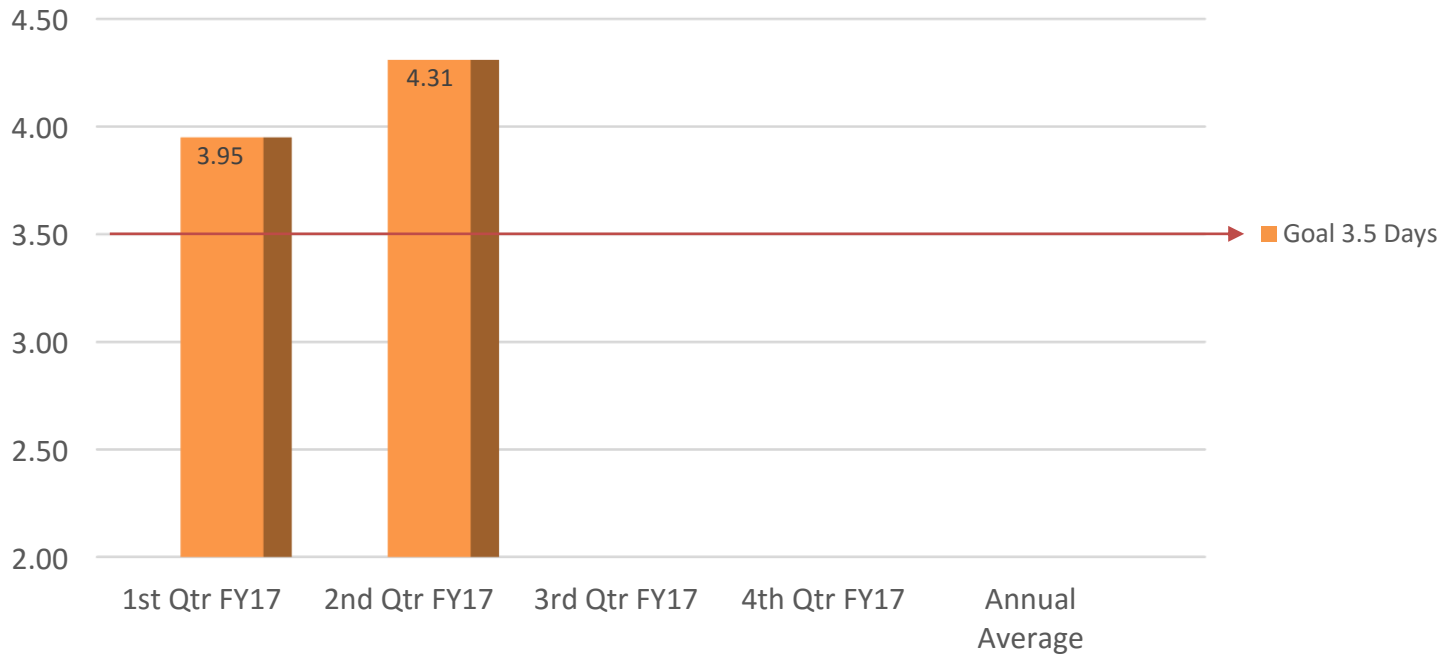
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Reduce Average Non-stock Requisition to Receipt Time



STATUS
2nd Qtr

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

ACTION PLAN

Actions Planned

1. Bi-weekly review of recurring services and scheduled services currently being completed using PM work request.
2. Daily check and balance of completed work orders.
3. Monthly review with Supervisors to monitor 30 Day Report.
4. Supervisors meeting with technicians on a daily basis to prioritize work assignments.
5. Develop and implement White Board Work Request Status Report (October 2016)

Actions Completed

1. Reduced active work orders on 14 Day Report by 40%.
2. Implemented White Board Work Request Status Report in September 2016

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

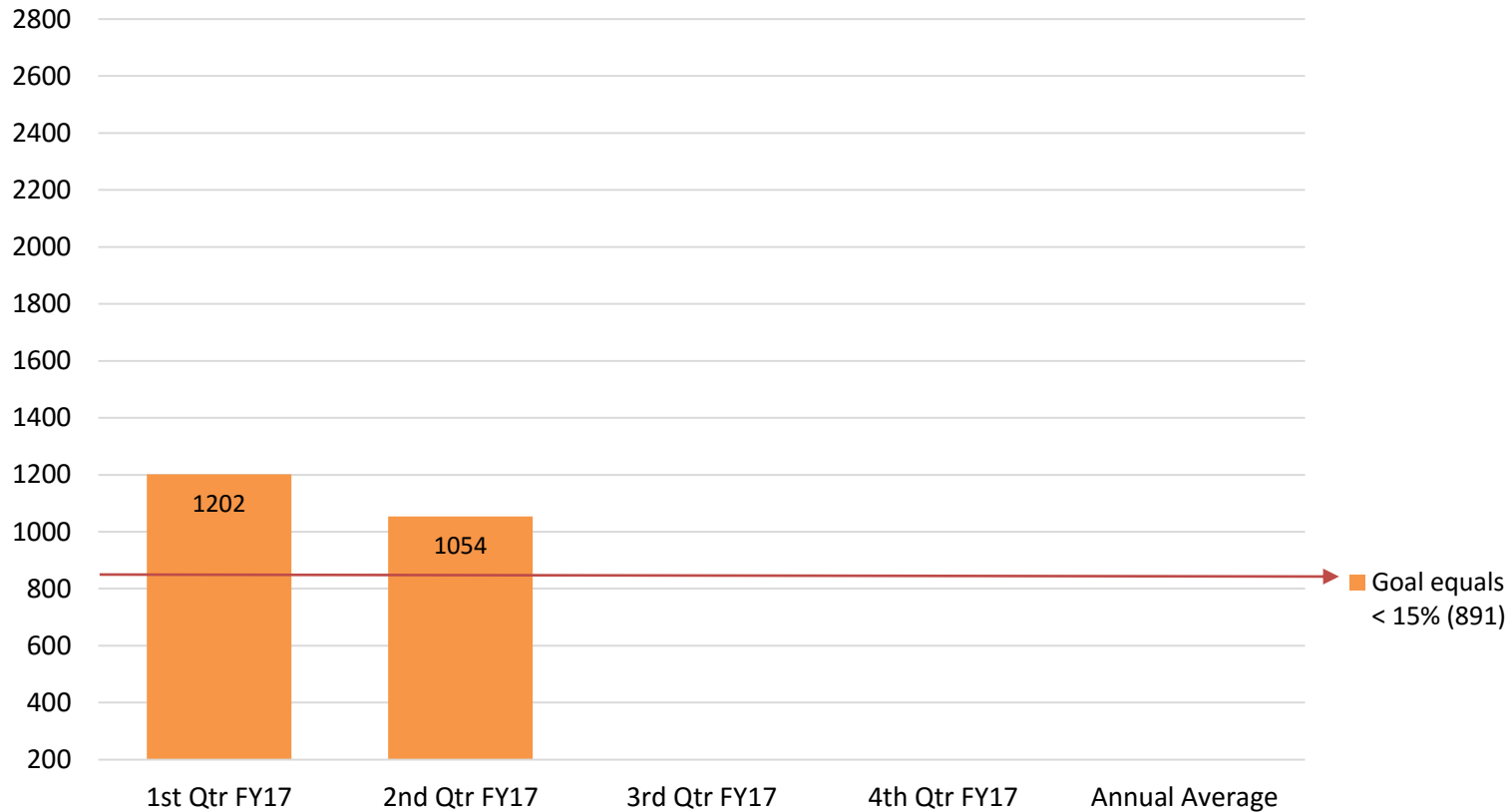
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days



STATUS
2nd Quarter

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

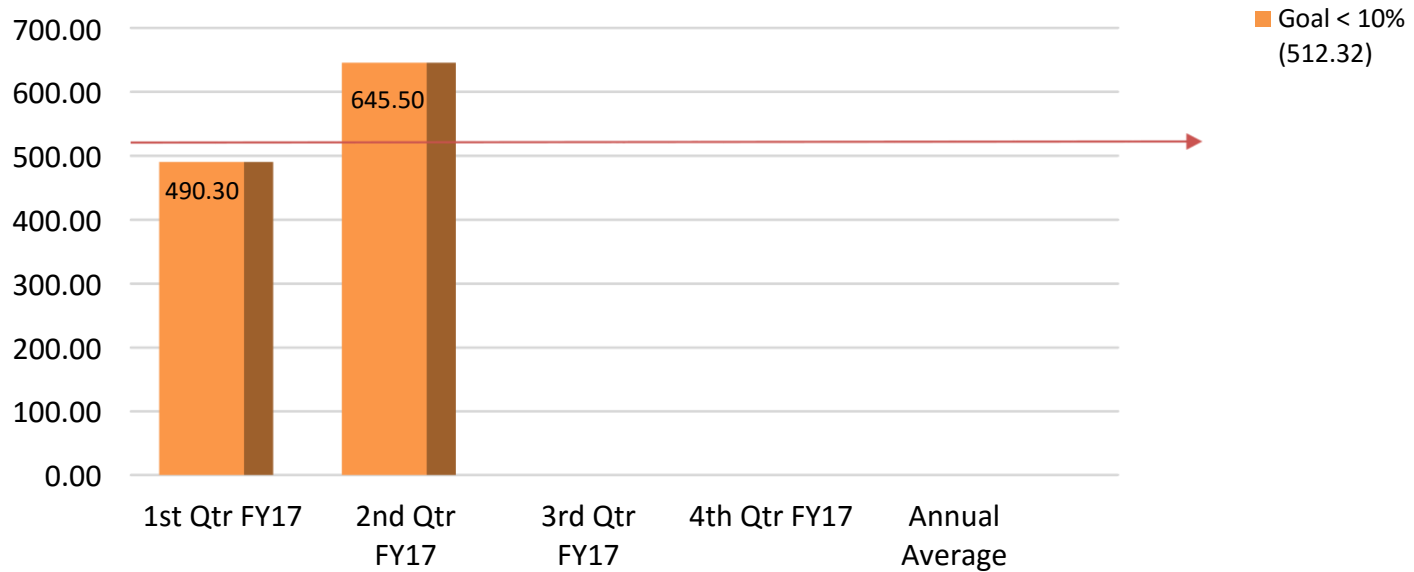
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%

Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time



STAUS
2nd Quarter

GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes
Tactic 1.4.1: Achieve APPA Level 2 in 98% of Buildings

Lead
BES

ACTION PLAN

- **Actions Completed**
 - CCAP Classroom Renovation Pilot (11/2016)
 - (Part III) Attended Workloading Workshop (11/2016)
 - Developed in-service training curriculum and matrix (12/2016)

- **Actions Planned**
 - Complete Hiring Process/Flow Chart (1/2017)
 - Workload Bioinformatics building (1/2017)
 - Implement In-service training curriculum and matrix (2/2017)
 - (2nd Iteration) Workload McEniry building (3/2017)
 - Develop digital APPA Appearance Audit forms and implement new forms into monthly audits (3/2017)
 - Develop Standard Operating Procedures Manual (SOP) for BES&R (ongoing)
 - Implement High Performance Team Cleaning (ongoing)

Facilities Management Strategic Planning Session – Second Quarter FY 2017

Lead
BES

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

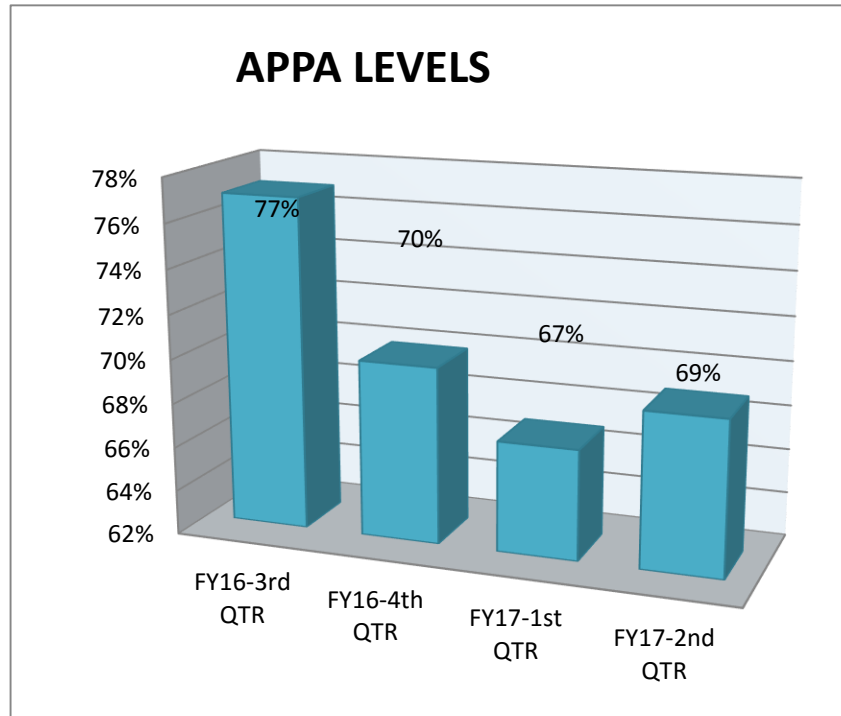
Objective: 1.4: Improve BES Processes

Tactic 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)

Lead: Building Environmental Services

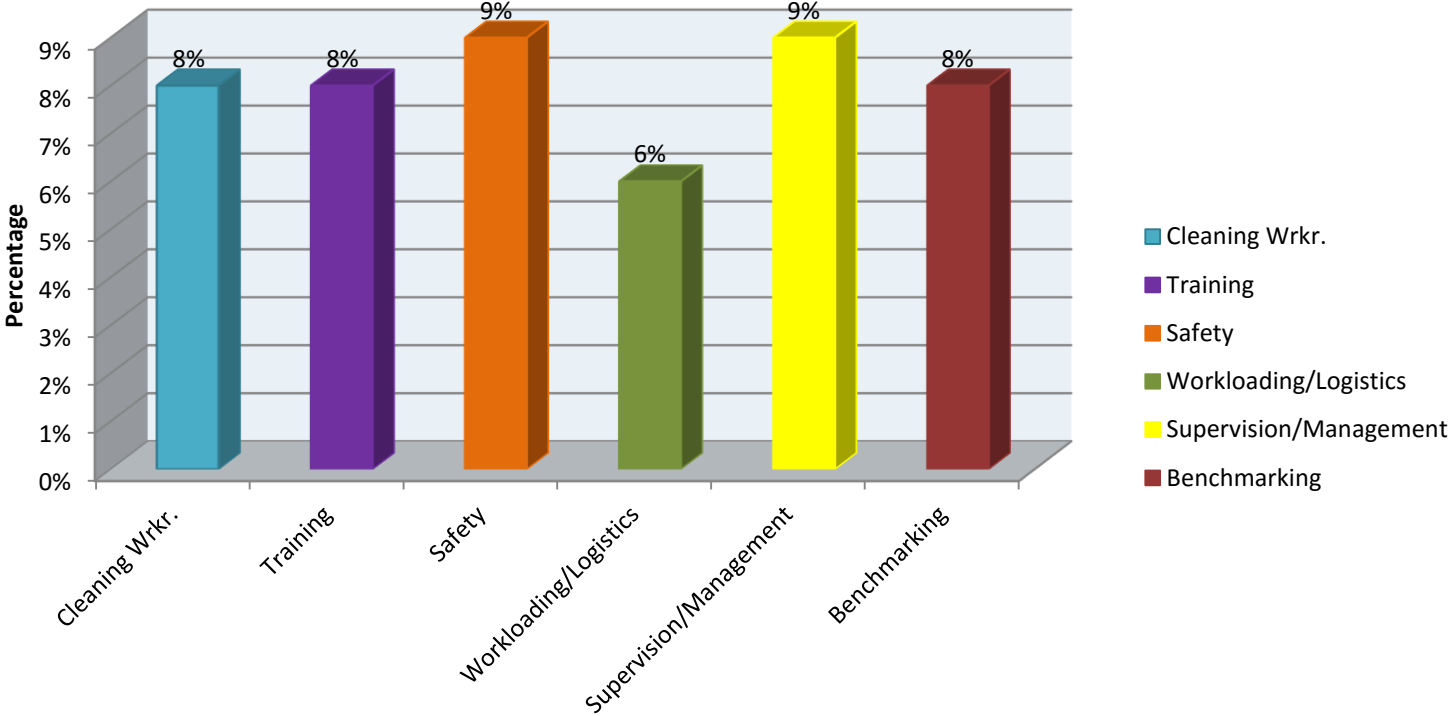
Balanced Scorecard Category: Customer Perspective

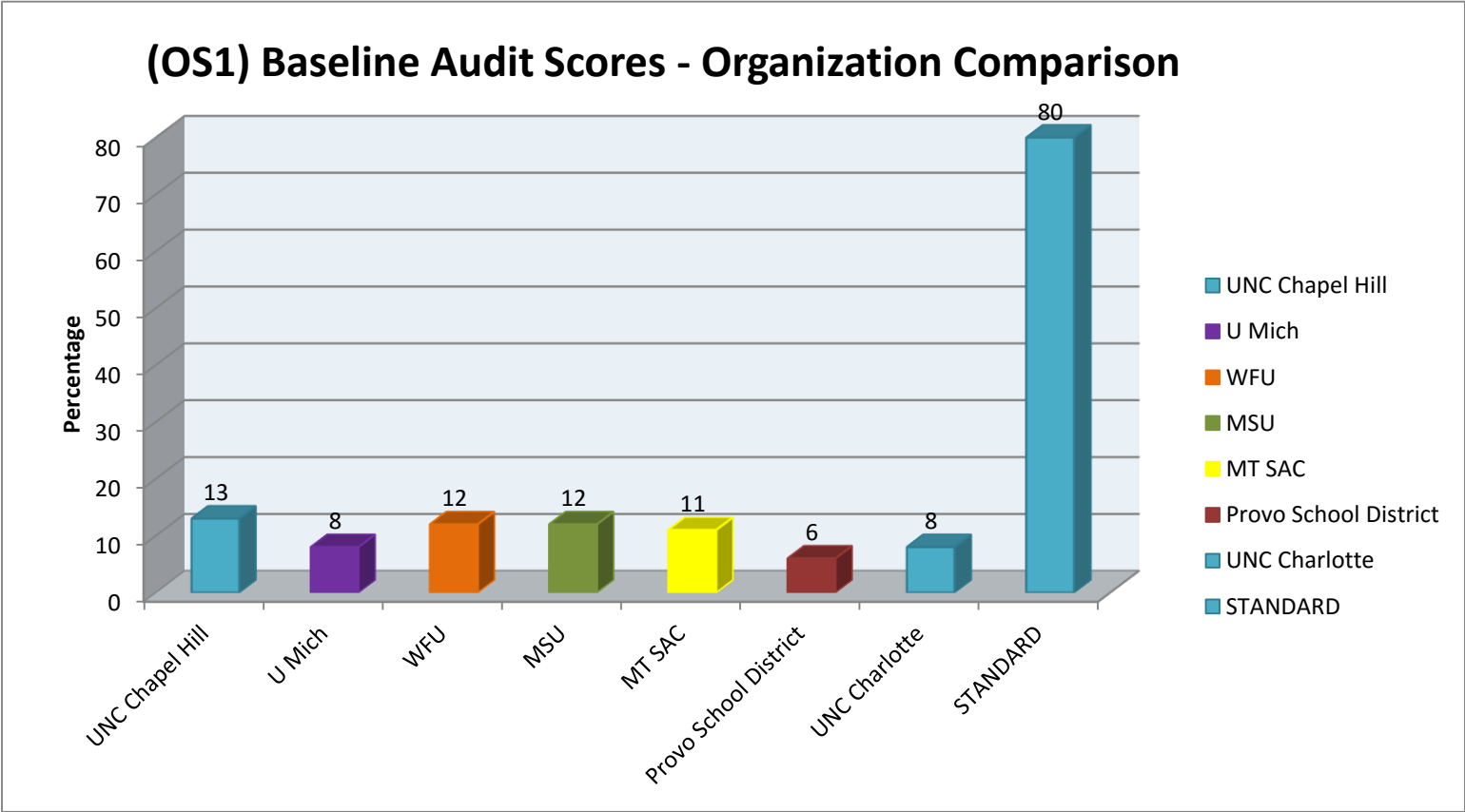


Percentage = 69%

STATUS

(OS1) Baseline Audit Scores - Job Category





GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

ACTION PLAN

Actions Planned

1. Realign PM Program; complete conversion from old PM Module to new PM Module. (3rd Qtr FY 17)
2. Continue expansion of PM Program; Work with key customers (Aux Svs)
3. Restructure the Archibus PM Equipment Manager module.
4. Continue to identify non-traditional equipment that requires PM
5. FCAP will continue to identify and prioritize equipment conditions and needs, for replacement. (This information is used to support CRDM projects.)
6. Re-implementing VDC/ILM (Virtual Design Construction/Integrated Lifecycle Management) program (Spring 2017)

Actions Completed

1. Incorporated FCAP inspection process into CRDM and Daily Operations.
2. Implemented Archibus Facilities Outage Notification Module

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

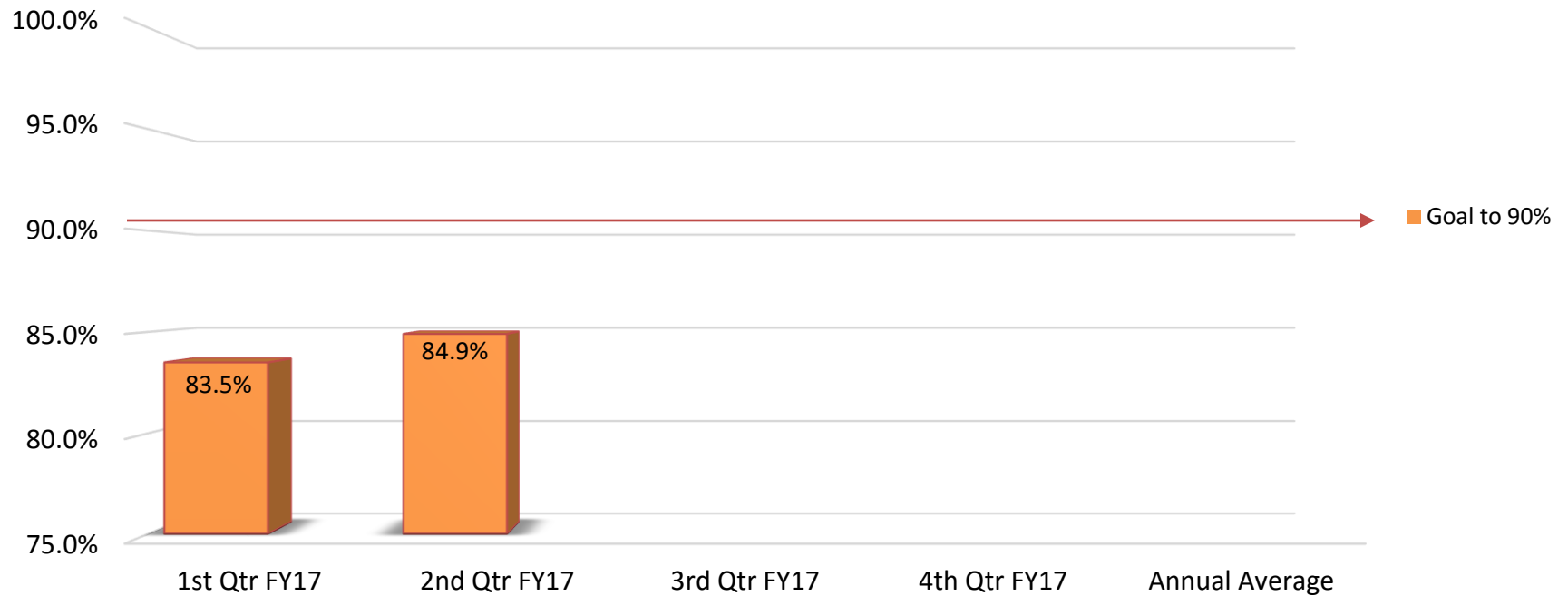
Tactic: 1.5.1: Improve Completion of Preventative Maintenance Work Requests to 90%

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Improve Completion of PM Work Orders



STATUS
2nd Qtr

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

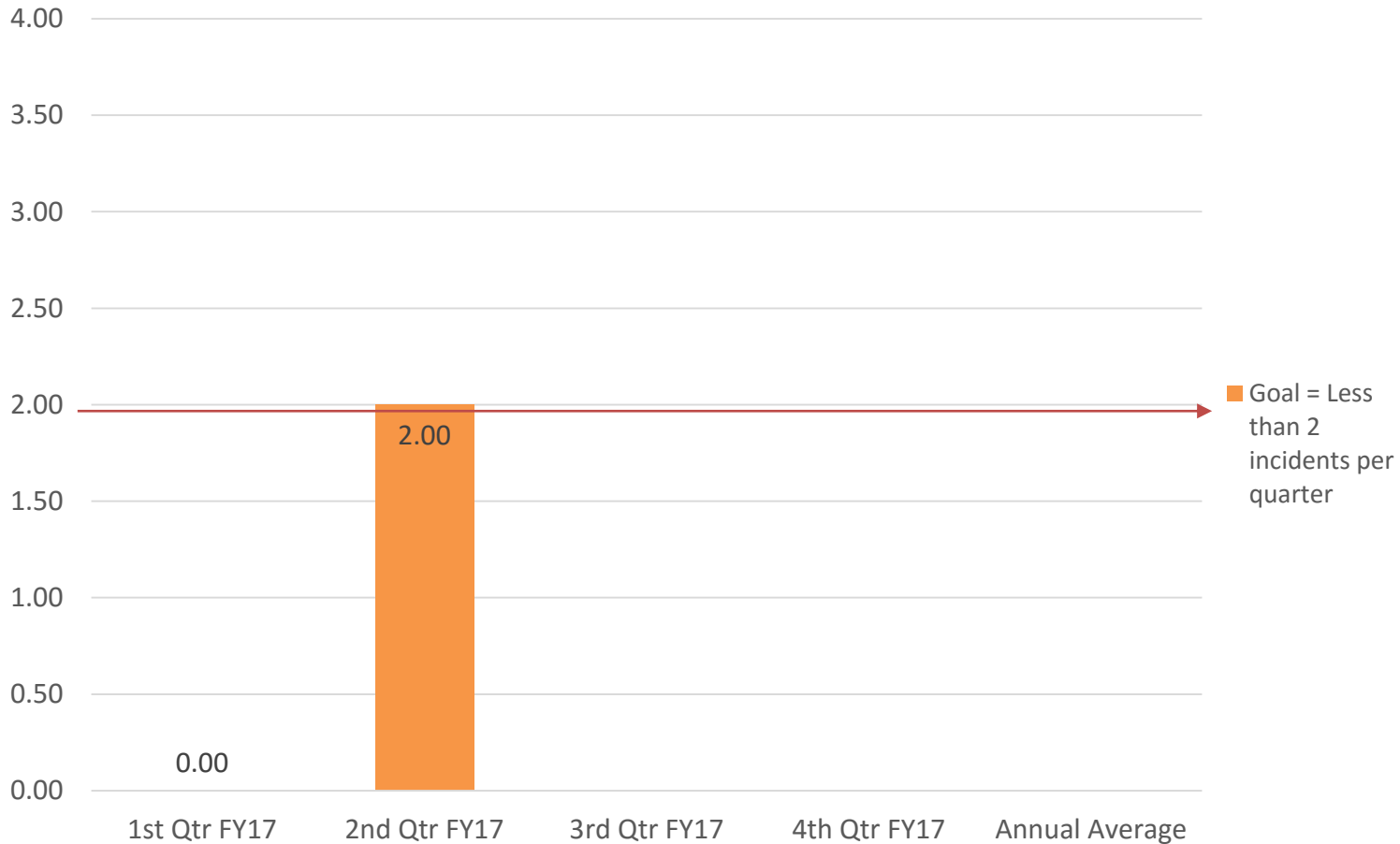
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects



STATUS
2nd Qtr

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

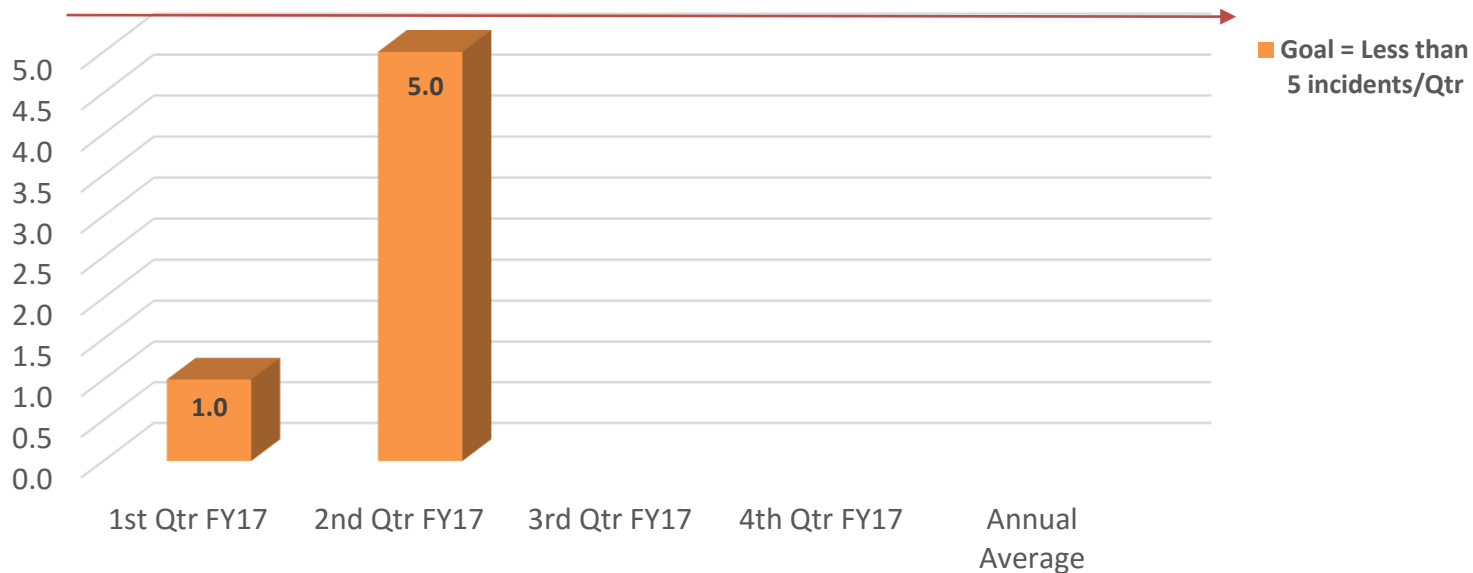
Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Measure: Number of Occurrences ; Electric, Water, Sewer, HVAC, (Roofs, Lots, Decks, Roads measured separately).

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages



STATUS
2nd Qtr

Lead
F. O.

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

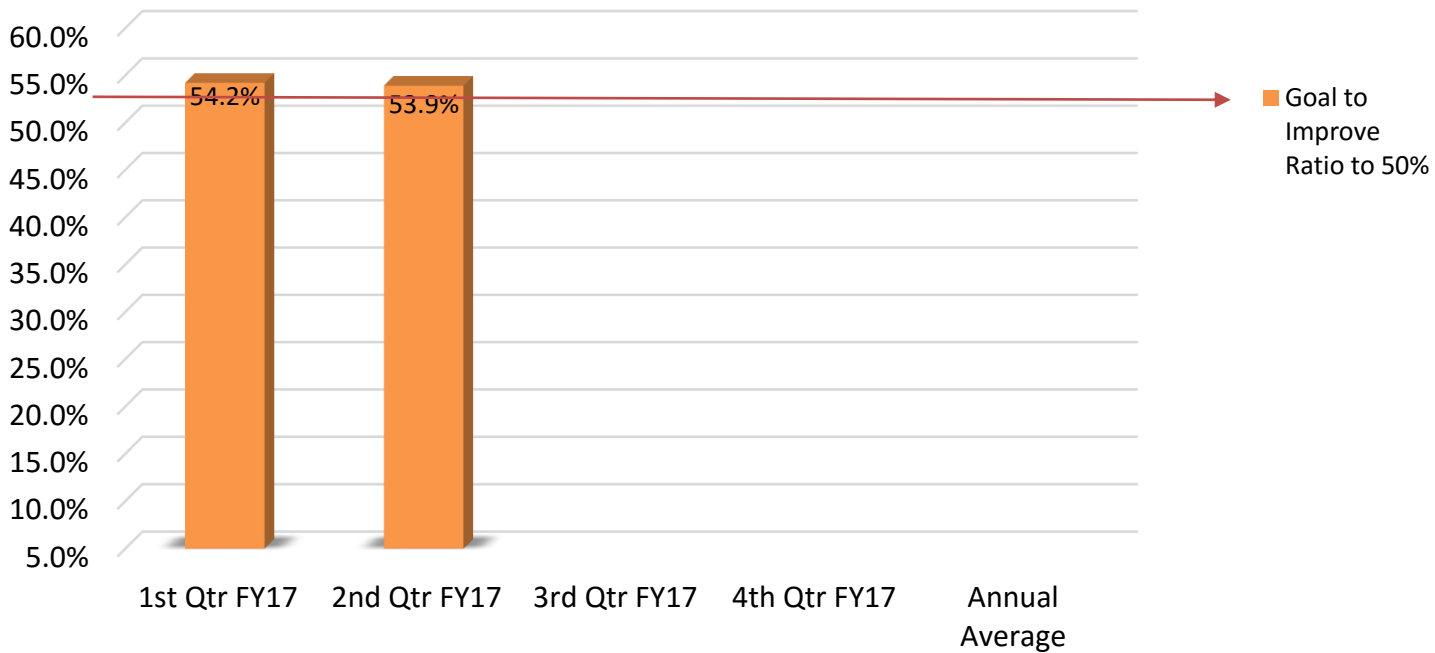
Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to Reactive request to 50%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Improve Ratio of Preventive/Predictive Work Requests



STATUS
2nd Qtr



UNC CHARLOTTE

Great leaders help their people see how they can directly impact the company's objectives and their own personal goals.

Chip Conley

GOAL #2

Create a Reliable and Sustainable Physical Infrastructure



FM Prioritized Projects – FY17

1. **Mobile PM WR** – Estimated Completion May 15, 2017
2. **GIS Master Plan Map** – Estimated Completion Jun 30, 2017
3. **ARCHIBUS Work Order Reinvention** – Estimated Completion Jun 30, 2017
4. **ARCHIBUS Upgrade 23.1** – **Completed**
5. **ARCHIBUS Training Workflow** – Estimated Completion Jun 30, 2016
6. **BAS Website Upgrade Phase 1** – Estimated Completion Jun 30, 2017
7. **GIS Dept. Map** – Estimated Completion Apr 30, 2017
8. **GIS Wayfinding Signage** – Estimated Completion Jun 30, 2017
9. **FM Windows 10 Upgrades** – Estimated Completion Jun 30, 2017
10. **FM Computer Hardware** – **Completed**
11. **ARCHIBUS Training: Transition to CANVAS** – Estimated Completion May 1, 2017
12. **Mobile Floor Plans** – Estimated Completion Jun 1, 2017
13. **Water Valve Survey** – **Completed**
14. **Fire Hydrant Survey** – Estimated Completion Jun 30, 2017
15. **ADA Pathways Phase 1, 2 & 3** – **Phase 1 Completed**; Phase 2 Est. Completion Feb 10, 2017
16. **Impervious Layer Clean-up/Updates** – Estimated Completion Jun 30, 2017
17. **FM Screens & Banner Asset 2017 Inventory** – Estimated Completion Mar 15, 2017
18. **ARCHIBUS Security Upgrades** – **Completed**
19. **WO Assignment status board** – **Completed**
20. **ARCHIBUS Non-Assignable area** – **Completed**
21. **Geodatabase Cleanup Project** – Estimated Completion June 15, 2017
22. **ARCHIBUS Survey Reports Improvements** – Estimated Completion Nov 23, 2016
23. **GIS Publishing Rule Improvements** – Estimated Completion Jun 30, 2016
24. **Mobile Intent Reinvention** – Estimated Completion Apr 10, 2017
25. **Remote Key Admins** – Estimated Completion Dec 14, 2016
26. **PM Forecasting Report** – Estimated Completion Mar 30, 2017
27. **CRDM 3rd Generation** – Estimated Completion Apr 10, 2016
28. **Database Migration to ITS** – **Completed**
29. **Estimating /Scope & Budget Workbook Upgrade** – Estimated Completion May 25, 2017
30. **Dropbox for Asset Management (BIM)** – Estimated Completion Jun 30, 2017
31. **BES Mobile App** – **Completed**
32. **Server Migration to VM Support** – Estimated Completion June 28, 2017

Other Projects (Not Calculated)

1. **Key Management Module**
2. **Equipment Maps**
3. **ARCHIBUS Card Access Integration**
4. **Campus Outdoor Lighting Controls**
5. **SDI Enhancements**
6. **Dropbox Records Mgmt. for Design Services**
7. **Space Mgmt. Reports**
8. **Project Mgmt. Tools**
9. **ARCHIBUS Testing Framework**

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Lead
FIS

ACTION PLAN

Actions Planned:

1. Complete and Finalize Dropbox for Asset Mgmt. by Feb 28, 2017.
2. Complete final changes to Estimating Workbook/New Scope and Budget process for Design Services by Jan 31, 2017.
3. Transition all ARCHIBUS Moodle2 training course to Canvas by April 15, 2017.
4. Complete WR PM app for testing by April 28, 2017.
5. Complete the Deployment of Building Automation Systems (BAS) FIN 4.0 by Apr 28, 2017.
6. Migrate JACES to new N4 Server by June 30, 2017.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Lead
FIS

ACTION PLAN

Actions Completed:

1. Go Live Completed for ARCHIBUS 23.1 Upgrade on Nov. 2, 2016.
2. Went live with Facilities Notification process Nov 10, 2016.
3. Completed Water Valve Survey by Nov 20, 2016.
4. Completed Final PC set up and distribution on Dec 20, 2016.
5. Completed initial front page development, layout and structure for ARCHIBUS Customer Training courses in CANVAS.
6. Completed BES App Testing by Dec 22, 2016.

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

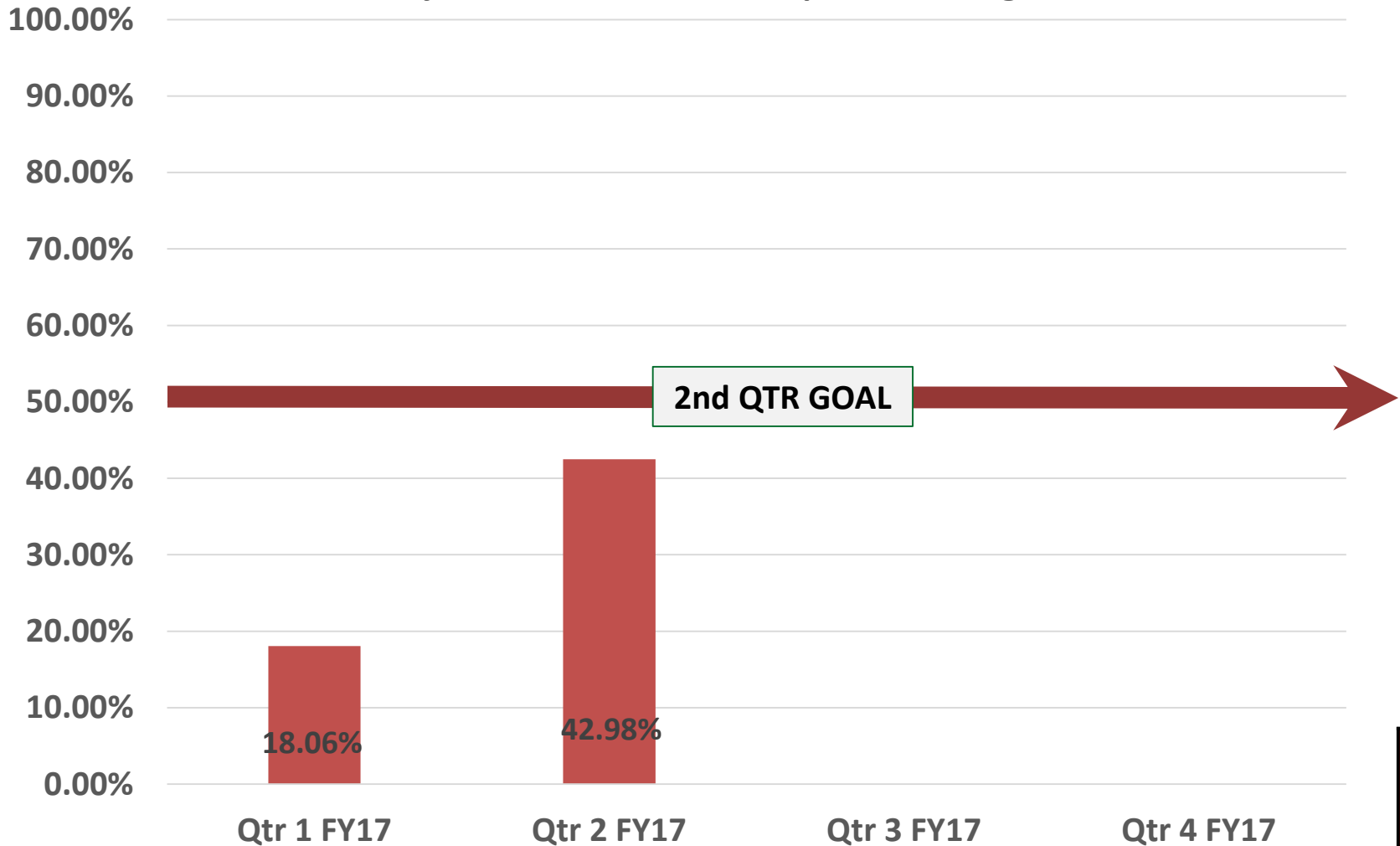
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes

FIS Project Task Cumulative Completion Average



STATUS

Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

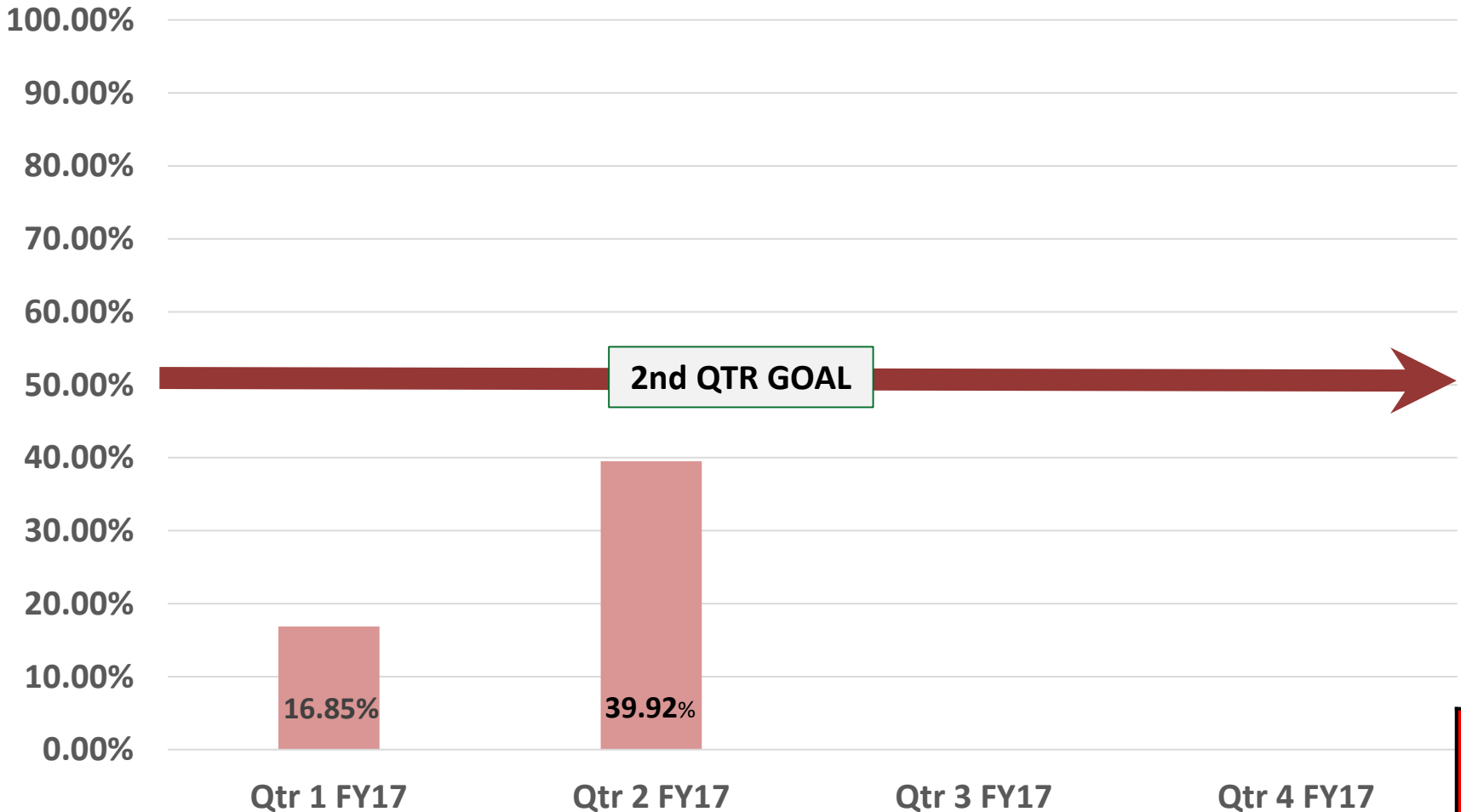
Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes

FIS Weighted Project Average Completion



STATUS

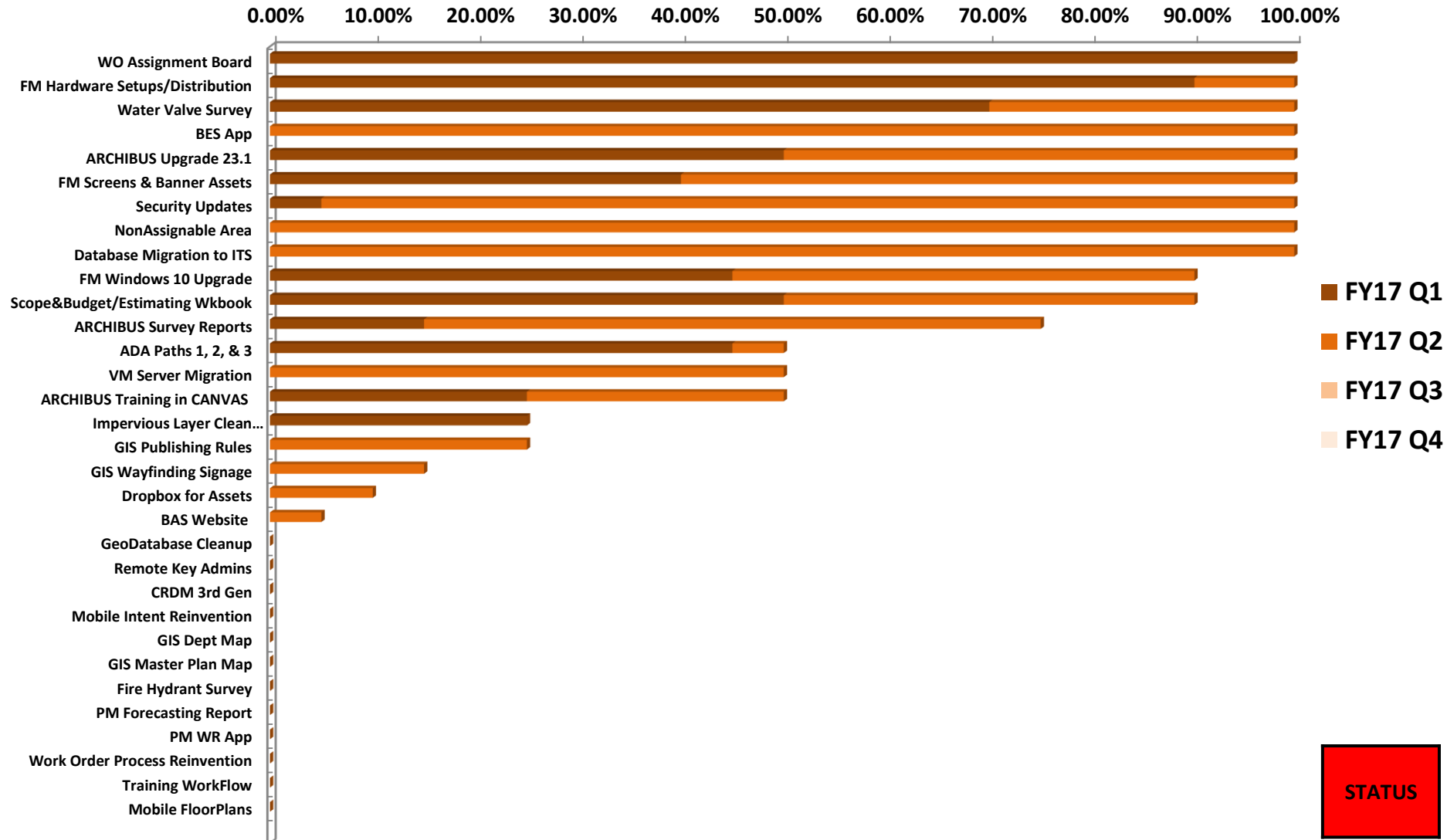
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Lead
FIS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan
Measure: Percent Completion of Five-Year Technology Projects
 Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes



STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1:	95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure:	Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)
Tactic 2.2.2:	Review Project Capacity - Goal 250 projects per year.
Measure:	Number of Projects Completed (Annual Goal)

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:

- Modify Estimating Workbook to include a separate section for Capital direct payments via Purchase Order or Direct Pay.
✓ *Timeline: **FY17 QTR 3 – FIS COMPLETING FINAL DETAILS - PRELIMINARY TESTING WORKS***
- Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
✓ *Timeline: **FY17 QTR 3 – DESIGN SERVICES TESTING PHASE ONGOING***
- Convert Excel Purchase Requisition (PR) to Archibus PR.
✓ *Timeline: **On Hold***
- Updates to Estimating Workbook to improve Contingency and Fee calculations.
✓ *Timeline: **FY15 QTR 4 – UPDATED AND PROVIDING ACCURATE CALCULATIONS***

Customer Orientation for Design Services Processes and Archibus Design Services Project Management:

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
✓ *Timeline: **FY16 QTR 2 - FY17 QTR 4 – Work In Progress***

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.

Annual Goal
95%

QTR 2 Status
93.3%

Lead
Design Services

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

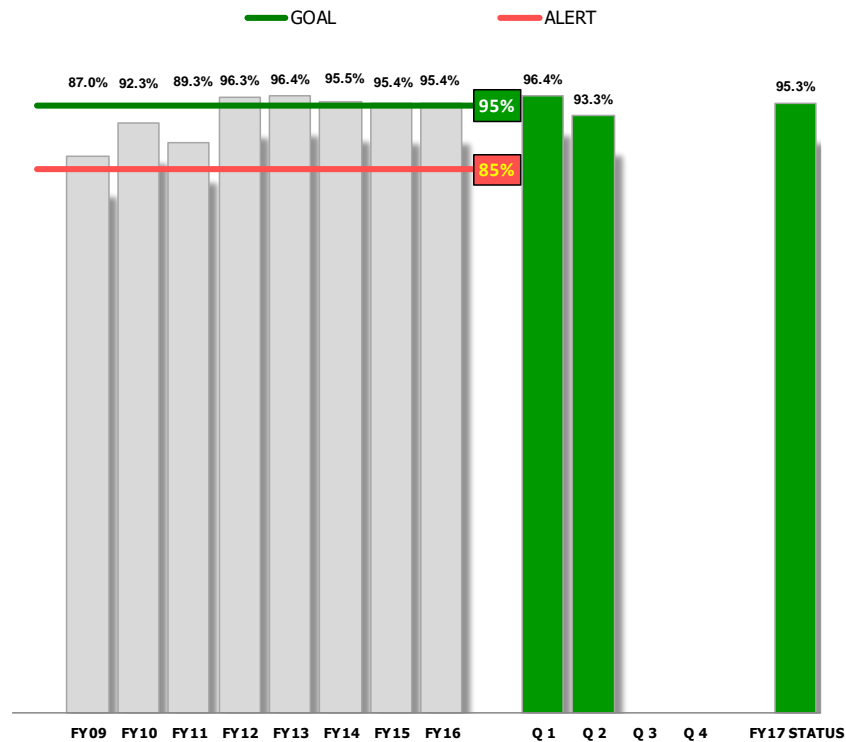
Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)

QUARTERLY REVIEW	No. Of Projects	Projects Occupied by scheduled date	Projects not Occupied by scheduled date	Percent
FY09	115	100	15	87.0%
FY10	182	168	14	92.3%
FY11	224	200	24	89.3%
FY12	240	231	9	96.3%
FY13	139	134	5	96.4%
FY14	221	211	10	95.5%
FY15	216	206	10	95.4%
FY16	216	206	10	95.4%
Q 1	28	27	1	96.4%
Q 2	15	14	1	93.3%
Q 3	0	0	0	0.0%
Q 4	0	0	0	0.0%
FY17 STATUS	43	41	2	95.3%



GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2017.

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Continue to update CRDM data (ongoing)
- Integrate feedback from users of [CRDM map](#) and master list (ongoing)
- Update FCI tracker by building to capture FCAP changes and project completions to calculate movement in FCI (ongoing)
- Provide status and recommendations to attain a 5% improvement (July 2017)
- Developed “Third Generation” CRDM – Forecasting reports for roofs (July 2017)

STATUS

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

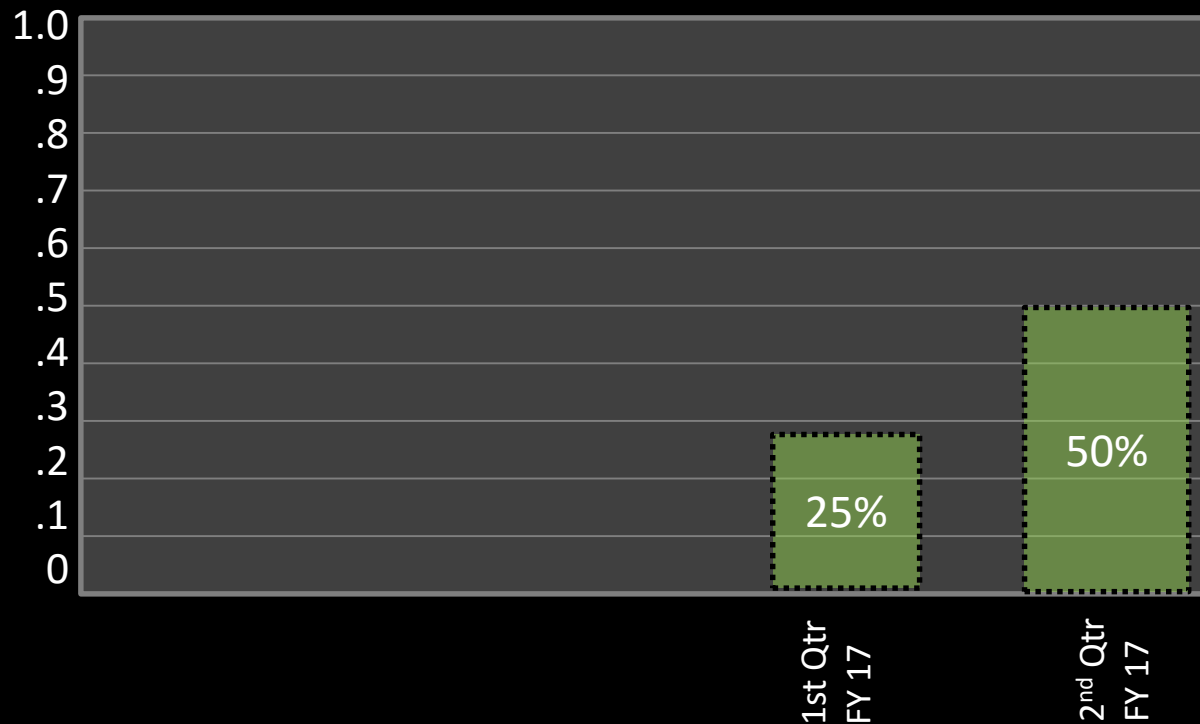
Tactic 2.3.1: Refine FCI tracking method to illustrate changes over time (by quarter) and use this information as a tool for recommending projects to improve campus FCI by 5% NLT July 2017.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Percentage of Completion



Status

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process

Tactic 2.5.1: Develop Lifecycle cost analysis and funding process for capital projects (Action Plan only)

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Planned:**
 - **Sustain current process of completing Operating Budget sheets for new projects**
 - **Continue to collaborate with Financial Services, the administration, and customers on the funding of the 5-Year Capital Plan.**

STATUS

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.5	Improve the Capital Planning and Design Process
Tactic	2.5.2	90% of designers under contract within 120 days of the Project posting in CAPSTAT
	2.5.3	90% of Designs complete by the scheduled completion date
	2.5.4	90% of designs complete within design budgeted fee

ACTION PLAN

Actions Completed

- Cone Center Air Handlers, Admissions & Visitors Center, Union Deck, Scott Hall Renovation

Actions Planned

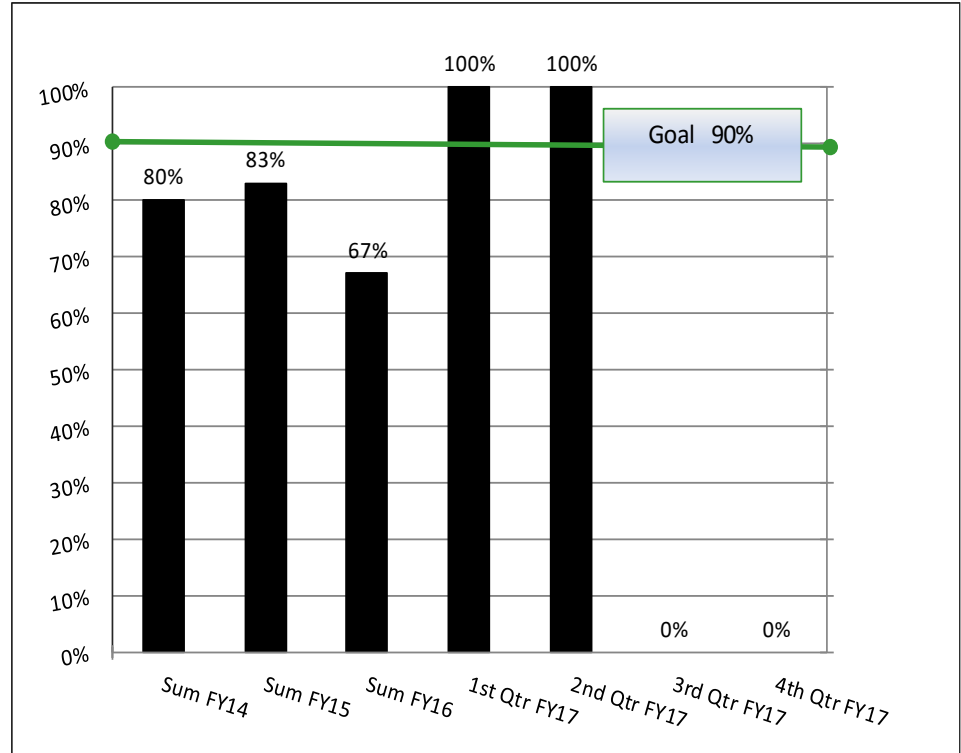
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer's agreement.
- Baseline (BL) schedules – accurate, used weekly by PMs & CMs
- PMs print project budget / financial sheets. Have them on hand for all design meetings. PMs must know their project authorization, current source of funding, available balances.
- Report monthly to AVC FM status of changes relating to designer fees, scope creep, schedule misses, etc..
- Protect contingency limit uses for unforeseen conditions, inflation.

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.2 90% of designers under contract within 120 days of the Project posting in Interscope Plus
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 auth. in Interscope	Designer under contract w/in 120	Designer not under contract w/in 120	% Designers under contract
Summary FY-14	7	4	1	80%
Summary FY-15	7	5	1	83%
Summary FY-16	6	4	2	67%
1st Qtr. FY-17	1	3	0	100%
2nd Qtr. FY-17	0	3	0	100%
3rd Qtr. FY-17	0	0	0	
4th Qtr. FY-17	0	0	0	



Tactic Measurement for 2nd Quarter is 100%

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Lead Capital

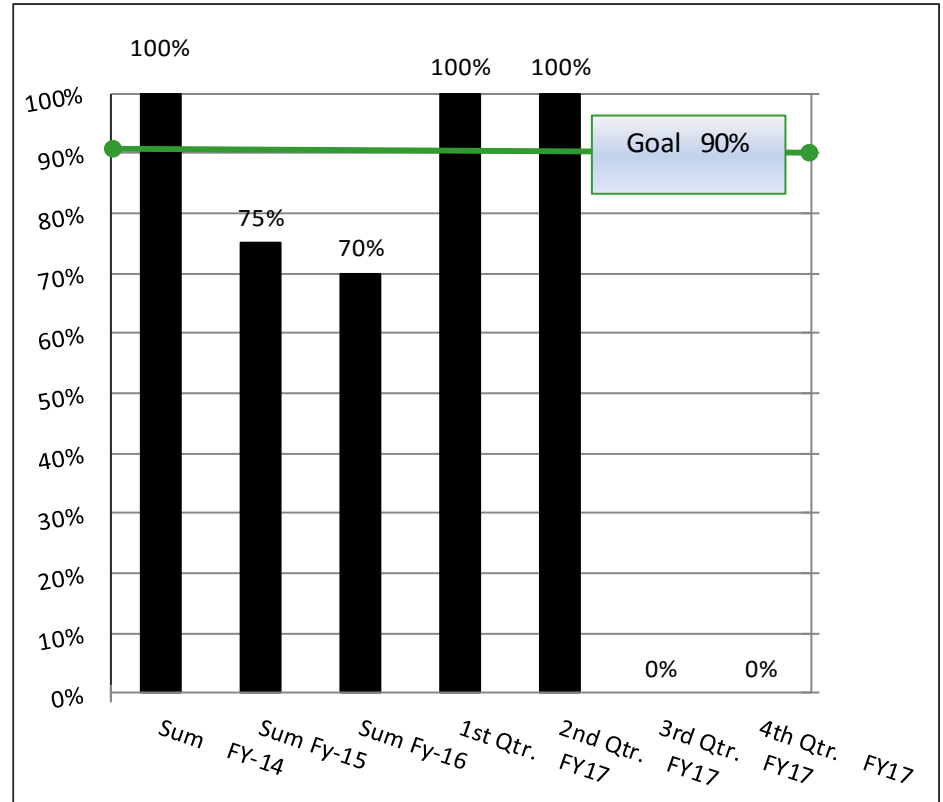
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.3 90% of designs complete by the scheduled completion date

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	#not completed by scheduled time	% Designs complete by completion time
Summary FY-14	8	0	100%
Summary FY-15	3	1	75%
Summary FY-16	7	3	70%
1st Qtr. FY-17	1	0	100%
2nd Qtr. FY-17	1	0	100%
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Status

Tactic Measurement for 2nd Quarter is 100%

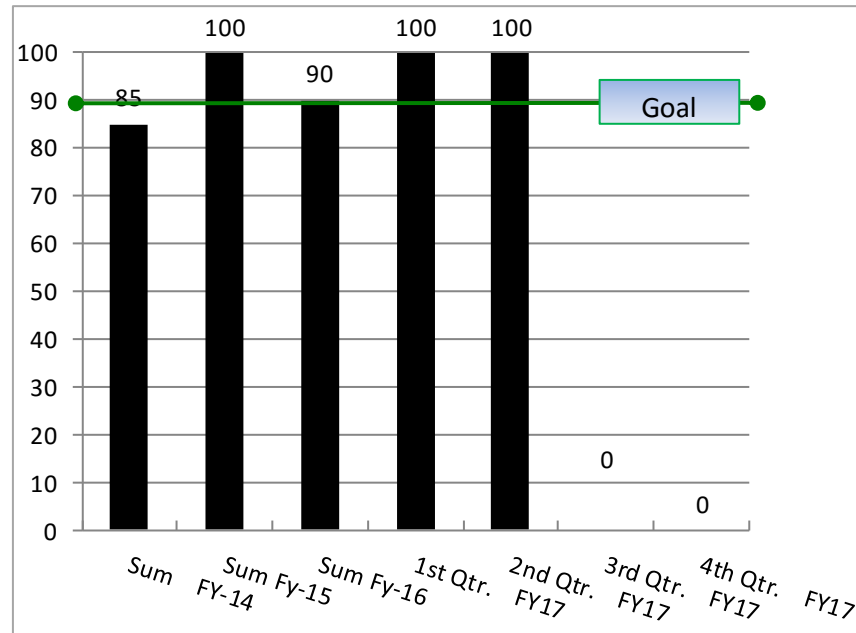
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.4 90% of designs complete within design budgeted fee

Measure: Percentage of designs completed within the original design contract amount

Balanced Scorecard Category: Internal Processes

STRATEGIC REVIEW by Fiscal Year (July-June)	# of designs with original budgeted fee	# designs complete not within budget	% Designs not complete w/in budgeted fee
Summary FY-14	6	1	85%
Summary FY-15	3	0	100%
Summary FY-16	9	1	90%
1st Qtr. FY-17	1	0	100%
2nd Qtr. FY-17	1	0	100%
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Tactic Measurement for 2nd Quarter is 100%

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Lead
Capital

Objective	2.6	Improve the Capital Construction Process
Tactic	2.6.1	90% of capital construction Projects completed on time
	2.6.2	95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

ACTION PLAN

Actions Complete

- Residence Hall Phase 14
- Actions Planned
- CMs keep baseline schedules current & refer to them regularly, focus on design and construction end dates.
- PMs & CMs discuss schedule (baseline & current) with end users, designers & contractors
- Inform designers and contractors of each other's contractual schedule dates
- PMs & CMs maintain & print project budgets & account reports monthly (have at all project meetings)
- PMs share budgets with AVC and end users.
- Hold contingency for unforeseen conditions, project requirements, inflation, etc.
- Manage construction scope creep

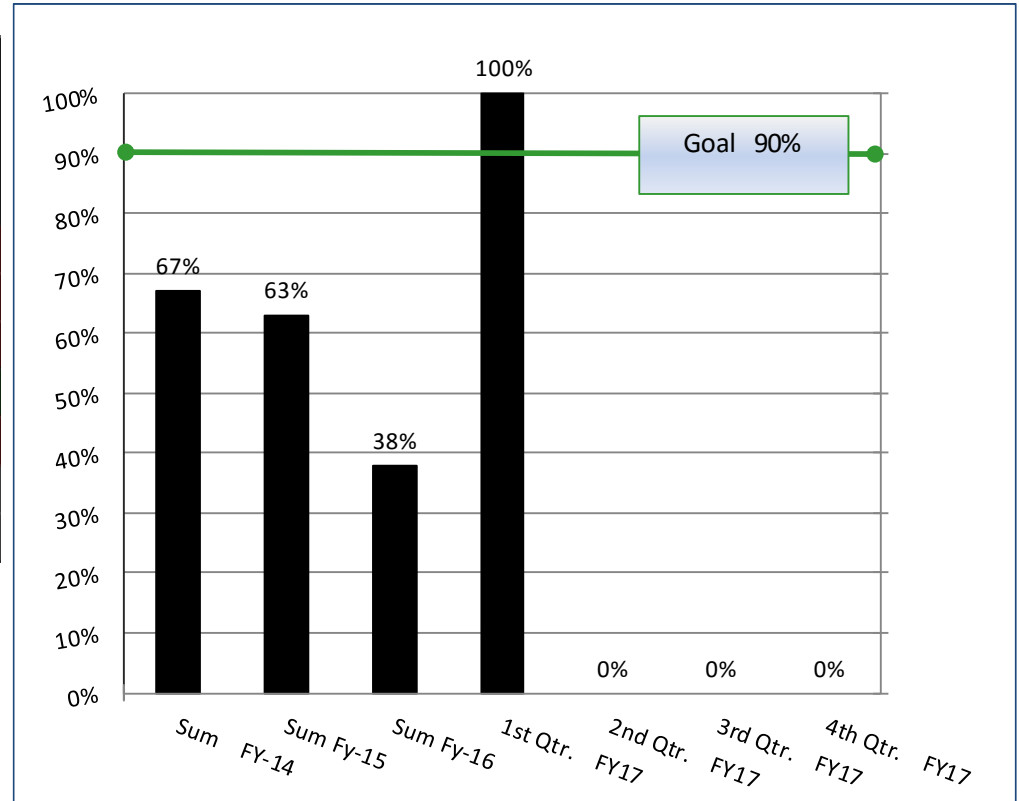
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.1 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-14	6	3	67%
Summary FY-15	5	3	63%
Summary FY-16	3	5	38%
1st Qtr. FY-17	2	0	100%
2nd Qtr. FY-17	0	1	0%
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Tactic Measurement for 2nd Quarter is 0%

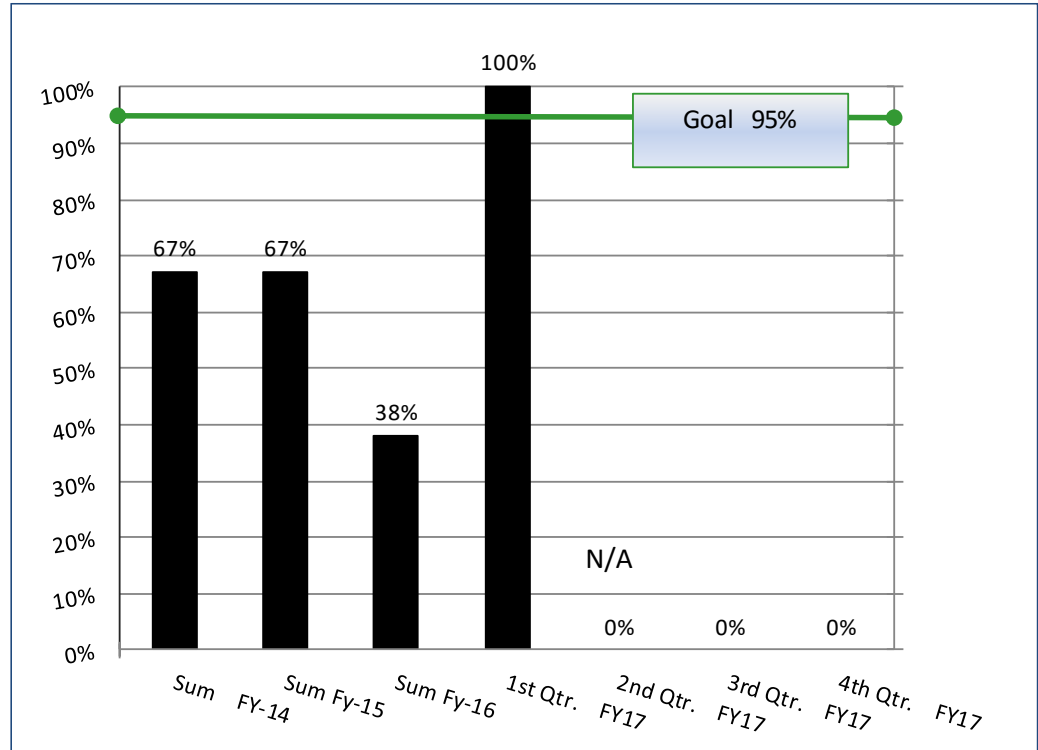
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.2 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

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-14	6	3	67%
Summary FY-15	4	2	67%
Summary FY-16	3	5	38%
1st Qtr. FY-17	2	0	100%
2nd Qtr. FY-17	0	0	N/A
3rd Qtr. FY-17	0	0	
4th Qtr. FY-17	0	0	



Status

Tactic Measurement for 2nd Quarter is N/A

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.9: Develop a strategic plan for supporting research facilities, including installation of adequate redundant infrastructure to ensure continuous daily support (Action Plan only)

Lead: Facilities Operations

Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Actions Planned

1. Construction of a new sub station (2018)
2. Continue monthly and annual PM service on generators
3. Implement Generator Load Bank Testing program (2017)
4. Implement Fuel Polishing program (2017)
5. Implement Di-electric Oil Testing on transformers (2018)
6. Hire a Critical Facilities Supervisor (March 2017)

Actions Completed

1. Completed monthly and annual generator PM's (On-going)



UNC CHARLOTTE

In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance... you thrive on that.

Bill Gates

GOAL #3

Foster a Customer Focused Organization



GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.1:	Achieve overall customer satisfaction of 93% for FM services.
Measure:	Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with <the service> I received from Facilities Management”

Lead: Facilities Management Wide

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Publicity/Public Relations:

- **Campus Construction Reports*:** Prepare and distribute every four weeks. **Last completed 12/16, next 01/17**
- **News Releases:** Write and distribute through several media channels. **Continual**
 - 5-Year Capital Construction Plan, Academic Complex Renovation, STARS Silver rating, etc.
- **Publicity documentation and analytics*:** Will continue to work with UComm and ITS on analytics; goal is to increase external media (in particular, trade publications) coverage.

Internal Communications:

- **Intranet and Web Site** Content review and user feedback. *(note: level 0 security information)* **Began working alongside FIS to begin a pilot phase of Confluence and assess the needs of BES and Operations.**
- **FM Communication SOP:** Departmental guidelines in communication, branding, etc. (targeted completion Spring 2017)

Customer Communication Initiatives (interrelated):

- **Launch 2nd customer feedback interviews** **Late Spring/Early Fall 2017**
- **Customer Facing technology** **Ongoing**
 - ARCHIBUS Notifications migration complete and launched in November as the new Facilities Notification announcements, RSS feed added to FM web site in December, and continual training planned for late spring

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

ACTION PLAN

Actions Planned

1. Continue to work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy
2. Continue to develop BAS Controls section and cross-train with Zones
3. Hire Lead BAS Technician (February 2017)
4. Continue to include Energy Manager in Bi-Weekly Operations' meetings
5. On-going discussions with FIS re campus wide analytics (BAS Dashboard)
6. Develop Utilities Team and Retro Commissioning Supervisor (March 2017)
7. Working with Capital; Mechanical Systems Upgrade Project (Kennedy) (April 2017)
8. Develop and implement customer follow-up plan (On-going)
9. Working with Capital; Retro-commissioning (Woodward and Grigg) (On-Going)

Actions Completed

1. Implemented daily monitoring of temperature using BAS and field verification.
2. Updated temperature policy
3. Feed water pump replacement (System Reliability)(November 2016)
4. Completed Retro-commissioning of Cameron, McEniry and Smith

Lead
F. O.

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

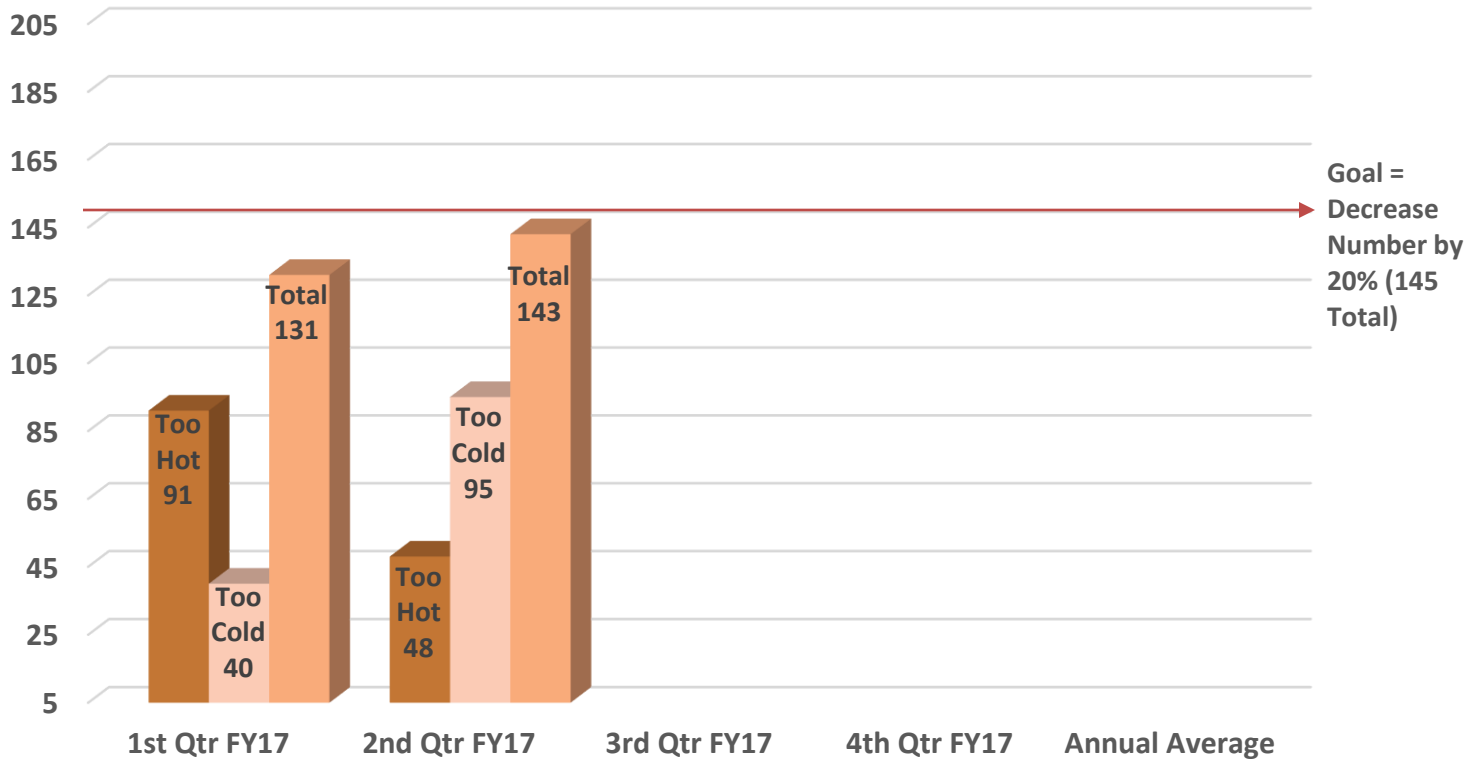
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%

Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls



STATUS
2ND Quarter

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously improve customer service/satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 95% of Informal Project Customers are satisfied or very satisfied
Measure: Results from Archibus – Design Services Projects Customer Survey

ACTION PLANS FOR IMPROVEMENT

Archibus - Design Services Customer Survey:

INCREASED GOAL TO 95%

Process Improvements using: Define, Measure, Analyze, Design, and Verify

- Project Compliance with State Construction Office (SCO)
- Inspection Compliance with State Construction Office
- Project Entry into Interscope Plus
- Project Documentation
- Project HUB Reporting

Actions taken by Members of the Design Services Team:

- Stop by Customers after the project is complete and in use to review how the renovated space is performing. Received excellent feedback.
- Keeping the communication lines open by email, phone and face to face works wonders. This helps with options going forward on other projects.
- Sending daily construction field reports has been working for one very “hands on” Customer.
- Hold weekly meetings on job site to discuss progress with Customer. Customers enjoy seeing the project and discussing any issues or concerns face to face.
- Each Customer is unique and so must be the way I communicate with them. Often it's face to face, other times email or a phone call.
- The process is simple to state, but difficult to master; effective communication is not easy.

Facilities Management Strategic Planning Session – Second Quarter FY 2017

Annual Goal
95%

QTR 2 Status
100%

Lead
Design Services

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 3.1.3: 95% of Informal Project Customers are more than satisfied or satisfied
Measure: Results from Project Related Customer Surveys

95% of Informal Project Customers More than Satisfied or Satisfied with services received

Survey Totals by Fiscal Year	Number of Surveys issued	Number of Survey Responses	More than Satisfied	Satisfied	Less then Satisfied	Percent Satisfied
FY09	22	22	18	3	0	95.5%
FY10	30	30	18	5	0	76.7%
FY11	33	33	24	6	2	90.9%
FY12	31	31	27	2	0	93.5%
FY13	22	22	18	3	0	95.5%
FY14	24	24	18	3	0	87.5%
FY15	117	41	35	3	0	92.7%
FY16	117	41	35	3	0	92.7%
FY17		12	5	6	1	92%
Q 1	22	8	1	6	1	88%
Q 2	13	4	4	0	0	100%
Q 3						
Q 4						
YEAR TO DATE	35	12	RESPONSE RATE - TOTAL			34.3%



GOAL #3 Foster a Customer Focused Organization

Objective 3.1: Continuously improve customer service/satisfaction

Tactic 3.1.5: Build brand awareness

Measure: Action Plan Only

Lead: Facilities Business Office - Communications

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Special Projects:

- **Light Rail Coordination Committee** (member of the communications working group)
- **Academic Complex Communication Plan** (implementation underway)
- **5-Year Plan External Communication Plan** (implementation underway)
- **5-Year Plan website** (continual updates to project listing)
- **SRAPPA Conference** – FM hosting
 - Logo design underway
- **Traffic communications committee** (joint partnership with University Communications):
 - Request guidance from AVC



UNC CHARLOTTE

Start with good people, lay out the rules, communicate with your employees, motivate them and reward them. If you do all those things effectively, you can't miss.

Lee Iacocca

GOAL #4

Recruit, Develop, and Retain
Quality Employees



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1:	Vacancy time of no longer than 80 calendar days – Nonexempt Vacancy time of no longer than 120 calendar days - Exempt
Tactic 4.1.2:	Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2017

Recruitment Strategies:

- Expanding advertising venues when appropriate to increase the pool of qualified applicants and ensure a qualified, diverse applicant pool;
- Monitoring timely and efficient processing of position management actions; Assisting units with PDs, job postings, NinerTalent usage, etc.;
- Monitoring budgeted vacancies to ensure that they do not reach the abolishment threshold; Work with FBO Director, University Budget Office and GA/OSBM;
- Participating on selection committees for FO Zones and Central Ops, BES, FBO, Space Management, Real Estate, FIS and Design Services. Hope to expand to remaining FM units in future.

GOAL #4 Recruit, Develop and Retain Quality Employees

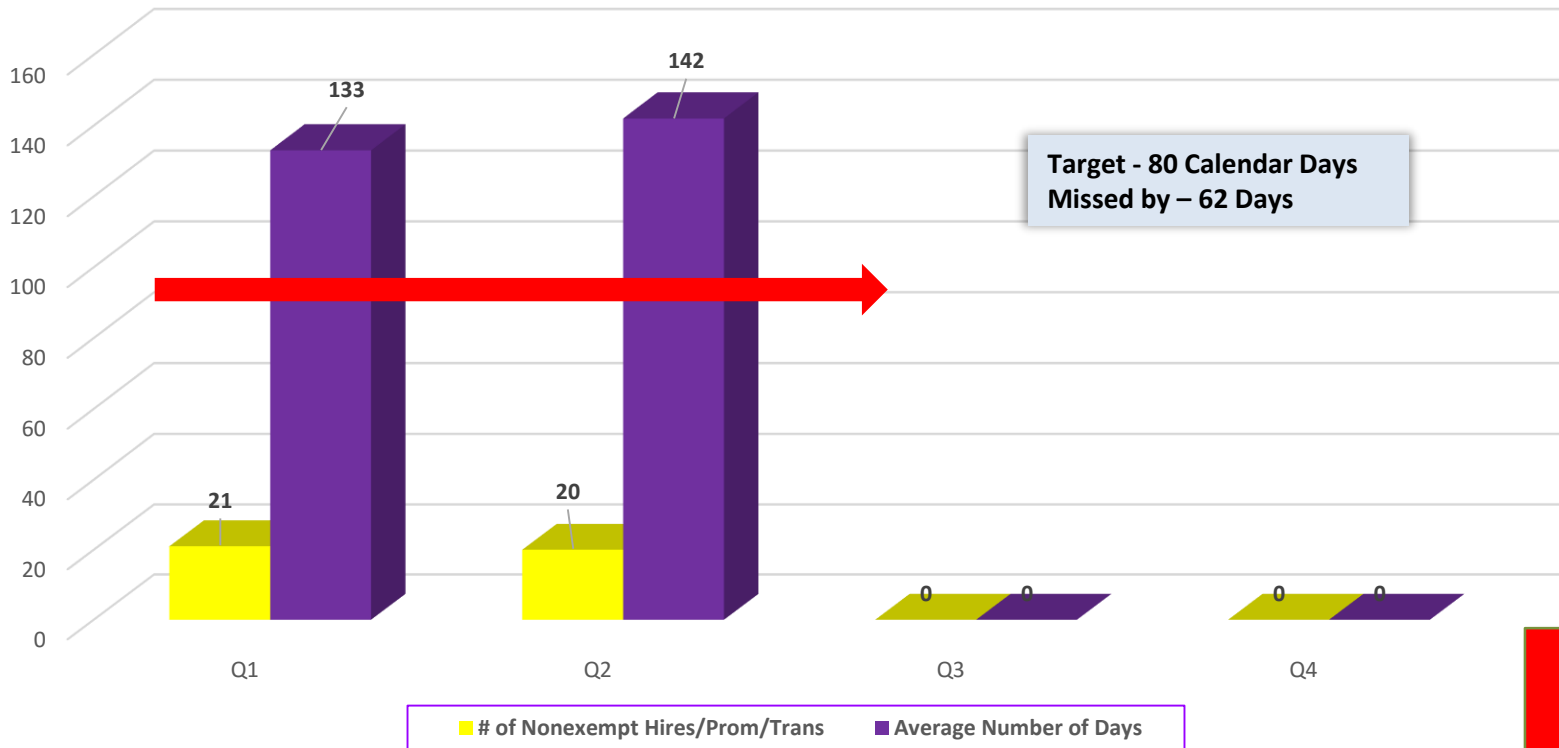
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1:	Vacancy time of no longer than 80 calendar days – Nonexempt Vacancy time of no longer than 120 calendar days - Exempt
Measure:	Days needed to fill vacant positions

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Nonexempt Vacancies - FY 2017



STATUS

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

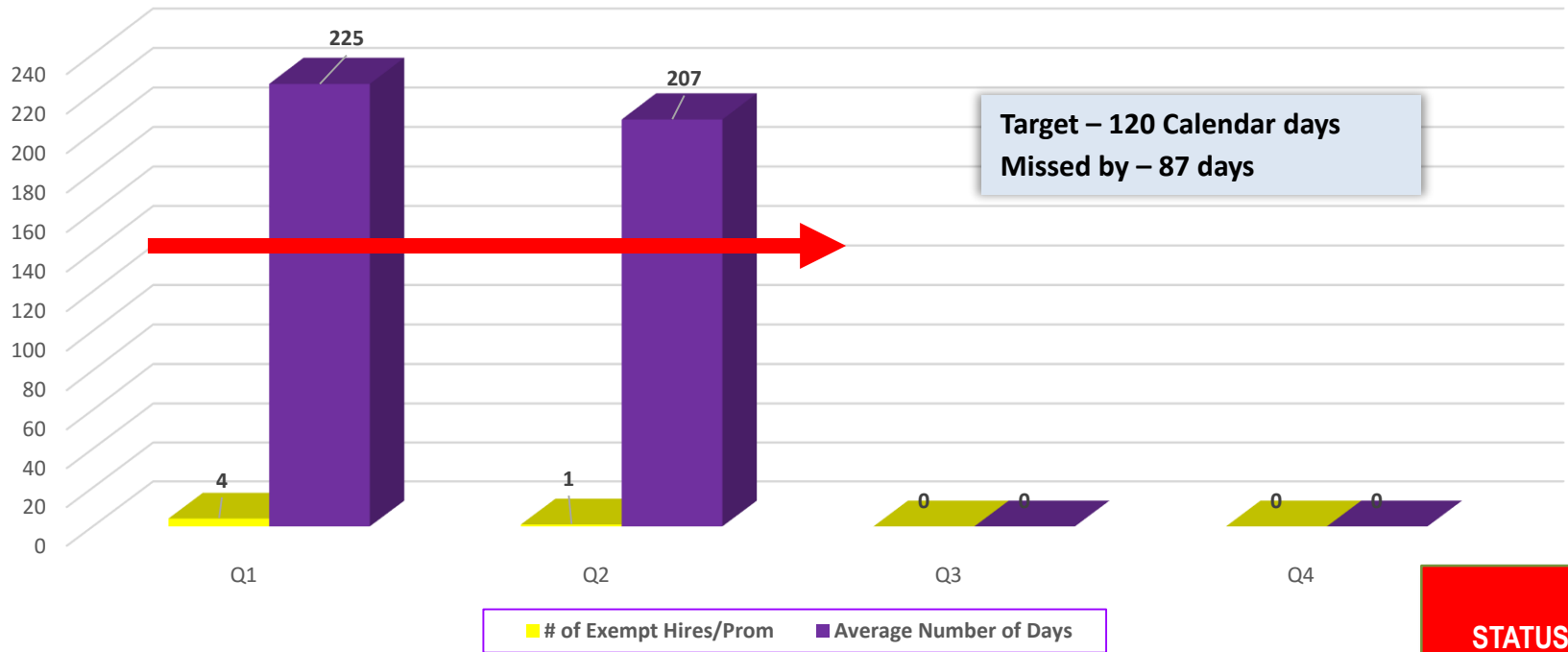
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.1:	Vacancy time of no longer than 80 calendar days – Nonexempt Vacancy time of no longer than 120 calendar days - Exempt
Measure:	Days needed to fill vacant positions

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Exempt (Salaried) Vacancies - FY 2017



STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%
Measure:

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

ACTION PLAN FOR IMPROVEMENT

ONGOING AND CONTINUOUS – Through June 2017

Performance Management:

- 1) Maintain updated position descriptions;
- 2) Work Plans – majority of work plans have been completed for Facilities Management;
- 3) Probationary Period – 12 month;
- 4) Employee Evaluations:
 - a) Annual Evaluation Cycle: March 1, 2016 – February 28, 2017;
 - b) New scale to assess employee performance:
 - Rating #1 = Does Not Meet Expectations
 - Rating #2 = Meets Expectations
 - Rating #3 = Exceeds Expectations
 - c) FM-HR will be sending an instructional email in February;
 - d) Available NinerTalent Performance Management training from Learning and Development.

Lead
FBO

GOAL #4 Recruit, Develop and Retain Quality Employees

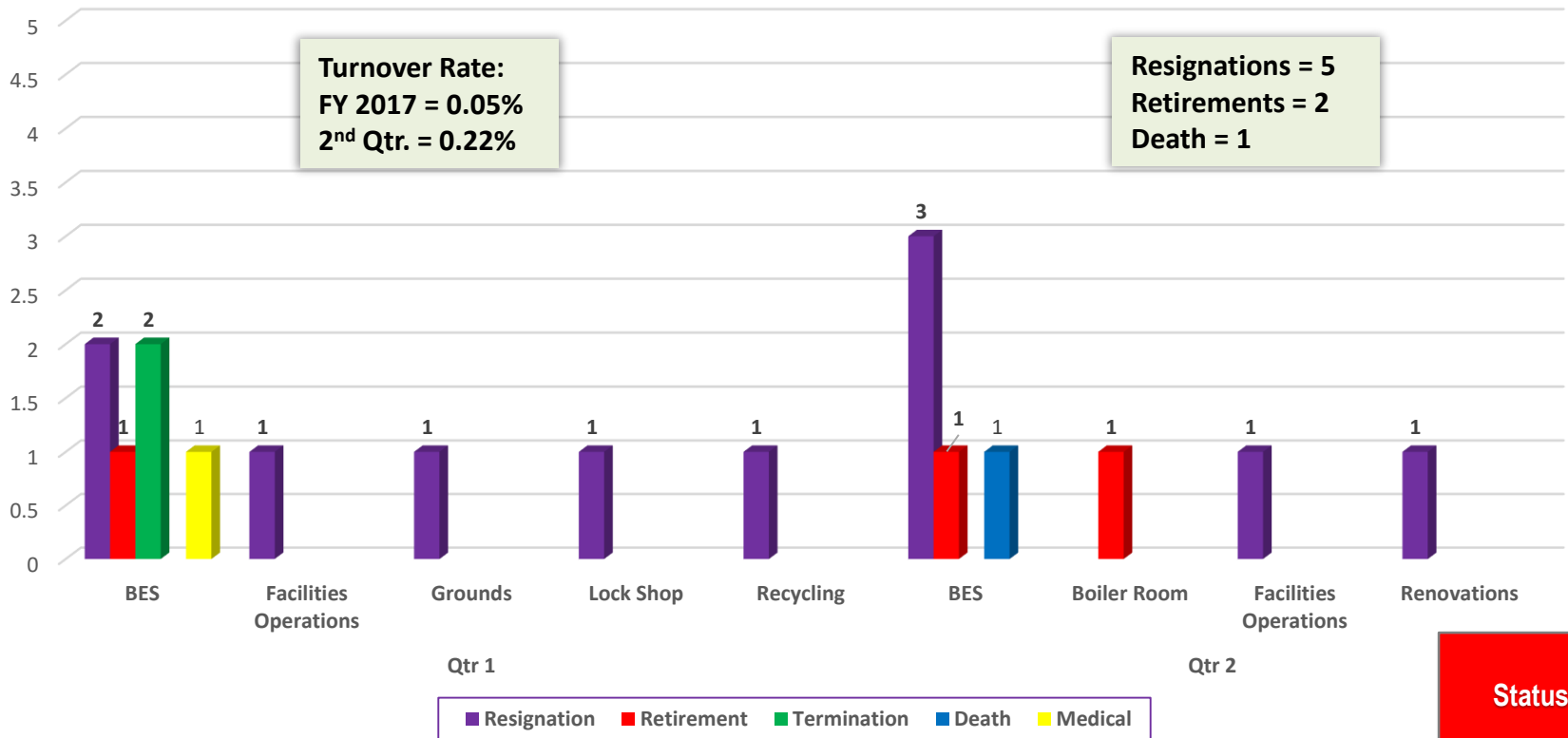
Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%
Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2017 - Nonexempt



Status

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion

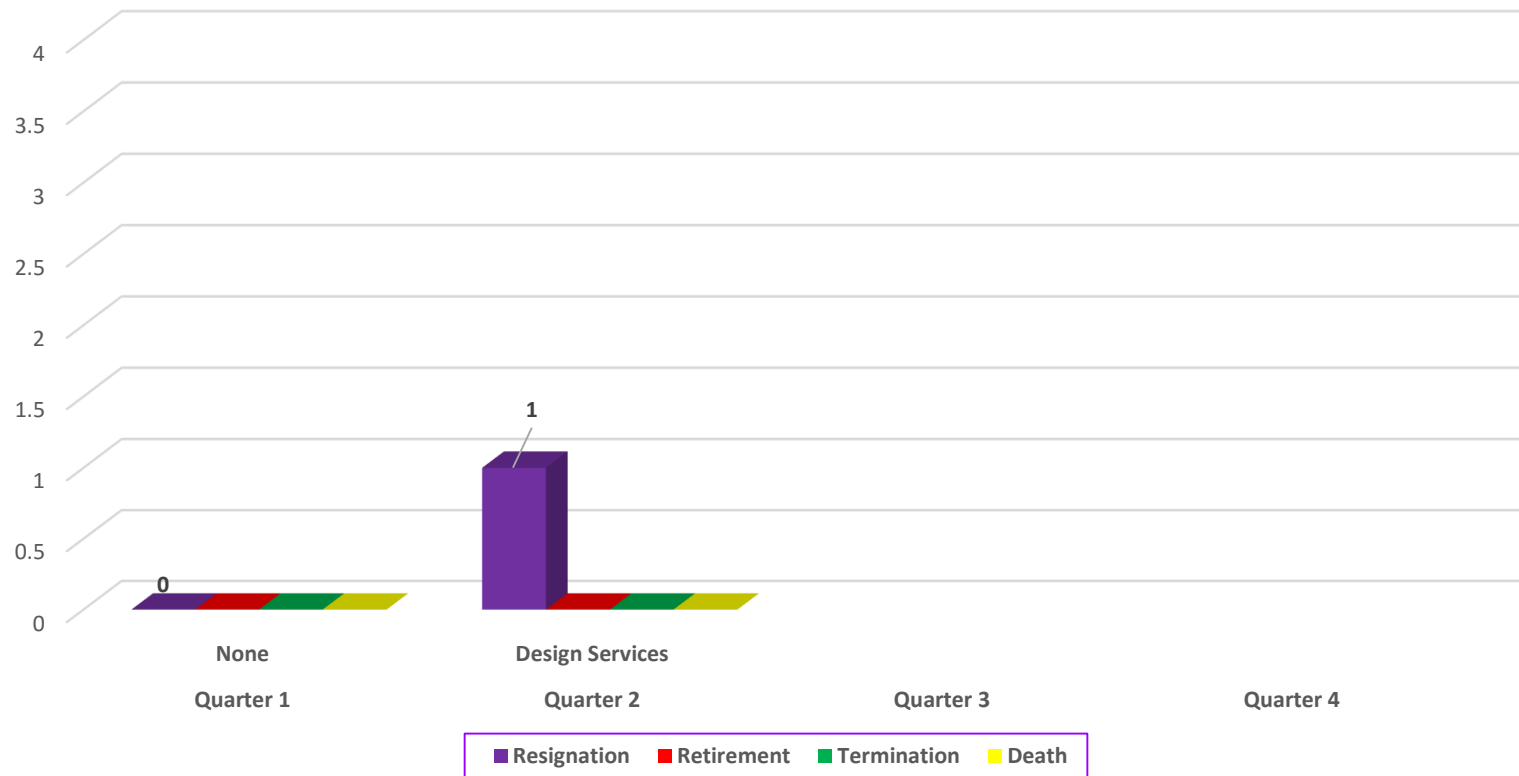
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure: Percent Employees Terminated before end of probationary period

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation & Learning

Separations FY 2017 - Exempt



GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

Tactic 4.2.1:	Increase Supervisor/Manager Training to 40 hours/year
Tactic 4.2.2:	Increase Employee Training to 20 hours/year

Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

ACTION PLAN FOR IMPROVEMENT

Departmental Development

- Identify and source vendors for training delivery;
 - Areas of focus: Leadership, Technical, Administrative, Safety and Professional Development;
 - Encourage use of campus training providers – Campus HR and Skillport. NOTE: some campus HR courses now have a cost;
- Communicate upcoming training events to FM employees;
- Coordinate and collaborate with other FM Learning and Development specialists.

Digital Training Records System

- FM team (Franklin, Mullins and Derberry) developed a Google Docs based system:
 - System roll out for Feb/Mar 2017;
 - FM Training Calendar devised to schedule FM & EHS training sessions.

FM Apprenticeship Program

- Met with State agencies regarding program requirements and certification;
- Secured buy-in from FO in Summer 2016;
- Business Case – being written (80% complete); Submission to AVC scheduled for first week in February;
- Next Steps:
 - Obtain approval from AVC to move forward;
 - Resume discussion with FO; Invite campus HR to discussions (recruitment and class/comp).

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

Tactic 4.2.1:	Increase Supervisor/Manager Training to 40 hours/year
Measure:	Average Hours of Training completed by Supervisors and Managers

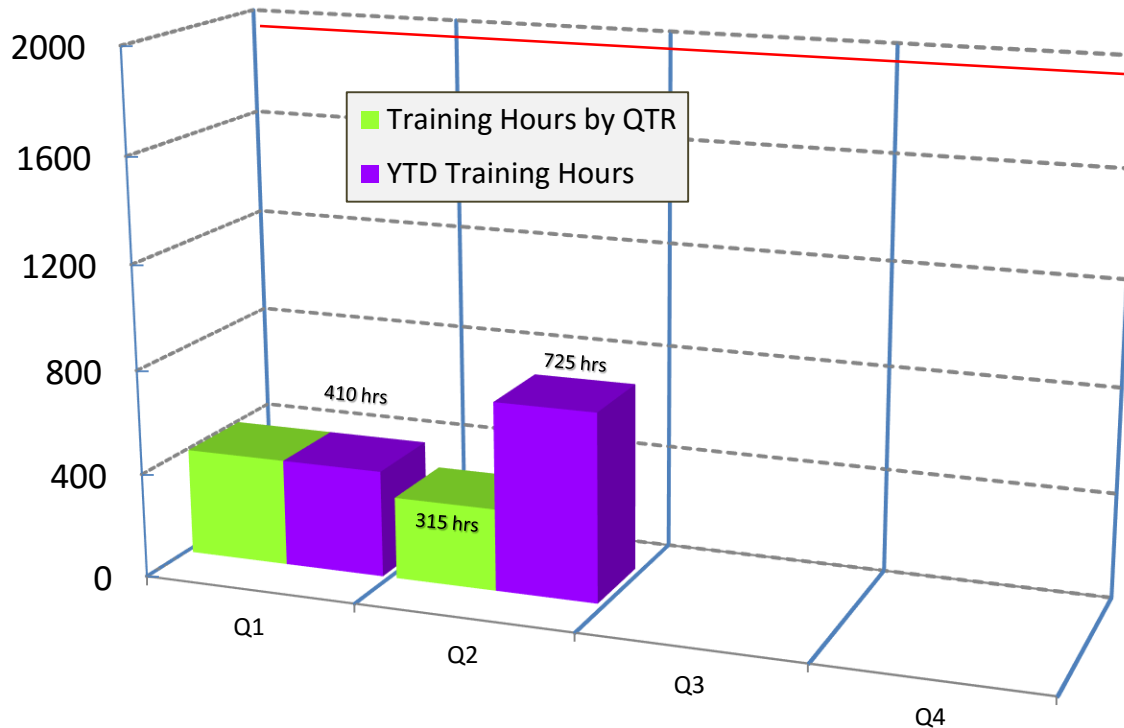
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process, Learning and Growth

Training
Hours

FY 17

Training Hours for Supervisors & Managers by Quarter



Annual Target

<p>FY 2017</p> <p>Target - 1,960 hrs</p> <p>2nd Qtr. Target – 490 hrs</p> <hr/> <p><i>Actual YTD</i></p> <p>725 hrs (37 %)</p> <p><i>Actual 2nd Qtr.</i></p> <p>315 hrs (64 %)</p>

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development

Tactic 4.2.2:	Increase Employee Training to 20 hours/year
Measure:	Average Hours of Training completed by front line employees

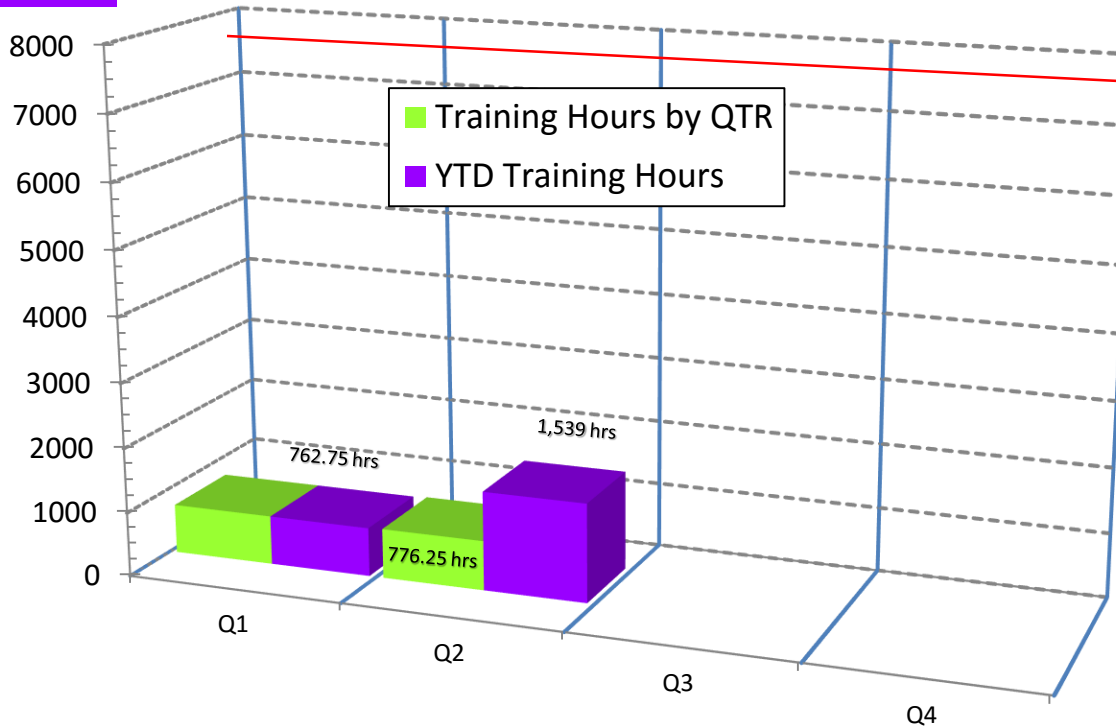
Lead: Facilities Business Office

Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 17

Training Hours for front line employees by Quarter

Training
Hours



Annual Target

FY 2017
Annual Target - 7,760 hrs
2nd Qtr. Target - 1,940 hrs

<i>Actual YTD</i>
1,539 hrs (20 %)
<i>Actual 2nd Qtr.</i>
776.25 hrs (40 %)

STATUS

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment

Tactic 4.3.1:	90% of Employees satisfied or very satisfied working in FM
Tactic 4.3.2:	87% of Employees satisfied or very satisfied in each unit of FM

Lead: Facilities Business Office

Balanced Scorecard Category: Customer Perspective

ACTION PLAN FOR IMPROVEMENT

Survey Logistics:

- Contract signed October 2016;
- Focus Group development and assignment to begin November 2016;
- Survey instrument updated based on feedback from employee focus groups (reduced # of questions, clarified verbiage where needed, added a comment box after each section or field for employees to provide feedback, etc.);
- Coordinated with L&D specialists within the larger units of FO and BES to ensure maximum participation and scheduling timeframe – December 2016;
- Work Climate Survey administration set for January 2017:
 - Survey ends January 25th, 2017;
 - Participation as of January 23rd – 63%.
- Survey findings:
 - Report anticipated April/May 2017;
 - Briefing to AVC-FM and directors – May/June 2017;
 - Briefing to staff – July 2017 AEM.

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

Tactic 4.4.1:	Reduce the number of reportable accidents by 20%
Tactic 4.4.2:	98% of Mandatory Compliance Training completed annually

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

Efforts to reduce accidents:

Safety Training Provided FY17 YTD – 745 hours

- Safety Training Taskforce (Collaborative initiative with EHS):
 - FM Training Calendar established listing safety training topics delivered by EHS
 - Discussion held on best way to report training;
 - Digital training records system developed by FM team, roll out in Feb/Mar 2017
- Initiate Safety related activities:
 - FM Safety Committee meeting - Bi-monthly
 - Supervisor Safety Talks (*12-month topics posted to website; coordinating topic selection with EHS*)
 - Safety Slogan Contest - "*Safety is our Norm*"
 - FBO recommending frequency of safety slogan contest be revisited for possible change to every two years.
- Current Stats for Accident/Incident Totals (**CY17**)
 - Accidents - 3
 - Minor incidents – 0

Lead
FM Wide

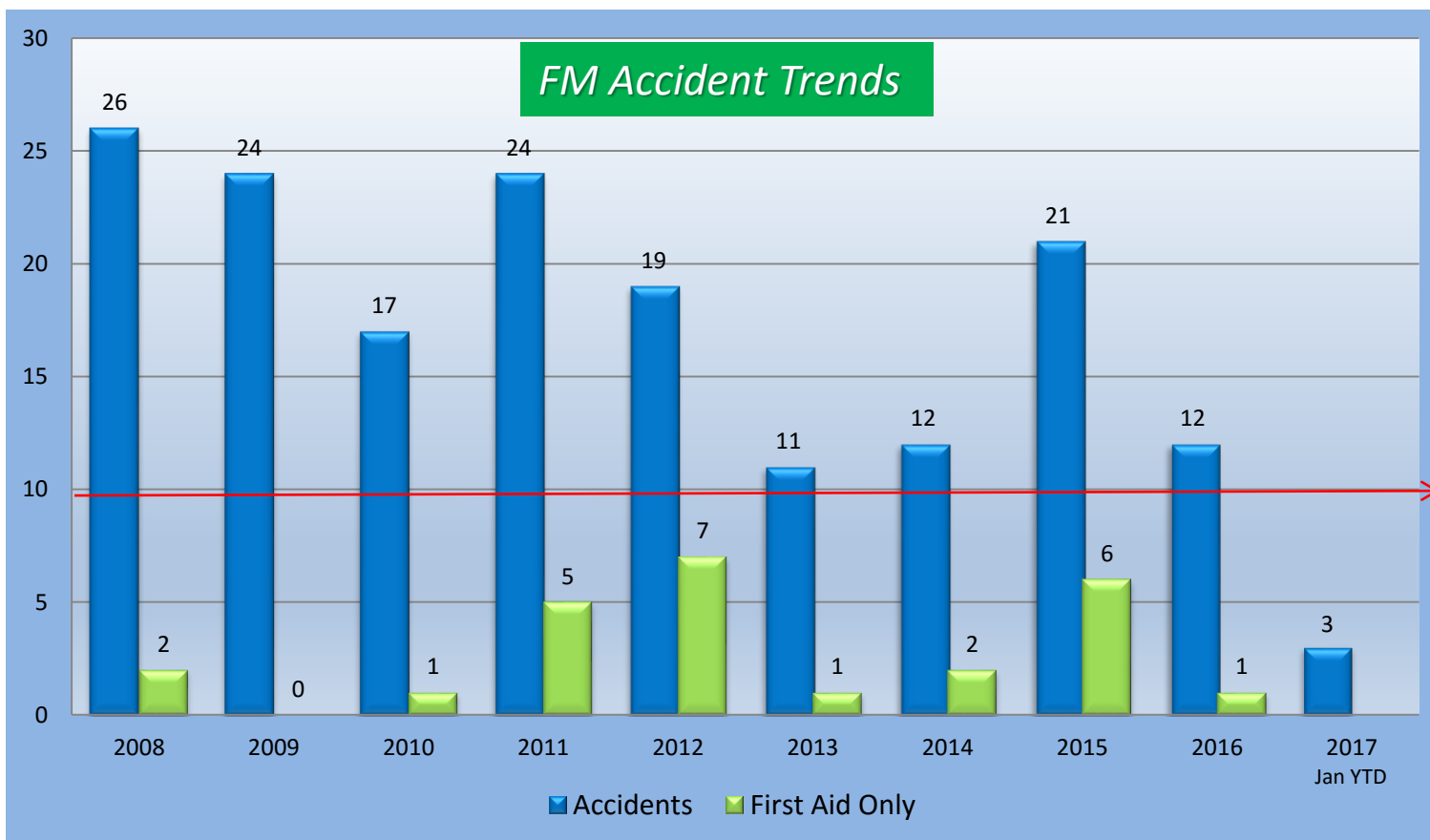
GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety

Tactic 4.4.1: Reduce the number of reportable accidents by 20%
Measure: Number of Reportable Accidents (Measured by Calendar Year)

Lead: FM Wide

Balanced Scorecard Category: Innovation and Learning Perspective



CY 2017
Continuous Improvement
Target ≤ 10

STATUS

Lead
FM Wide

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN FOR IMPROVEMENT

Action Item	Target Date
FM Academy	
<ul style="list-style-type: none"> • Web Content Development, working with FM Communications Officer <ul style="list-style-type: none"> – Digital training records development & launch – Supervisor Safety Talk (SST) topics 2017 calendar published – Training vendor sourcing & selection (as needed/as funded) – Updates to website on upcoming L & D events 	<p>Ongoing</p> <p>Feb/Mar 2017</p>
Leadership	
<ul style="list-style-type: none"> • APPA leadership workshops. <ul style="list-style-type: none"> – APPA Supervisor Toolkit – APPA Leadership Academy (Level IV) – Updates to FM Leadership Development Matrix 	<p>Spring 2017</p> <p>Jan 2017</p> <p>In Process</p>
Technical	
<ul style="list-style-type: none"> – Apprenticeship Project (Business case preparation) – EPA 608 Certification (FO) 	<p>In Process</p> <p>Spring 2017</p>



UNC CHARLOTTE

Transparency, honesty, kindness,
good stewardship, even humor,
work in businesses at all times.

John Gerzema

GOAL #5

Promote Good Stewardship



GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.1:	100% of financial accounts within budget
Tactic 5.1.2:	Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3:	Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Finance/Budget:

- **NEW:** Quarterly meetings with BES reinstated. Next meeting February 2017
- FY 18 Annual Budget Process to begin January 23, 2017; Submittal deadline – March 10, 2017. New component added: 3-year look ahead (FY 18, FY 19 and FY 20) for personnel.
- Labor Services – continued deficits with fund balance
- FBO Year-end meetings underway to determine best close-out strategies for FY 17.

BUDGET EXECUTION: Spend Target 2nd Qtr. = 50%; Spend Target for January 2017 = **58.3%**

Fund Description	% Spend YTD	% Spend + Commitments
Base Budget	50.84%	64.70%
Emergency Fund	36.45%	81.22%
One Time – BA	8.89%	42.49%
Central Funds	12.66%	

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.1:	100% of financial accounts within budget
Tactic 5.1.2:	Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3:	Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

Supplemental Grant/Award Funding:

- Search for grant and award possibilities for Facilities Management organizations. For those grants requiring matching funds, ensure buy-in from AVC prior to submitting proposals each fiscal year;
- Encourage use of APPA grant and award program to supplement funding within FM.

Cost Accounting – Ongoing and Continuous Improvements

- Continuously work on strategy to improve cost accounting measures within all areas of Facilities Management:
 - Improve org code usage – July 2016 through June 2017;
 - Continue realignment of positions to appropriate cost centers;
 - Review monthly position control reports to ensure that positions/budgets are appropriately aligned; Positions with insufficient budget have become a growing concern – recommend using annual budget process as possible means to address this strategic issue.

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.3:	Achieve Administrative cost/GSF \pm 5% of APPA Average for Peer Institutions
Measure:	Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Lead: Facilities Business Office

Balanced Scorecard Category: Financial Perspective

ACTION PLAN FOR IMPROVEMENT

FY 16 APPA Survey:

- Cost Data collection for FY 16 survey : Completed December 2016;
- Beta version available: March 2017 - tentative;
- Actual results available: late March - April 2017 - tentative;
- Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF: April 2017

FY 16 NACUBO Key Facilities Metrics Survey:

- Cost Data collection for FY 16 survey: Completed December 2016
- Beta version available: March 2017 - tentative;
- Actual results available: late March - April 2017 - tentative;
- Presentation of comparative findings for UNC Charlotte Administrative cost/ GSF - April 2017.

Administrative Cost/GSF Analysis:

- Cost per GSF for administration – data available March 2017.

Lead
F. O.

GOAL #5 – Promote Good Stewardship

Objective: 5.1: Promote Fiscal Responsibility

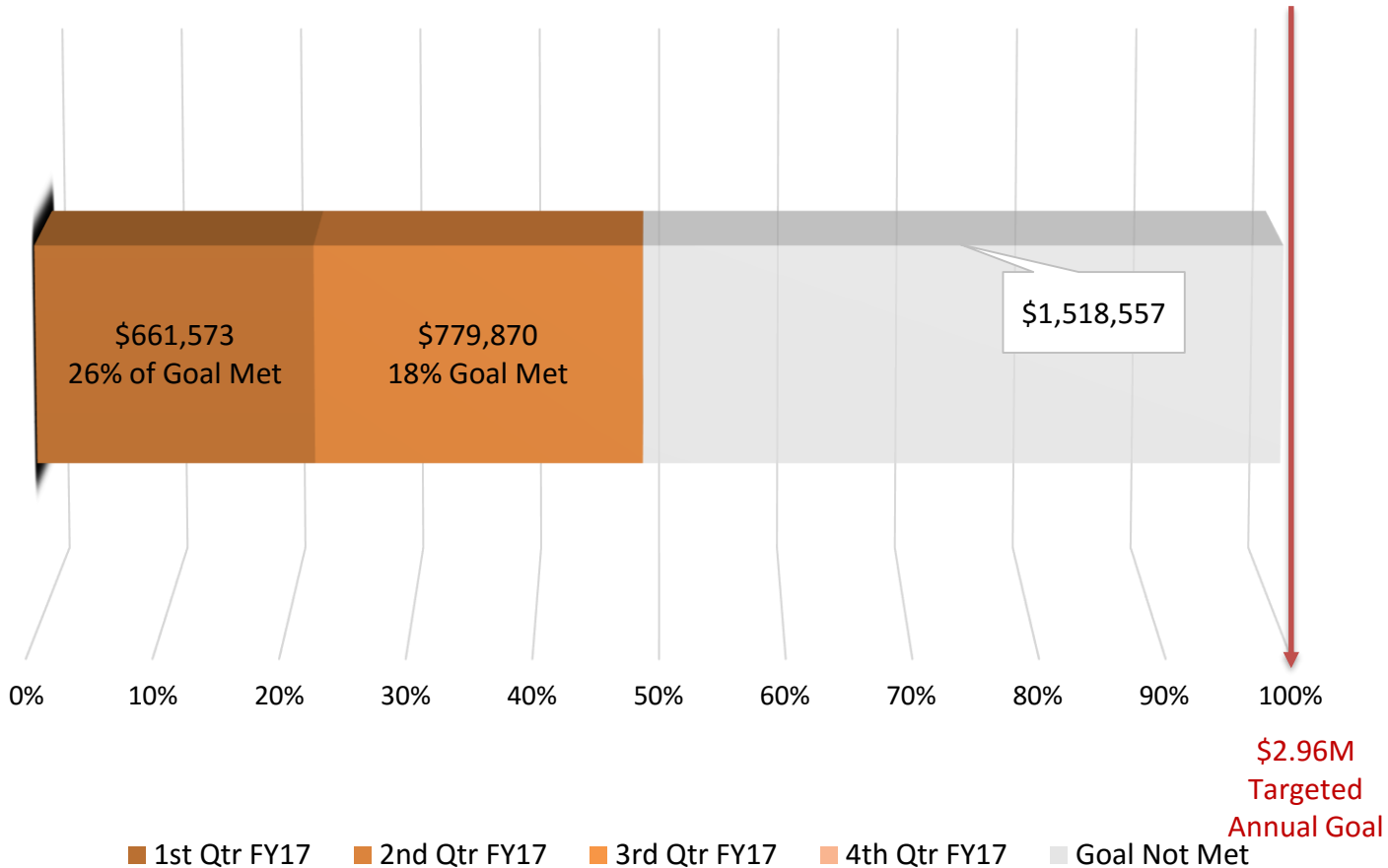
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations

Balance Scorecard: Financial Perspective

Dollars in Account at End of Fiscal Year



STATUS
Annual
Goal

GOAL #5 – Promote Good Stewardship

Objective	5.2	Develop a Sustainable Campus
Objective	5.2.2	Increase Percent of Solid Waste diversion on Campus to 45% by 2018

Lead
Recycling

ACTION PLAN

• Waste Reduction and Recycling

Actions Complete

- Campus Cleanup and Tree Banding (October)
- Completed Football season (80% diversion rate for season)
- Set a new organizational structure for Recycling Zones in order to provide better customer service.
- Provided Compactor Safety/Recycling training for Chartwells - all dining facilities on campus.
- Survived the first set of moves to Cedar in accordance with 5-Year Capital Plan.

3rd Quarter Actions Planned

- With FCAP staff, develop plan for safe handling and disposal of refrigerant cylinders. (complete)
- Complete upgrade of open Recycling Technician position to support new Zone structure. (in process; waiting for funding)
- Continue work on building Recycling facility to replace processing facility between SDI and Receiving and Stores. (Working with Design Services)
- Continue with Implement BES&R plan for 5-Year Capital Plan moves. (on-going)
- Work with other groups to develop consistency in recycling collections throughout campus (ie: HRL, Cone Center, SAC, Student Union). (Phil?)
- Organize spring events with Sustainability Department – Earth Day, Campus Cleanup, Tree Planting/Arbor Day (in process – events held throughout April)

Facilities Management Strategic Planning Session – Second Quarter FY 2017



Tactic 5.2.2

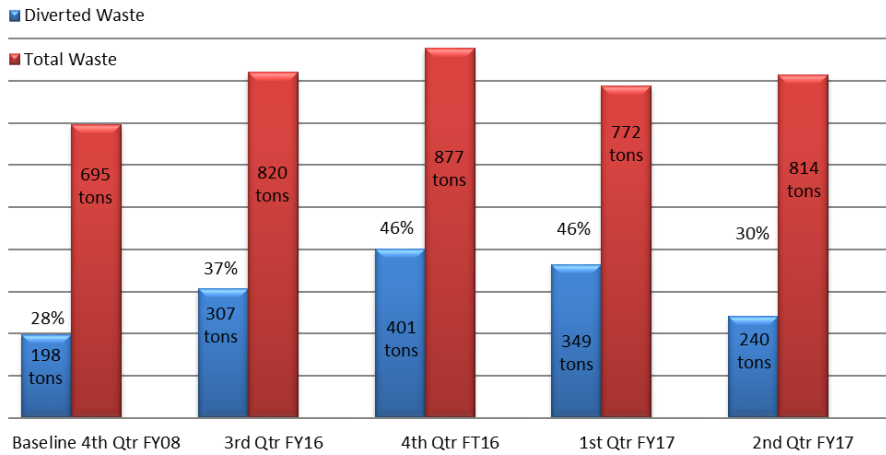
Increase Percent of Solid Waste Diversion on Campus to 45% by 2020

Measure: Pounds of Solid Waste Recycled, composted and reused

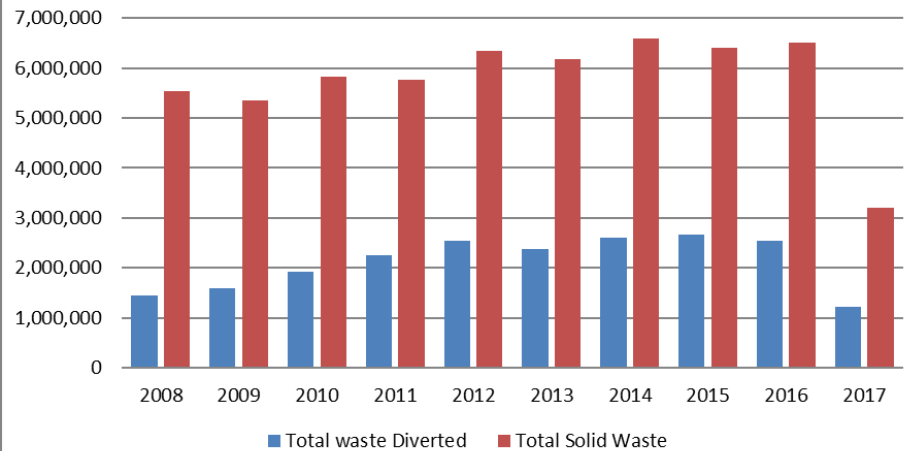
Annually divided by Total Solid Waste

Balanced Scorecard Category: Innovation and Learning Perspective

Breakdown of Solid Waste



Annual Solid Waste Comparison



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 17.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **Achieved STARS 2.0 Rating of Silver in October**
- **Re-set goal: STARS 2.1 Gold by June 2018**

STATUS

GOAL #5 – Promote Good Stewardship

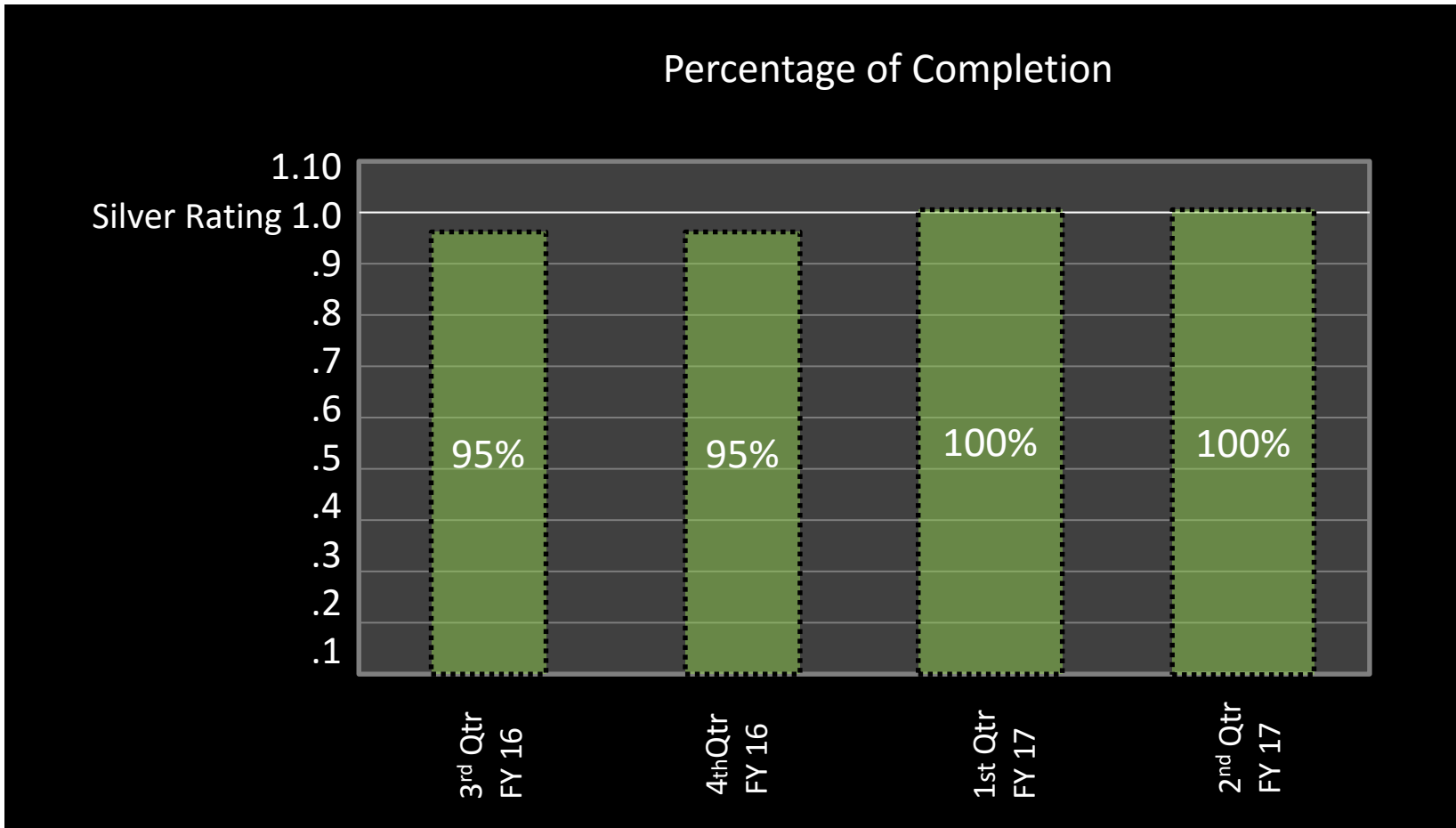
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.3: Achieve silver rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 17.

Measure: STARS points to achieve silver rating

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 17.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

- **63% of Sustainability Plan goals have best practices implemented (goal 60%)**
- **Rewrite Sustainability Plan by end of 2017**
 - **RFP for Sustainability Plan Update Support (Spring 2017)**
 - Assess resources currently used to achieve sustainability goals
 - Facilitate workshops and online stakeholder input for goal-setting in:
 - Producing Waste and Pollution
 - Transporting People and Goods
 - Consuming Materials, Water, and Energy
 - Supporting Health, Wellness, and Prosperity
 - Engaging Teaching, Learning, and Scholarship

STATUS

GOAL #5 – Promote Good Stewardship

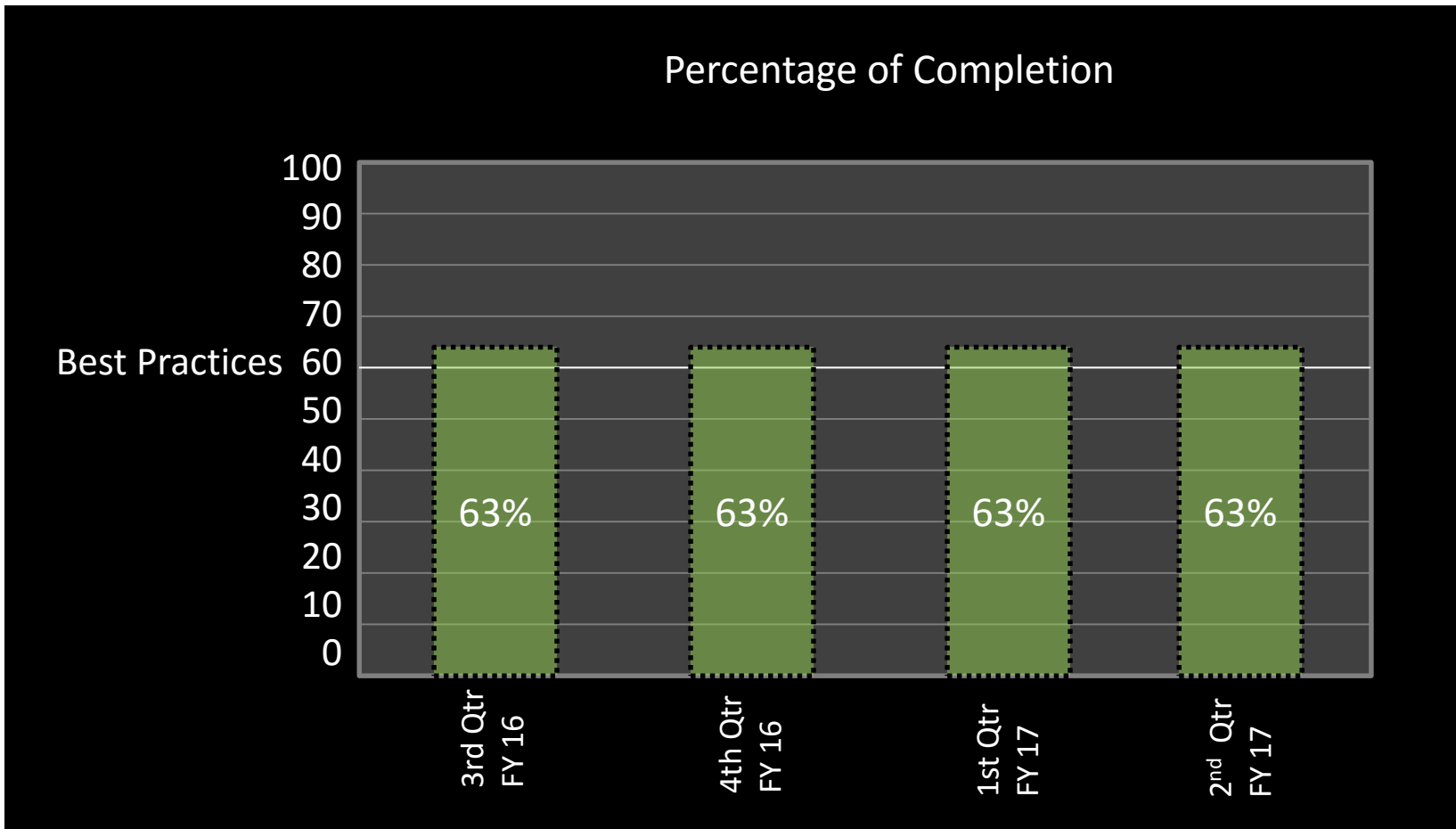
Objective: 5.2: Develop a Sustainable Campus

Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 17.

Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning

Balanced Scorecard Category: Innovation and Learning Perspective



GOAL #5 – Promote Good Stewardship

Objective	5.3	Conserve Natural Resources
Tactics	5.3.1	Decrease Energy Usage 40% by FY2025

Lead
Capital

ACTIONS TO REDUCE CAMPUS ENERGY USAGE

- Retro-commissioning program
 - Grigg & Woodward in progress
 - Next year Bio and King
- Exterior Lighting upgrades to LED
 - Replacing building mounted HID's
 - Pedestrian Lights to be replaced as funds become available – start with campus core.
- New Goal of 40% reduction by 2025

Facilities Management Strategic Planning Session – Second Quarter FY 2017

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage by 40% by FY2025

Measure: kBTUs/GSF/Year consumed on campus

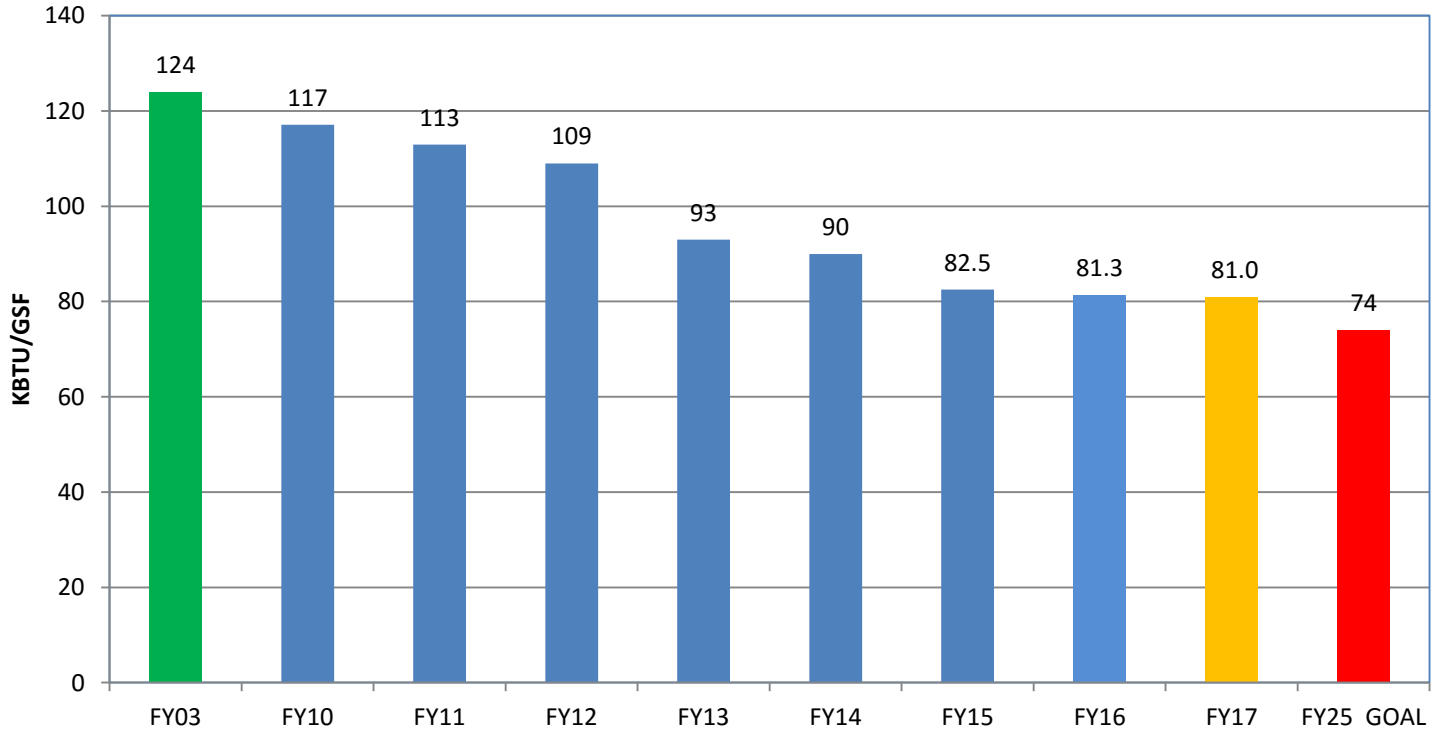
Balanced Scorecard Category: Financial Perspective

Lead
Capital

Base Year FY 2003
Current Reduction 35%
System Goal of 40% by
2025

STATUS

CAMPUS ENERGY USAGE
Kbtu/GSF



GOAL #5 – Promote Good Stewardship – Second Quarter FY 2017**Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation****Tactic 5.4.1:** 12% HUB participation on 80% of Capital Projects**Tactic 5.4.2:** 5% African American Participation on Capital Projects**ACTION PLAN**

- Conduct Construction “*Meet & Greet*” March 8, 2017
- Continue . . .
- Establish project specific participation goals for single prime projects
 - Challenge general contractors to obtain 25% or better participation on Construction Management at Risk projects
 - Review *Good Faith Effects* documentation for compliance
 - Work with internal/external groups to identify skilled HUB contractors

GOAL #5 – Promote Good Stewardship

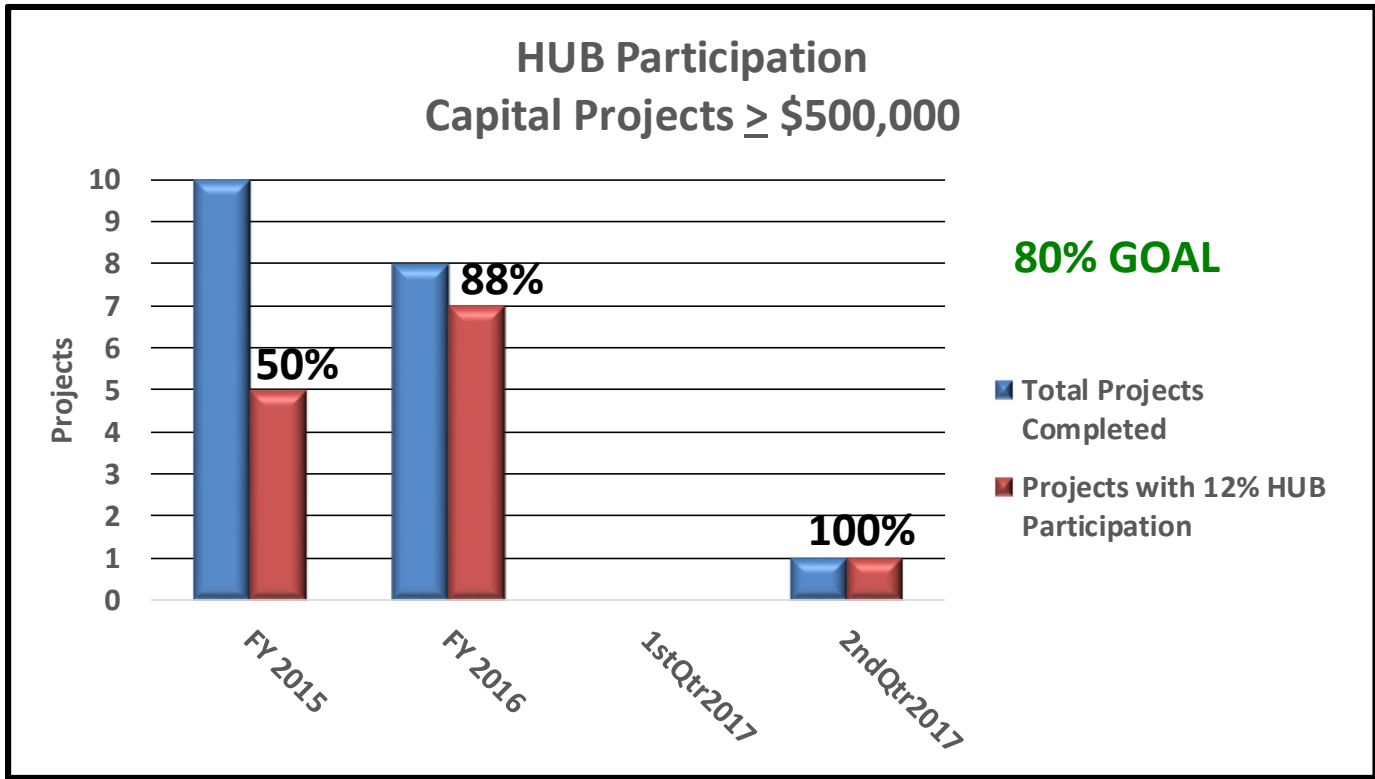
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



Levine Hall
35%

2ndQtr FY2017
STATUS

GOAL #5 – Promote Good Stewardship

**Lead
Capital**

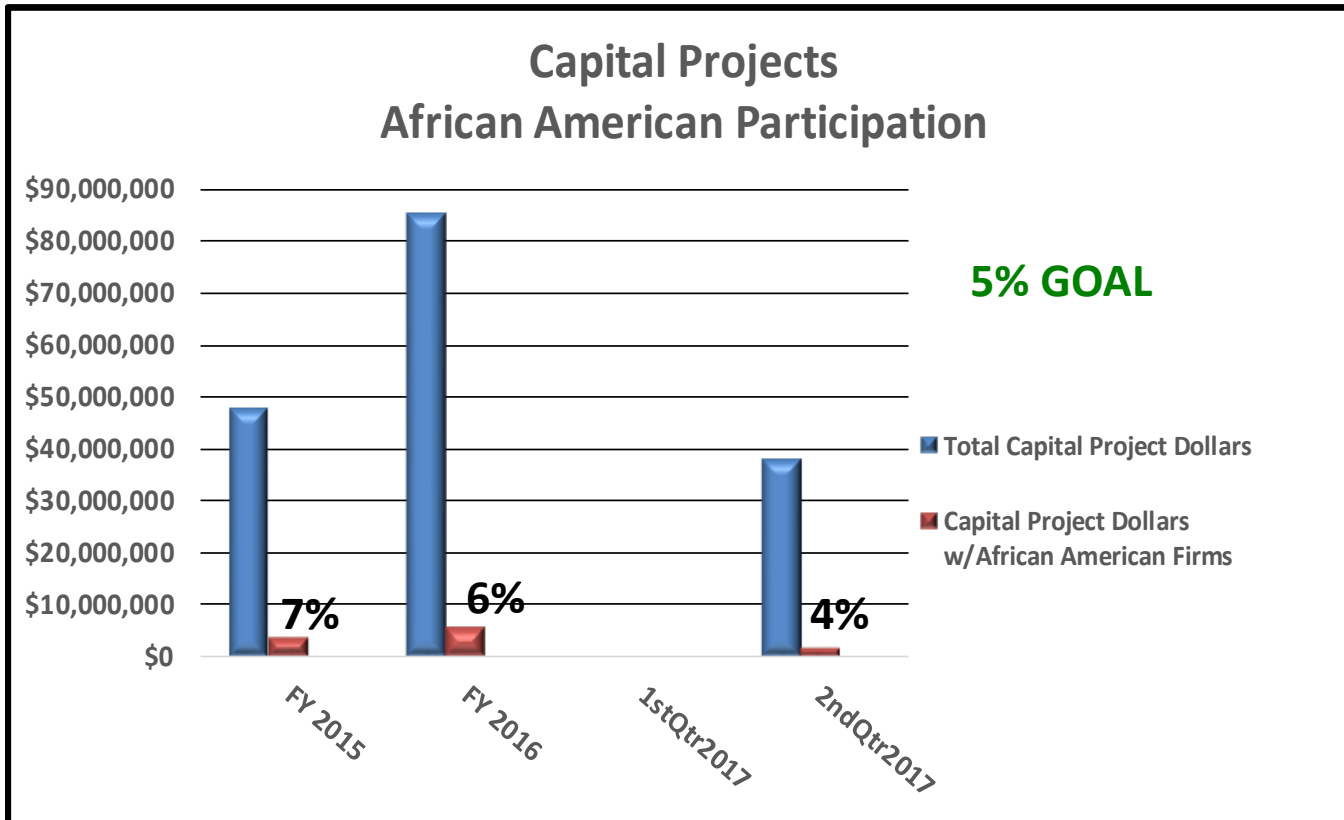
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.2: 5% African American Participation on Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



**\$38.1M Total
\$1.6M AA**

**1stQtr FY2017
STATUS**

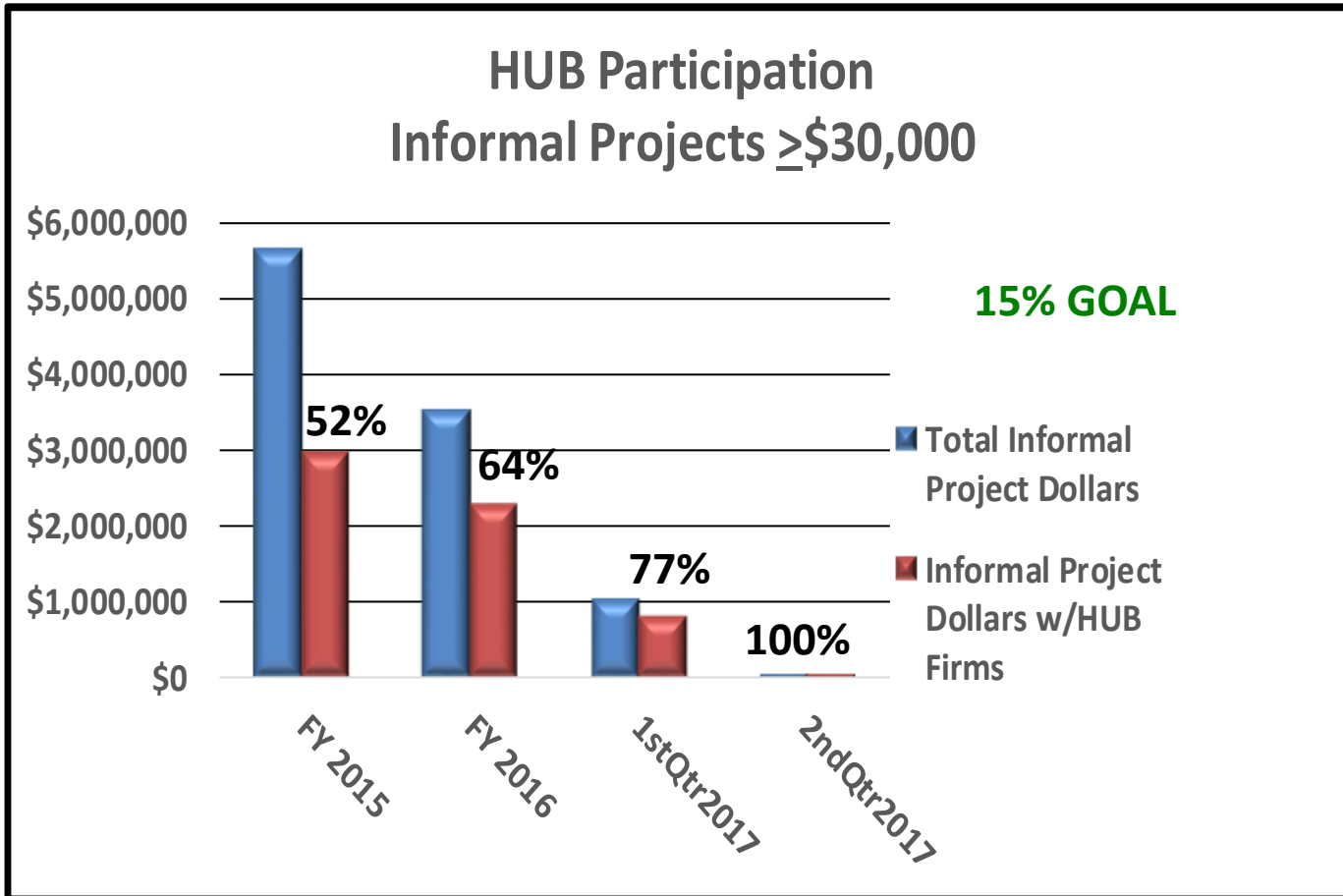
Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.3: 15% overall HUB participation on Informal contracts \$30,000 and above

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective



2ndQtr FY2017
2STATUS

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4:	13% overall HUB participation on informal projects below \$30,000 including 3% African American
Measure:	Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts
Tactic 5.4.5:	3% African American participation on Informal projects below \$30,000
Measure:	Total African American contract dollars (Construction only) divided by Total Contract Dollars

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Design Services' HUB participation improvement is currently focused on expanding our outreach to new African American contractors & vendors.

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors & vendors via ARCHIBUS Strategic Quarterly Reports – ***Current Archibus download information does not match State of North Carolina reports.***

ONGOING IMPROVEMENTS

All Coordinators are encouraged to reach out to new vendors for work on our Under \$30K projects - Ongoing.

- Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
- Amanda Caudle acts as advisor for other Coordinators.

Annual Goal
13%

QTR 2 Status
43.4%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

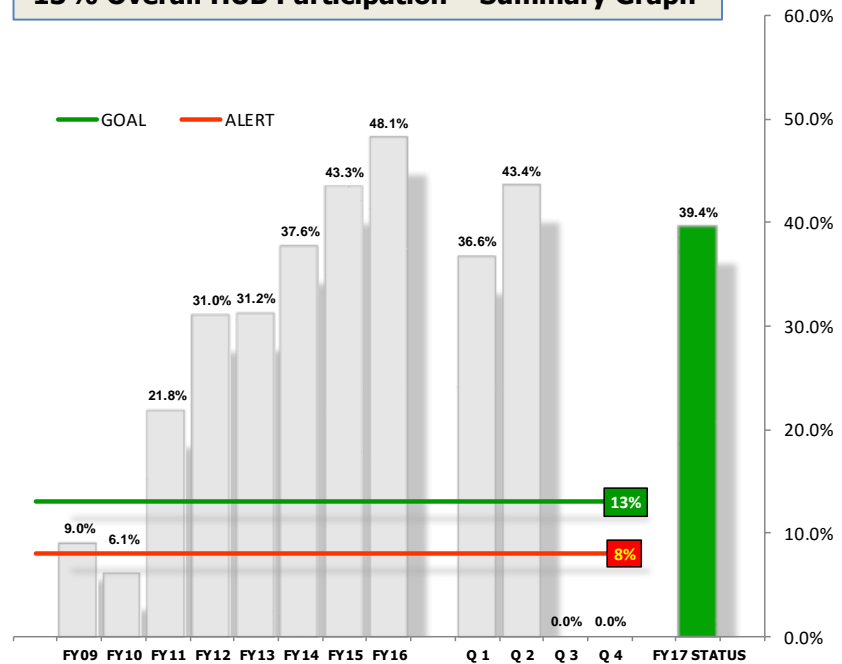
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4: 13% overall HUB participation on informal projects below \$30,000 including 3% African American
Measure: Total Percentage of HUB participation on all Informal Projects below \$30,000 (Construction only) divided by Total Contracts

13% Overall HUB Participation Informal Projects Below \$30,000

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY09	\$ 996,756	\$ 89,479	9.0%
FY10	\$ 1,452,202	\$ 88,703	6.1%
FY11	\$ 3,924,102	\$ 857,125	21.8%
FY12	\$ 2,878,027	\$ 891,793	31.0%
FY13	\$ 2,891,003	\$ 902,065	31.2%
FY14	\$ 1,863,533	\$ 700,603	37.6%
FY15	\$ 2,655,882	\$ 1,150,394	43.3%
FY16	\$ 2,605,540	\$ 1,252,152	48.1%
Q 1	\$ 455,156	\$ 166,732	36.6%
Q 2	\$319,739	\$ 138,885	43.4%
Q 3	\$ -	\$ -	0.0%
Q 4	\$ -	\$ -	0.0%
FY17 STATUS	\$ 774,895	\$ 305,617	39.4%

13% Overall HUB Participation – Summary Graph



Annual Goal
3%

QTR 2 Status
0%

Lead
Design Services

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

Tactic 5.4.5: 3% African American participation on Informal projects below \$30,000
Measure: Total African American contract dollars divided by Total Contract Dollars

3% African American Participation Informal Projects Below \$30,000

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY09	\$ 996,756	\$ 40,894	4.1%
FY10	\$ 1,452,202	\$ 73,987	5.1%
FY11	\$ 3,924,102	\$ 77,377	2.0%
FY12	\$ 2,878,027	\$ 46,475	1.6%
FY13	\$ 2,891,003	\$ 115,219	4.0%
FY14	\$ 1,863,533	\$ 103,513	5.6%
FY15	\$ 2,655,882	\$ 46,795	1.8%
FY16	\$ 2,605,540	\$ 47,345	1.8%
Q 1	\$ 455,156	\$ 1,250	0.3%
Q 2	\$319,739	\$ -	0.0%
Q 3			0.0%
Q 4			0.0%
FY17 STATUS	\$ 774,895	\$ 1,250	0.2%

3% African American Participation – Summary Graph

