



UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Third Quarter – Fiscal Year 2010

April 29, 2010

First Shift





UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Third Quarter – Fiscal Year 2010

April 29, 2010

Second and Third Shift



...Creating a Campus of Distinction

ACTION PLAN - ESPC

Energy Savings Performance Contract

- **Actions Complete**
 - ESCO Selected (Ameresco).
 - 3rd Party consultant, Celtic Energy, to support evaluation of IGA.
- **Actions Planned**
 - Investment Grade Audit (IGA) June - October, 2010
 - Energy Services Agreement (ESA) (4th Quarter 2010)
 - ESCO Completes Installation of Energy Conservation Measures (2010 - 2011)

Lead
Capital

GOAL #6 – Promote Good Stewardship

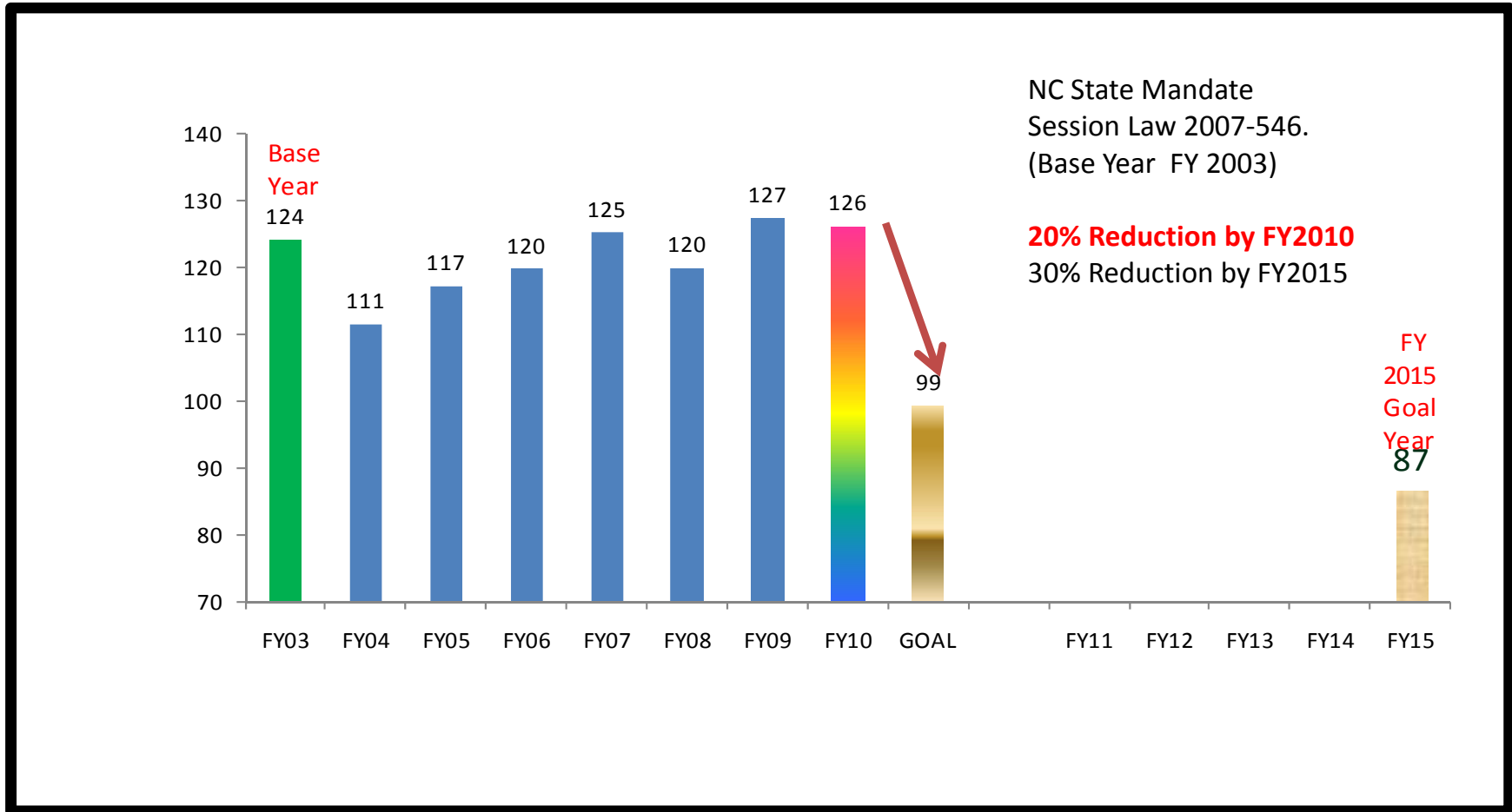
Strategy 6.3 Conserve Natural Resources
Objective 6.3.1 Decrease Energy Usage by 20% by FY2010

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE Kbtu/GSF



GOAL #6 – Promote Good Stewardship

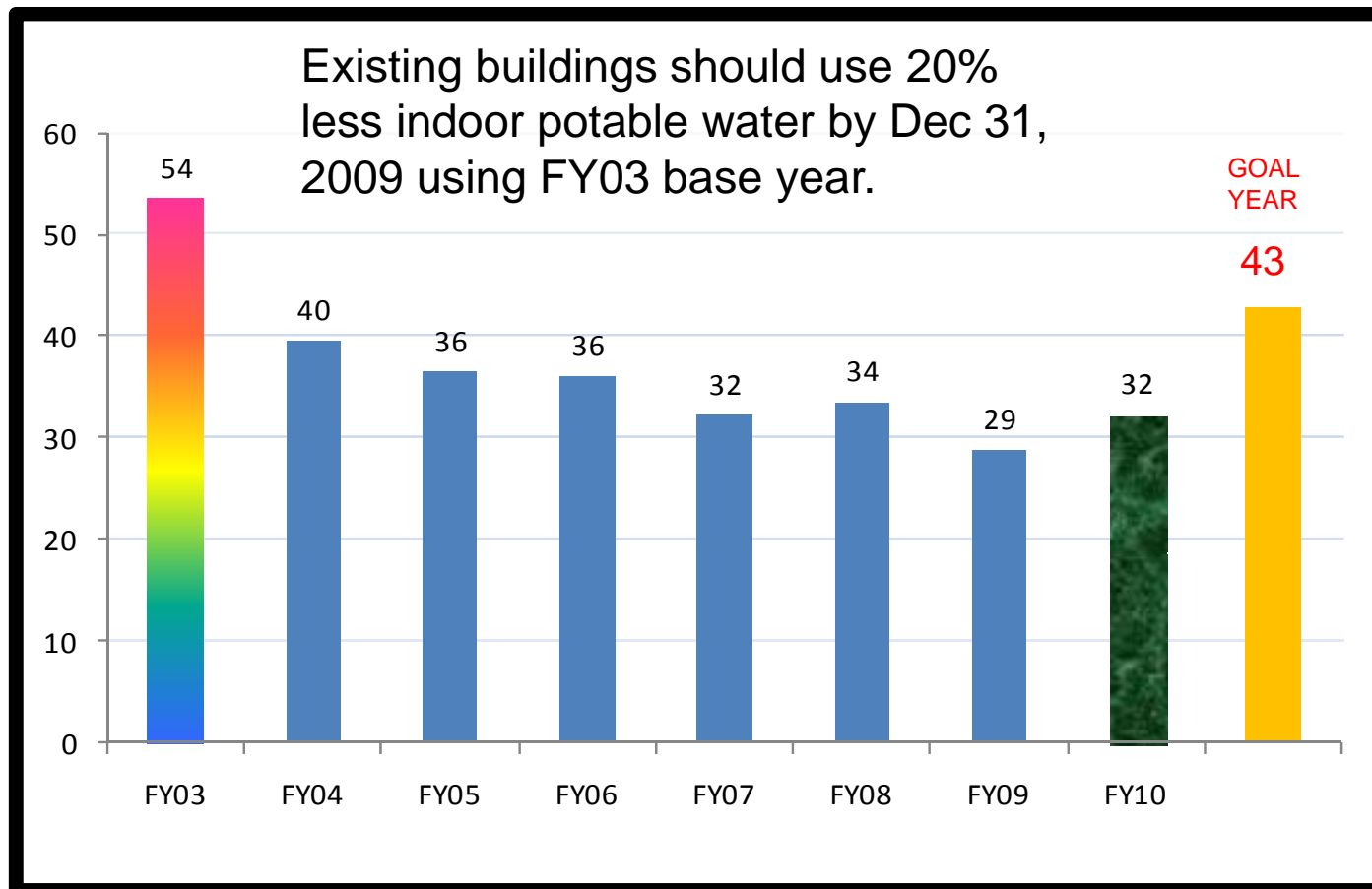
Strategy 6.3 Conserve Natural Resources
Objective 6.3.2 Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

Still need to reduce water usage to help preserve valuable resources



GOAL #6 – Promote Good Stewardship

Lead
Capital

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

HISTORICAL ACTIONS TO REDUCE CAMPUS ENERGY USAGE

STATUS

UNCC SCORE SHEET			HISTORICAL ACTIONS TO REDUCE CAMPUS ENERGY USAGE
AGGRESSIVE	PASSIVE	NO ACTION	
	✓		• Dedicated Energy Manager/Team
	✓		• Awareness (Energy Dashboard, newsletters, web based information)
	✓		• Reduce lighting loads and schedule for unoccupied periods
	✓		• Electrical demand load shedding
			• HVAC - Existing (UNCC is aggressive on new systems)
	✓		–Install high efficiency equipment and systems (motors, drives, etc)
		✓	–Install energy recovery
✓			–Schedule systems for unoccupied mode
		✓	–Establish space temperature guidelines with support of Chancellor and Provost
	✓		–Install building automation systems AND utilize to max capabilities
		?	–Optimize system operation (Tuning and trending for efficiency)
	✓		• Performance Contracting
	✓		• Retro-commissioning
		?	• FM Coordination (Shops, Housekeeping, Engineering, Sustainability, Recycling)
		✓	• Renewable Energy Projects





UNC CHARLOTTE

Balance Score Card
CUSTOMER
Perspective

Strategic Objectives:
Customer Satisfaction
Enhance Customer Satisfaction



UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

GOAL #4

Perfect a Customer Focused Organization





GOAL #4 – Perfect a Customer Focused Organization

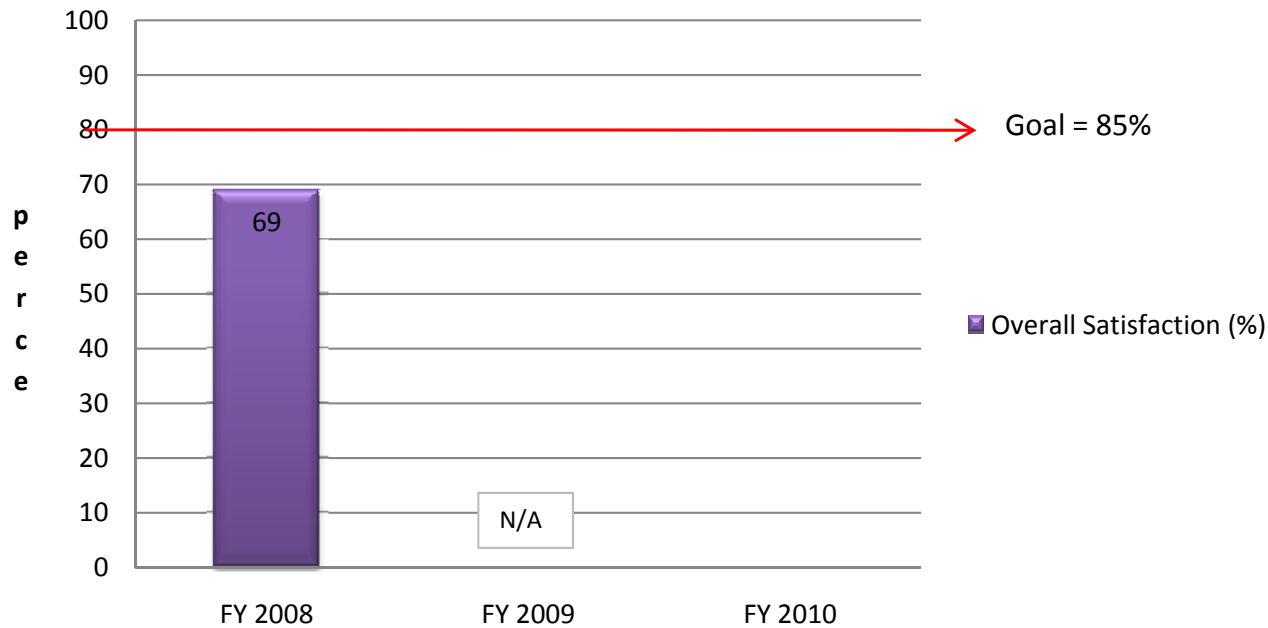
Strategy Objective 4.1 Continually Improve Customer Service/Satisfaction
4.1.1 Achieve Overall FM Customer Satisfaction of 85%

Annual objective

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

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



In progress

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ Met with Urban Institute to discuss service provision and administration of survey;
 - ✓ Spoke with Design Services Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
- **Actions Planned**
 - Review current survey questions and propose modifications.
 - Meet with unit directors for input on questions for their areas.
 - Survey to be conducted during March – April 2010.

Facilities Management Strategic Planning Session – Third Quarter FY 2010



GOAL #4 – Perfect a Customer Focused Organization

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

Annual objective

Measure: **Annual** Customer Survey Results

Balanced Scorecard Category: Customer Perspective

In
Progress

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
FBO

ACTION PLAN

- Actions Complete

- Actions Planned
 - Facilities Business Office
 - External customers: Complete survey administration (Urban Institute);
 - Internal customers: Review internal business processes and work with key stakeholders to continuously improve tools, reporting, etc.



Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M&O

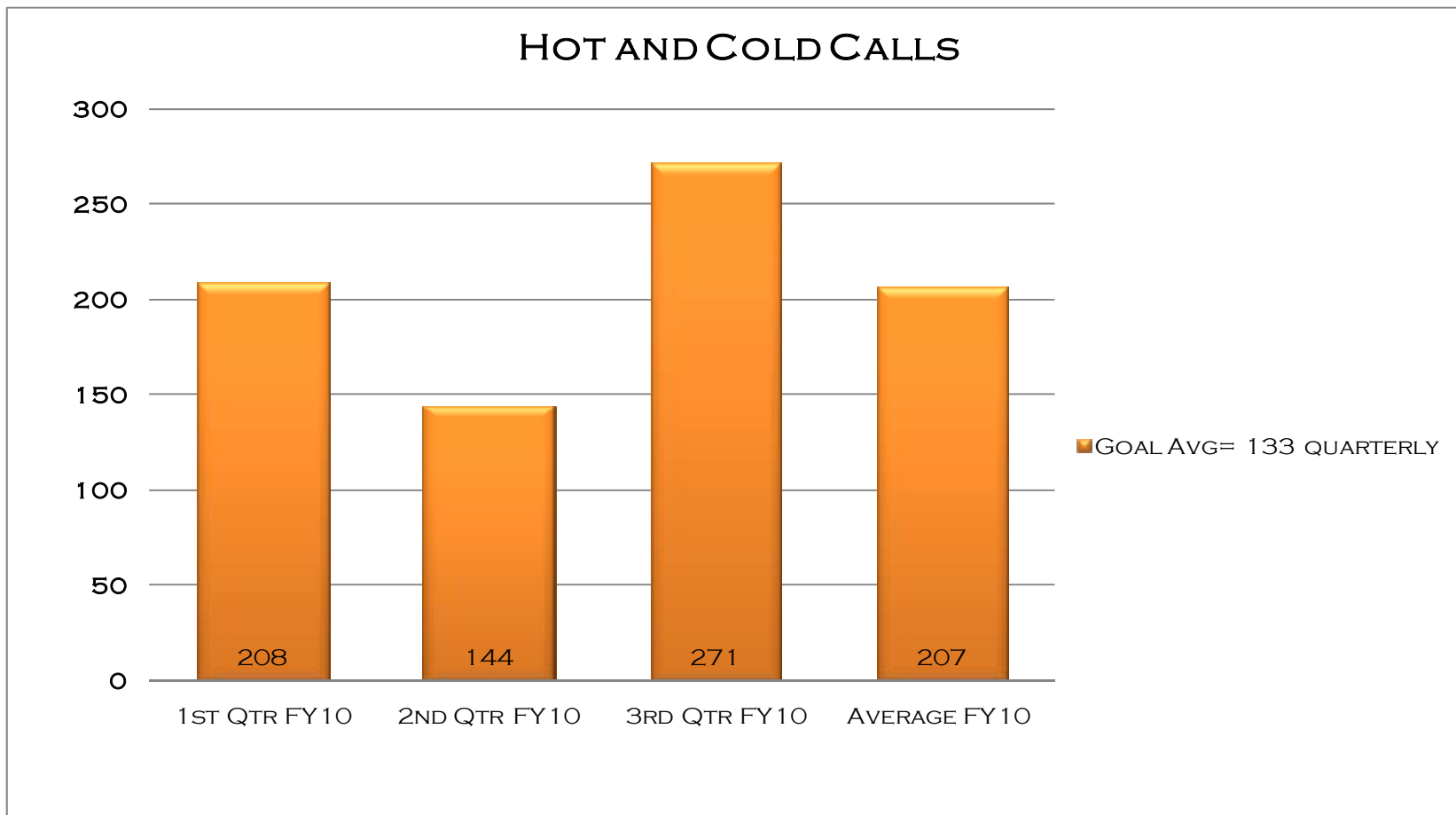
GOAL #4 – Perfect a Customer Focused Organization

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

Measure: Number of hot/cold calls submitted on work requests. 1st Qtr – Too Hot = 145 Too Cold = 126

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
M&O

ACTION PLAN

- Actions Complete

- 1 – Identified and backlogged repairs for additional HVAC System repairs.

Note: Breakdown on calls were 126 too Cold, 145 too Hot.

- Actions Planned

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

- 2 – See what ESCO's might recommend that would improve comfort and seek wider application.



GOAL #4 – Perfect a Customer Focused Organization

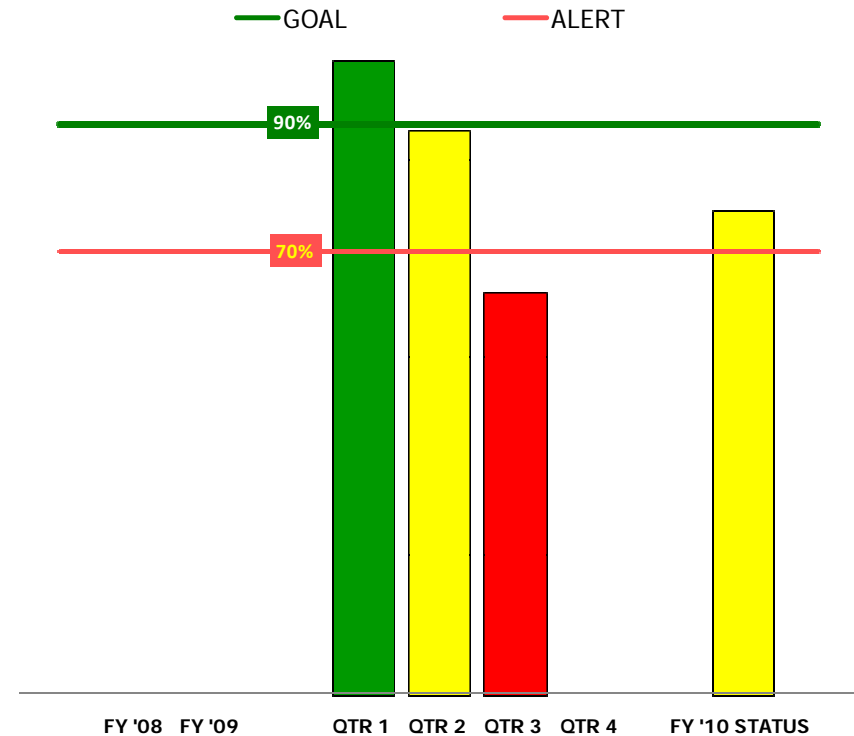
Strategy 4.1 Continually improve customer service/satisfaction
Objective 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

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

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY SURVEY	Number of Surveys Completed	Very Satisfied 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied or Very Satisfied
FY '08	0	0	0	0	0	0	0	0.0%
FY '09	0	0	0	0	0	0	0	0.0%
QTR 1	1	1	0	0	0	0	0	100.0%
QTR 2	9	6	2	1	0	0	0	88.9%
QTR 3	11	4	3	1	2	1	0	63.6%
QTR 4	0	0	0	0	0	0	0	0.0%
FY '10 STATUS	21	11	5	2	2	1	0	76.2%
								GOAL: 90.0%



GOAL
90.0%

FY'10 STATUS
76.2%

GOAL #4 – Perfect a Customer Focused Organization

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

ACTION PLAN

4.1.4 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys

4.1.4 - Actions Planned:

- Monitor Customer Satisfaction Survey responses and implement appropriate actions.
- Review with FIS the ability for Design Services to print survey responses from Archibus.
- Review Objective 4.1.4 at Strategic Planning meeting for better and easier tracking:
 - (a) Objective is too restrictive for the start of a new goal.*
 - (b) Calculating the objective should be simple and intuitive.*



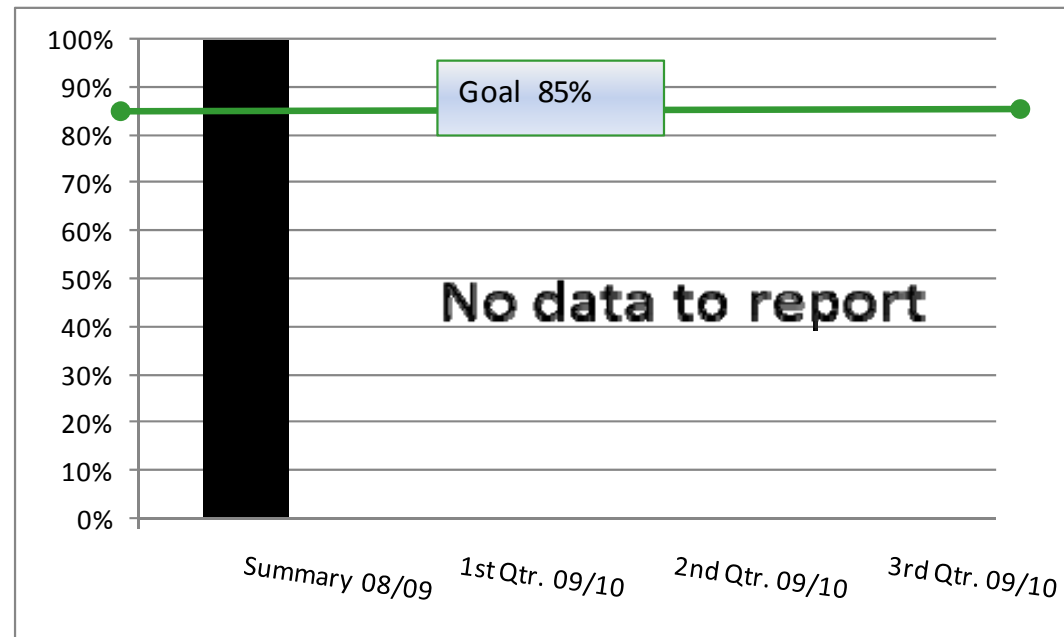
GOAL #4 – Perfect a Customer Focused Organization

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

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary 08/09	2	1	0	100%
1st Qtr. 09/10	2	0	0	No Data
2nd Qtr. 09/10	2	0	0	No Data
3rd Qtr. 09/10	2	0	0	No Data



No data is a result of customer not answering questionnaire

Status

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
Capital

ACTION PLAN

- Actions Complete
 - 1.
- Actions Planned
 - 1. Need to submit satisfaction survey to customers on Tennis Courts, Alumni Parking and New Outdoor Student Rec. Field, Parking Deck H.

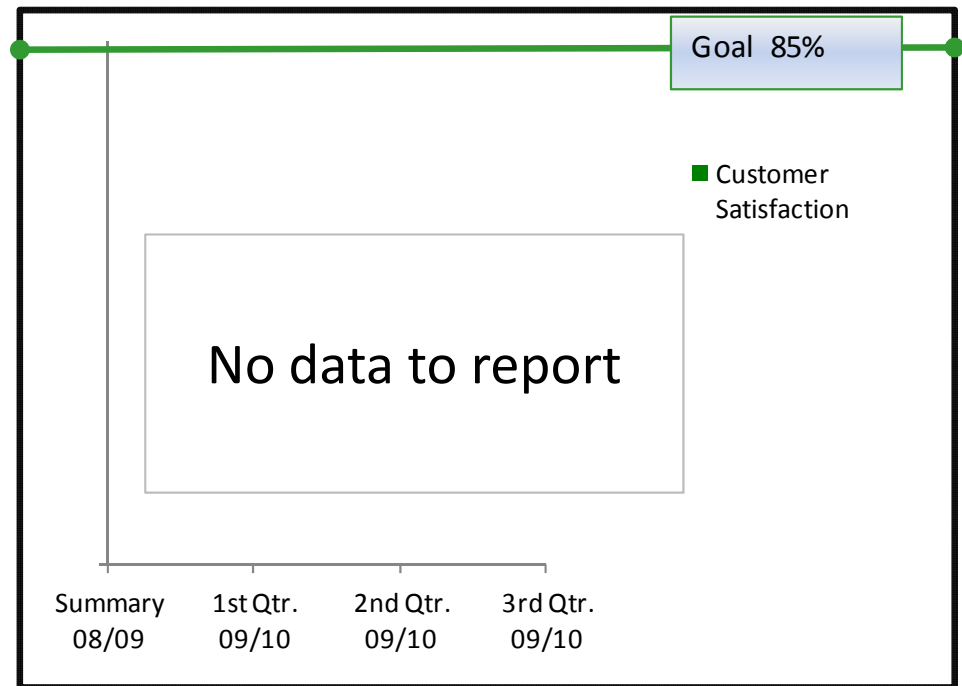
GOAL #4 – Perfect a Customer Focused Organization

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

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary 08/09	no data	0	0	#VALUE!
1st Qtr. 09/10	no data	0	0	#VALUE!
2nd Qtr. 09/10	2	0	0	0.0%
3rd Qtr. 09/10	0	0	0	0.0%



Status

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
Capital





ACTION PLAN

- Actions Complete
 - 1. No construction completed this quarter.
- Actions Planned

Balanced Scorecard

Customer Perspective

Facilities Management FY 2010 Balanced Scorecard

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	Goal Status	Prev. Qtr
Customer <i>To achieve our vision, how must we view & treat our customers?</i>	Customer satisfaction	4.1.1	Improve: Overall satisfaction rating	85%	-	Annual	Annual
		4.1.2	Unit satisfaction rating	85%	-	Annual	Annual
	Enhance customer satisfaction	4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-15% or <133	207		
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	76%		
		4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	no data		
		4.1.6	Improve: Capital Projects rating (sat./very sat.) - constr	85%	no data		
LEGEND:	Met Target		100% performance to target ratio				
	Near Target		90-99% performance to target ratio				
	Needs Attention		Below 90% performance to target ratio				
	No Data Available		Unable to Measure or In Progress				



UNC CHARLOTTE

Balance Score Card

FINANCIAL

Perspective

Strategic Objectives:

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



UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
FBO

GOAL #6 – Promote Good Stewardship

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

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

FACILITIES MANAGEMENT REPORT thru March 31, 2010

ACCOUNT DESCRIPTION	2009-10 Budget	% of Total Budget	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) UF
STUDENT AND TEMPORARY WAGES	\$ 43,000	1%	\$ 29,075	\$ -	\$ 29,075	\$ 13,925	\$ 13,925 F
PERSONAL SERVICE CONTRACTS	\$ 91,500	3%	\$ 49,258	\$ 39,010	\$ 88,268	\$ 3,232	\$ 3,232 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 644,756	22%	\$ 406,408	\$ 206,502	\$ 612,910	\$ 31,846	\$ 31,846 F
OTHER ADMINISTRATIVE EXPENSES	\$ 19,520	1%	\$ 14,683	\$ 2,687	\$ 17,370	\$ 2,150	\$ 2,150 F
DOMESTIC TRAVEL/TRAINING	\$ 70,000	2%	\$ 27,444	\$ 300	\$ 27,744	\$ 42,256	\$ 42,256 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 342,936	12%	\$ 174,375	\$ 102,868	\$ 277,243	\$ 65,693	\$ 65,693 F
OTHER PURCHASED SERVICES	\$ 448,900	15%	\$ 207,434	\$ 159,059	\$ 366,493	\$ 82,407	\$ 82,407 F
SUPPLIES	\$ 1,065,054	36%	\$ 579,152	\$ 129,057	\$ 708,209	\$ 356,845	\$ 356,845 F
EQUIPMENT	\$ 105,000	4%	\$ 40,618	\$ 21,515	\$ 62,133	\$ 42,867	\$ 42,867 F
CAPITAL OUTLAY	\$ 40,000	1%	\$ 1,532	\$ 10,432	\$ 11,964	\$ 28,036	\$ 28,036 F
FIXED CHARGES	\$ 39,000	1%	\$ 20,555	\$ 39	\$ 20,593	\$ 18,407	\$ 18,407 F
RECYCLING	\$ 36,250	1%	\$ 7,232	\$ 6,681	\$ 13,913	\$ 22,337	\$ 22,337 F
FACILITIES MANAGEMENT Main Operating Funds	2,945,916		1,557,767.36	678,149.00	2,235,916.36	710,000.08	\$ 710,000

STATUS

GOAL #6 – Promote Good Stewardship

Lead
FBO

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

ACTION PLAN

- **Actions Complete**

- ✓ Periodically review expenditure reports as part of continuous improvement effort.
- ✓ Development of new budget request tools and comprehensive instructions completed;

- **Actions Planned**

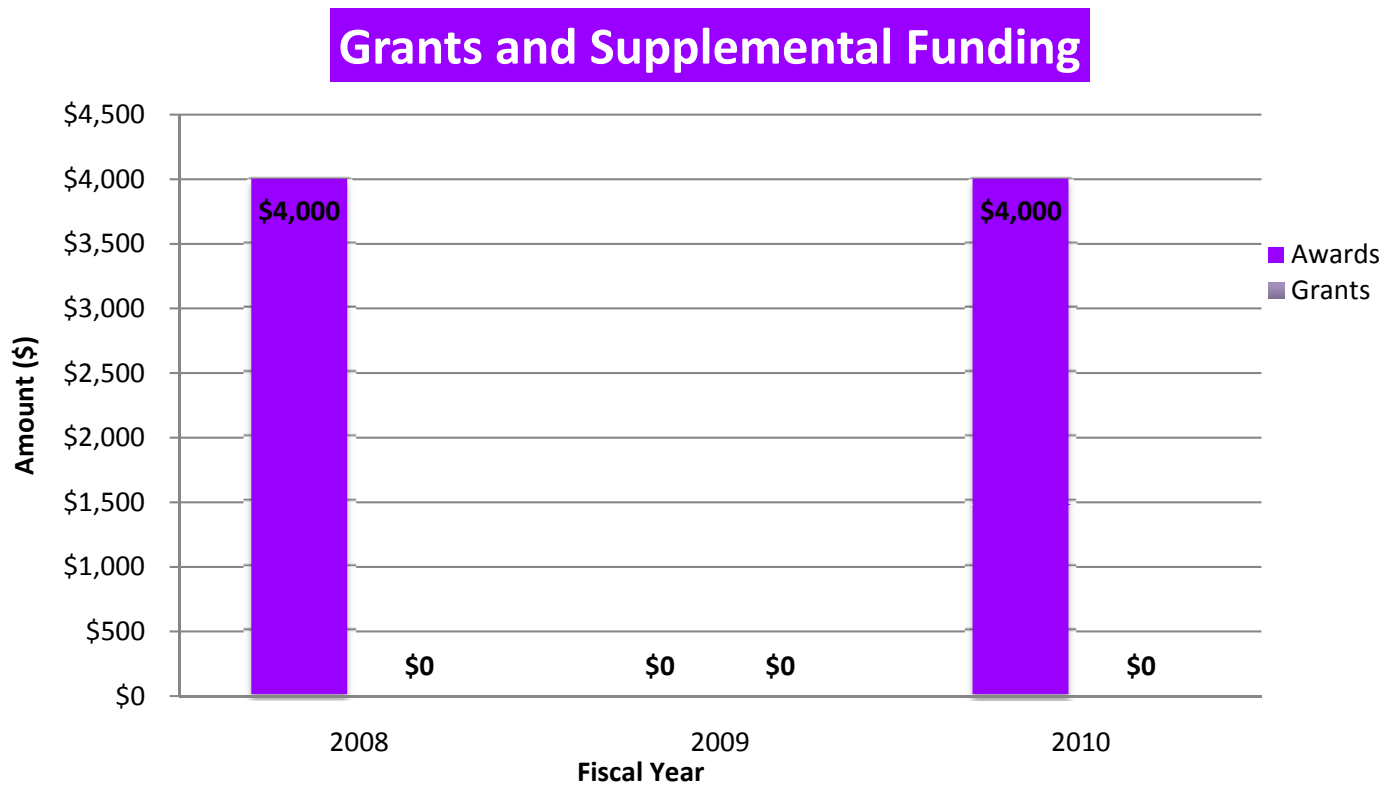
- As part of Leadership Development Training Program, create training course - FM Budgeting 101 - which will focus on budget management skills. Anticipated development completion date has been pushed back to Fall 2010;
- Publish articles on budgeting and/or other financial topics within FM Leader. No schedule for these articles has been developed;
- Develop scope of analysis, identify process gaps , prepare input and output gap analysis and create system map of current FM procurement processes. Continue process mapping efforts for the DPR and Purchase Order processes. [Continued efforts postponed due to Year-end closeout; Anticipated completion date: August 30, 2010.];
- Rollout of new budget request process on April 2nd ;
- Review existing procurement/budget tracking tools; Meet with key stakeholders from Facilities Ops. (meeting scheduled for May 12th).

GOAL #6 – Promote Good Stewardship

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

Measure: Total dollar amount of grants and supplemental funding

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
FBO

ACTION PLAN

- Actions Complete
 - ✓ **APPA Grant Application – Take It or Leave It Program**
 - Application for Award submitted January 2010
 - Notification from APPA received – *WE WON!!!!*
- Actions Planned
 1. Encourage individuals to participate in proposal development; Suggest that brief paragraphs on conceptual ideas for grants be developed for future use by Grants Management Specialist.
 2. Boast effort to locate external funding opportunities that align with FM’s strategic vision, mission and goals.
 3. Provide assistance in developing a strong proposal response to external funding collaboration within FM.
 4. Determine best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Working with Sponsored Programs, Budget Office and Development to determine viable, legal solution.

GOAL #6 – Promote Good Stewardship

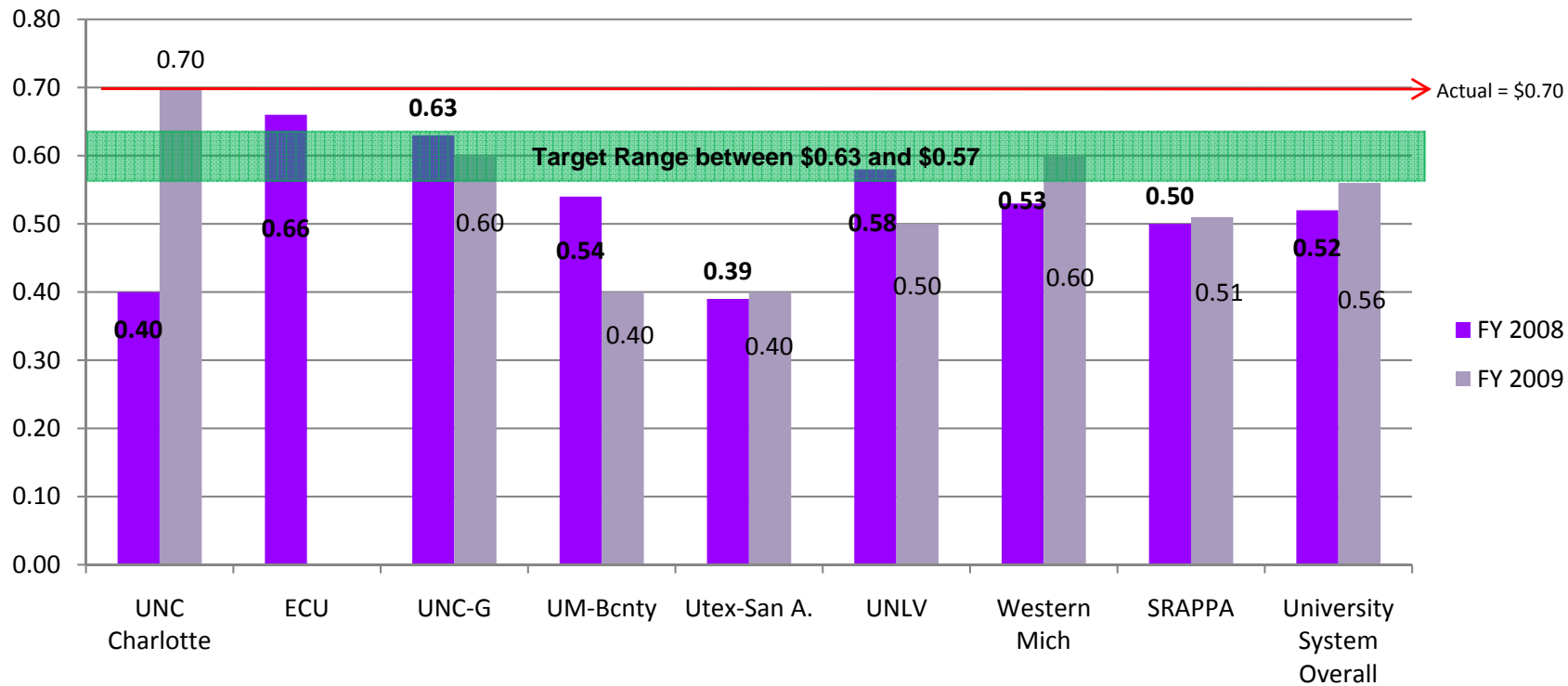
Strategy 6.1 Promote Fiscal Responsibility
Objective 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

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

Balanced Scorecard Category: Financial Perspective

APPA Facilities Performance Indicators Report

Total Administrative Cost/GSF



STATUS

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

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ APPA FY 2009 FPI Survey completed on time; (1st week of December 2009)
 - ✓ Participated in new APPA Survey beta test; Survey now includes interactive dashboards.
 - ✓ Survey to be published in April 2010.

- **Actions Planned**
 - Continue review of survey data;
 - Analyze impact of administrative staff realignment from FY 08 to FY 09.
 - Complete new Budget Realignment Proposal to improve data collection process (proposal must be in effect July 1st).
 - Review data collection tools and begin preparations for upcoming FY 10 survey after year-end close out.
 - NOTE: Propose FM purchase and use of interactive dashboard reporting to Directors.



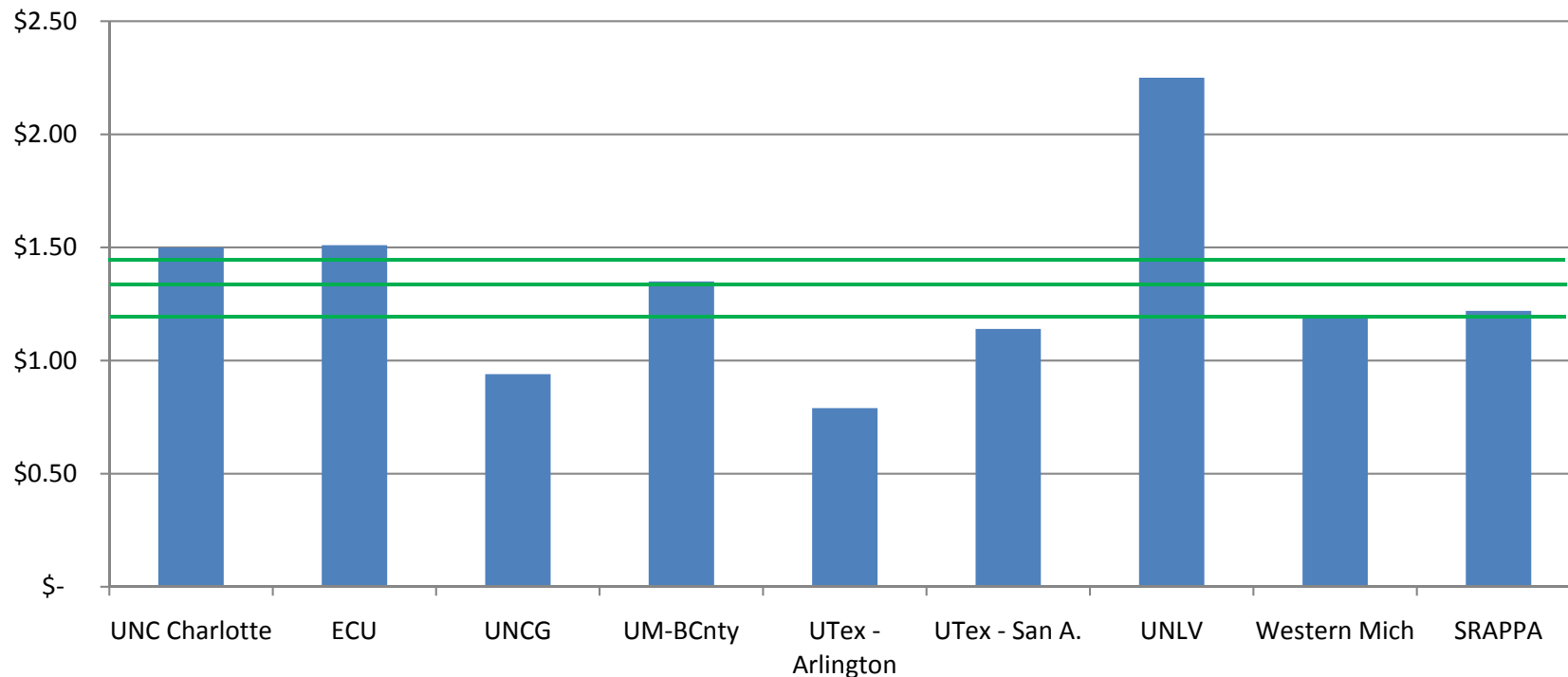
GOAL #6 – Promote Good Stewardship

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

Measure: Custodial Costs/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/GSF

Balanced Scorecard Category: Financial Perspective

Custodial-Total Cost/GSF Comparison



STATUS

2007 Baseline
 \$1.38 Target
 \$1.24 Range

■ Custodial

GOAL #6 – Promote Good Stewardship

Lead
Housekeeping

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

ACTION PLAN

- Actions Complete
 - None
- Actions Planned
 - In depth study of UNCC FM custodial costs/GSF
 - Further investigate why custodial cost per square foot is higher and cost per student lower.
 - Obtain custodial cost/student for our National Peer Institutions
 - Find out if our peers included non-academic spaces in their cost per sq. ft.
 - Begin study to determine possibility of reduction of staff due to budget constraints

Lead
M&O

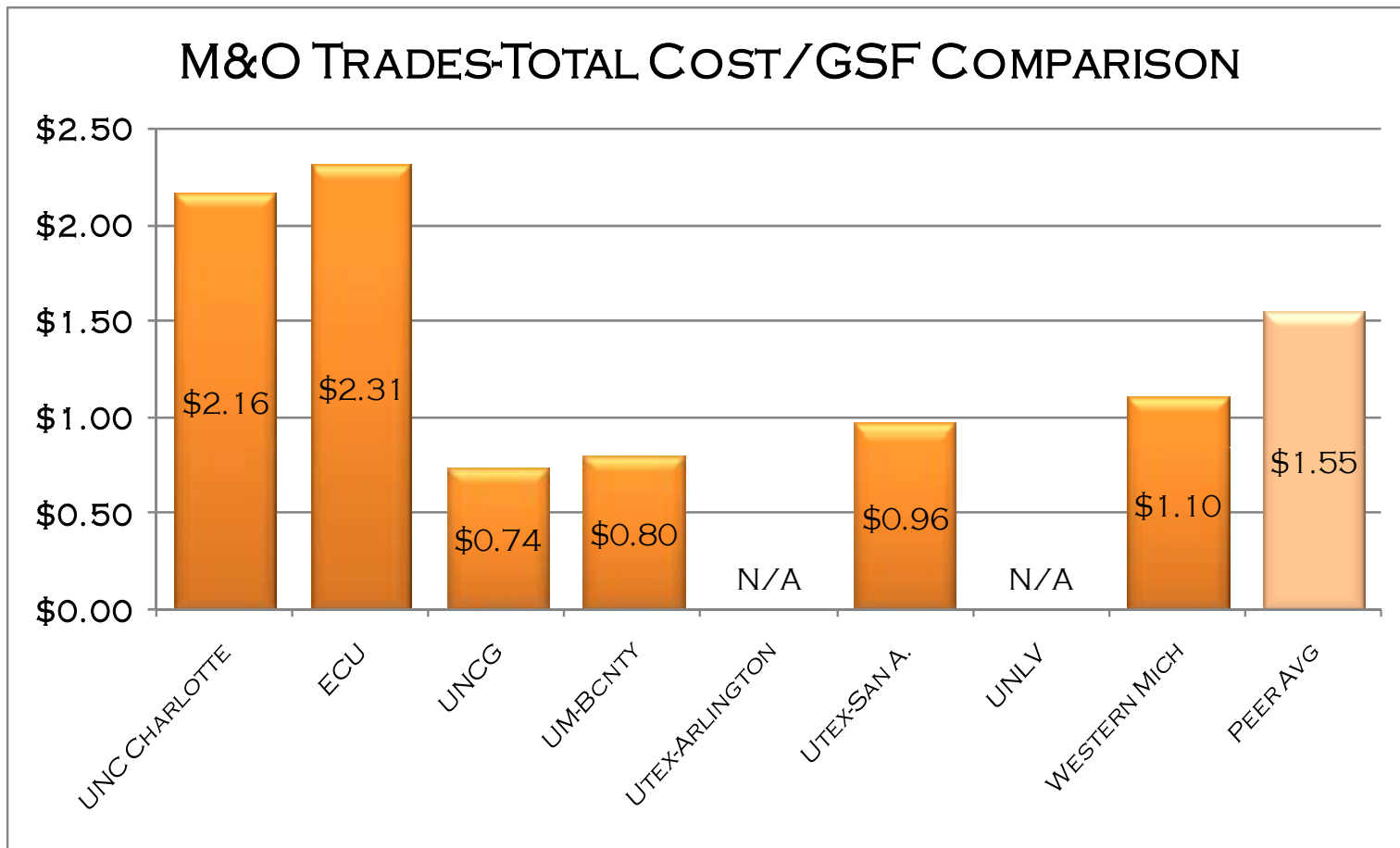
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.5 Achieve Total Maintenance Cost/GSF \pm 5% of APPA Average for Peer Group .

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

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
M&O

ACTION PLAN

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

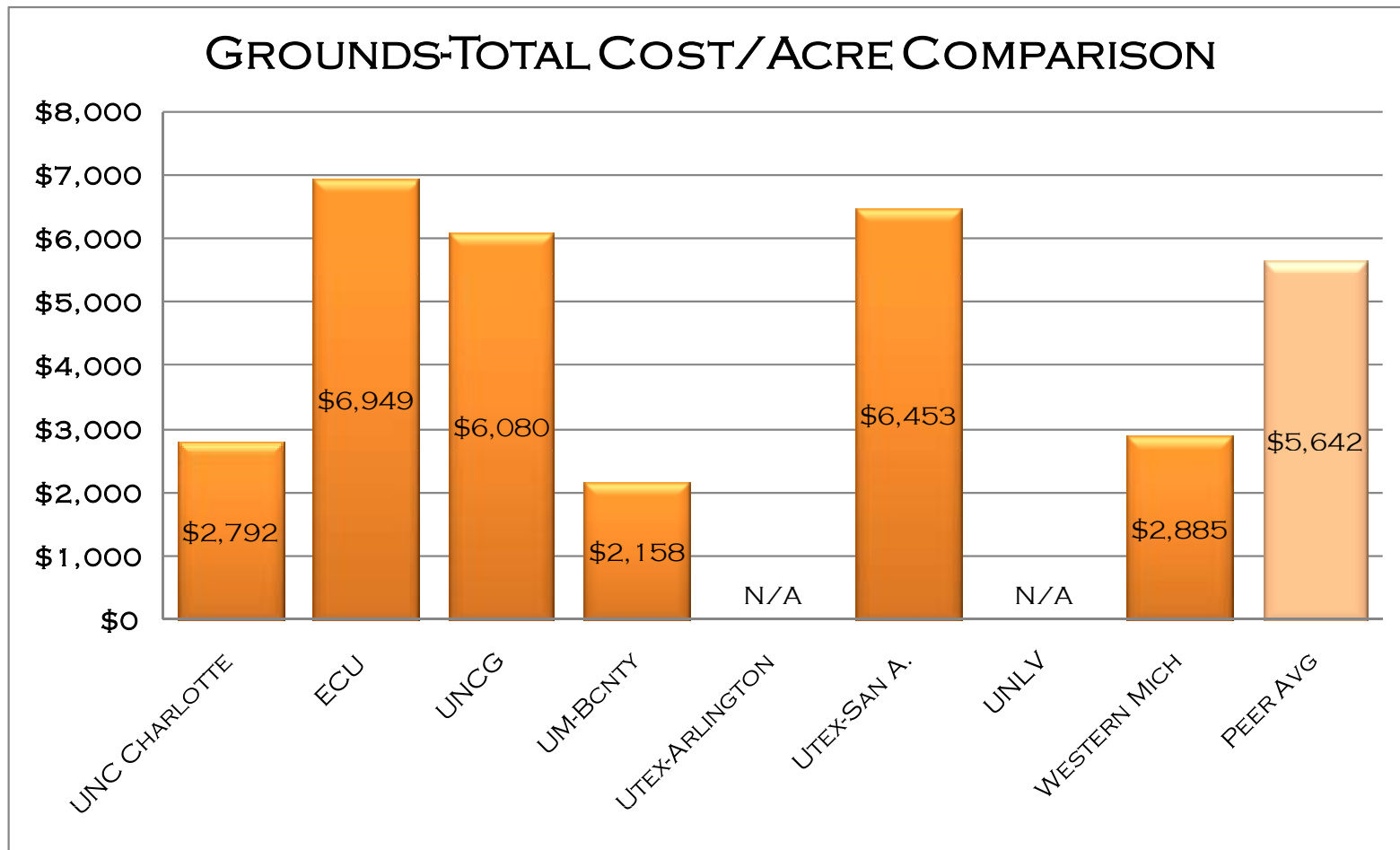
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.6 Achieve Total Landscape Cost/Acre ± 5% of APPA Average for Peer Group .

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

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
M&O

ACTION PLAN

- Actions Complete
 - 1 – Reviewed APPA 2007-2008 Facilities Performance (FPI) Indicators Report.
 - 2 – Requested additional staffing to raise level of maintenance. No staff provided due to budget constraints.
 - 3 – Noted level of maintenance rated below peers as well as expenses.
- Actions Planned
 - 1 – Review the manner in which data was collected and provided for the FPI Report.
 - 2 – Pull new data from next APPA RDI Report when available and update graph.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M&O

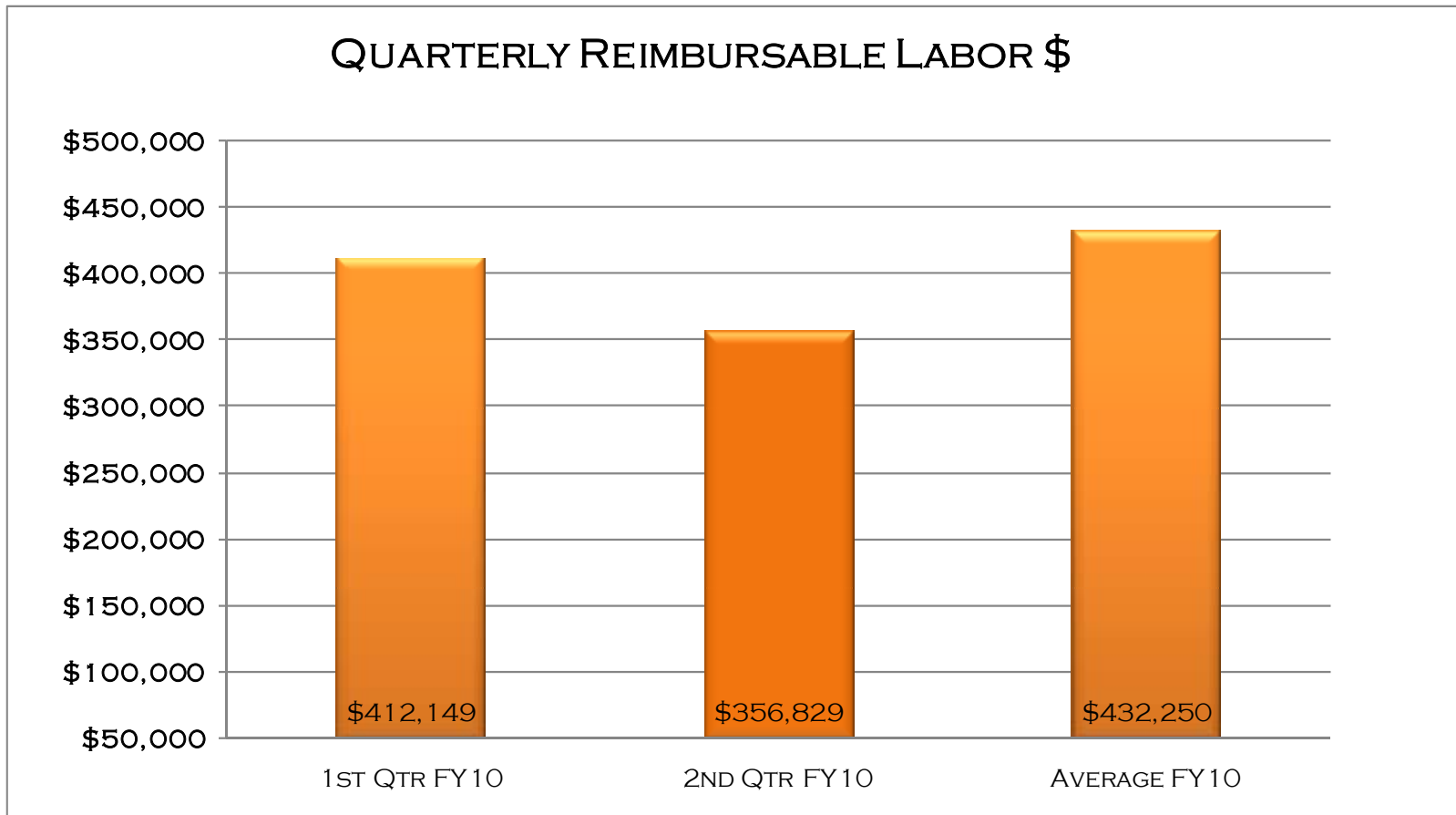
GOAL #6 – Promote Good Stewardship

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

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

Goal: Recover \$1.6 million for all of FY10.

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
M&O

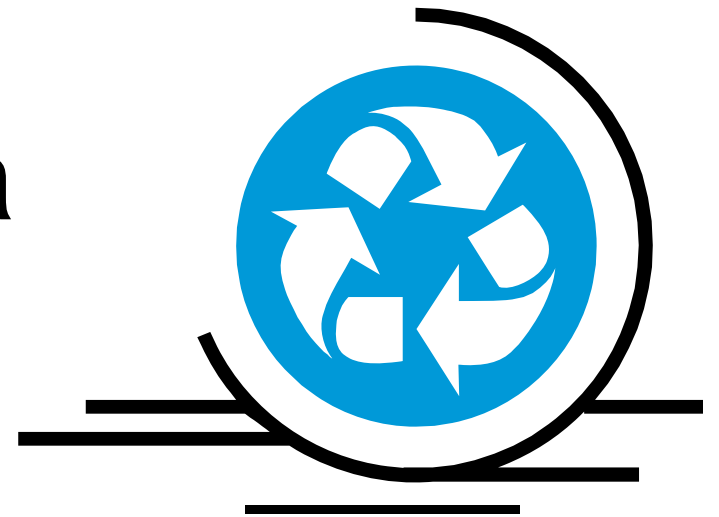
ACTION PLAN

- Actions Complete
 - 1 – Utilized in-house staffing from other areas of M&O on projects rather than going to outside resources.
 - 2 – Continued freeze on vacant Labor Services positions.
 - 3 – Picked up additional reimbursable work from Auxiliaries.
- Actions Planned
 - 1 – Continue to look for opportunities to expand reimbursable work.
 - 2 – Continue to look within our M&O Labor pool before going outside for additional staff support.



RECYCLE

To collect, sort, and process waste into a material that can be manufactured into a new product.



**Recycling is
good for UNCC
because...???**

Legal & Organizational Requirements

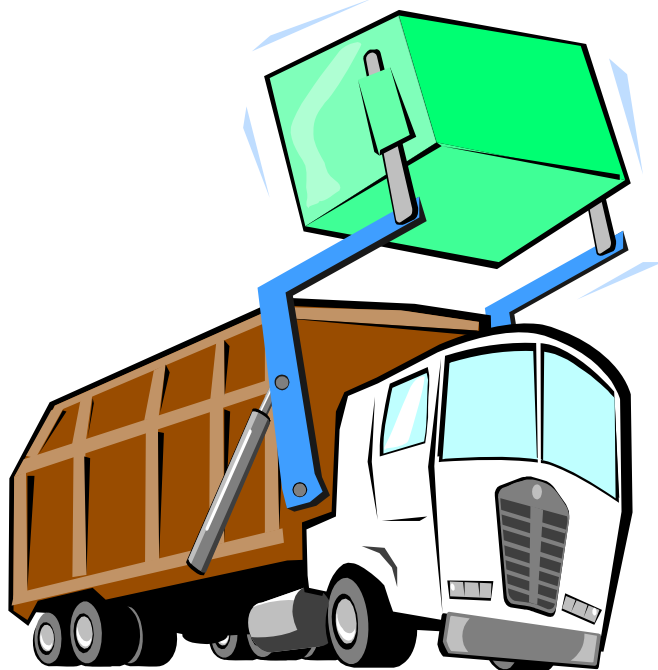
- **NC General Statutes:**
 - ban certain materials from the landfill.
 - require that recycling be easily accessible to all State employees in buildings occupied by State agencies.
- **Mecklenburg County Business Recycling Ordinance** bans Cardboard and Office Paper from the landfill.
- **UNC System “Sustainability Policy”** requires that we work towards a “zero-waste” campus.
- **UNC Charlotte Policy 110** makes all members of the University responsible for reducing the University’s trash through waste reduction, reuse, and recycling.

BANNED ITEMS:

Aluminum Cans
Antifreeze
Cardboard
Lead-acid Batteries
Motor Oil
Office Paper
Plastic Bottles
Tires
White Goods
Wooden Pallets
Yard Waste

TVs & Computer
Monitors *will join the
list in 2011*

Economics



every MONTH, we pay
~\$21,000
to have our trash picked up
and removed from campus

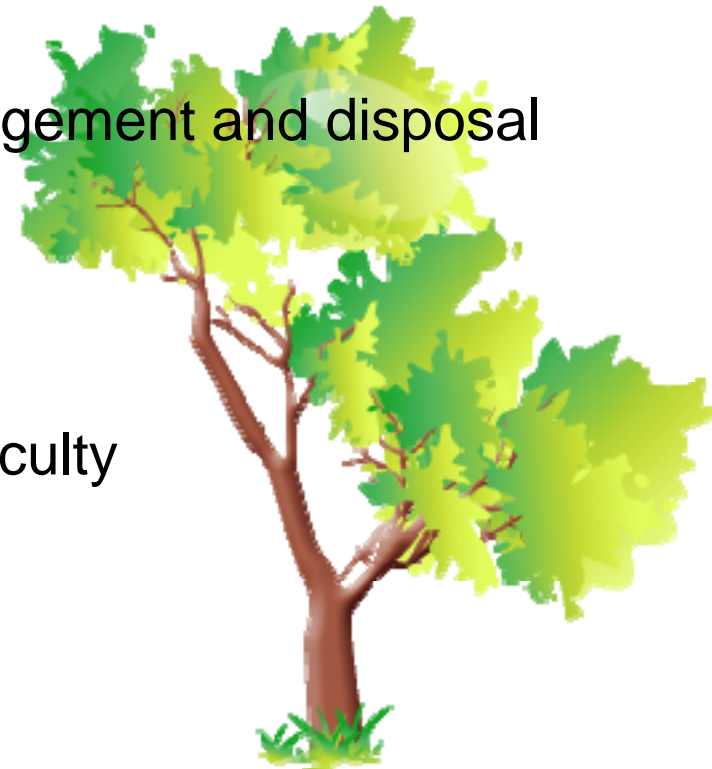
Depending on the material, our recycling costs range from:

- **completely free** (metal, pallets)
- a **haul/pick up cost only**; no tipping fee (concrete, paper, drink containers)
- or a **hauling cost with a reduced tipping fee** (yard waste - \$16.50/ton vs. \$44/ton)

Environmental & Social

This is the warm fuzzy part that can't be measured. At a minimum, recycling helps the University:

- **Avoid fines** from improper management and disposal of materials
- **Avoid negative PR** from improper management and disposal of materials
- **Get good PR** for doing the right thing
- Make our **student body happy**
- Potentially **attract more** students/staff/faculty



The Rules of Recycling

- **SOMEBODY** can take almost **ANYTHING**, as long as you:
 - have enough to make it worthwhile (dumpster loads are okay if you have them regularly; infrequent loads generally need to be tractor-trailer sized)
 - can get the material to them
- The **cleaner** the material is, the **easier** it is (ie: the less it costs) to recycle
 - less time & energy spent sorting
 - less damage done to processing equipment (balers, shredders, etc.)
 - fewer chances for imperfections in end product

You can help by making sure your recyclables are in the right bin.

What are We Recycling?

Automotive Fluids (Antifreeze, Diesel Fuels, Motor Oil)

Batteries (Automotive, Household, Rechargeable)

Cafeteria/Dining Waste (Cooking Oil, Edible Food, Compostable Food Waste)

Chemicals & Hazardous Waste (Oil Filters, Paint, Refrigerants, Solvents)

C&D Materials (Asphalt, Concrete, Untreated Drywall, Untreated Lumber)

Computer-Related Items (Inkjet & Toner Cartridges, CDs, Disks)

Drink Containers (Aluminum Cans, Glass Bottles, Plastic Bottles, Steel Cans)

Educational Materials (Microfiche, Transparencies, Videotapes)

Fluorescent Bulbs & Ballasts

Other (Six-Pack Rings, Tires, Tyvek Garments)

Packing Materials (Peanuts, Block Styrofoam)

Paper (Books, Cardboard, Office Paper, Newspaper, Paperboard, etc.)

Reusable Stuff (Reusable Office/School Supplies; Clothes, Food, etc. from Move-out)

Scrap Metal (including Copper Wire and White Goods)

Wood Waste (Pallets, Yard Waste)

Campus Outreach & Education

- Coordinate meetings for Keep Charlotte Green and advise student groups.
- Sponsor bi-annual campus cleanups.
- Coordinate yearly “Earth Day” celebration.
- Hold education sessions throughout the year for faculty, staff, and students.
- Participate in SOAR and EXPLORE UNC Charlotte (programs for prospective and incoming students).
- Participate in campus events (Rec Fest, etc.)
- Give programs and tours to classes, student groups, and “Camps on Campus”.
- Offer “Take It or Leave It” weekly (weather permitting).



Academic Recycling

Recycling Staff collects several materials from inside the academic/support buildings and loading docks, including:



- Aluminum Cans
- Batteries
- Cardboard
- Glass & Plastic Bottles
- Inkjet & Toner Cartridges
- News Blend
- Office Paper
- Reusable Office Supplies
- Styrofoam

These materials are then taken to the proper locations for vendor pick up.



Paper Collection



- **“Office Blend”** bins are emptied into 96-gallon toters, which are then swapped out as needed by the contractor. Paper is taken back to their warehouse, where it is baled and shipped back to paper mills.
- **“News Blend”** is loaded into our residence hall recycling bins, where it is hauled to a processing facility that turns it into insulation.
- **Cardboard** is placed into 8-yd cardboard recycling bins which are emptied twice per week by our contractor and hauled to International Paper.





“News Blend”
is recycled into
insulation →



“Office Blend” is
recycled back into
office/copy paper or may
be “down-cycled” into
catalogs, magazines, and
newspaper. →



Cardboard is recycled
back into brown kraft paper
or boxboard. →



Co-mingled Drink Containers

Drink containers are taken to one of the 30-yd covered rollofs located outside the residence halls. Full rollofs are hauled to FCR, a processing facility where materials are sorted, baled, and shipped to processors.





Plastic is sorted by type, washed, ground into flakes, and re-processed into a wide variety of materials.



Metal is sorted by type, melted, and re-processed into a wide variety of materials. Nearly all metal items are made with recycled content.



Facilities Management Recycling

In addition to the normal materials recycled on campus, FM recycles **motor oil, ballasts, tires, automotive batteries, fluorescent bulbs, scrap metal, solvents, refrigerants, paint, electrical wiring, pallets, yard waste, and some types of construction/demolition debris.**





This presentation brought to you by...
The Office of Waste Reduction & Recycling

***Thanks for
Recycling!***





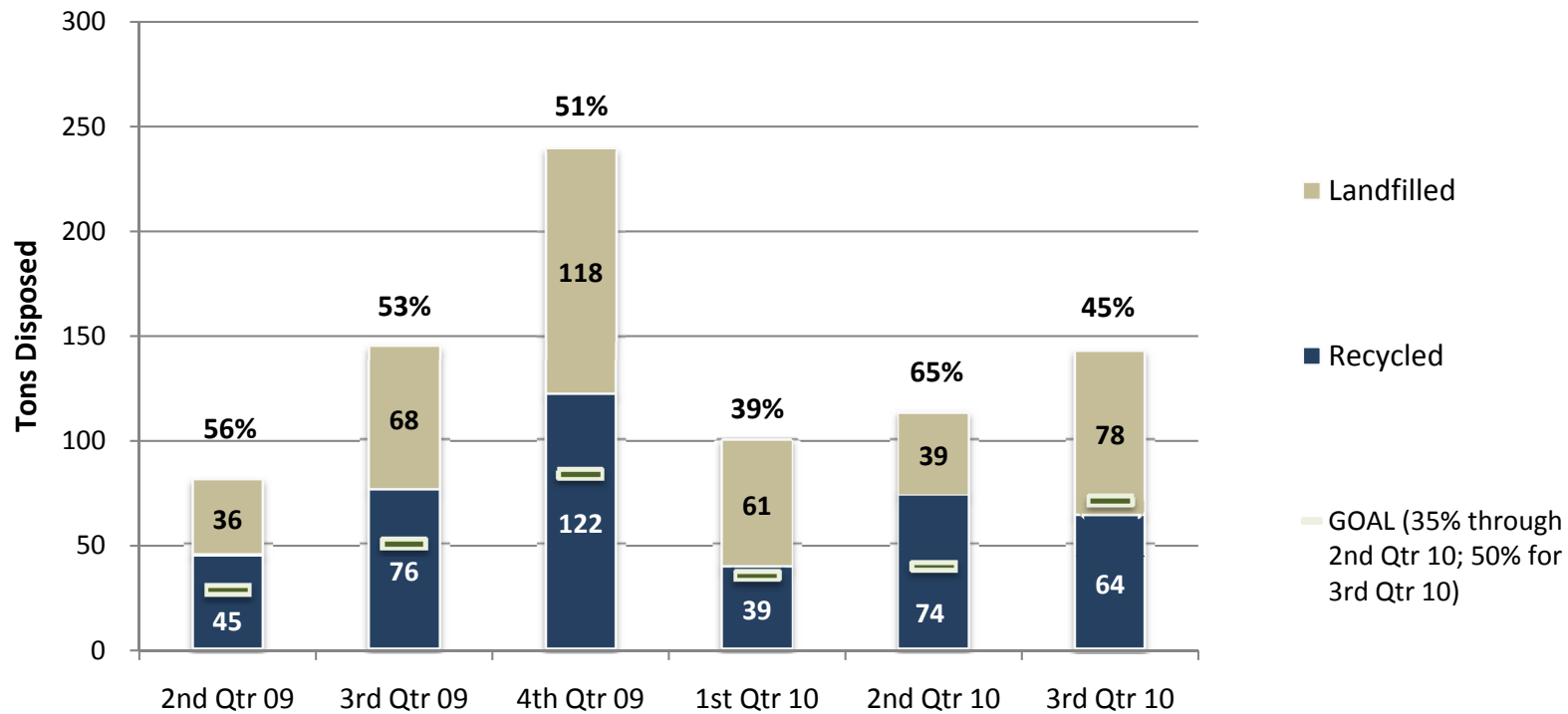
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

**Informal Projects - Materials Disposed
3rd Qtr FY10**



GOAL #6 – Promote Good Stewardship



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

ACTION PLAN

- Actions Complete
 - Diversion rate for informal projects is 45% for third quarter FY10 – savings of:
 - \$2,198 in tipping fees
 - \$1,100 in pull charges.
 - Increased diversion goal to 50% as discussed at previous Strategic Planning sessions to reflect LEED and UNC Sustainability Policy requirements.
 - Attended CRA conference and met potential partners/vendors.
- Actions Planned
 - Work with Design to get built-in recycling whenever scope of renovation will allow.
 - Pursue partnerships that allow for alternative disposal methods.



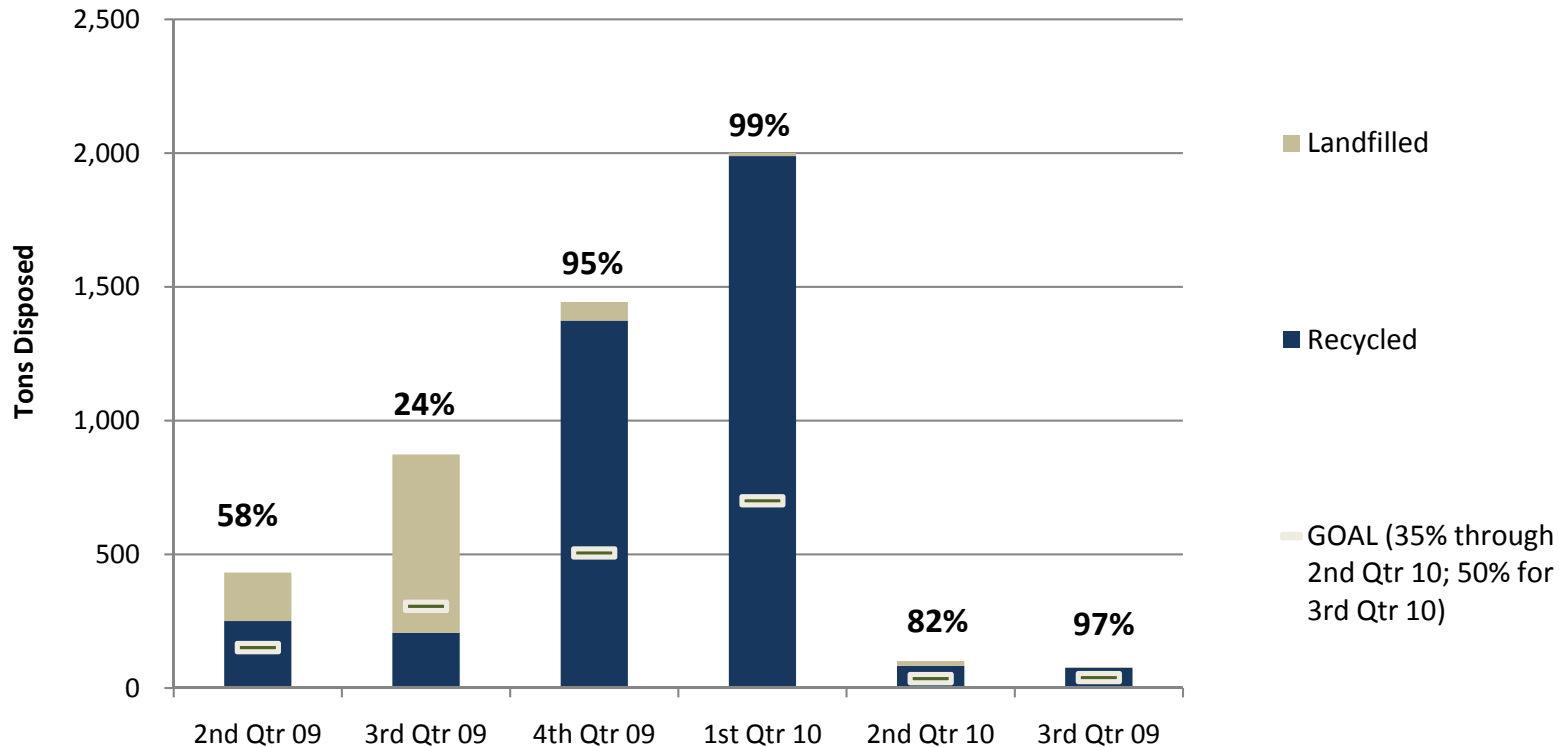
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

**Capital Projects - Materials Disposed
3rd Qtr FY10**



GOAL #6 – Promote Good Stewardship

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



ACTION PLAN

- Actions Complete
 - Increased diversion goal to 50% as discussed at previous Strategic Planning sessions to reflect LEED and UNC Sustainability Policy requirements.
- Actions Planned
 - Work on standardizing recycling bins in lobbies/common areas.
 - Continue monitoring and tracking projects.

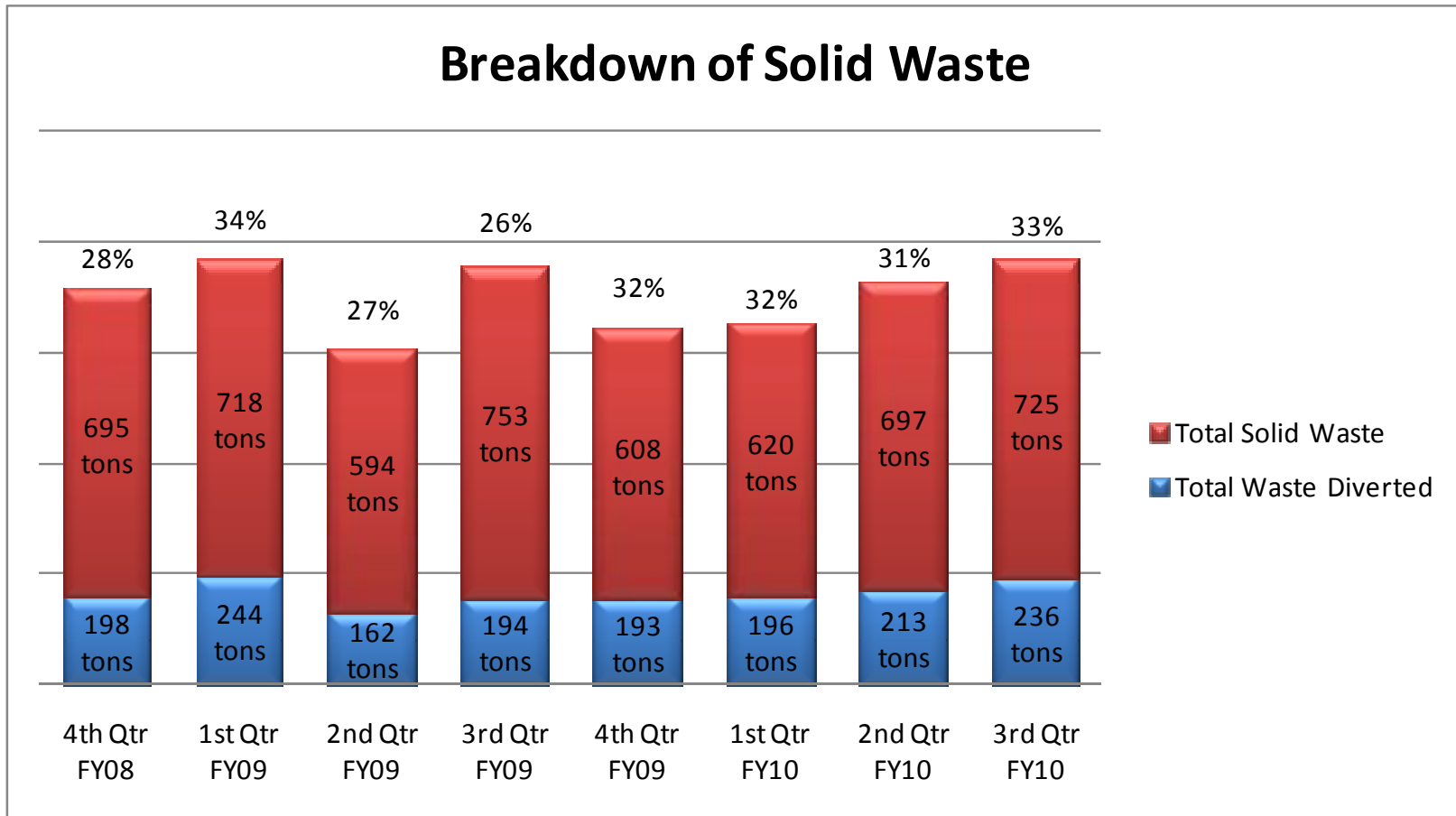


GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship



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

ACTION PLAN

Actions Complete

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Paper recycling revisions
- Continue outreach efforts to University community (coordinated over 250 student volunteers, provided environmental tours, promoted Adopt-A-Spot program (10 groups), advise EARTH Club, Charlotte Green Initiative and Global Architecture Brigade
- Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
- Coordinate Campus Clean UP
 - over 160 volunteers on March 31st and another 150 Student Volunteers later in the week
- Coordinate 18th Annual UNC Charlotte EARTH DAY Festival on the occasion of the 40th anniversary of EARTH DAY
 - Over 35 exhibitors, new location CHHS plaza
- Presented and attended the CRA conference in March
- Participated in Waste Minimization Contest with Recyclemania
- Added Foundation Office (Church of God Building) to route
- Partnered with Housekeeping – classroom trashcan removal project and pilot office trash can consolidation program

Quarter	Total Waste Diverted	Total Solid Waste	% Diverted	Tons diverted	Tons Total Solid Waste
4th Qtr FY08	395,581	1,390,905	28%	198	695
1st Qtr FY09	487,715	1,435,915	34%	244	718
2nd Qtr FY09	323,562	1,188,802	27%	162	594
3rd Qtr FY09	388,609	1,506,909	26%	194	753
4th Qtr FY09	385,961	1,215,381	32%	193	608
1st Qtr FY10	392,701	1,239,541	32%	196	620
2nd Qtr FY10	425,182	1,393,820	31%	213	697
3rd Qtr FY10	465,047	1,444,267	33%	236	725

4th Quarter Actions Planned

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Continue to research markets and collection options for more efficient recycling with reduced staff
- Continue educational outreach and promotion (Sustainable Campus tour, Adopt-A-Spot program, advising EARTH Club, Global Architecture Brigade and Charlotte Green Initiative)
- Coordinate MOVE OUT with Housing and Residence Life
- Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**



UNC CHARLOTTE

Sustainability

David Jones

Sustainability Coordinator

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GOAL #6 – Promote Good Stewardship

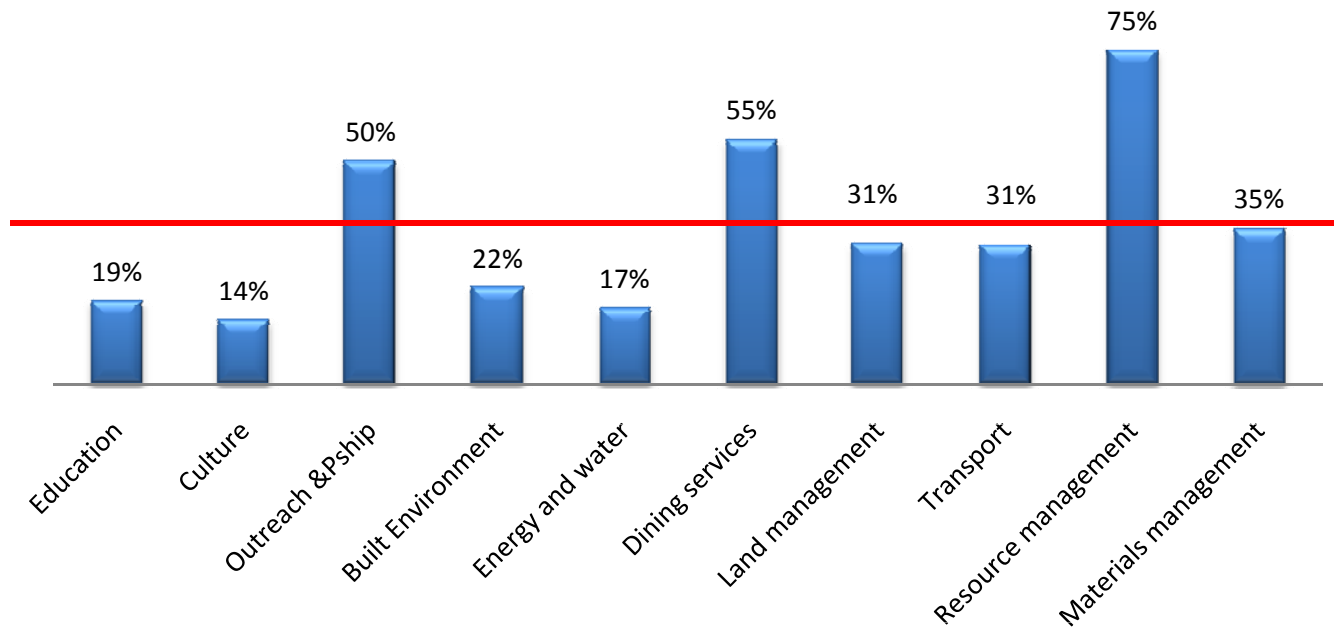
Strategy 6.2 Develop a Sustainable Campus

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

Measure: Number of goals achieved in each category

Balanced Scorecard Category: Innovation and Learning (this has been under Financial)

Sustainability Progress



Status

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions



ACTION PLAN

Actions Completed

- Discussions with Associate Vice Provost and 2 Deans regarding sustainability and the curriculum:
 - Draft definition of sustainability in the curriculum
 - Initial discussions on sustainability in Gen Ed offerings
- Mecklenburg County and Sustain – Charlotte events
- Recommendations for campus sustainability policy from the sustainability committee
- Reviewed campus sustainability plan with sustainability committee
- ACUPCC : Data gathering begun – post graduate student study
- NPDES Phase II permit analysis
- LEED EB O&M study
- Capital Planning process study
- Partnership with PATS on developing campus bike program

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions



ACTION PLAN

• Actions Planned

- Education/Research:
 - Engage with faculty to determine level of support for sustainability Gen Ed requirements
- Culture and Community
 - Institute Campus Sustainability speaker series (Depending on funding)
 - Publish campus sustainability plan and send Sustainability Committee recommendations to AVC Business Affairs
 - Communicate sustainability plan to campus community via website and events.
- Outreach and partnership
 - Continue coordination program with Mecklenburg county environmental policy department
 - Represent UNC Charlotte sustainability on SustainCharlotte committee
- Built Environment
 - Development of campus green building resource database
 - Pilot incorporation building performance criteria into capital planning process
 - Develop facilities orientated LEED EB O&M tool
 - Design and construction guidelines

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of Sustainability plan actions

Lead
RELU

ACTION PLAN

Actions Planned

- Energy and water management
 - Complete 75% of data gathering for campus green house gas inventory
- Dining Services
 - Meal plan - bottled water ban
- Land management
 - Continue with next phase of Phase II permit.
- Transport
 - Develop campus bike plan with PATS
- Materials Management
 - Support green purchasing policy development

Lead
M&O

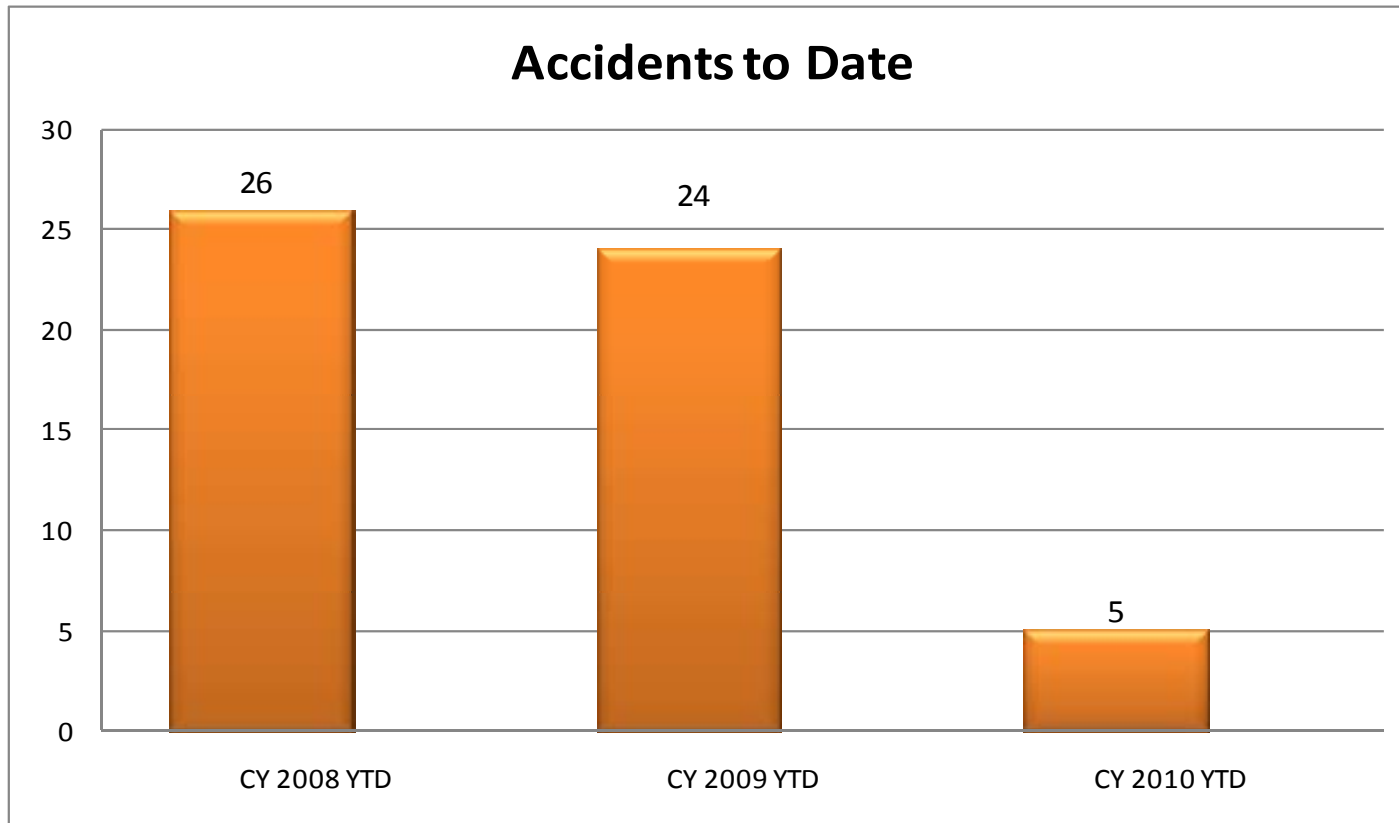
GOAL #6 – Promote Good Stewardship

Strategy 6.4 Improve Employee Safety
Objective 6.4.1 Reduce Accidents by 10 Percent Annually

Measure: Number of reportable accidents (Measured by Calendar Year)

Goal: Less than 22 per year

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



Goal <22

STATUS

GOAL #6 – Promote Good Stewardship

Strategy	6.4	Improve Employee Safety
Objective	6.4.1	Reduce Accidents by 10 Percent Annually

Lead
M&O

ACTION PLAN

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

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
Capital

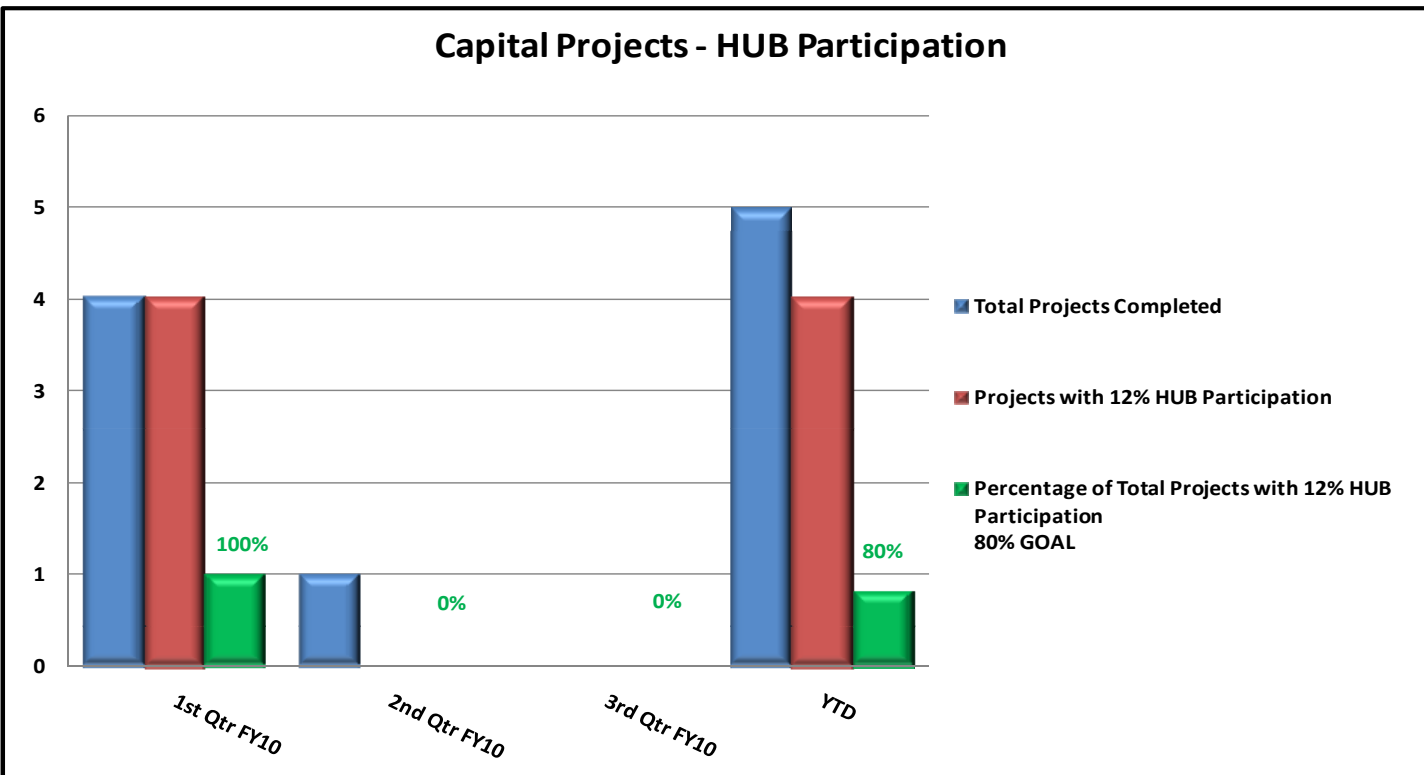
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Internal Business Process

	Total Projects Completed	Projects with 12% HUB Participation	Percentage of Total Projects with 12% HUB Participation 80% GOAL
Strategic Review			
1st Qtr FY10	4	4	100%
2nd Qtr FY10	1	0	0%
3rd Qtr FY10	0	0	0%
YTD	5	4	80%



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN

- **Actions Complete**

- ✓ Participated in the EPIC “Project Information/Vendor Networking” session for Phase 2 bid packages
- ✓ Participated in State Construction Conference HUB Reception & Expo

- **Actions Planned**

1. Encourage higher HUB participation goals on single prime projects
2. Work with CM contractors to identify potential mentor-protégé candidates
3. Continue –
 - Work with GCs to identify qualified HUB contractors to bid projects
 - Cultivate teamwork between government agencies to support HUB growth/development
 - Monitor Pay Applications/Good Faith Efforts
 - Provide upcoming project information
 - Educate firms on the process
 - Community outreach efforts

Facilities Management Strategic Planning Session – Third Quarter FY 2010

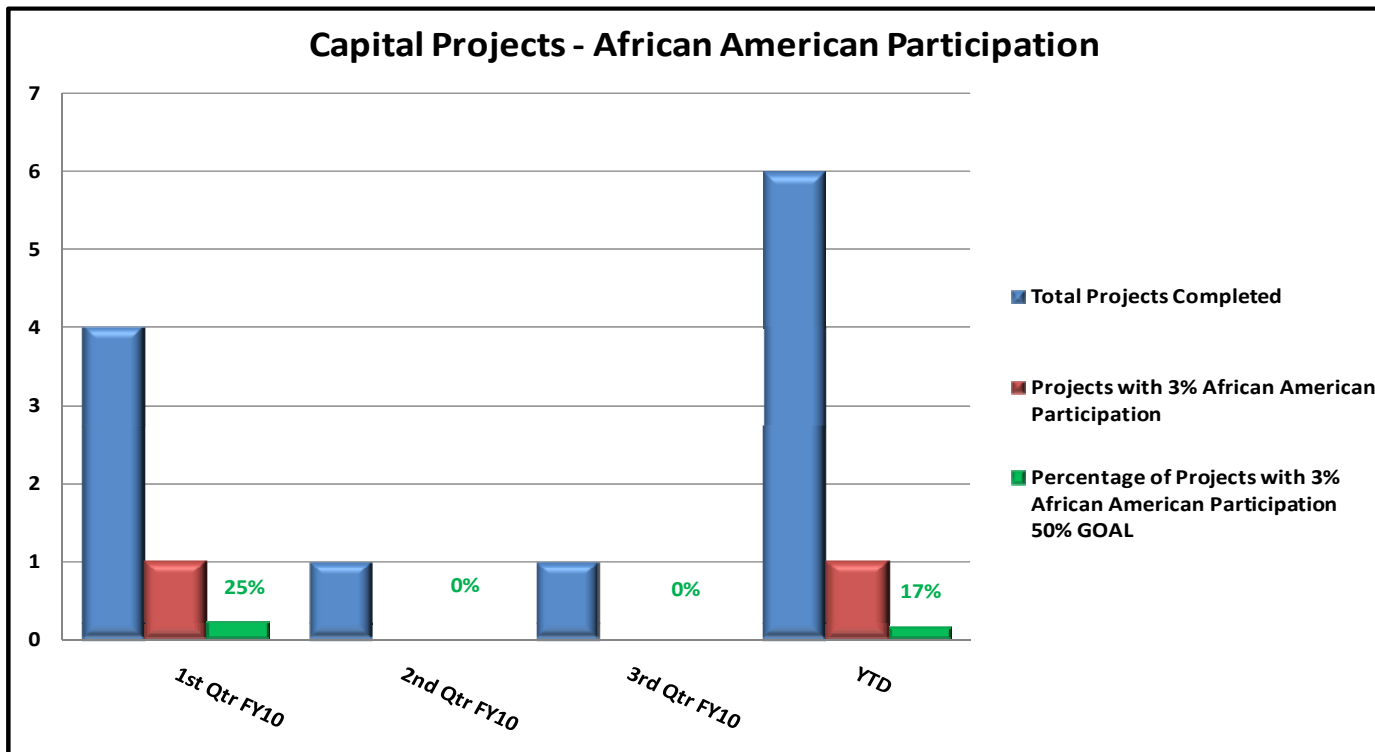
GOAL #6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.2 3% African American participation on 50% of Capital Projects

Measure: Percentage of Individual Capital Projects achieving 3% African American participation

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Projects Completed	Projects with 3% African American Participation	Percentage of Projects with 3% African American Participation 50% GOAL
1st Qtr FY10	4	1	25%
2nd Qtr FY10	1	0	0%
3rd Qtr FY10	1	0	0%
YTD	6	1	17%



STATUS

GOAL #6 – Promote Good Stewardship

Lead
Capital

Strategy	6.5	Improve Historically Underutilized Business (HUB) Participation
Objective	6.5.2	3% African American participation on 50% of Capital Projects

ACTION PLAN

- **Actions Complete**

- ✓ Co-sponsored monthly United Minority Contractors of NC (UMCNC) meeting w/Rodgers Builders

- **Actions Planned**

1. Provide “business development” workshops to Metrolina Minority Contractors Association (MMCA)
2. Work with CM Contractors to develop targeted training for subcontractors
3. Encourage CM Contractors to identify reduced barrier packages to increase HUB participation
4. Examine Goals & Objectives of MBE Advisory Committee
5. Continue –
 - Identify qualified HUB contractors to bid projects
 - Educate firms on the process
 - Encourage partnerships
 - Provide upcoming project information
 - Community outreach efforts

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
Capital

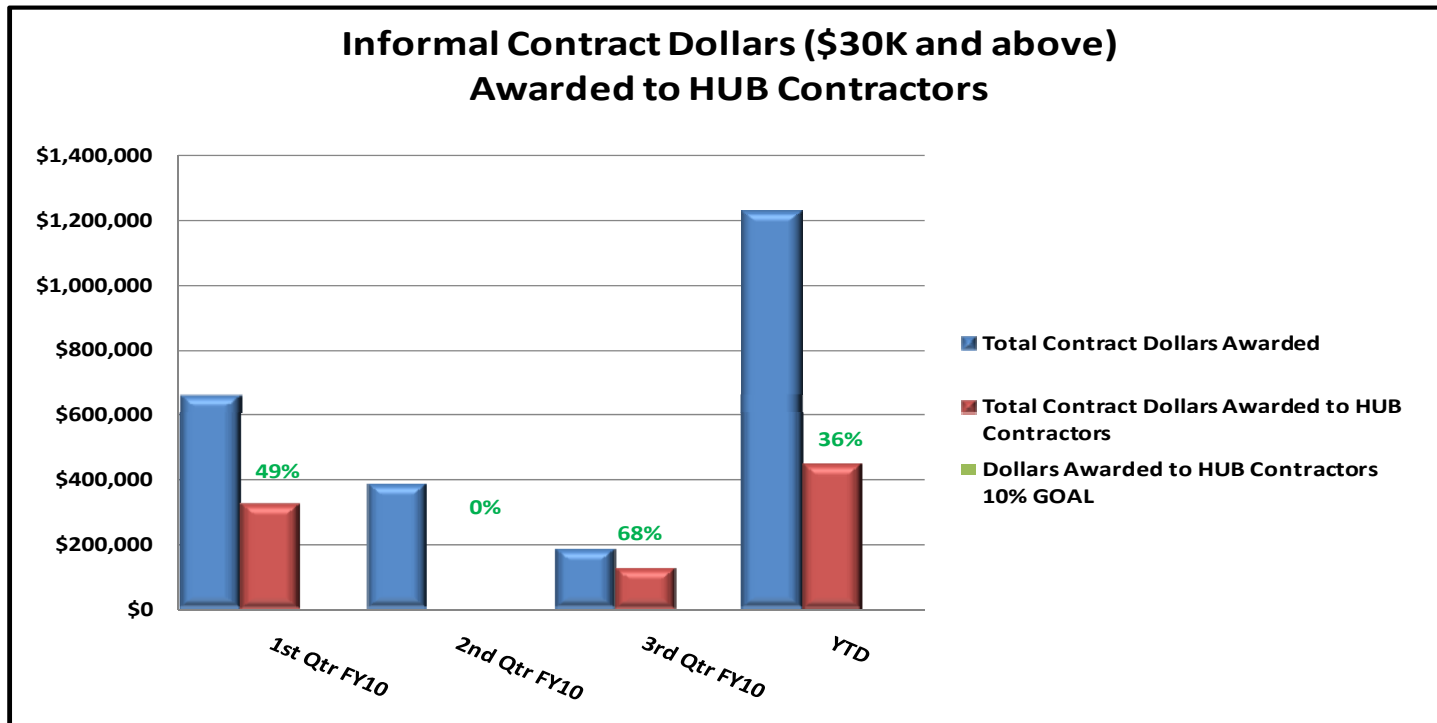
GOAL #6 – Promote Good Stewardship

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

Measure: Percentage of Informal Contract Dollars awarded to HUB Contractors

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Contract Dollars Awarded	Total Contract Dollars Awarded to HUB Contractors	Dollars Awarded to HUB Contractors 10% GOAL
1st Qtr FY10	\$659,799	\$321,332	49%
2nd Qtr FY10	\$384,620	\$818	0%
3rd Qtr FY10	\$184,646	\$125,046	68%
YTD	\$1,229,065	\$447,196	36%



STATUS

GOAL #6 – Promote Good Stewardship

Lead
Capital

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

ACTION PLAN

- **Actions Complete**

- ✓ Participated in “GC & Subcontractor Information & Networking” session for Informal construction Process

- **Actions Planned**

1. Participate in upcoming “GC & Subcontractor Information & Networking” session for Informal construction process
2. Continue –
 - Encourage/Invite HUB contractors to bid Informal Projects
 - Work with Design Services/Materials Management to identify qualified HUB contractors for business opportunities
 - Educate firms on the process
 - Community outreach efforts

GOAL # 6 – Promote Good Stewardship

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

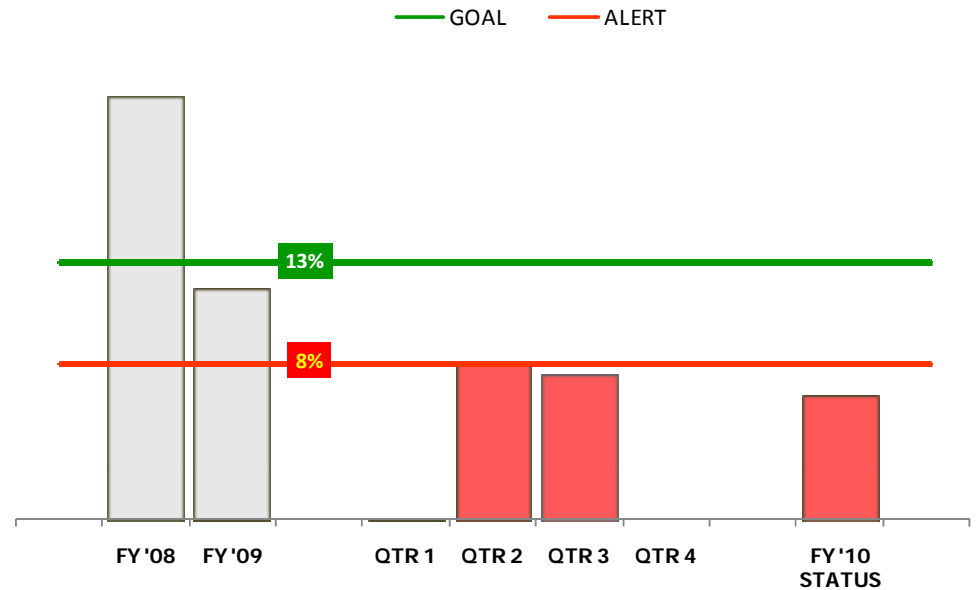
Measure: Total % of HUB participation on all Informal Projects below \$30,000 (**Construction only**) divided by Total Contracts

Balanced Scorecard Category: Internal Business Process

13% HUB participation projects below \$30,000 -Construction- 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY'08	\$ 2,861,776	\$ 608,415	21.3%
FY'09	\$ 1,404,456	\$ 163,049	11.6%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2	\$ 522,917	\$ 40,731	7.8%
QTR 3	\$ 659,240	\$ 47,972	7.3%
QTR 4	\$ -	\$ -	0.0%
FY '10 STATUS	\$ 1,452,202	\$ 88,703	6.1%

HUB OVERALL GOAL: 13.0%



GOAL 13.0%	FY'10 STATUS 6.1%
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GOAL # 6 – Promote Good Stewardship

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

ACTION PLAN

- Individual meetings with JOC Contractors to discuss ways to improve use of HUB firms.

6.5.4 - Actions Planned:

- Promote usage of HUB firms with Project Coordinators (Amand Felock).
- Continue Meet & Greet sessions with successful HUB firms that have been used but need greater exposure to all of Design Services.
- FIS to update Archibus to provide Strategic Planning reports rather than running queries.
- All Project Coordinators will have a new "Expectation" as part of their Performance Management and Career Development.:

Document your efforts to show the extent that you sought out HUB participation for your "Under \$30,000.00" construction projects.

GOAL # 6 – Promote Good Stewardship

Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.5 **3% African American participation on informal projects below \$30,000.**

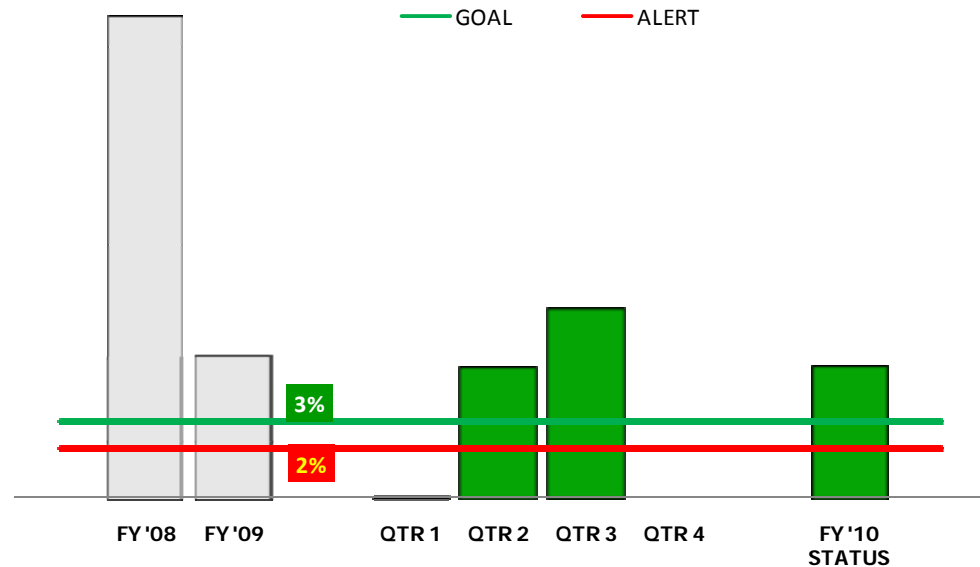
Measure: Total African American participation on all Informal Projects below \$30,000 (**Construction only**) divided by Total Contracts

Balanced Scorecard Category: Internal Business Process

3% African American participation projects below \$30,000 -Construction- 6.5.5

QUARTERLY REVIEW	Value of Contracts under 30K	African American Contribution	African American
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2	\$ 522,917	\$ 26,015	5.0%
QTR 3	\$ 659,240	\$ 47,972	7.3%
QTR 4	\$ -	\$ -	0.0%
FY '10 STATUS	\$ 1,452,202	\$ 73,987	5.1%

AFRICAN AMERICAN GOAL: 3.0%



GOAL 3.0%	FY'10 STATUS 5.1%
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Balanced Scorecard

Financial Perspective

Facilities Management FY 2010 Balanced Scorecard

Financial <i>To financially sustain our mission, what must we focus on?</i>	Manage Budget	6.1.1	Balanced Budget @ End of Year	100%	100%		
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%	100%		
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5% "	-8%	Annual	Annual
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5% "	?	Annual	Annual
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5% "	?	Annual	Annual
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5% "	?	Annual	Annual
		6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	\$432,250		
	Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	35%	?		
		6.2.2	C&D Recycling Capital Projects	35%	97%		
		6.2.3	Increase % Solid Waste Recycled (Baseline 2007)	5% (25.27%)	33%		
		6.2.4	Implement 35% of each 2008 Sustainability goals	35%	multiple		
	Conserve Natural Resources	6.3.1	Energy Usage by 2015	-20% or 99 kBTUs/GSF	126 kBTUs		
		6.3.2	Water Usage by 2010	-20% or 43 Gal/GSF	32 Gal		
	Improve Employee Safety	6.4.1	Reduce Accidents by 10% annually - goal 23 or less	23	5		
	Improve HUB Participation	6.5.1	80% Cap Projects achieve 12% HUB	80%	80%		
		6.5.2	50% of Cap Projects achieve 3% AA participation	50%	17%		
6.5.3		10% Overall HUB for Informal Proj above \$30,000	10%	36.00%			
6.5.4		13% Overall HUB for Informal Proj below \$30,000	13%	6.10%			
6.5.5		3% AA HUB participation on Inf. Proj below \$30,000	3%	5.1%			

LEGEND:

- Met Target  100% performance to target ratio
- Near Target  90-99% performance to target ratio
- Needs Attention  Below 90% performance to target ratio
- No Data Available  Unable to Measure or In Progress



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

Labor Availability, Logistics Efficiency, Optimize Supply Chain, Work Request Process, Housekeeping Processes, Improve Process Reliability, Manage Technical Resources, Increase On-Time Delivery, Informal Project Administration, Master/Project Planning Process Capital Project Administration



UNC CHARLOTTE

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

-- Harold Geneen, industrialist

GOAL # 1

Improve Maintenance and
Operation on the Campus

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

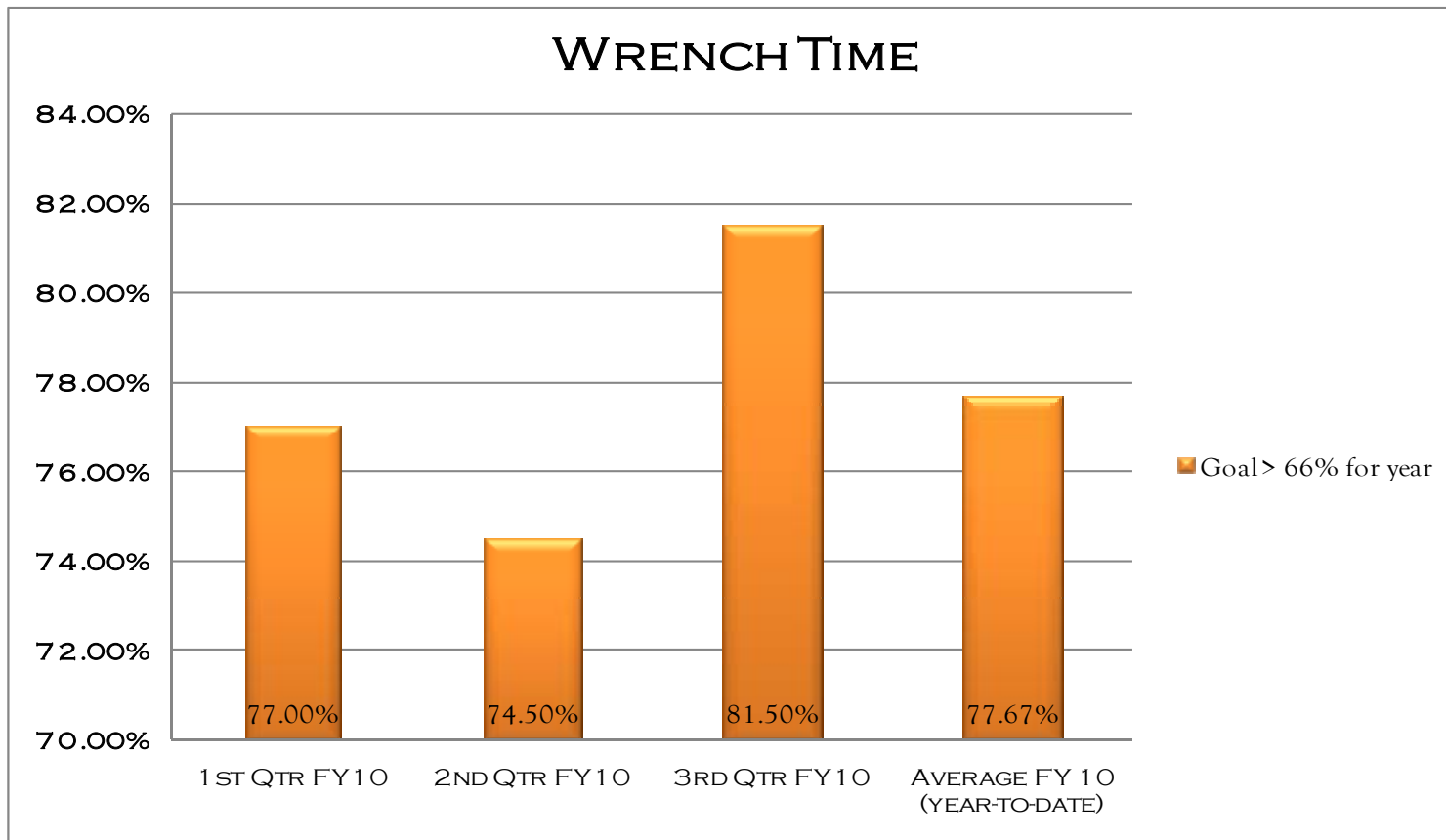
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.1 Improve Labor Availability
Objective: 1.1.1 Increase "Wrench Time" by 3%

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

Goal: Greater than 66% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Lead
M. & O.

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

ACTION PLAN

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

- Actions Planned
 - 1 – Continue development of a more extensive PM program.
 - 2 – Continue to stress reporting accuracy.
 - a) Meet with shop supervisors and PA’s to review.
 - b) Stress importance with all employees.
 - c) “Recorded hours” has improved from 79.5% of available hours last quarter to 81.2% of available hours this quarter.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

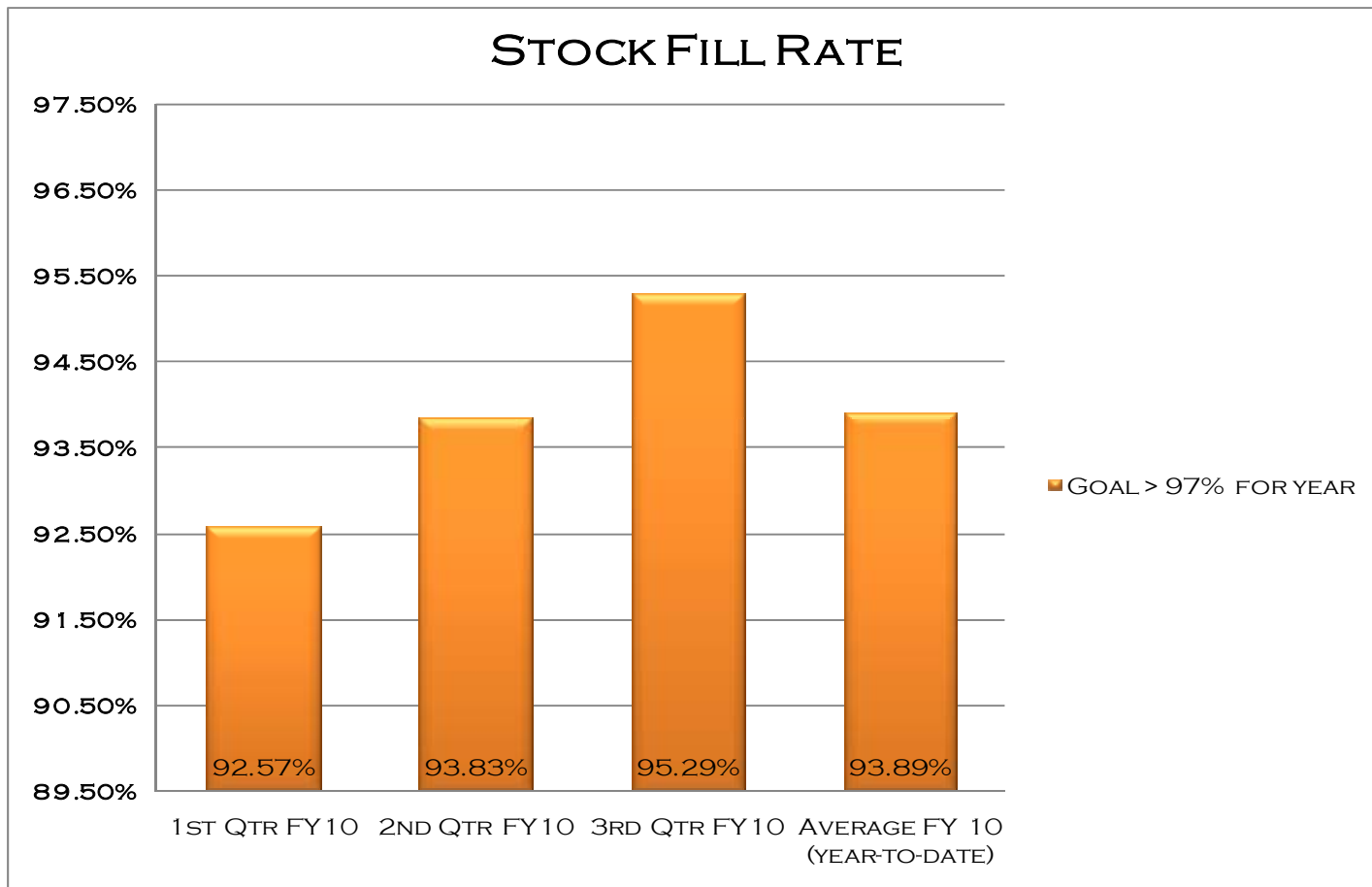
GOAL #1 – Improve Maintenance and Operations of the Campus

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

Measure: Percentage Fill (SDI's Key Performance Indicator {KPI} – Stock Fill Rate)

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

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

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

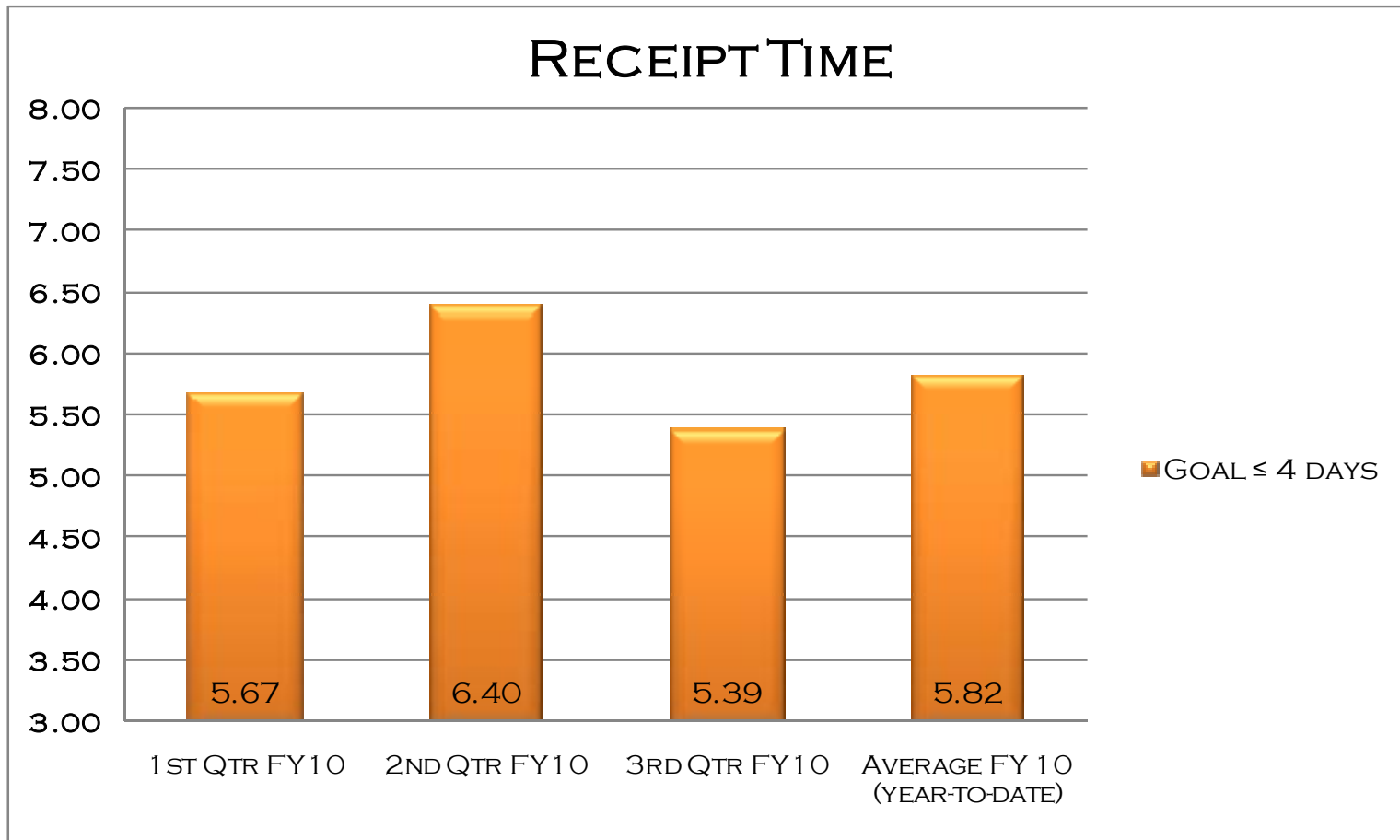
GOAL #1 – Improve Maintenance and Operations of the Campus

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

Measure: Days (SDI's KPI – Non-stock Requisition to Receipt Time)

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Supervisors improved average approval time from 7.5 hrs. in Qtr 2 to 7.37 hrs. in Qtr 3.
 - 2 – Information to buyers at SDI back-tracked from 2.1% of requests needing information in Qtr 2 to 0.8% in Qtr 3.
 - 3 – Reviewed non-stock orders to determine items that should be stocked. Monthly non-stock orders averaged 292 for all of FY09. Despite tight budget; the average monthly non-stock orders this fiscal year has averaged 417 per month. The 33% increase has strained SDI's resources.
- Actions Planned
 - 1 – Encourage all employees and supervisors to review orders and stop ordering as non-stock materials which are stocked in the warehouse.
 - 2 – SDI has already added additional resources on their end to help with higher volumes.

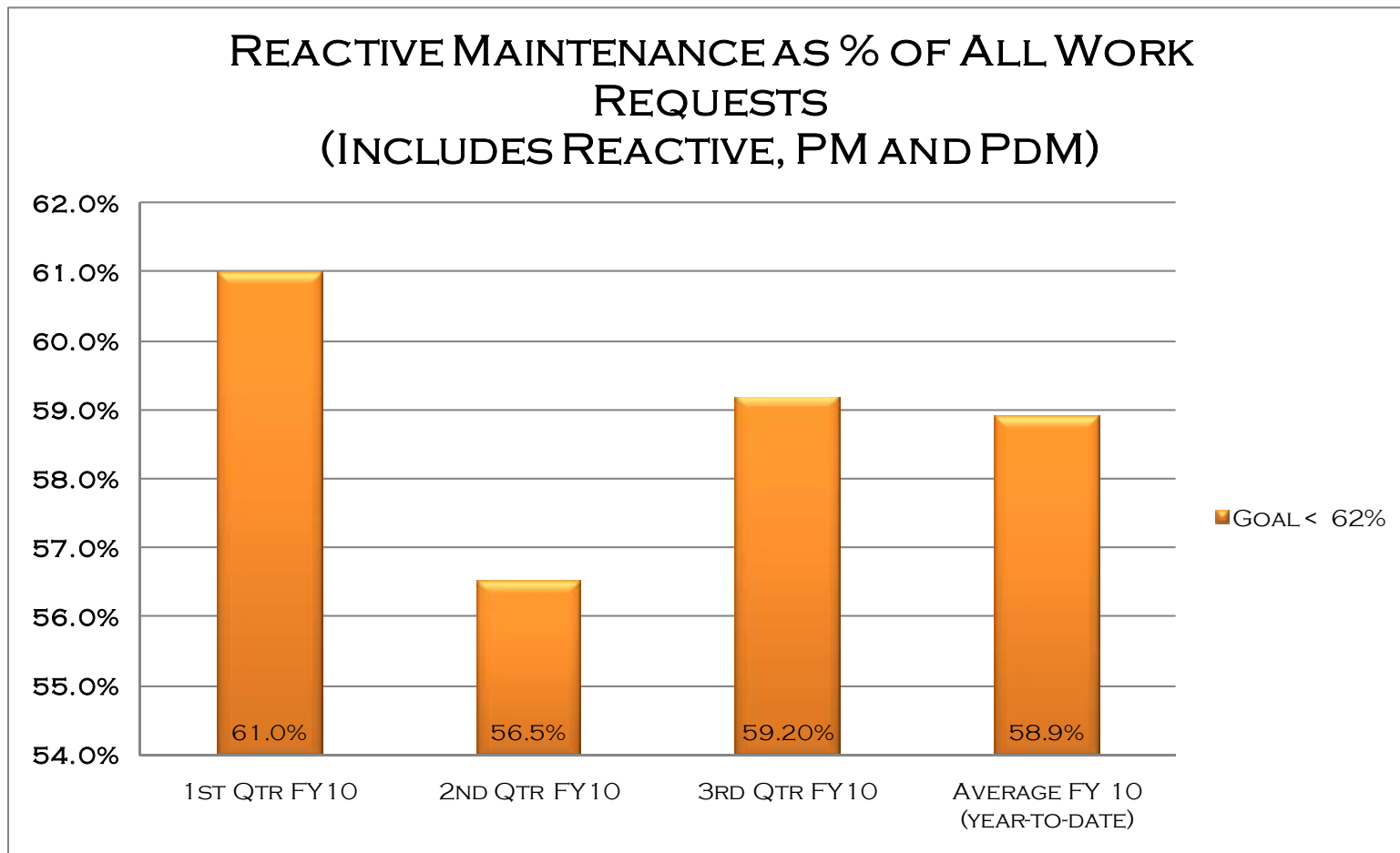
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.1 Decrease Percentage of Reactive Work Requests by 2%

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

Goal: Percentage to average < 62% for year.

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.3 Improve Work Request Process
Objective: 1.3.1 Decrease Percentage of Reactive Work Requests by 2%

Lead
M. & O.

ACTION PLAN

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

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

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

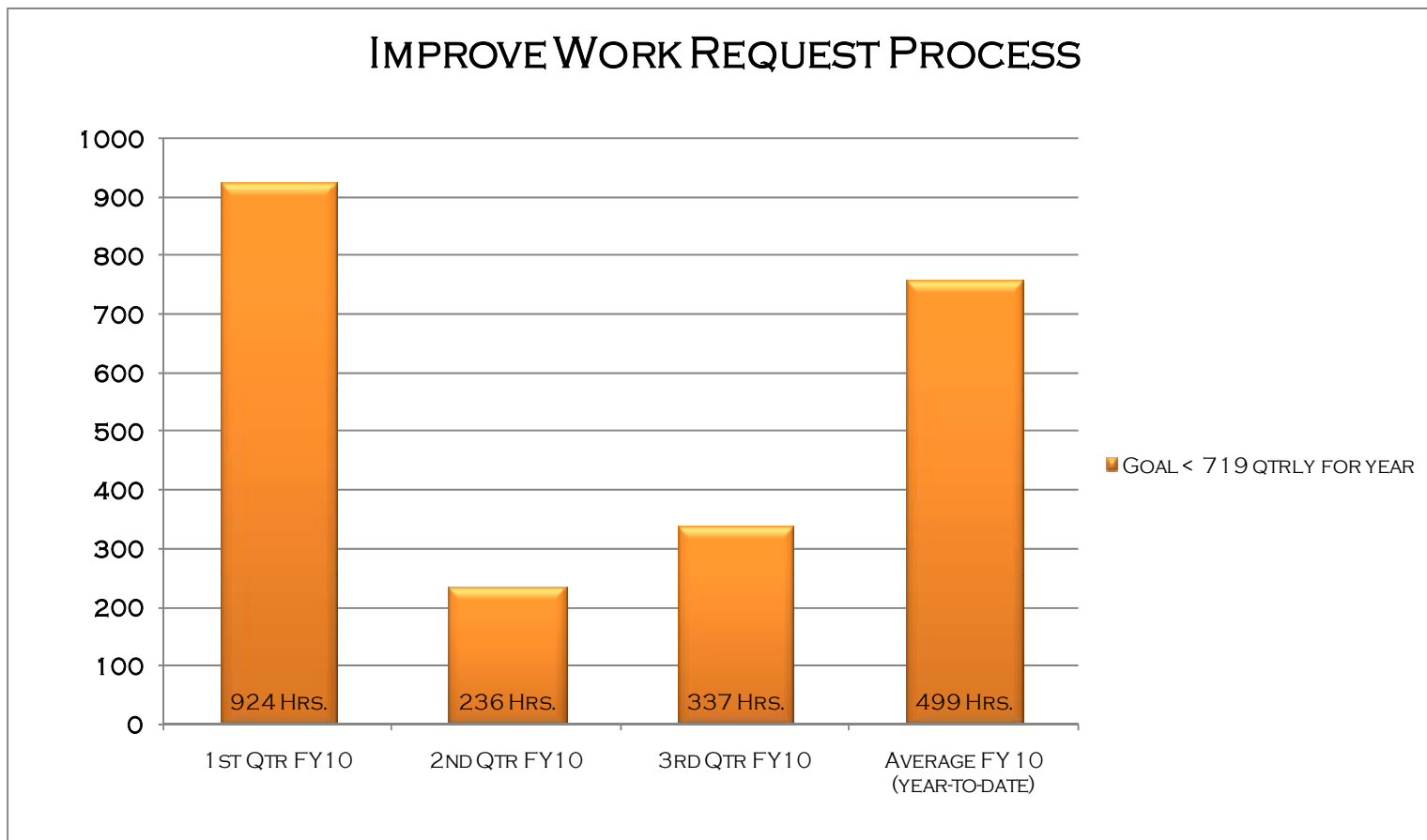
GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

Goal: Less than 719 quarterly average for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

Actions Complete

- 1 – Continued emphasis on over 14 day and 30 day reports by supervisors and managers.
- 2 – Continued review of unassigned WR's by supervisors and managers.
- 3 – Continued review of PM and other work assignments and completions with technicians.
- 4 - Review the manner in which data is used to calculate cycle time with FIS to ensure accuracy.

Actions Planned

- 1 – Emphasize M&O Policy II-16 for Timely and Accurate Handling/Processing of WRs.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
Housekeeping

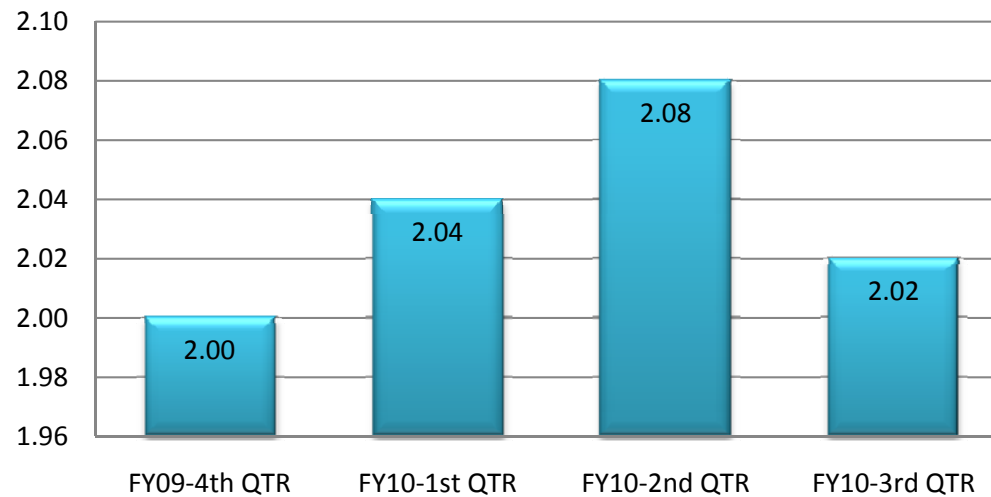
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

Measure: Percentage of buildings meeting APPA Level 2 cleanliness standards during quarterly inspection (APPA Benchmark)

Balanced Scorecard Category: Internal Business Process

APPA LEVELS



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.4 Improve Housekeeping Processes
Objective: 1.4.1 Achieve APPA Level 2 in 98% of Buildings

Lead
Housekeeping

ACTION PLAN

- Actions Complete
 - All buildings not in renovation audited (self audit)
 - Changed chart to reflect summary data for last four quarters
- Actions Planned
 - Continue quarterly self audits
 - Write RFP for external benchmark analysis
 - Establish subject matter expert training position for housekeeping

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

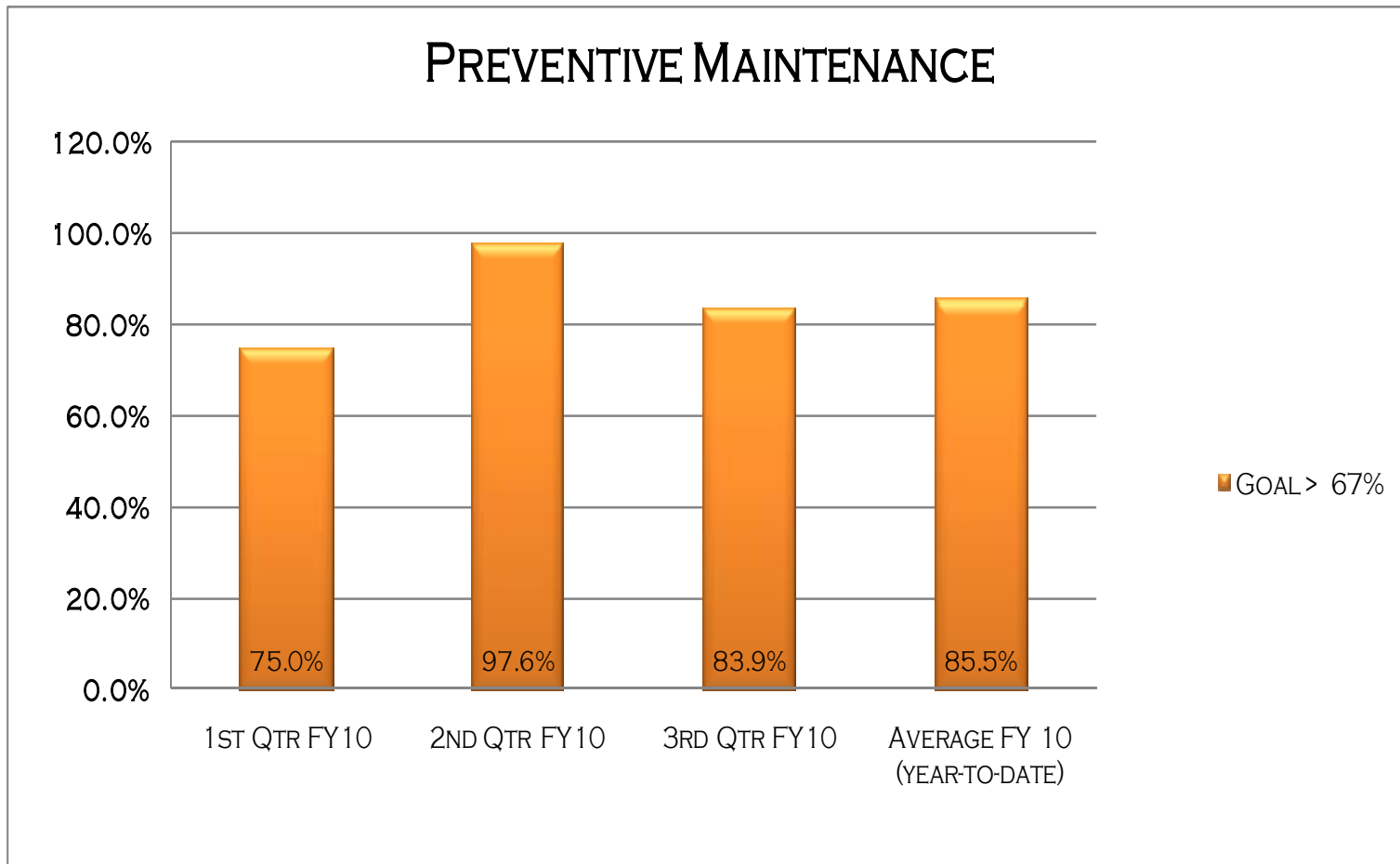
GOAL #1 – Improve Maintenance and Operations of the Campus

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

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

Goal: Greater than 67%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

Strategy: 1.5 Improve Reliability
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Discussed importance of PM's with managers; 2379 of 2834 PM's completed in 3rd Qtr.
 - 2 – Stressed importance of completing PMs on time.
 - 2 – Stressed importance of PM template approvals with customers.
- Actions Planned
 - 1 – Hire PM Manager.
 - 2 – Continue development of PM Program.
 - 3 – Closer monitoring of PM completions.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

GOAL #1 – Improve Maintenance and Operations of the Campus

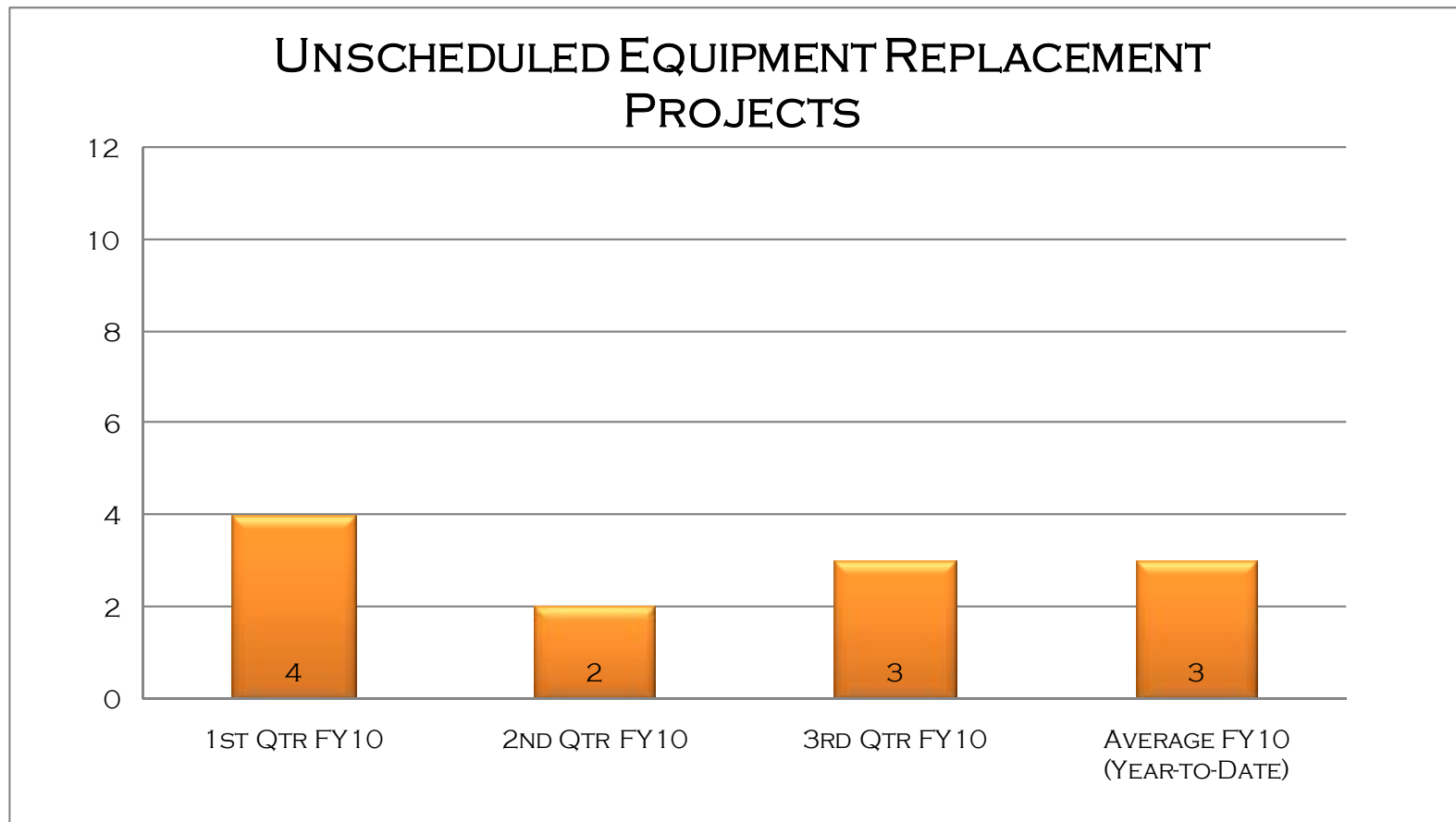
Strategy: 1.5 Improve Reliability

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

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

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

Note: Failures: CARC Chiller, Coil at Cone, Feedwater pump at the Steam Plant

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

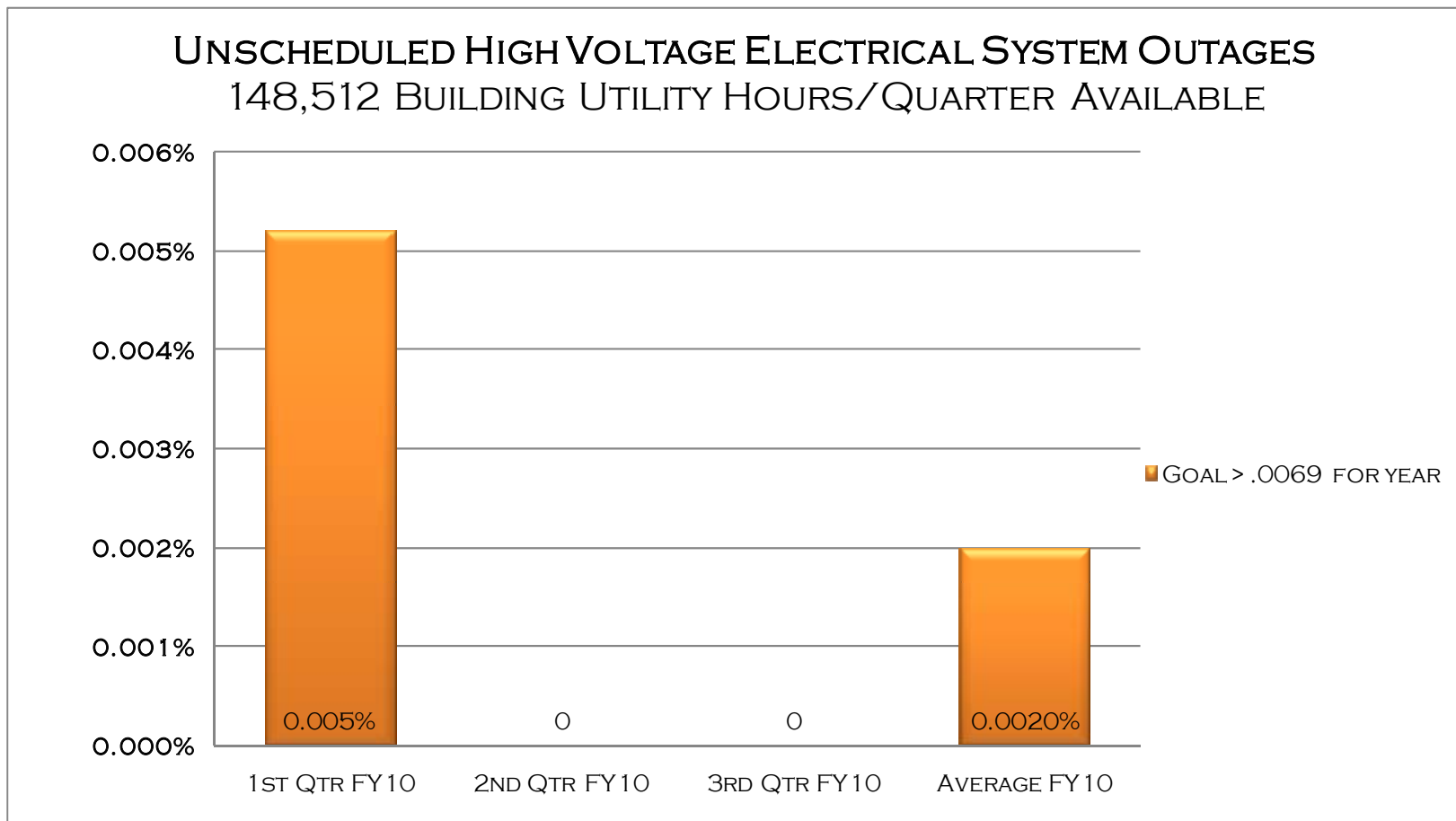
GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

Goal: Less than .0069 for year.

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

Lead
M. & O.

ACTION PLAN

- Actions Complete
 - 1 – Completed PM's as scheduled.
 - 2 – Continued working closely with Project Managers and contractors performing work on-site to preclude accidental interruptions by properly identifying location of underground utilities.
 - 3 - Identified several switches needing replacement and prepared estimates for planning.
- Actions Planned
 - 1 – Continue PM's.
 - 2 – Prepare program for major equipment repairs and replacement.
 - 3 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

Lead
M. & O.

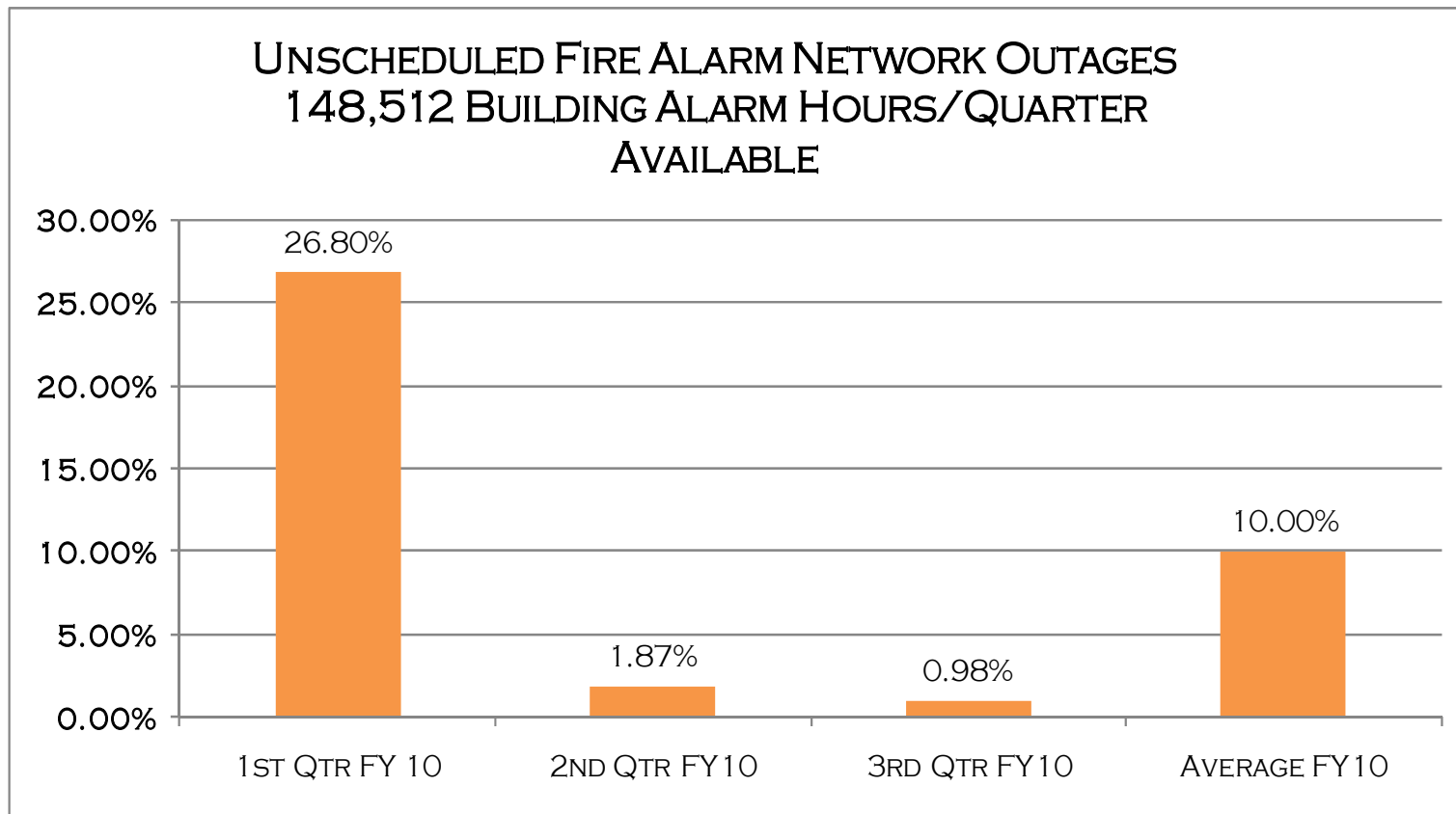
GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

Goal: Less than 10%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Maintenance and Operations

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

ACTION PLAN

Actions Complete

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

Actions Planned

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



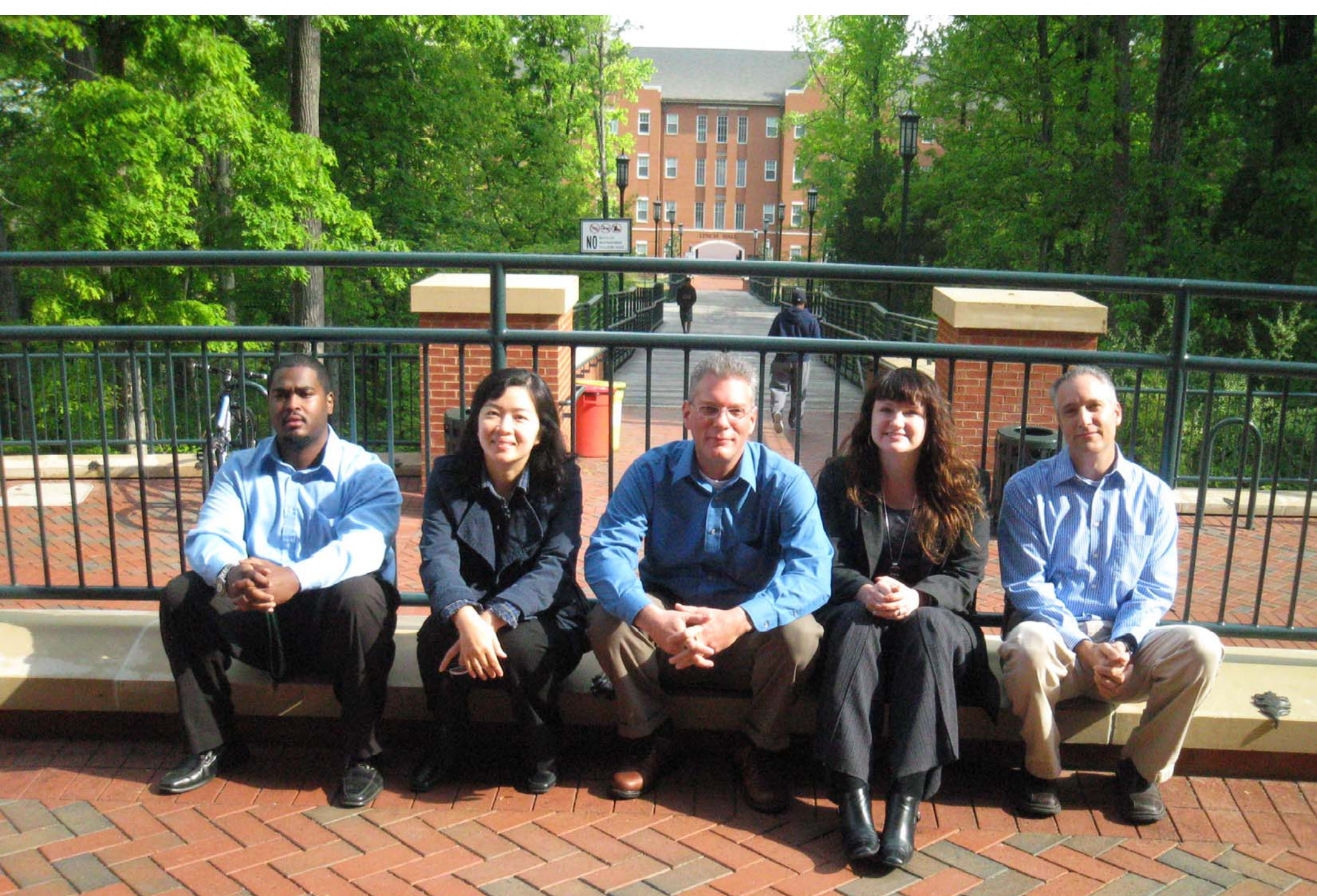
UNC CHARLOTTE

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

-- Stephen Covey, Author and Speaker

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements



Facilities Information Systems



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



FM 5YP Prioritized Projects

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

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

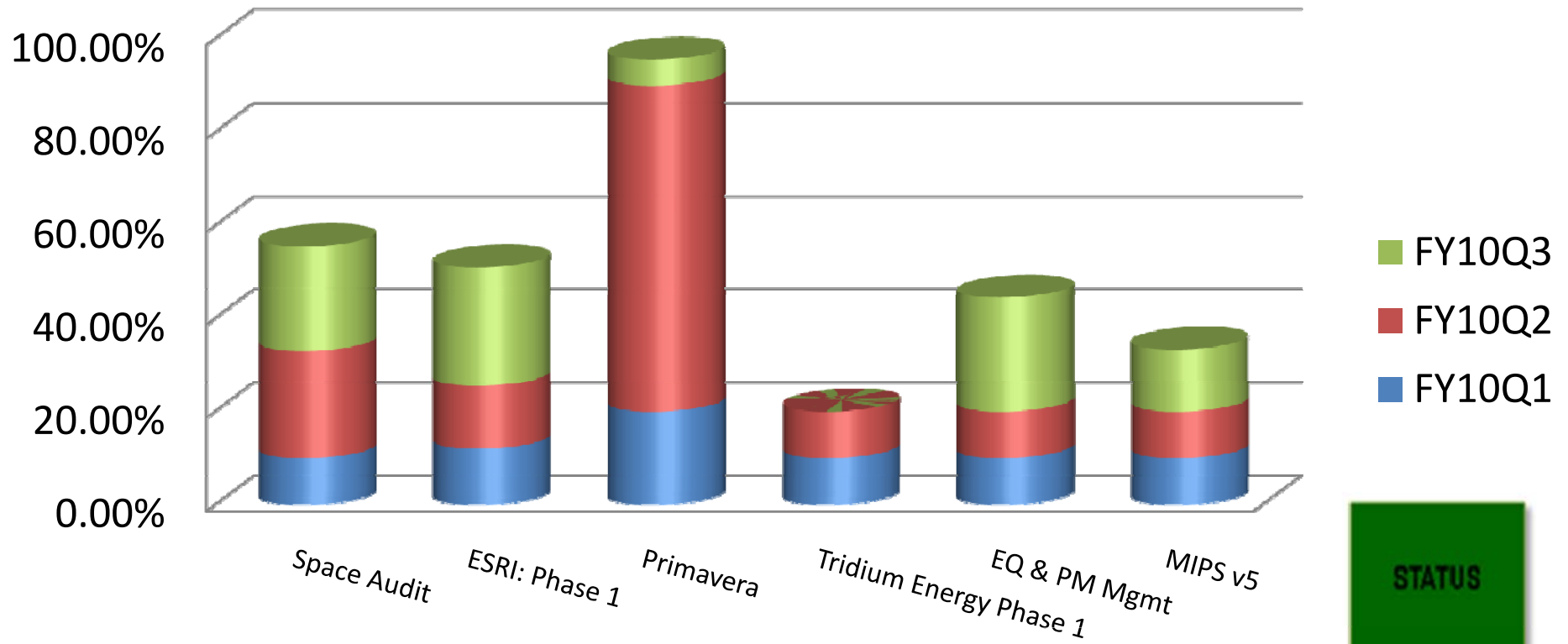
Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

Measure: Completion of Five-Year Technology Milestones

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

Project Percentage Completion Status



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

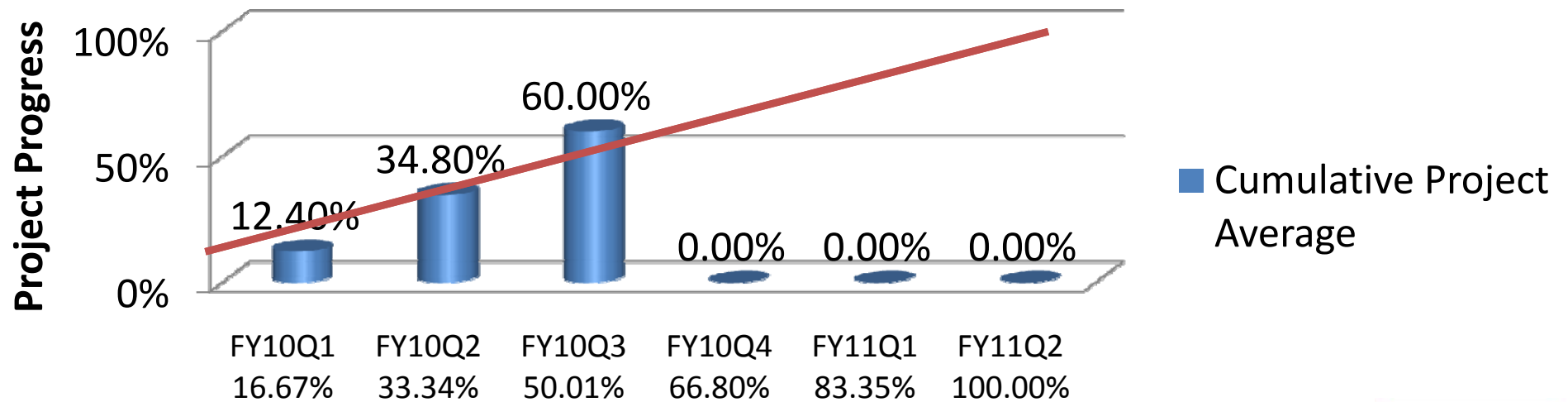
Strategy: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

Measure: Completion of Five-Year Technology Milestones

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

Cumulative Project Average / Qtr within 18-Month Timeframe



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

Lead
FIS

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

ACTION PLAN

Actions Completed:

1. Completed Space Audit Documentation; scheduled/completed BA Space Audit training. Developed tentative training schedule for all Academic Affairs Departments and kicked off pilot program.
2. Began MIPS v. 5 Engineering phase with BRG.
3. Completed Equipment Management Requirement & Equipment Standards Identification/clean up.
4. BAS/Tridium - Finished R2 to AX migration.
5. Completed Primavera Next Steps Plan FY11 .
6. Completed first Archibus and ESRI extension; developed for online user testing.

Actions Planned:

1. Complete BA Space Audit Follow Up; coordinate/conduct training sessions for AA.
2. Complete Development Engineering documentation for MIPS Migration to Project Mgmt and begin Project Development.
3. Complete Equipment Mgmt Documentation Sign off; begin development of Pre-existing Views.

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

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

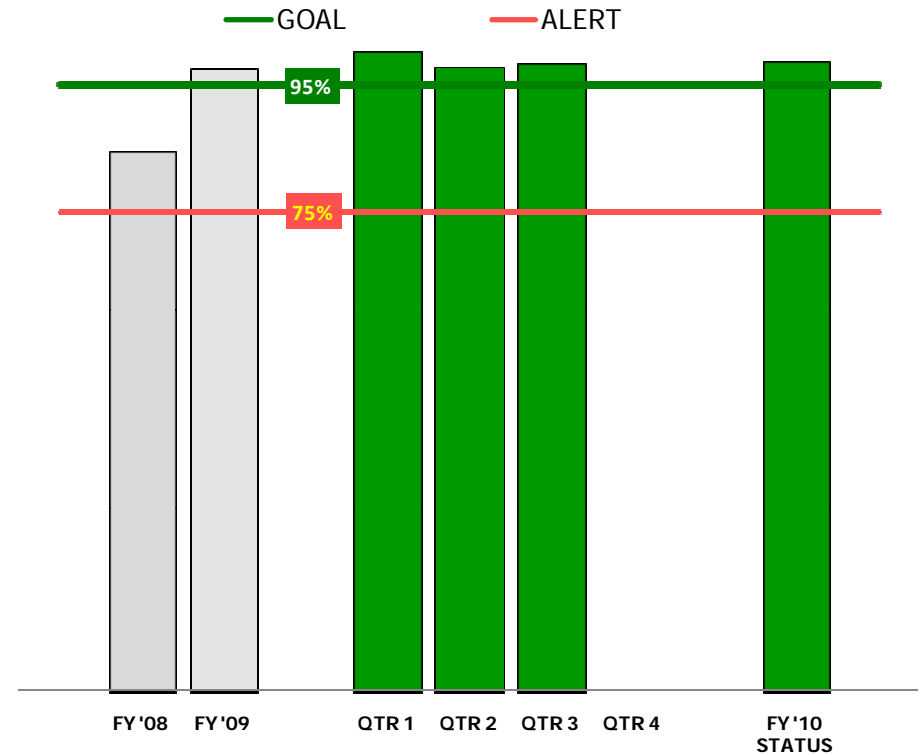
Measure: Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)

Balanced Scorecard Category: Internal Business Process

95% of Projects Designed on Time

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not completed on time	Designed On Time
FY '08	65	55	10	84.6%
FY '09	115	112	3	97.4%
QTR 1	23	23	0	100.0%
QTR 2	42	41	1	97.6%
QTR 3	56	55	1	98.2%
QTR 4	0	0	0	0.0%
FY '10 STATUS	121	119	2	98.3%

GOAL: 95.0%



GOAL
95.0%

FY'10 STATUS
98.3%

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

Lead
Design
Services

ACTION PLAN

2.2.1 - Actions Completed:

- Updating and tracking all AA projects. Modifying project process per AA's request.
- Enhance "Campus Priority" and Project "Status Block" features.
- Meet with new SCO Electrical Inspector - discussed minor projects.

2.2.1 - Actions Planned:

- Continue to adopt SCO procedural steps to secure project approvals and inspections.
- Continue to provide Classroom Capacity data by developing Building Capacity standards.
- FIS to assist by updating Archibus to provide Strategic Planning reports rather than running queries.

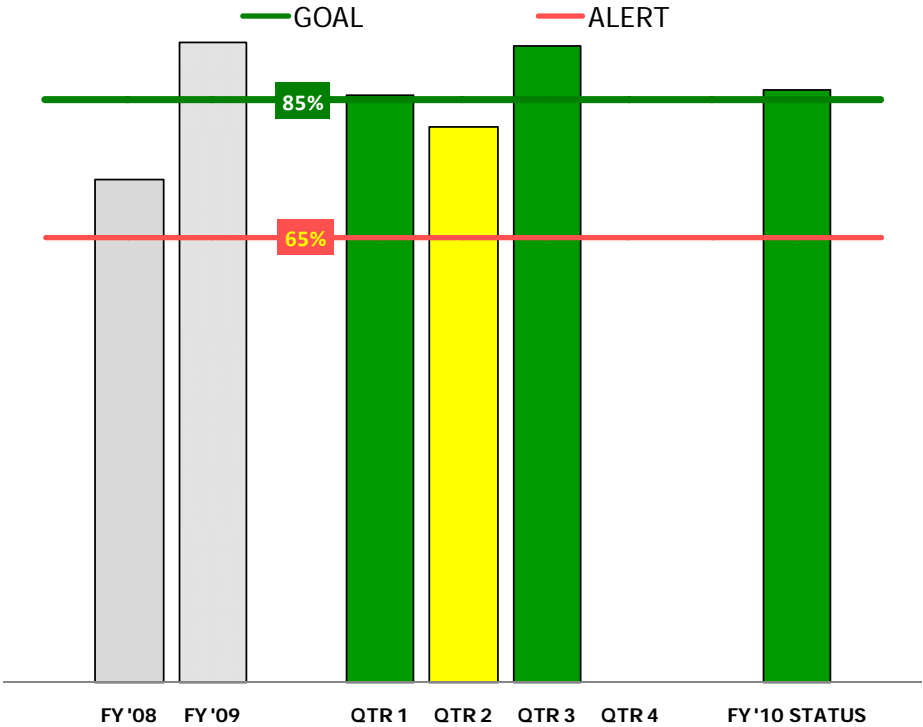
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

85% of Estimates for In-house Construction within 10% - 2.2.2

QUARTERLY REVIEW	No. Of Projects Estimated	In-House Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '08	30	22	8	73.3%
FY '09	31	29	2	93.5%
QTR 1	7	6	1	85.7%
QTR 2	16	13	3	81.3%
QTR 3	14	13	1	92.9%
QTR 4	0	0	0	0.0%
FY '10 STATUS	37	32	5	86.5%
			GOAL:	85.0%



GOAL 85.0%	FY'10 STATUS 86.5%
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GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

ACTION PLAN

2.2.2 - Actions Completed:

- FIS updated Archibus to include requested columns in Priority Project lists.
- Develop new Scope & Budget form to address project costs that are either not captured in the final estimate or not a direct billing through Design Services.

2.2.2 - Actions Planned:

- Continue to assign staff review process for internal team analysis (Mac's #2 WIG).
- Continue Project Coordinator's tracking of expended project costs.
- Use new Scope & Budget form developed as noted above.

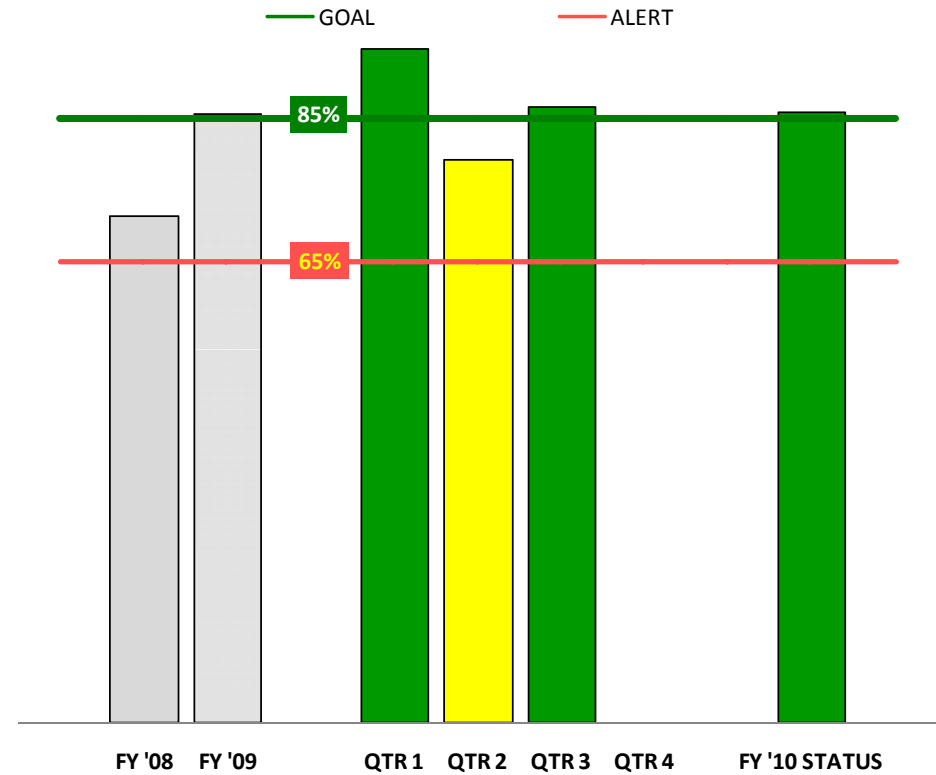
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

85% of Estimates for Contractor Construction within 10% - 2.2.3

QUARTERLY REVIEW	Number Of Projects Estimated	Number of Projects within 10% of Estimate	Number Projects not within 10% of Estimate	Estimates within +/- 10%
FY '08	35	25	10	71.4%
FY '09	84	72	12	85.7%
QTR 1	20	19	1	95.0%
QTR 2	34	27	7	79.4%
QTR 3	53	46	7	86.8%
QTR 4	0	0	0	0.0%
FY '10 STATUS	107	92	15	86.0%
			GOAL:	85.0%



GOAL 85.0%	FY'10 STATUS 86.0%
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GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

ACTION PLAN

2.2.3 - Actions Completed:

- Renewed two of the three JOC contractors contracts.

2.2.3 - Actions Planned:

- Continue to implement projects that are suitable for the JOC process.
- Provide earlier compilation of design costs (during Scope & Budget phase).
- Remove road blocks or “gaps” in achieving successful projects using JOC process.
- Document JOC successful projects to share with of fellow Project Managers.

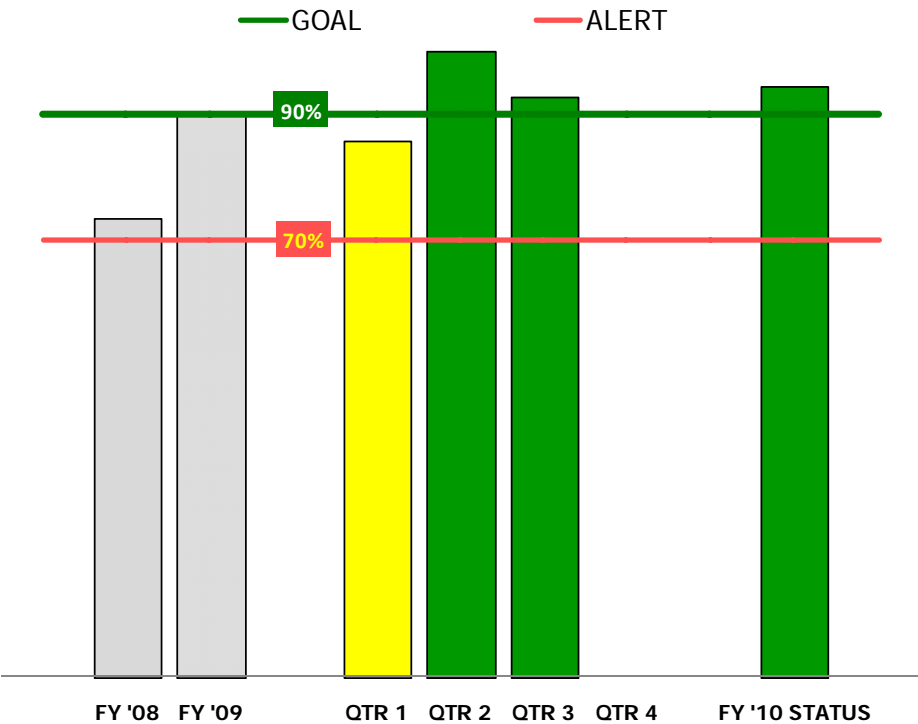
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

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

QUARTERLY REVIEW	No. of In-house Projects	No. of In-house met Beneficial Occupancy	No. of In-house did not meet Delivery Date	Completed On Time
FY '08	30	22	8	73.3%
FY '09	31	28	3	90.3%
QTR 1	7	6	1	85.7%
QTR 2	16	16	0	100.0%
QTR 3	14	13	1	92.9%
QTR 4	0	0	0	0.0%
FY '10 STATUS	37	35	2	94.6%
			GOAL:	90.0%



GOAL 90.0%	FY'10 STATUS 94.6%
----------------------	------------------------------

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

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

Lead
Design
Services

ACTION PLAN

2.2.4 - Actions Completed:

- Develop simple construction scheduling system to be used by all coordinators.

2.2.4 - Actions Planned:

- Continue to establish proven steps to beneficial occupancy via departmental meetings.
- Expand Design Services' communications and support for projects.
- Post construction schedules on website to increase awareness of project timeliness.

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

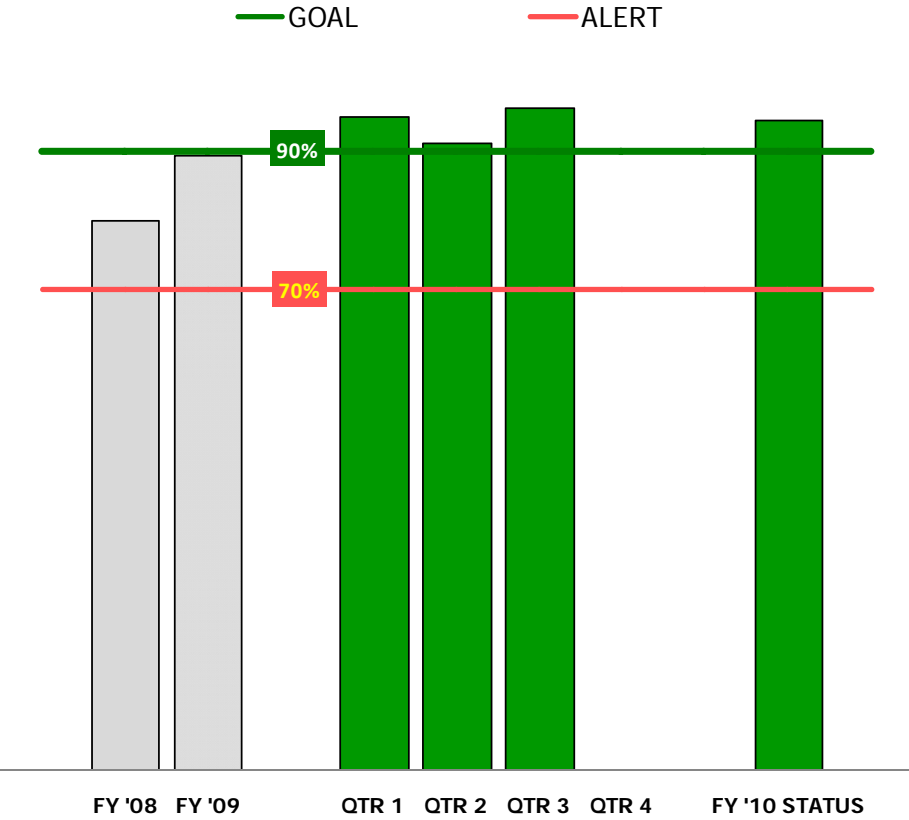
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.5 **90% of Contractor Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

Measure: Percentage (Number of Contractor Construction Projects completed on or before delivery date divided by number of projects completed)

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. of Contractor Projects	No. of Contractor met Beneficial Occupancy	No. of Contractor did not meet Delivery Date	Completed On Time
FY '08	35	28	7	80.0%
FY '09	85	76	9	89.4%
QTR 1	20	19	1	95.0%
QTR 2	34	31	3	91.2%
QTR 3	53	51	2	96.2%
QTR 4	0	0	0	0.0%
FY '10 STATUS	107	101	6	94.4%
			GOAL:	90.0%



GOAL 90.0%	FY'10 STATUS 94.4%
----------------------	------------------------------

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

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

Lead
Design
Services

ACTION PLAN

2.2.5 - Actions Completed:

2.2.5 - Actions Planned:

- Document all change order information at the earliest possible stage of the project.
- Develop better and more appropriate SCO submittal documents.
- Increase Project Coordinators attention to contractor's construction schedule throughout the delivery process.

Facilities Management Strategic Planning Session – Third Quarter FY 2010

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

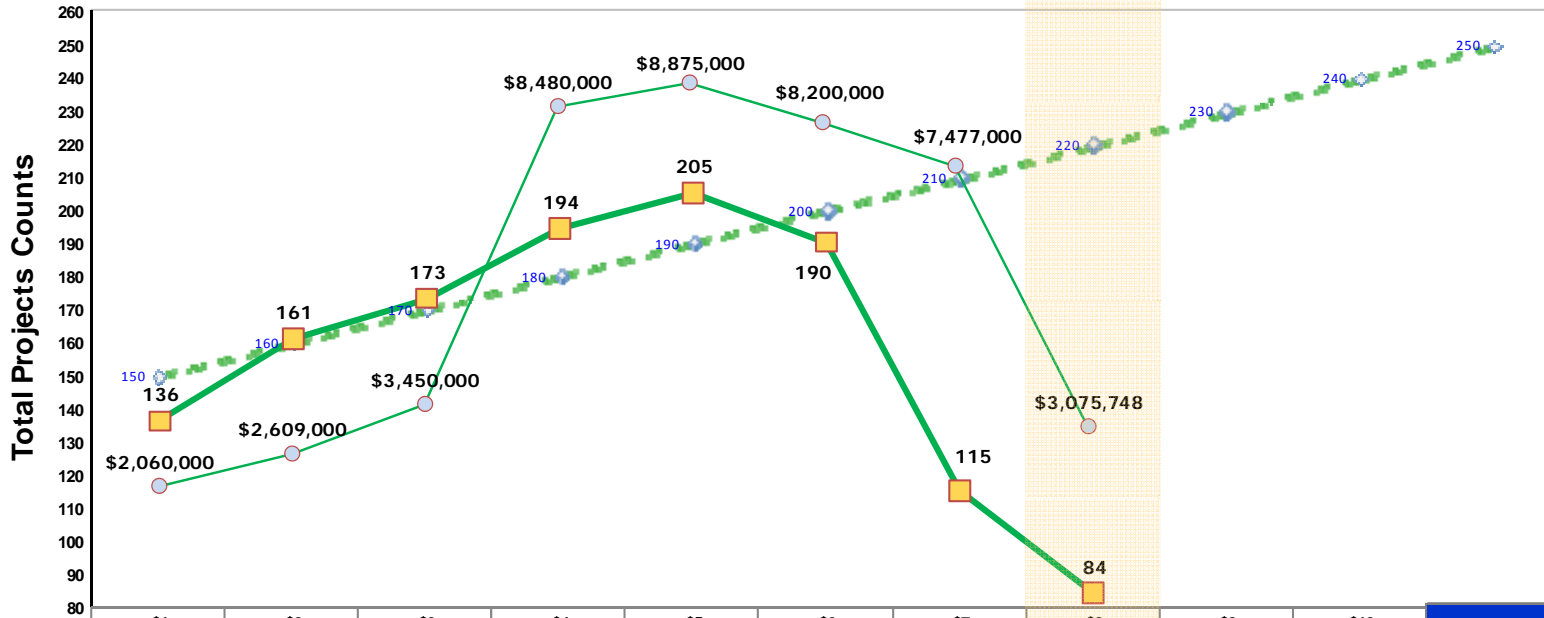
Strategy 2.2 Improve Informal Project Design and Construction Process
 Objective 2.2.6 Increase Project Volume by 10 projects per year - Project Counts by Phase

Measure: The 2010 Benchmark is 220 projects.

Balanced Scorecard Category: Internal Business Process

Increase Project Volume by 10 Projects per year - Project Counts by Phase											
GOAL	1	2	3	4	5	6	7	8	9	10	11
	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
Projects Completed	150	160	170	180	190	200	210	220	230	240	250
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$3,075,748			
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$36,185			

Increased Project Volume



	\$1	\$2	\$3	\$4	\$5	\$6	\$7	\$8	\$9	\$10
GOAL	150	160	170	180	190	200	210	220	230	240
Projects Completed	136	161	173	194	205	190	115	84		

**GOAL
100%**

**FY'10
STATUS
38.2%**

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

Lead
Design
Services

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

ACTION PLAN

- Review Priority 0 projects with customers alerting them that Design Services is prepared to address their project needs this fiscal year.

2.2.6 - Actions Planned:

- Review FY'09 projects that went On-Hold for scheduled completion as projects are reactivated to increase our overall counts.

Architectural Planning



9151



55

Facilities Management

Facilities Management

Architectural Planning Strategic Planning Slides (1 of 2):

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

New Strategy 2.3: Improve repair and renovation planning; prioritization process and Implementation
Balanced Scorecard Category: Internal Business Process

Status

Objective 2.3.1. Identify priority R & R projects and coordinate estimates

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

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

Status

Objective 3.2.1

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

Measure: % of Projects with completed Pre-Programs

Lead: **Architectural Planning Dept**

Status

Objective 3.2.2

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

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

Lead: **Architectural Planning Dept**

Architectural Planning Strategic Planning Slides (2 of 2):

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

New Strategy 3.5: Improve Infrastructure improvement planning

Objective 3.5.1. Integrate infrastructure projects into Capital Construction Project Scopes

Status

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

Lead: **Architectural Planning Dept**

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

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

Status

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

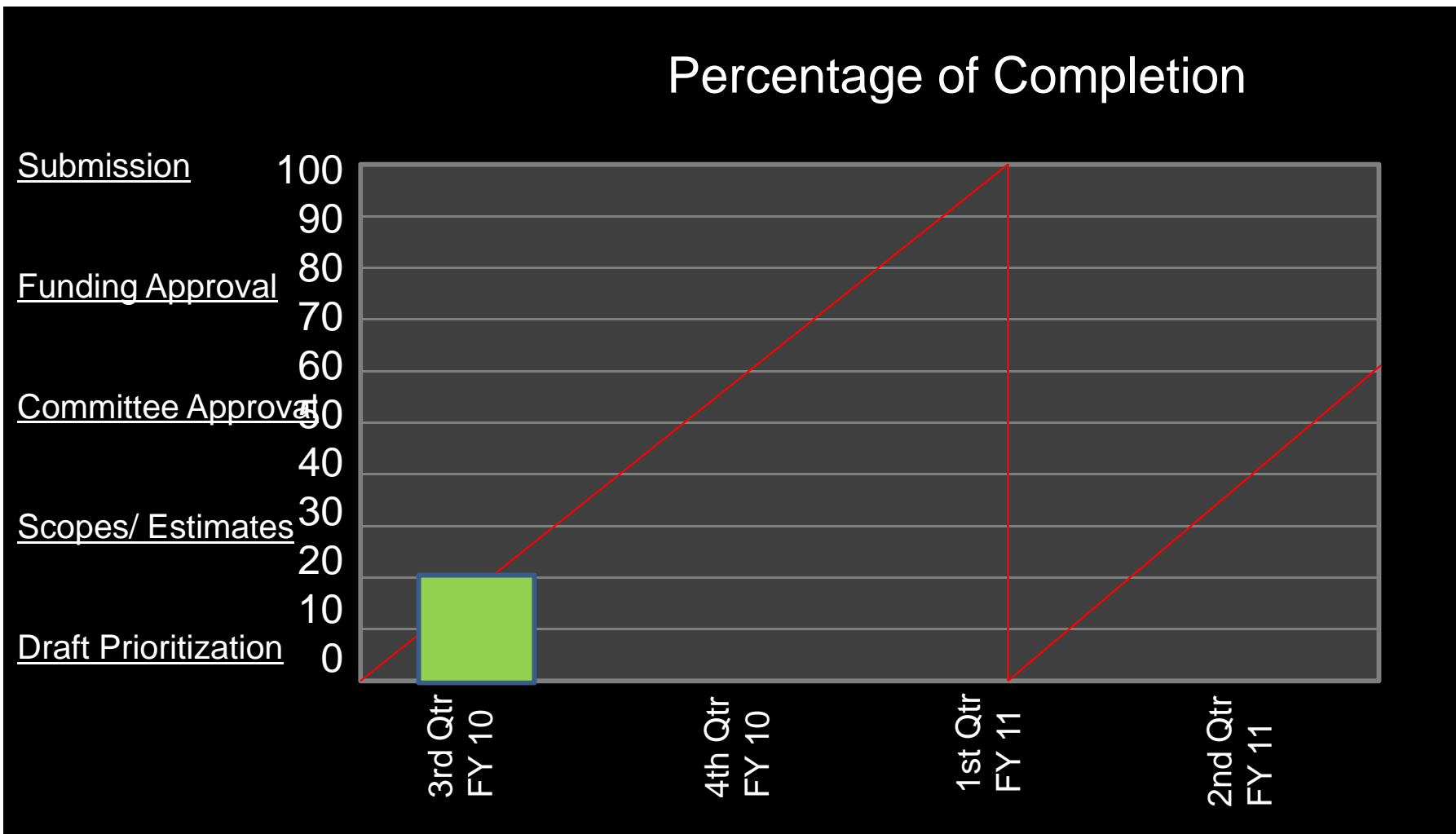
Lead: **“Architectural Planning Dept”**

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

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

Measure: % through the R & R process

Balanced Scorecard Category: Internal Business Process



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

Strategy 2.3: Improve repair and renovation planning; prioritization process and Implementation

Objective 2.3.1. Identify priority R & R projects and coordinate estimates

Measure: % through the R & R process

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Actions Complete
 - Consolidated R & R List
 - List reviewed by M & O
 - List prioritized
 - Draft Priorities Approved

- Actions Planned:
 - Estimates
 - Final Committee Approval
 - Funding Meeting
 - Submission

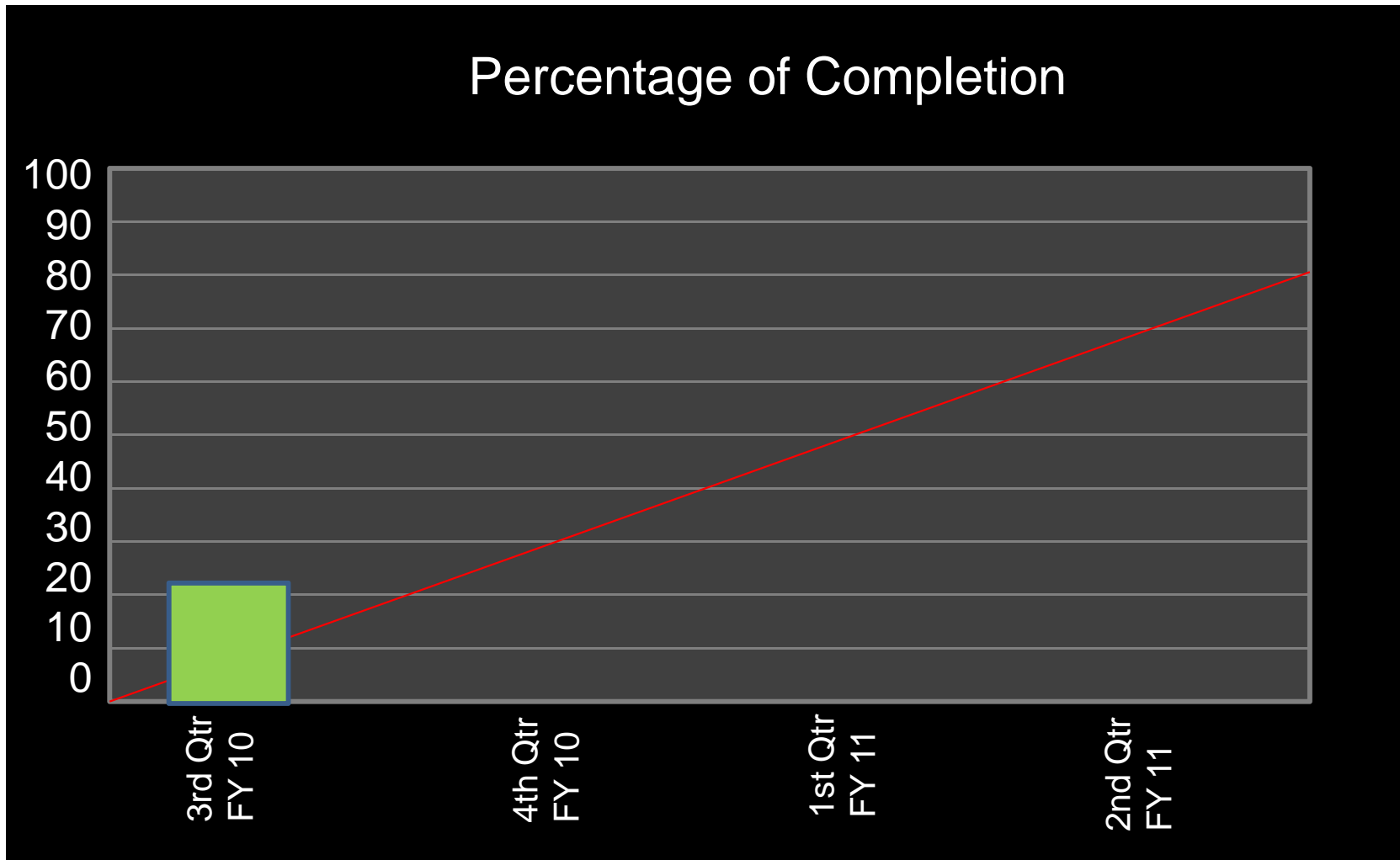
GOAL #3 – Deliver New Facilities that Support the University's Mission

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

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

Balanced Scorecard Category: Internal Business Process



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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 80% of Projects on the Appropriated Capital Improvements pre-programs by end of 2nd quarter FY 2010

ACTION PLAN

Appropriated Projects

1. Science Building*
2. Burson Building Modernization *
3. Student Academic Success and Retention Center *
4. Campus Infrastructure Development – Phase 2
5. Atkins Library Expansion and Modernization*
6. Physical Plant Complex
7. Belk Gym Modernization
8. Colvard Modernization
9. Environmental Infrastructure Center
10. Friday Building Modernization
11. Humanities Building
12. Smith and Cameron Building Modernizations
13. Health and Physical education Building
14. Residential High Rise Replacement
15. Kennedy Building Modernization
16. Regional Utility Plant #3

- **Actions Complete**
 - Process for Academic 5 year plan complete
- **Actions Planned: Validating Programs**
 - Science Building: Pending meeting with AA
 - Burson: Pending meeting with AA
 - Student Academic Success and Retention Center: Pending meeting with AA
 - Atkins Library: Pending meeting with new University Librarian
- **Actions Planned: Pre-programming**
 - Continue to work down the list

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

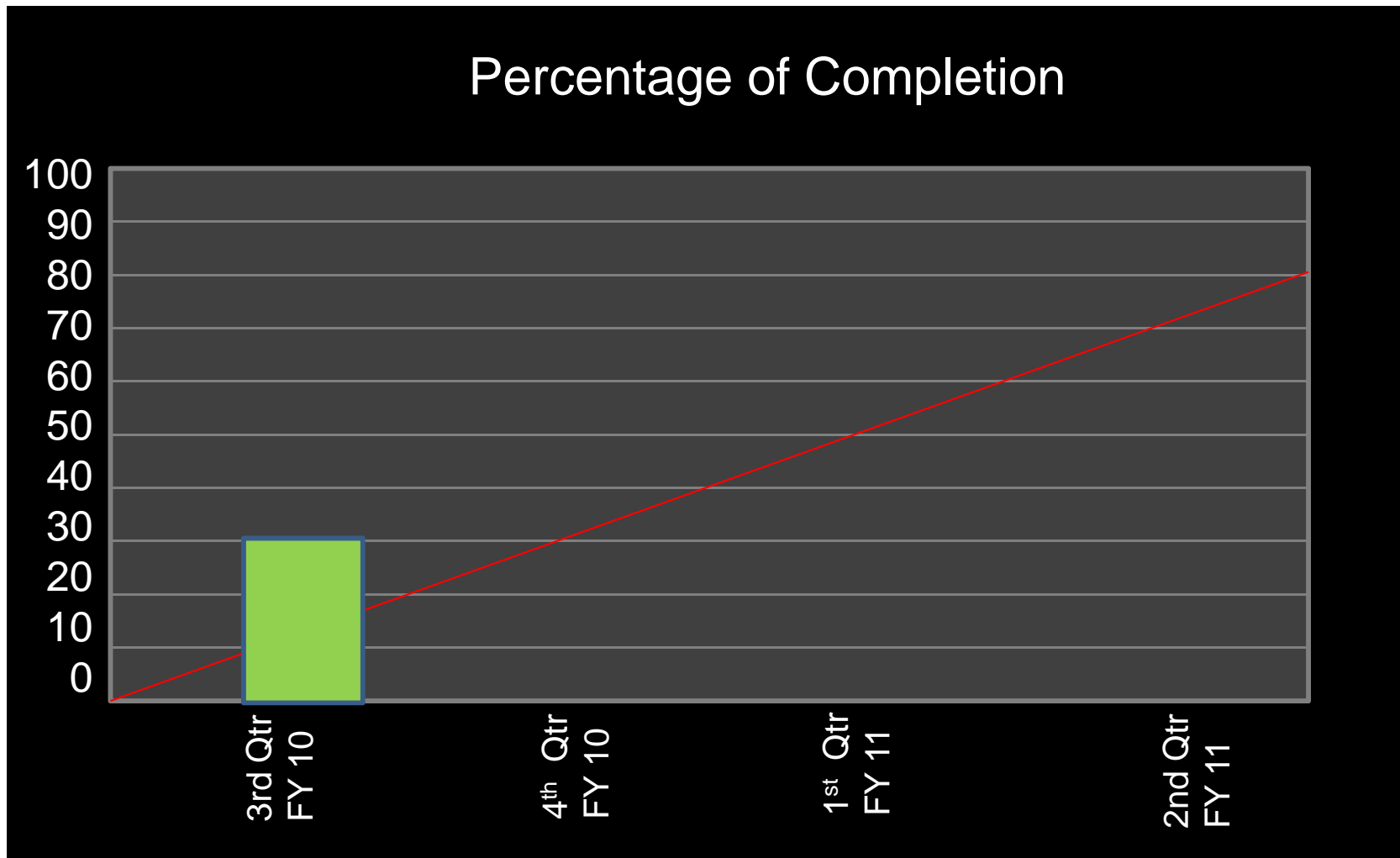
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

Objective 3.2.2 80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs and OC25s for hand-off to Capital by end of 2nd Quarter FY 2011

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

Balanced Scorecard Category: Internal Business Process



Status

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

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

Objective 3.2.2 80% of Projects on the Non-Appropriated Six Year Capital Improvements Plan have completed pre-programs by end of 2nd Quarter FY 2010

ACTION PLAN

1. Parking Deck H*
2. Center City Building CAFÉ and Bookstore Build Out*
3. Softball Stadium Seating Improvements*
4. New Outdoor Recreation Facility - Phase II*
5. Motorsports Building II*
6. Alumni Center Parking*
7. Prospector Hall Renovation - Phase II*
8. Residence Hall's Fire Sprinkler Installation
9. Intercollegiate Tennis Facility*
10. Partnership, Outreach, and Research for Accelerated Learning (PORTAL) Building
11. Sports Complex
12. Student Activities Center - Office Renovation
13. Football Stadium
14. New Residence Hall Phase X (400 beds)
15. Hunt Village Demolition*
16. Development Center*
17. Parking Deck I*
18. Hall of Champions Renovation
19. Residence Dining Hall Renovation/Replacement
20. Cafeteria Activities Building Renovation
21. New Residence Hall Phase XI (300 beds)
22. Phase III Apartments - Demolition
23. Central Quadrangle Improvements*
24. Martin Village Apartments Demolition
25. New Residence Hall Phase XII (608 beds)
26. Scott Hall Renovation
27. Cedar/Hickory/Sycamore (Phase IV-A) Renovation
28. Parking Deck J
29. Hayes Baseball Stadium Improvements - Phase 2
30. Sanford Hall Renovation
31. Hawthorn (Phase IV-B) Renovation
32. Moore Hall Renovation
33. Elm/Maple/Pine (Phase V) Renovation
34. Holshouser Hall Renovation
35. Oak (Phase V) Renovation
36. Witherspoon (Phase VI) Renovation
37. Recreation Fields 14 & 15
38. New Housing/Facilities Offices

• **Actions Complete**

Request for authorization:

Residence Dining Hall Advanced planning

Parking Deck J Advanced planning

• **Actions Planned**

Student Health and Wellness Center– Pre-program

Residence Dining Hall Renovation / Replacement –

Advanced Planning

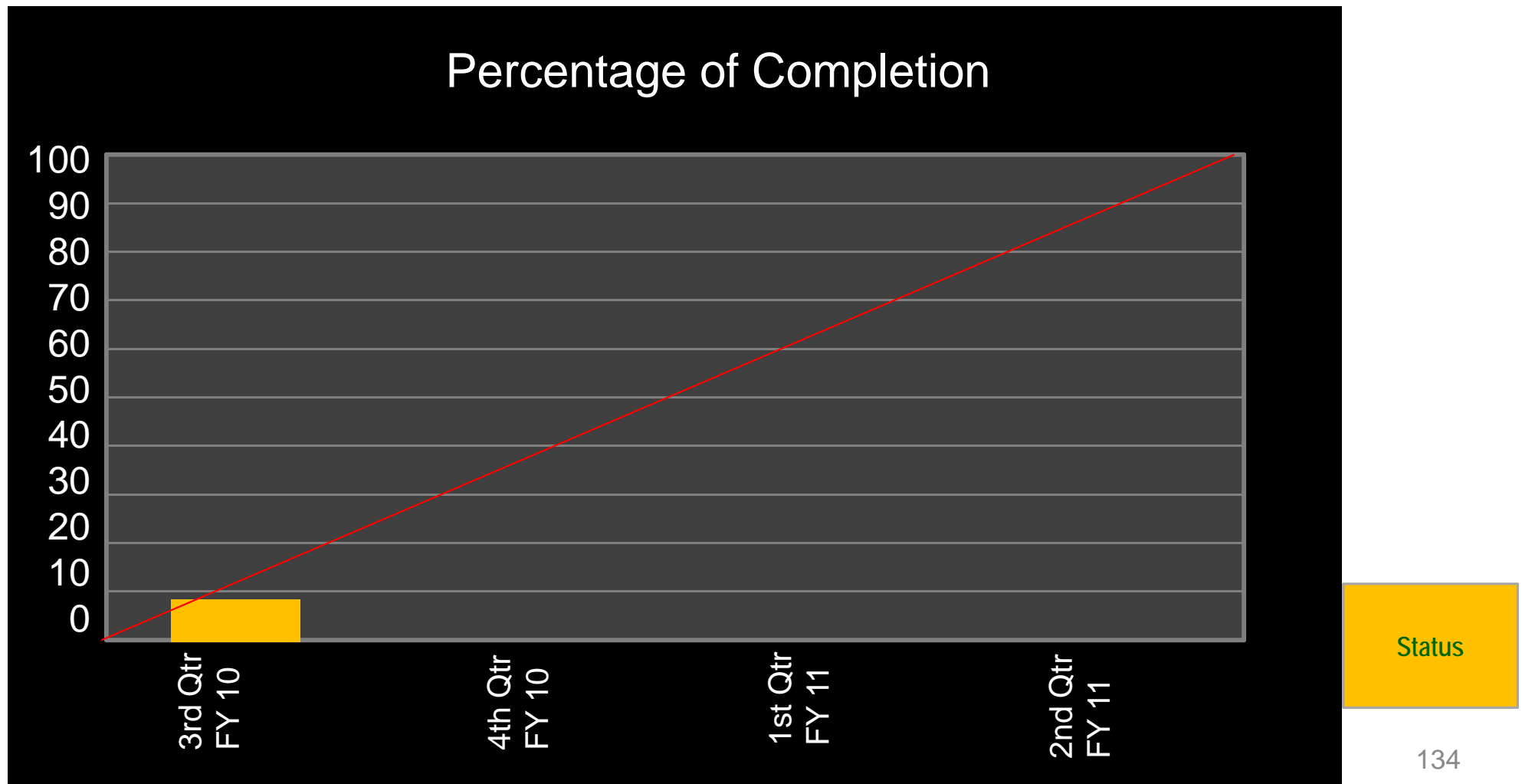
Parking Deck J Advanced Planning

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

Strategy 3.5: Improve Infrastructure planning
Objective 3.5.1. Integrate infrastructure projects into Capital Construction Project Scopes

Measure: % of proposed master plan infrastructure projects integrated with Capital Projects on the Six year Plan.

Balanced Scorecard Category: Internal Business Process



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

Strategy 3.5: Improve Infrastructure planning

Objective 3.5.1. Integrate infrastructure projects into Capital Construction Project Scopes

Measure: % of proposed master plan infrastructure projects integrated with Capital Projects on the Six year Plan.

Balanced Scorecard Category: Internal Business Process

Infrastructure Projects

ACTION PLAN

- **Actions Complete:**
 - Receive list of projects and estimates from ASG
 - Establish Capital Project Areas of Responsibility

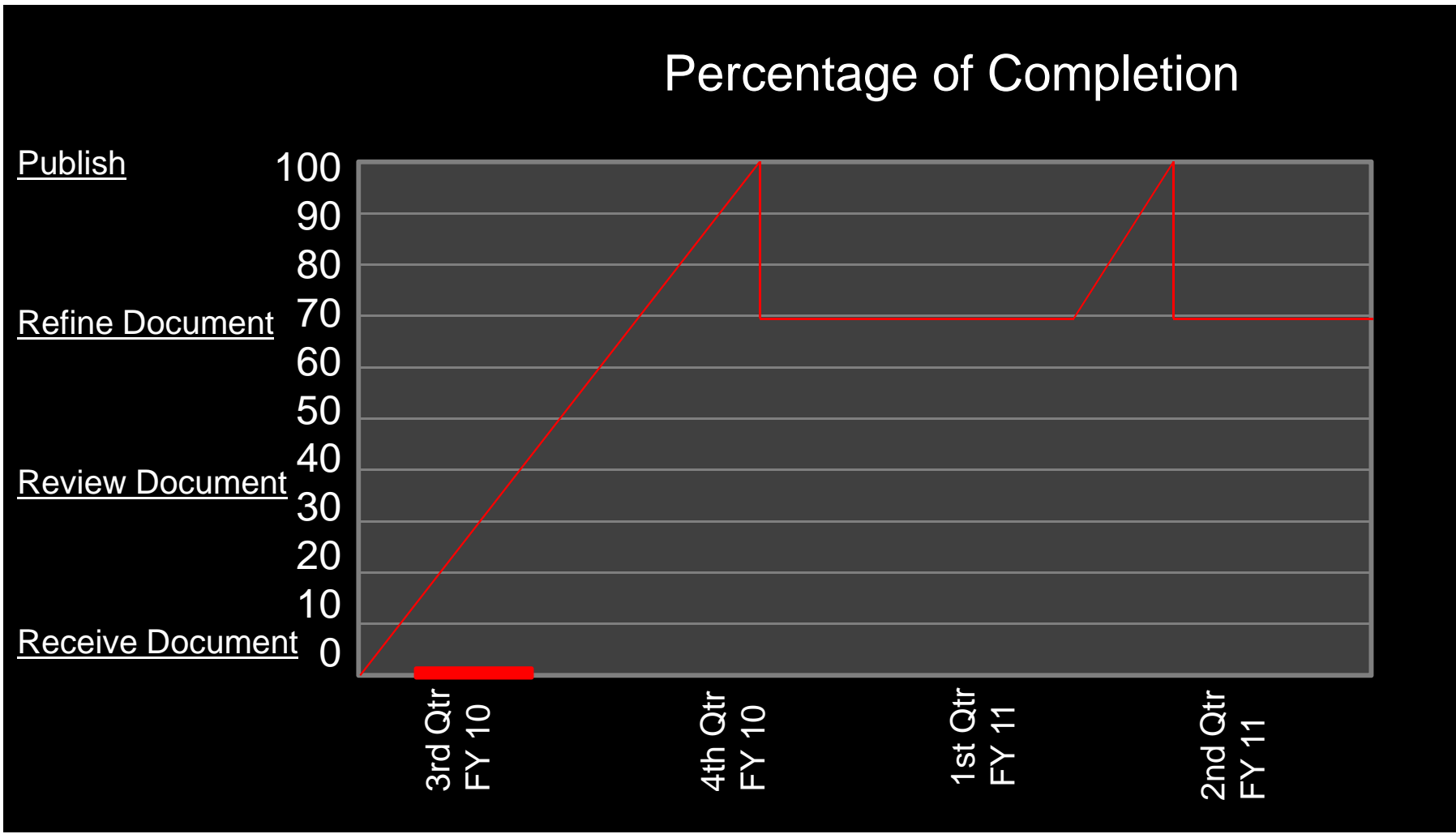
- **Actions Planned:**
 - Integrate List of Infrastructure into Capital Projects
 - Add estimates of probable costs for infrastructure to the OC 25 estimates
 - Gain approvals

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

Measure: New Design guidelines posted and annual review with updates conducted; % completion.

Balanced Scorecard Category: Internal Business Process



Status

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

Measure: New Design guidelines posted and annual review with updates conducted; % completion.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Complete:**
ASG has been hired to organize the draft

- **Actions Planned:**
 - Receive the draft from ASG
 - Review Sections with FM Sections
 - Publish
 - Conduct semi-annual updates



UNC CHARLOTTE

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

-- Michelangelo, Artist

GOAL #3

Deliver New Facilities that
Support the University's Mission

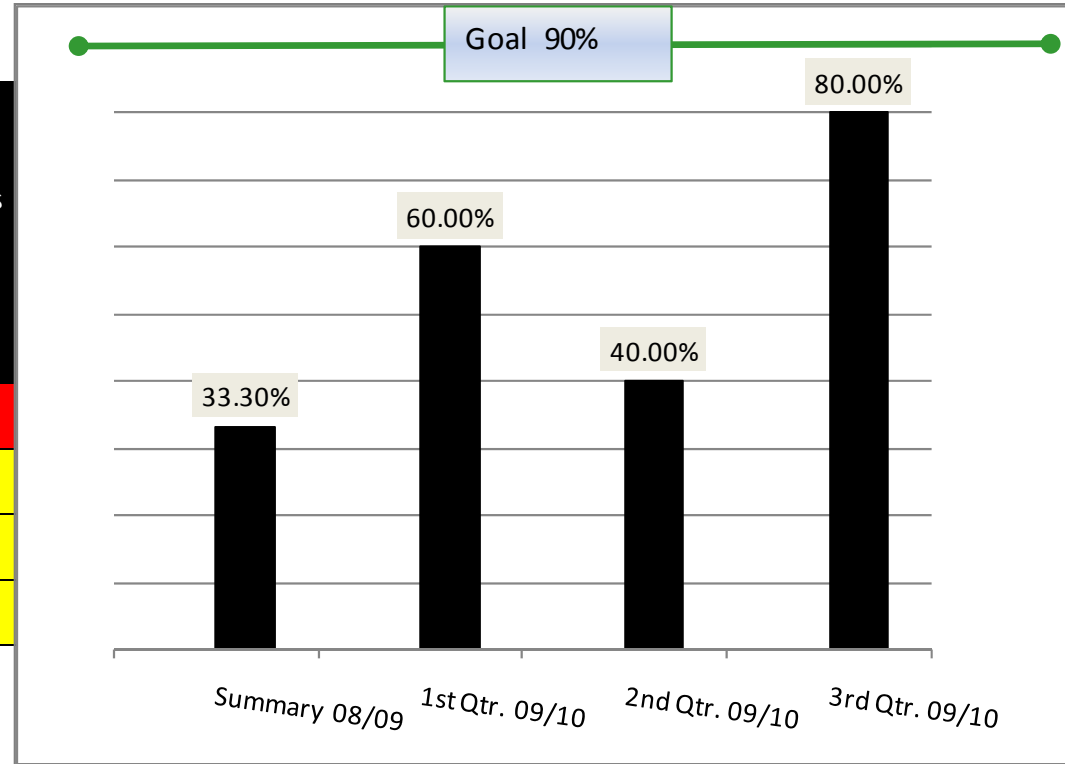
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

Measure: Percentage of Designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract with in
Summary 08/09	9	3	4	33.3%
1st Qtr. 09/10	5	3	1	60.0%
2nd Qtr. 09/10	5	2	0	40.0%
3rd Qtr. 09/10	5	4	1	80.0%



Status

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

Lead
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

ACTION PLAN

- Actions Completed
 - 1. Negotiated fees for Football/Sports Complex, Tennis Courts and Cameron Blvd./Mary Alexander Road resurfacing projects.
- Actions Planned
 - 1. Fee negotiations for Student Activity Center offices (pending).

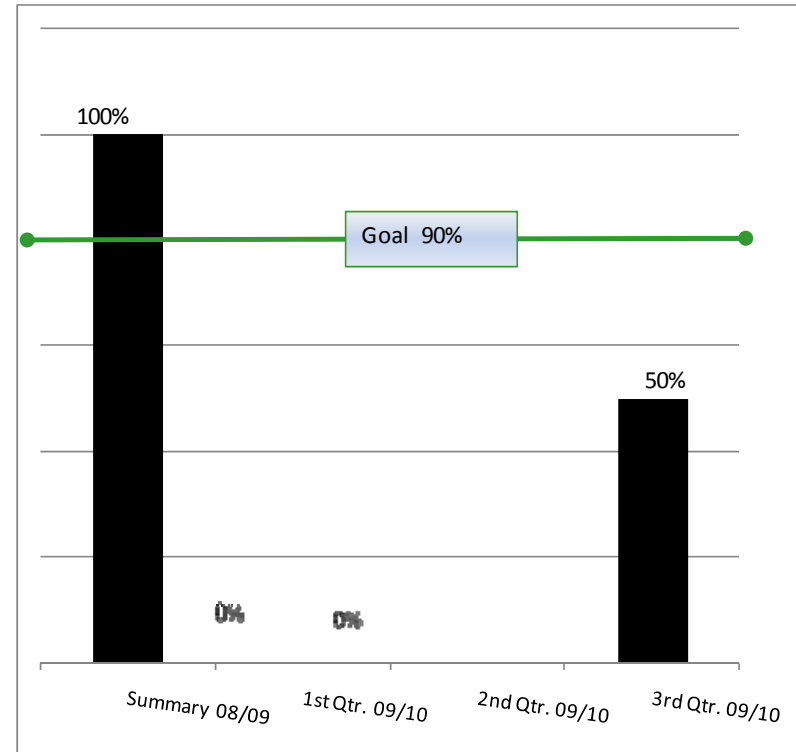
GOAL #3 – Deliver New Facilities that Support the University's Mission

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 08/09	4	0	100.00%
1st Qtr. 09/10	1	1	0.0%
2nd Qtr. 09/10	2	2	0.0%
3rd Qtr. 09/10	4	2	50.0%



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

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

Lead
Capital

ACTION PLAN

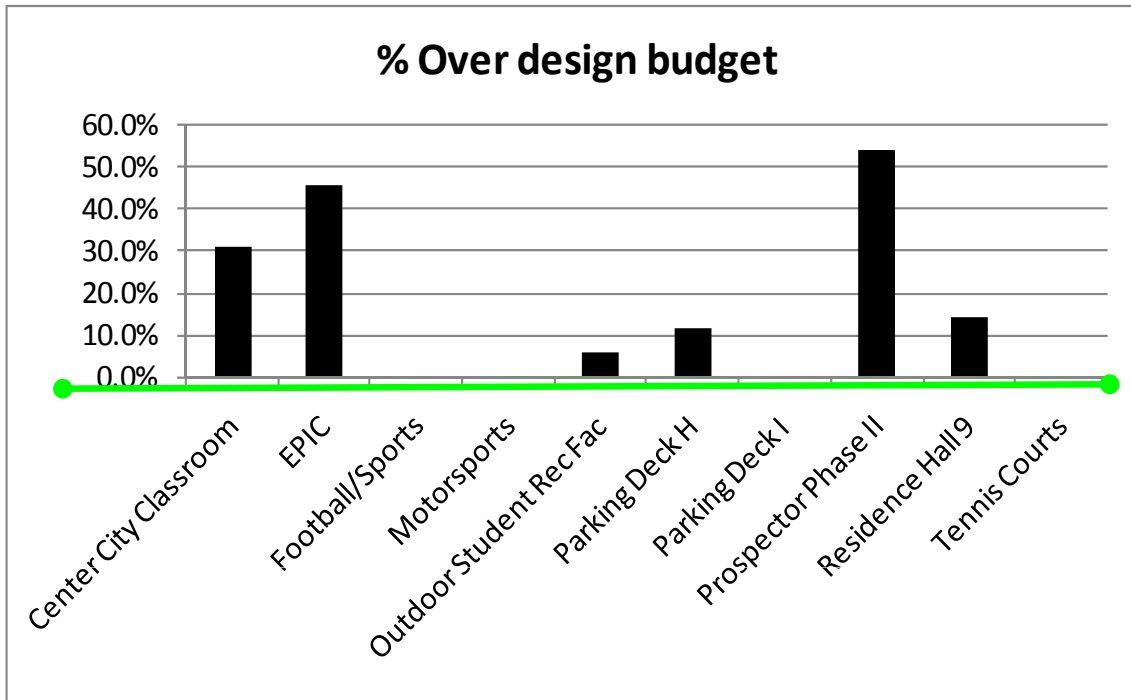
- Actions Completed
 - 1. PORTAL & Motorsports on schedule
 - 2. Tennis Courts schedule is recovering & pre-qualifying contractors completed for flat work
- Actions Planned
 - 1. Complete EPIC Trade packages (In review at SCO)
 - 2. Complete RUP & EPIC road plans (approvals)
 - 3. Obtain SCO approval for Prospector Phase II

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



Represents original design contract amount baseline

16.3% represents average of all projects not complete within original contract amount

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

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. New Tennis Courts design completed, now in bidding
 - 2. Parking Deck H design completed, now in bidding
 - Alumni Parking design completed, now in construction
- Actions Planned
 - 1. Keep Parking Deck I in budget
 - 2. Keep Motorsports II in budget
 - 3. Keep PORTAL in budget
 - 4. Keep Prospector II in budget

Facilities Management Strategic Planning Session – Second Quarter FY 2010

Lead
Capital

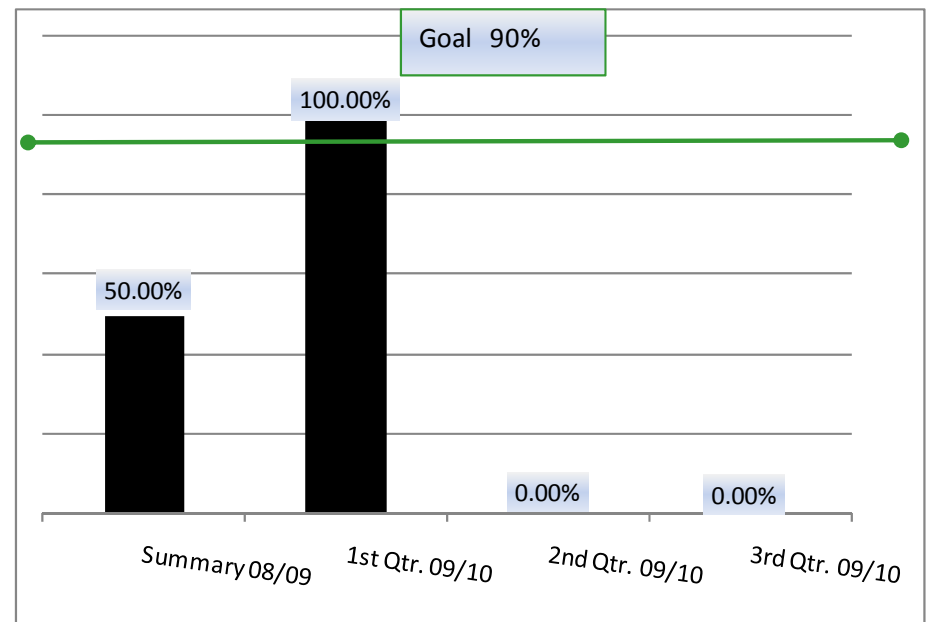
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

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

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary 08/09	4	2	50.0%
1st Qtr. 09/10	4	0	100.0%
2nd Qtr. 09/10	0	0	0.0%
3rd Qtr. 09/10	0	0	0.0%



Status

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

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

Lead
Capital

ACTION PLAN

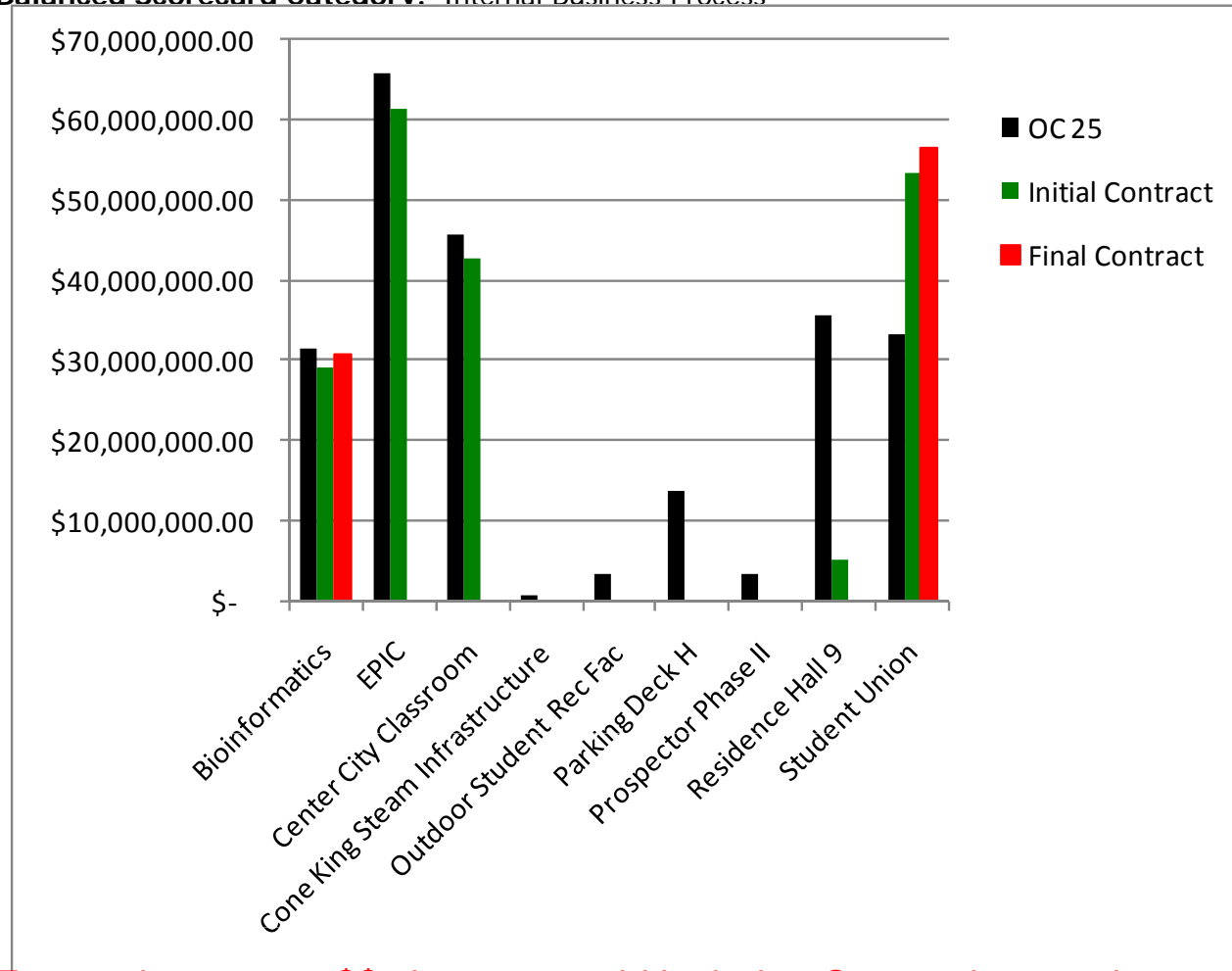
- **Actions Complete**
 - 1. Used Primavera as a tracking tool
 - 2. Prequalifying all contractors
 - 3. Use CM@Risk for larger projects
- **Actions Planned**
 - 1. Control change orders
 - 2. Limit customer requested change orders
 - 3. Limit additional scope request at 50% level from customer
 - 4. Use CM@Risk where appropriate
 - 5. Focus on summer projects – Residence Hall Sprinklers, Pedestrian Bridge, Cameron Blvd. Resurfacing, Mary Alexander Resurfacing

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

Strategy Objective 3.4 Improve Administration of the Capital Construction Process
 3.4.2 95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

Measure: Percentage of projects completed within the original contract amount or GMP plus 3% (contingency).

Balanced Scorecard Category: Internal Business Process



1% represents average of all projects complete within original contract amount

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

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

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

Lead
Capital





ACTION PLAN

- Actions Completed
 - 1. Closed out Student Union

- Actions Planned
 - 1. Insure we engage CM on constructive criticism early in the process
 - 2. Insure we get delivery of items in the RFP
 - 3. Engage CM's closer to SD's
 - 4. Gauge CM's performance on final contingency
 - 5. Close out Bioinformatics (final co)

Balanced Scorecard

Internal Processes Perspective

Facilities Management FY 2010 Balanced Scorecard						
<p>Internal Processes To satisfy and delight our customers, which operational processes must we excel in?</p>	Labor Availability	1.1.1	Increase Wrench Time	>66%	77.67%	Green
	Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	93.89%	Yellow
	Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	5.8	Red
	Work Request Process	1.3.1	Reactive Maintenance work requests	<67.5%	58.9%	Green
		1.3.2	Decrease Work Request Cycle Time	<719	499	Green
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	99%	Green
	Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 67%	85.5%	Green
		1.5.2	Reduce Unscheduled equipment repl projects	<2	3	Red
		1.5.3	Reduce Unscheduled HV outages by 10%	<0.0069	0.000%	Green
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<10%	10.0%	Green
	Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	-	In Progress
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	98.3%	Green
	Informal Project Administration	2.2.2	In-house IP construction estimates	85% w/in 10% actuals	87%	Yellow
		2.2.3	Estimates for Contractor Construction	85% w/in 10% actuals	86.0%	Green
		2.2.4	In-house IP construction meets BOD	90%	94.6%	Green
		2.2.5	Contractor IP construction meets BOD	90%	94.4%	Green
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 210	38.2	Red
		Master/Project Planning Process	2.3.1	% Appr. Annual R&R Projects Identified and Estimated	?	?
	3.2.1		% Appr. Projects with completed pre-programs	80%	?	Green
	3.2.2		% Non-Approp. Proj. with completed pre-programs	80%	?	Green
	3.2.3		% Projects with completed OC-25s - Appropriated	75%		White
	3.2.4		% Projects with completed OC-25s - Non-Approp.	75%		White
	Capital Project Administration	3.3.1	Designers under contract w/in 120 days of posting in CAPSTAT	90% w/in 120	83%	Yellow
		3.3.2	90% of designs complete by scheduled comp. date	90%	50%	Red
		3.3.3	90% of designs w/in design budgeted fee	90%	16%	Red
		3.4.1	90% Cap Construction Projects on Schedule	90%	0%	Yellow
		3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%	?	Green
LEGEND:						
Met Target		100% performance to target ratio				
Near Target		90-99% performance to target ratio				
Needs Attention		Below 90% performance to target ratio				
No Data Available		Unable to Measure or In Progress				



UNC CHARLOTTE

Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

- Develop high quality staff**
- Retain high quality staff**
- Develop positive culture**



UNC CHARLOTTE

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

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

GOAL #5

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



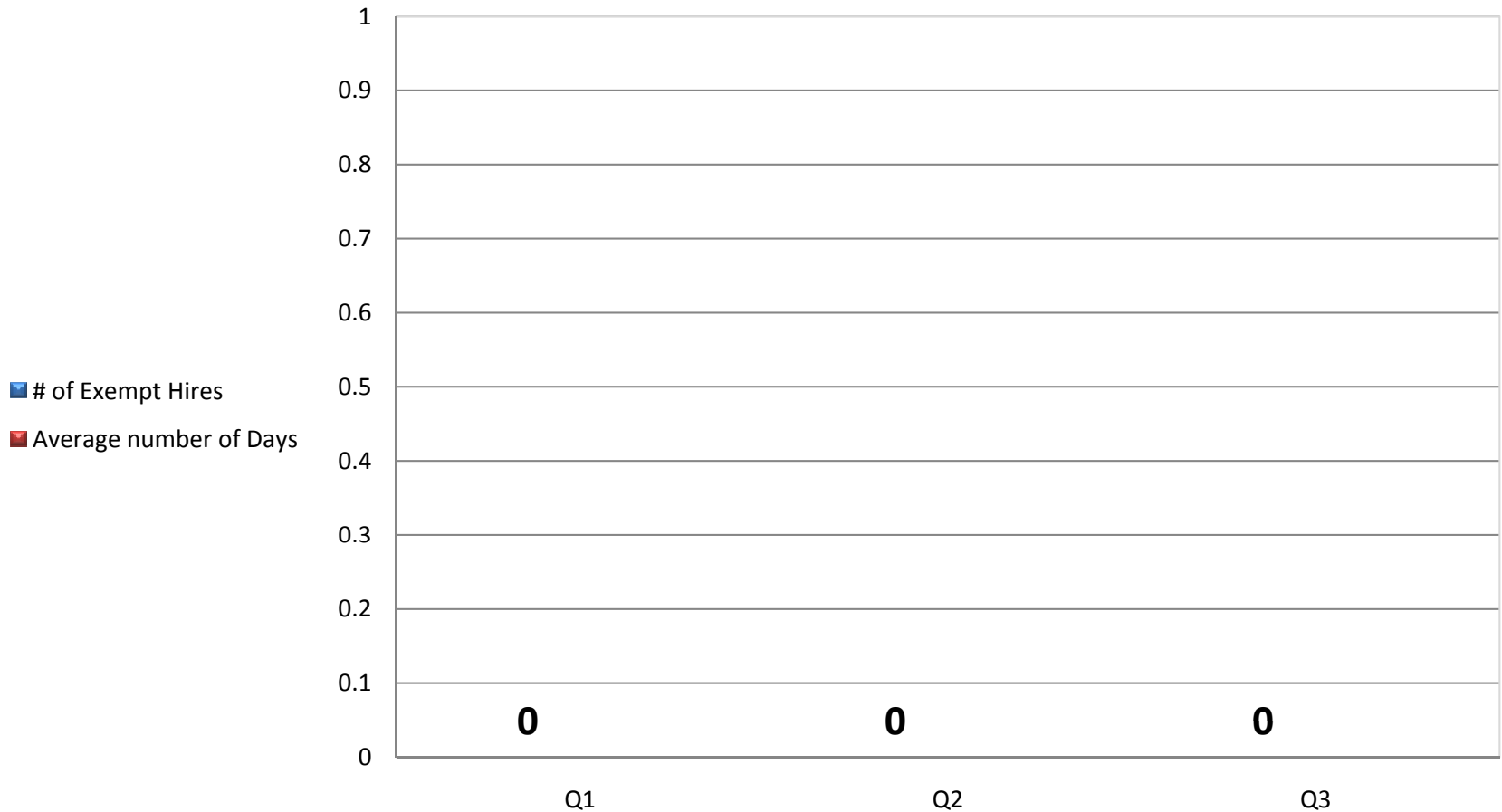
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Exempt (Salaried) Vacancies



STATUS

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

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

Measure: Days needed to fill vacant position

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

ACTION PLAN

- **Actions Complete**
 - ✓ New hiring process developed
 - ✓ Developed new process documentation
 - ✓ Met with University HR to review changes to People Admin system as it applies to new process
 - ✓ New Hiring Process review by FM Leadership team
 - ✓ Purchased new HRIS for FM HR

- **Actions Planned**
 1. Redefine process measured (active recruitment)
 2. Develop process communication plan for supervisors
 3. Implement revamped Hiring Process in FY 2010
 4. Implementation of new HRIS for FM HR
 - a. Meet with FIS to develop plan
 - b. Input data
 - c. Report development

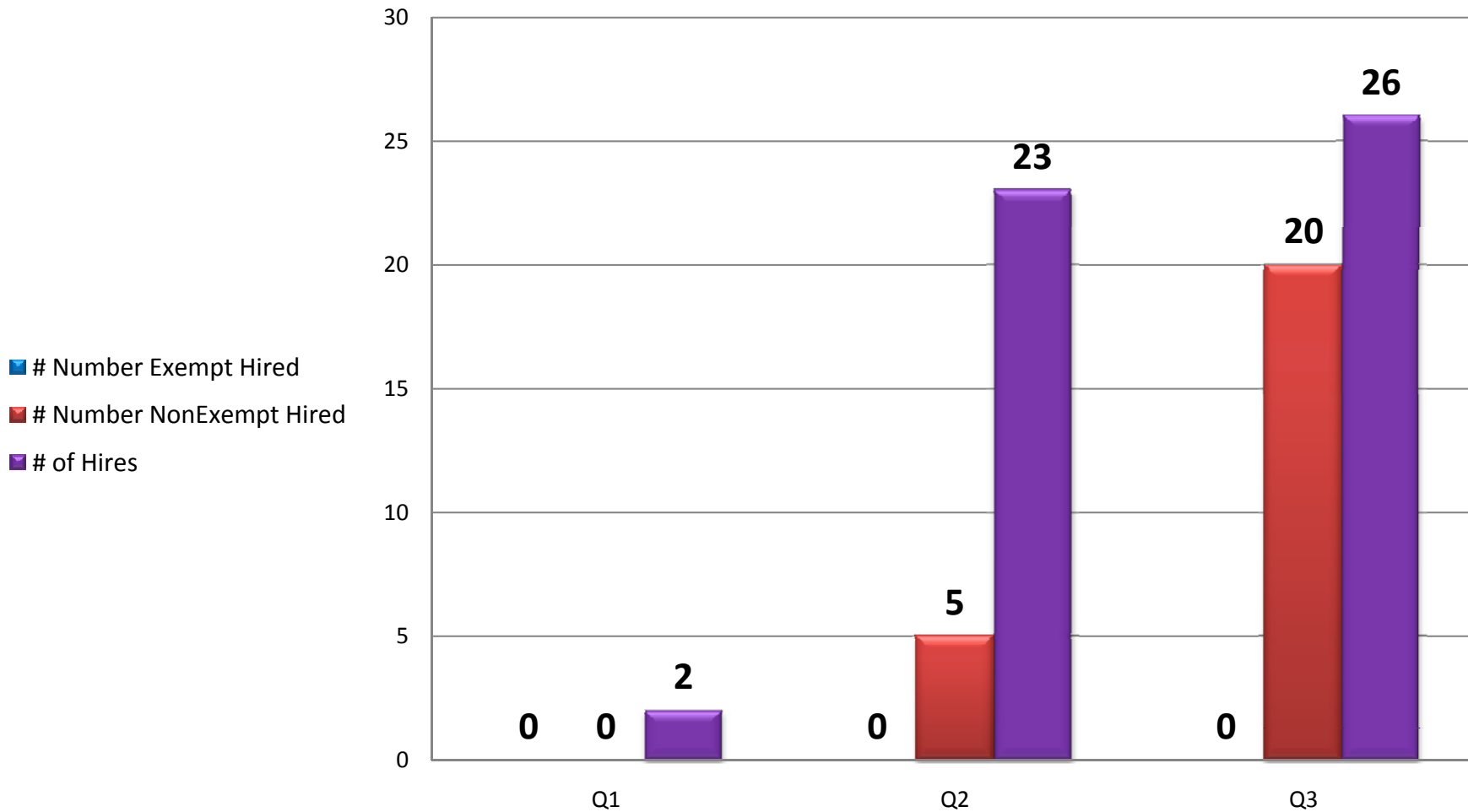
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

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

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

Positions filled using Targeted Selection



STATUS

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

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

Measure: **Completion of hiring checklist by hiring manager (including onboarding)**

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

ACTION PLAN

- **Actions Complete**
 - ✓ Obtained FM reservations for University offered training program
 - ✓ Certified to offer DDI Targeted selection training specific to FM
 - ✓ 35 FM managers and supervisors have completed Targeted Selection Training (97%)
 - ✓ Behavioral Targeted Selection Training for all FM managers and supervisors Feb and Apr 2010
 - ✓ Implementation of full Targeted Selection process 02/28/10

- **Actions Planned**
 1. Communication to Managers and Supervisors

Facilities Management Strategic Planning Session – Third Quarter FY 2010

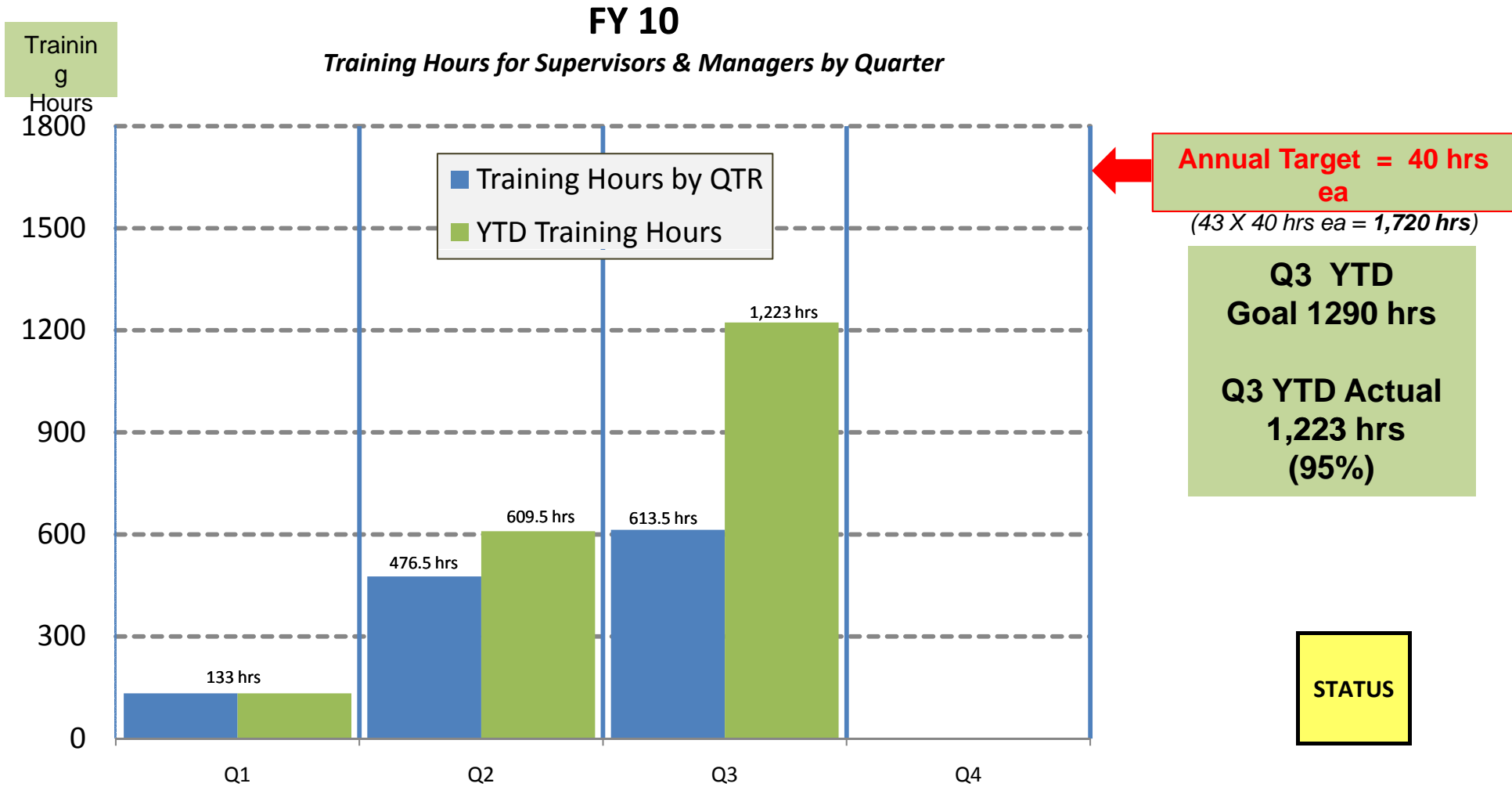
Lead
FBO

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

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

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

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



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

Lead
FBO

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

ACTION PLAN

- **Actions Completed**
 - ✓ Leadership Development Matrix developed
 - ✓ Roll-out of Leadership Development Program
 - ✓ Phase 1: Relationships and 7 Habits
 - ✓ Develop Individualized Leadership Development matrices w/ work plans by 6/1/2009
 - ✓ MECC II training and coaching

- **Actions Planned**
 1. Continue matrix updates
 2. Utilize new HRIS capabilities
 3. Campus-wide learning management system

Facilities Management Strategic Planning Session – Third Quarter FY 2010

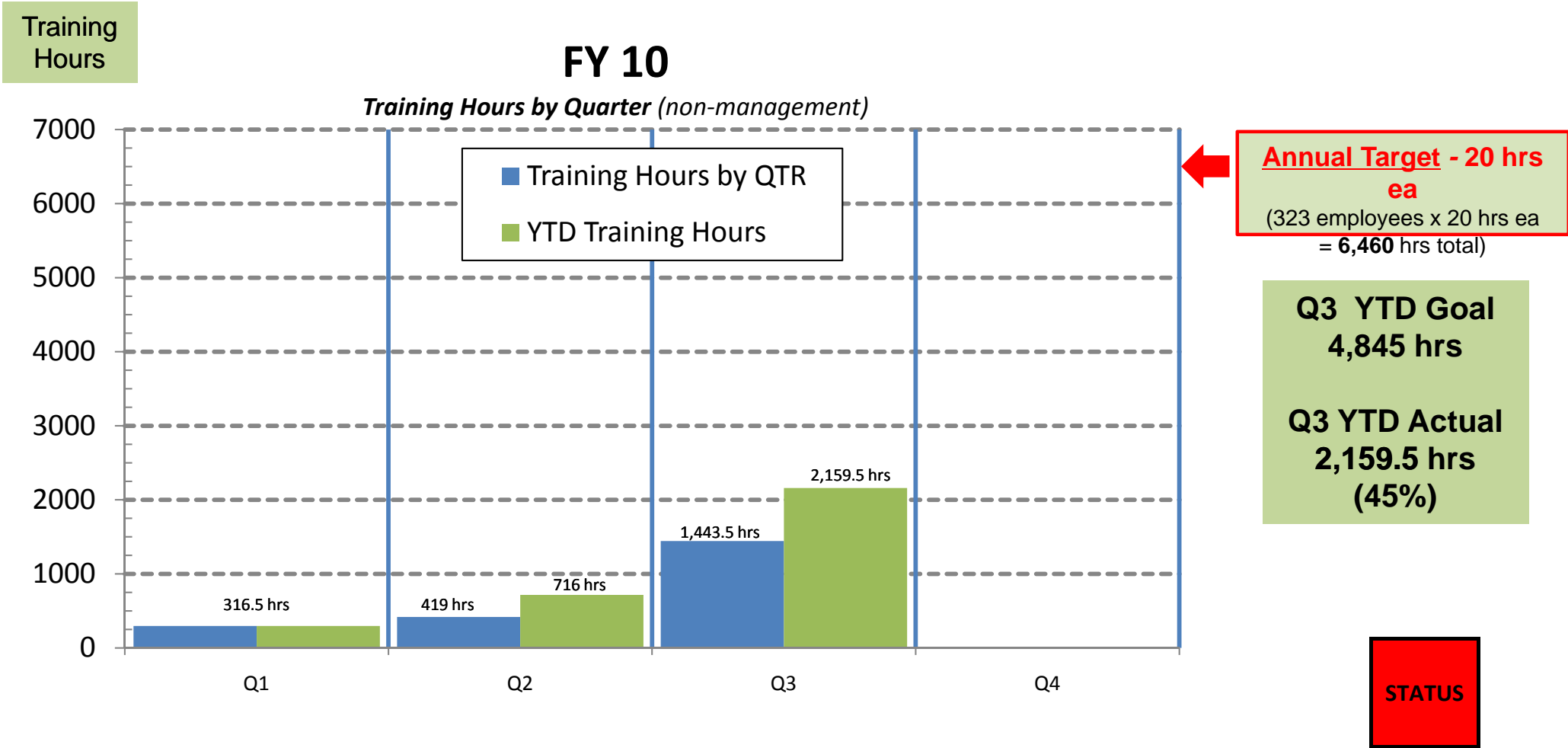
Lead
FBO

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

Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.2 Increase employees training to **20 Hours** per year.

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

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



09~10 YTD Training Hours by Area

Department	YTD	Department	YTD
Business Office	135%	Zone 1	63%
Design services	28%	Zone 2	59%
FIS	20%	Zone 4	88%
Capital Projects	38%	Zone 5	45%
Planning	198%	Zone 6	51%
Housekeeping *	46%	Zone 7	20%
Recycling	84%		
Grounds	25%		
Auto	96%		
Maintenance & Operations	53%		
C/O	50%		
High Voltage & Fire Alarms	48%		
Lock Shop	35%		
Steam Plant	37%		

* HSKY & Recycling = 49%

*Target = 20 hours per employee annually
OR 5 hrs/employee/quarterly*

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

Lead
FBO

Strategy 5.2 Implement training system to enhance employee performance and provide career growth
Objective 5.2.2 Increase employees training to 20 Hours per year.

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

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

ACTION PLAN

- Actions Complete
 - ✓ Task force commissioned to provide suggestions on improving training & promotion: 6/30/08
 - ✓ Formulated annual compliance training schedule in conjunction with EH&S Dept.
 - ✓ Assess current FM employee training tracking system
 - ✓ ESL training pilot
 - ✓ Purchase new HRIS for FM HR
 - ✓ Posted communication link to EH&S training schedule

- Actions Planned
 1. Develop training matrix proto-type and team development list for M&O positions
 2. PC skills training for infrequent users in preparation for Web Time entry
 3. Implementation of new HRIS for FM HR

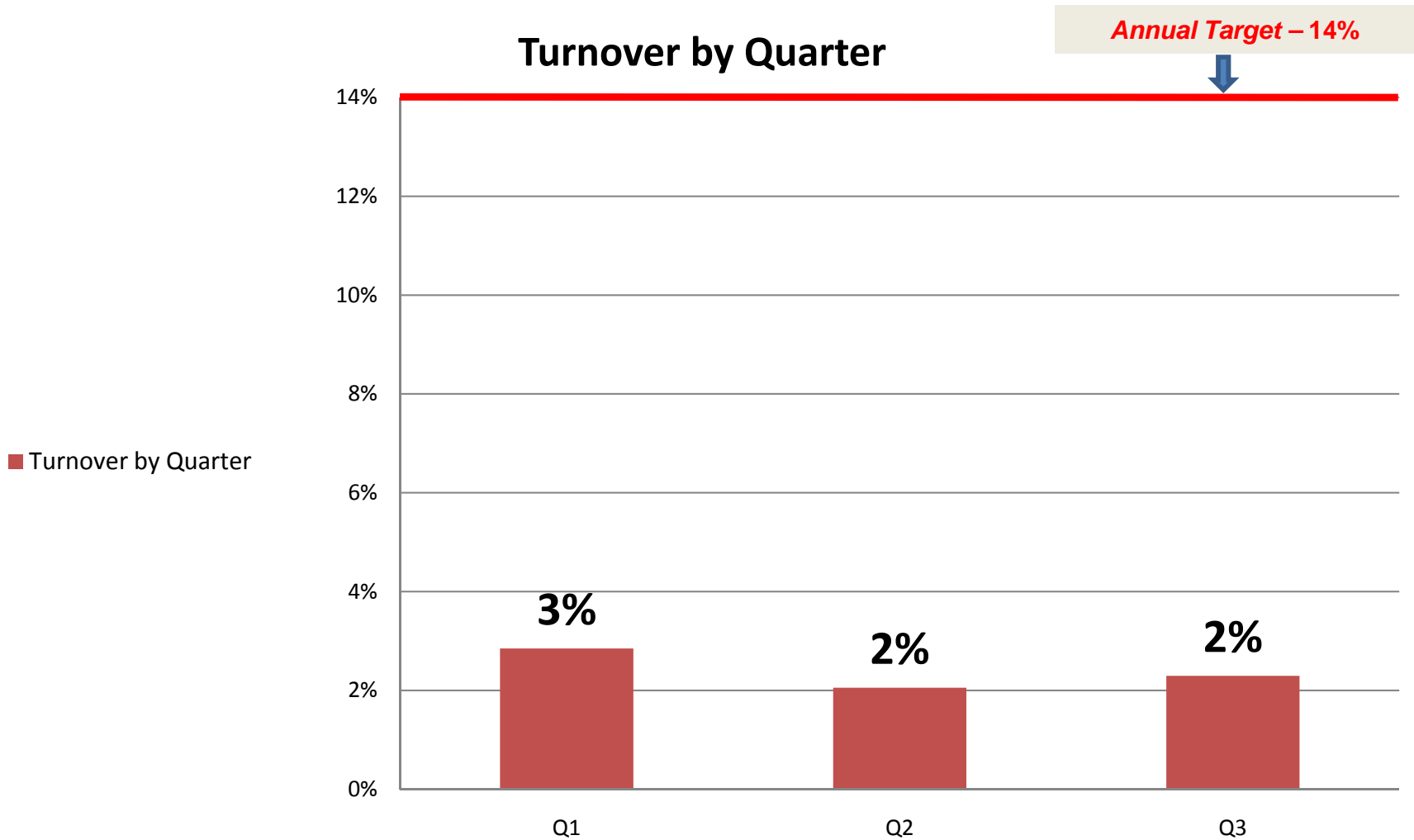
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Annual Employee Turn-over Rate

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

Turnover by Quarter



STATUS

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

Lead
FBO

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

Measure: Annual Employee Turn-over Rate

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

ACTION PLAN

- **Actions Complete**
 - ✓ Prioritized and implemented approved Taskforce recommendations
 - ✓ Management Development Program outlined
 - ✓ Introduced Communications Policy
 - ✓ Revamp employee exit interview process – web-based

- **Actions Planned**
 1. Develop action plan to address employee satisfaction survey issues

Facilities Management Strategic Planning Session – Third Quarter FY 2010

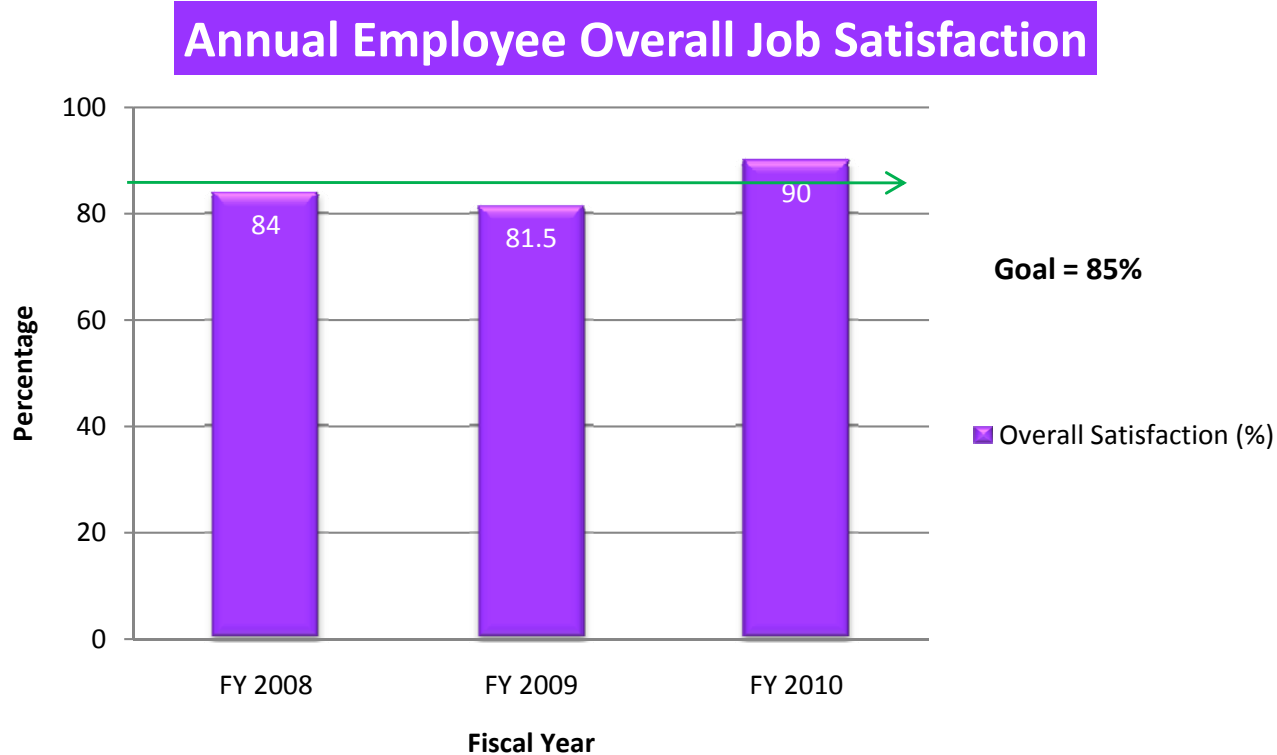
Lead
FBO

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

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

Measure: Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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



STATUS

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

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

Lead
FBO

ACTION PLAN

- **Actions Complete**
 - ✓ Survey administration done electronically.
 - ✓ Survey administered November through December 2009.
 - ✓ Survey results tabulated by UI and presented to Directors on January 26th.





- **Actions Planned**
 1. Develop action plan to address employee satisfaction survey issues

Balanced Scorecard

Learning and Growth Perspective

Facilities Management FY 2010 Balanced Scorecard

<p>Learning & Growth <i>How will we sustain our ability to change and improve?</i></p>	Develop high-quality staff	5.1.1	Reduce Vacancy Time Calendar Days	80 days/120 days	135 days		
		5.1.2	Targeted Selection/Recruitment Training	100%	22%		
		5.2.1	Supervisor (all levels of supervision) training hours	1720 hrs	609.5 hrs	Annual	Annual
		5.2.2	Staff (non supervisory) training hours	6460 hrs	716 hrs	Annual	Annual
	Retain high quality staff	5.3.1	Reduce annual turnover rate	-14%	1%		
	Develop positive culture	5.3.2	Overall Annual Employee satisfaction	85%	90%		

LEGEND:	Met Target		100% performance to target ratio				
	Near Target		90-99% performance to target ratio				
	Needs Attention		Below 90% performance to target ratio				
	No Data Available		Unable to Measure or In Progress				