



UNC CHARLOTTE

Facilities Management

Strategic Planning Session

Third Quarter – Fiscal Year 2011

April 26, 2011



...Creating a Campus of Distinction



UNC CHARLOTTE

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

-- Harold Geneen, industrialist

GOAL # 1

Improve Maintenance and
Operation on the Campus



UNC CHARLOTTE

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

-- Stephen Covey, Author and Speaker

GOAL #2

Successfully Adapt Existing
Facilities to Meet New
Requirements



UNC CHARLOTTE

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

-- Michelangelo, Artist

GOAL #3

Deliver New Facilities that
Support the University's Mission



UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

GOAL #4

Perfect a Customer Focused Organization





UNC CHARLOTTE

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

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

GOAL #5

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





UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship



UNC CHARLOTTE

Balance Score Card

CUSTOMER

Perspective

Strategic Objectives:

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

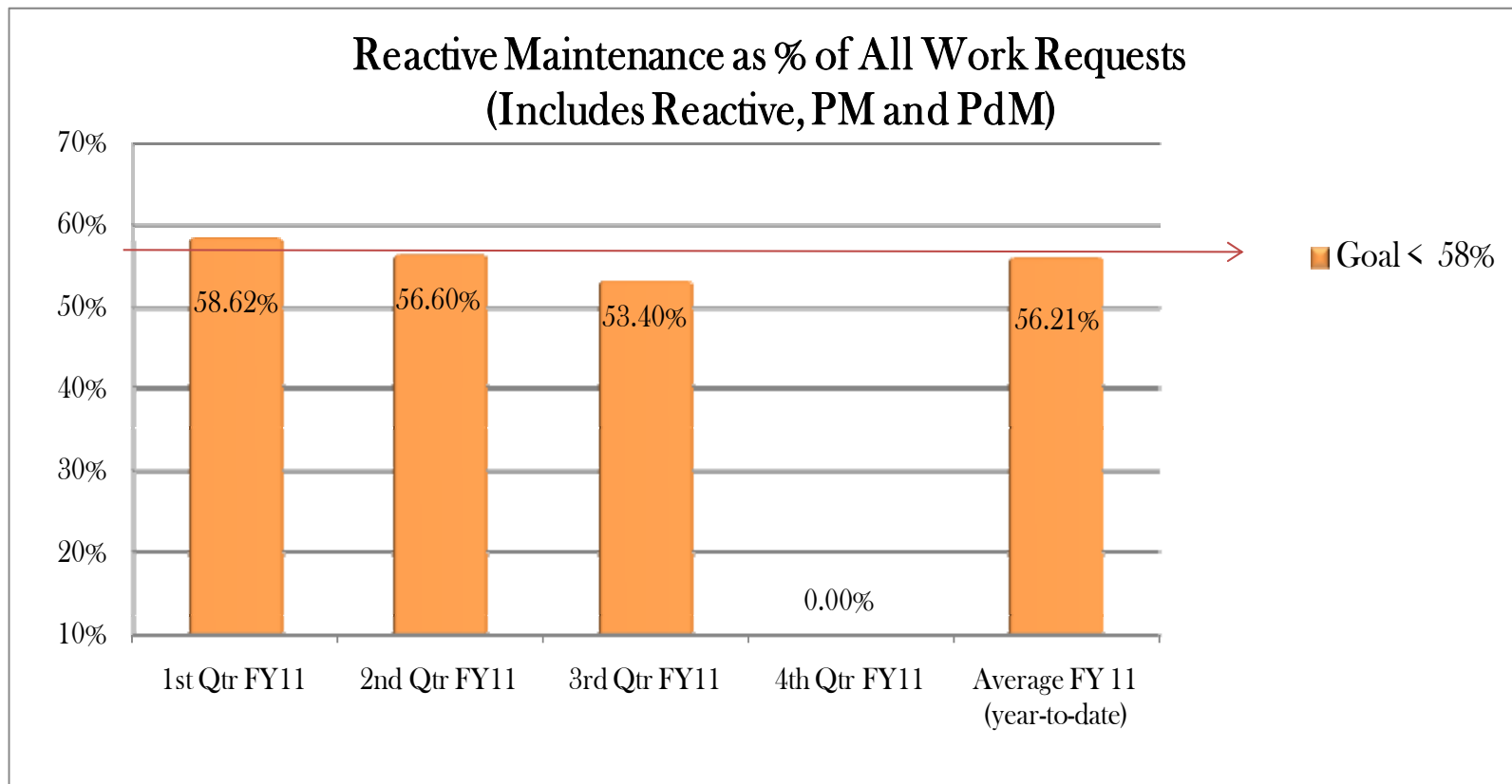
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Percentage to average < 58% for year.

Balanced Scorecard Category: Customer Service



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Reviewed Chillers, and Fire pump PM's – added missing PMs.
- Actions Planned
 - 1 – Continue to build PM program to cover all equipment.
 - a) 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 2011

Lead
F. O.

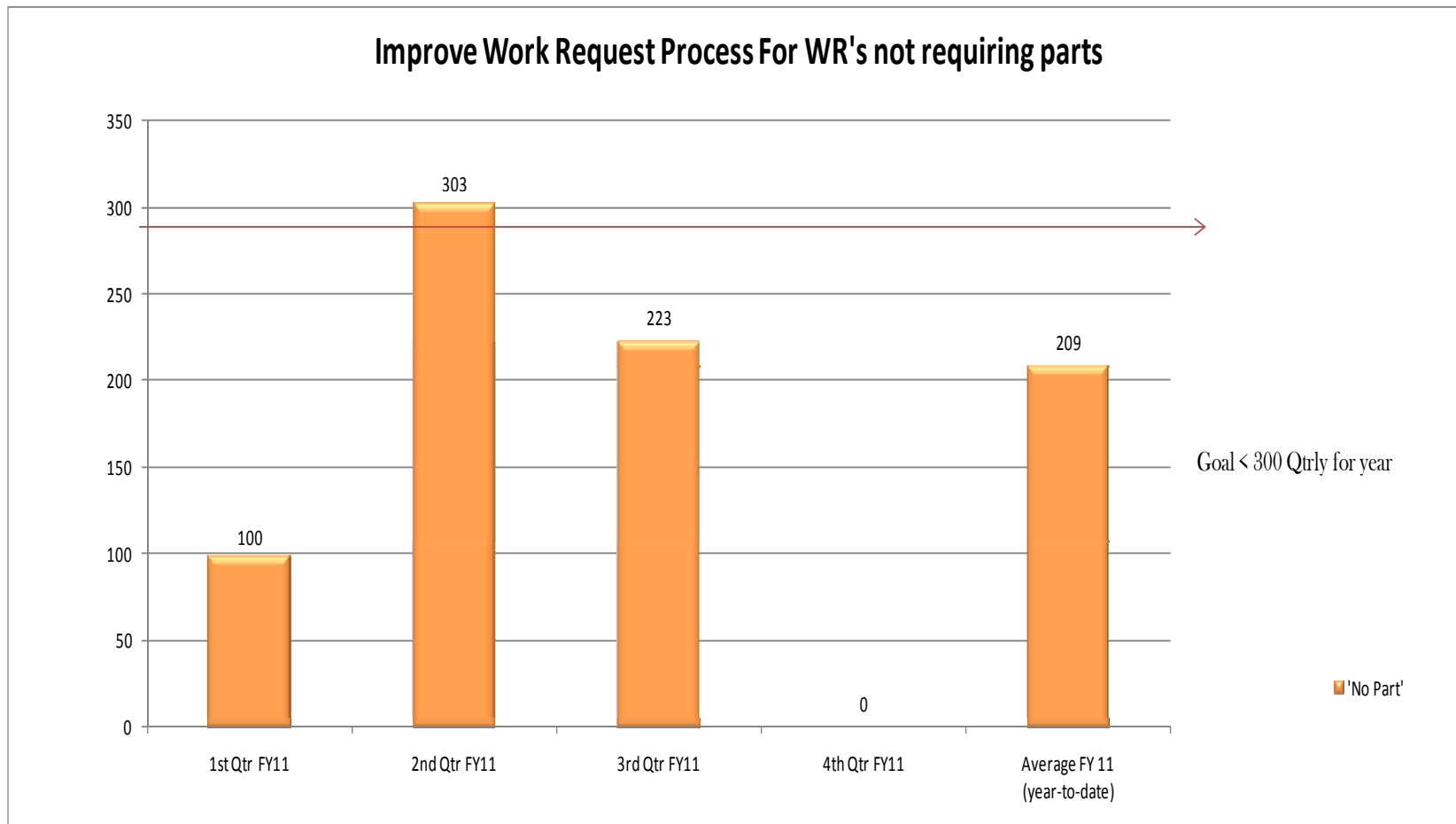
GOAL #1 – Improve maintenance and operations of the Campus

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 300 quarterly average for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

Actions Complete

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

Actions Planned

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

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Lead
Housekeeping

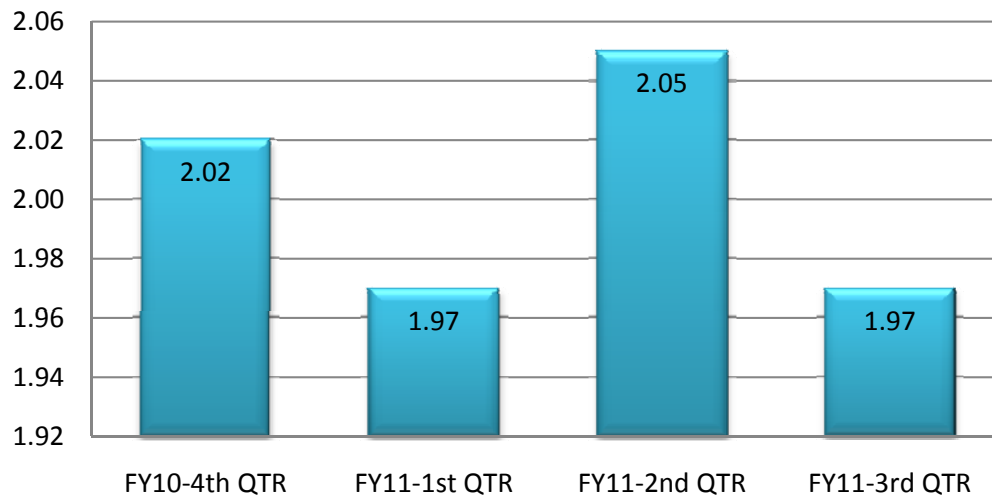
GOAL #1 – Improve Maintenance and Operations of the Campus

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 2011

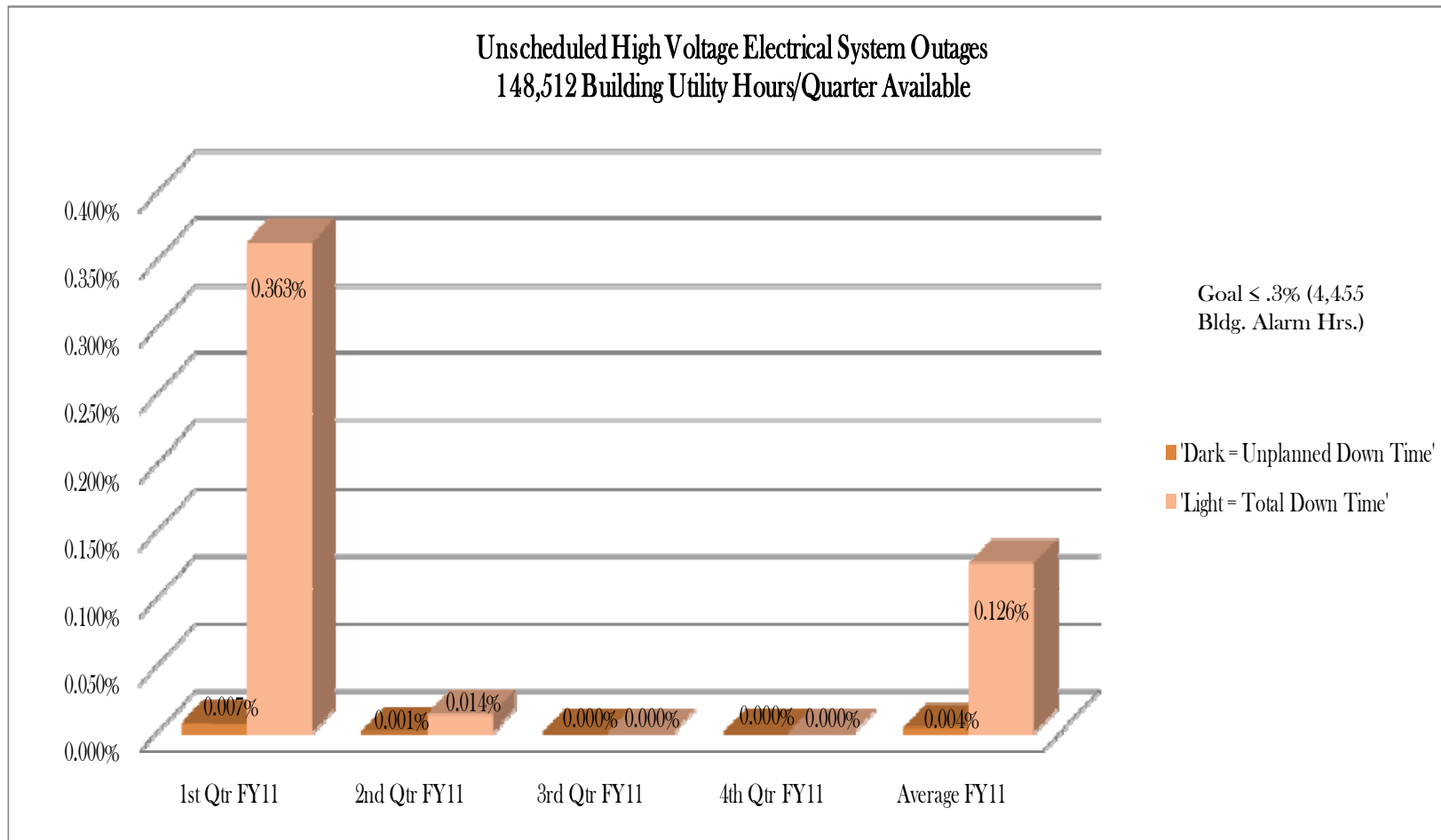
Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Completed PM's as scheduled.
 - 2 – Completed first half of thermal scanning.
- 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.

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Lead
F. O.

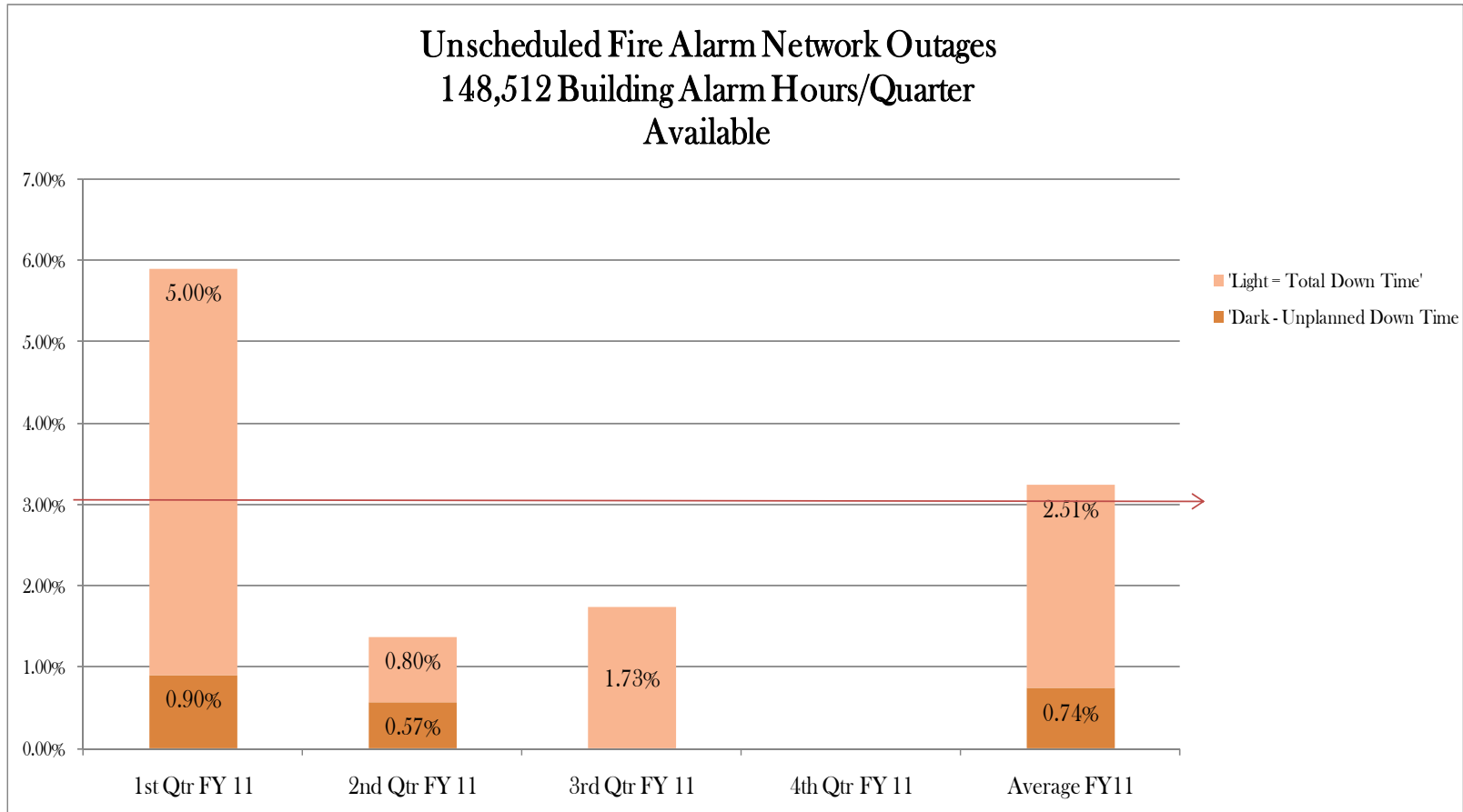
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: <=3%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

Actions Complete

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

Actions Planned

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

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

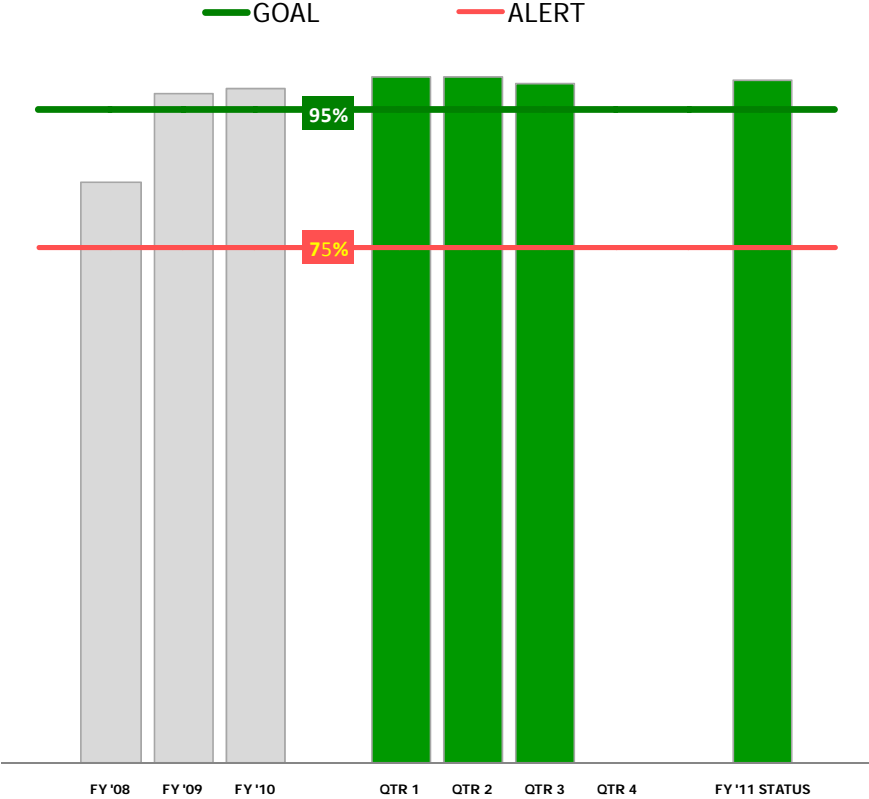
Strategy Objective 2.2 Improve Informal Project Design and Construction Process
 2.2.1 **95% of Projects Designed on Time**

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

Balanced Scorecard Category: 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%
FY'10	173	170	3	98.3%
QTR 1	49	49	0	100.0%
QTR 2	64	64	0	100.0%
QTR 3	89	88	1	98.9%
QTR 4	0	0	0	0.0%
FY '11 STATUS	202	201	1	99.5%



GOAL 95.0%	STATUS 99.5%
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GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

Lead
Design
Services

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

ACTION PLAN

2.2.1 - Actions Completed:

- Project Priority List upgrades.

2.2.1 - Actions Planned:

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

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

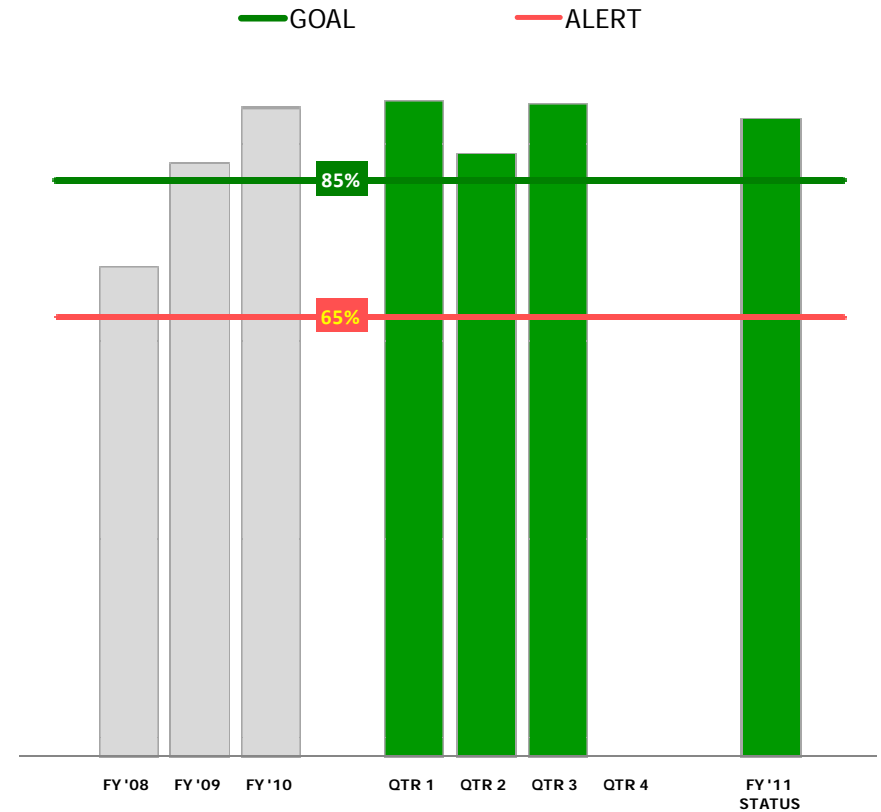
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.2 **85% of Estimates for All Construction within +/- 10% of Actual.**

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

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '08	65	47	18	72.3%
FY '09	115	101	14	87.8%
FY '10	255	244	11	95.7%
QTR 1	31	30	1	96.8%
QTR 2	36	32	4	88.9%
QTR 3	55	53	2	96.4%
QTR 4	0	0	0	0.0%
FY '11 STATUS	122	115	7	94.3%



GOAL
85.0%

STATUS
94.3%

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

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

Lead
Design
Services

ACTION PLAN

2.2.2 - Actions Completed:

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

2.2.2 - Actions Planned:

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

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

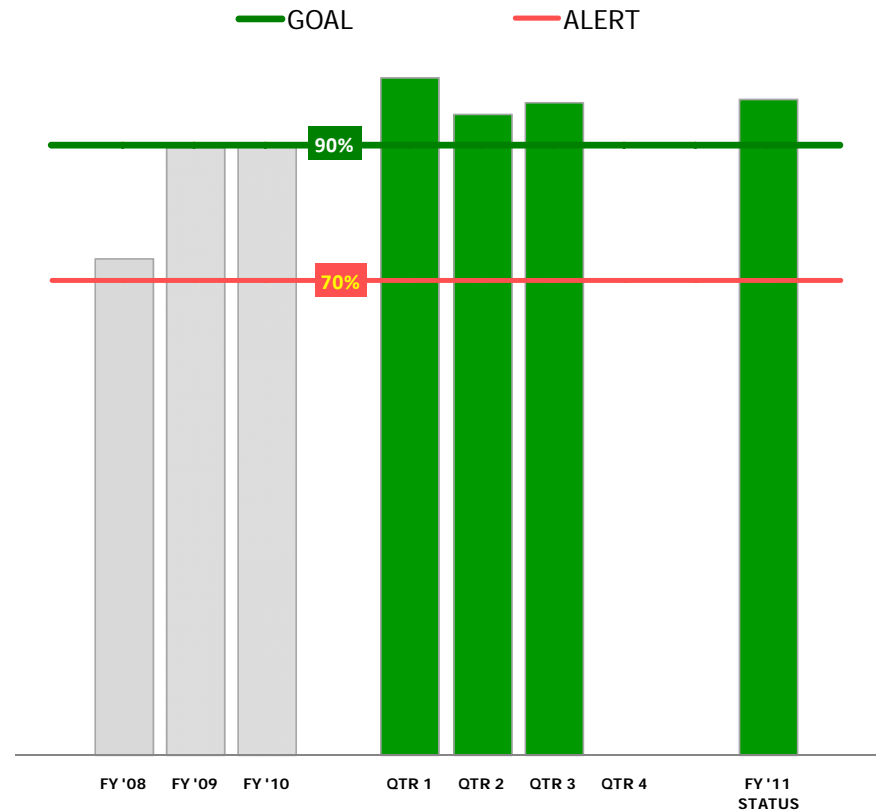
Strategy 2.2 Improve Informal Project Design and Construction Process
Objective 2.2.4 **90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)**

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

Balanced Scorecard Category: Internal Business Process

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

QUARTERLY REVIEW	No. of Projects	No. of met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '08	190	139	51	73.2%
FY '09	116	104	12	89.7%
FY '10	182	164	18	90.1%
QTR 1	31	31	0	100.0%
QTR 2	36	34	2	94.4%
QTR 3	55	53	2	96.4%
QTR 4	0	0	0	0.0%
FY '11 STATUS	122	118	4	96.7%



GOAL
90.0%

STATUS
96.7%

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

Lead
Design
Services

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

ACTION PLAN

2.2.4 - Actions Completed:

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

2.2.4 - Actions Planned:

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead Design Services

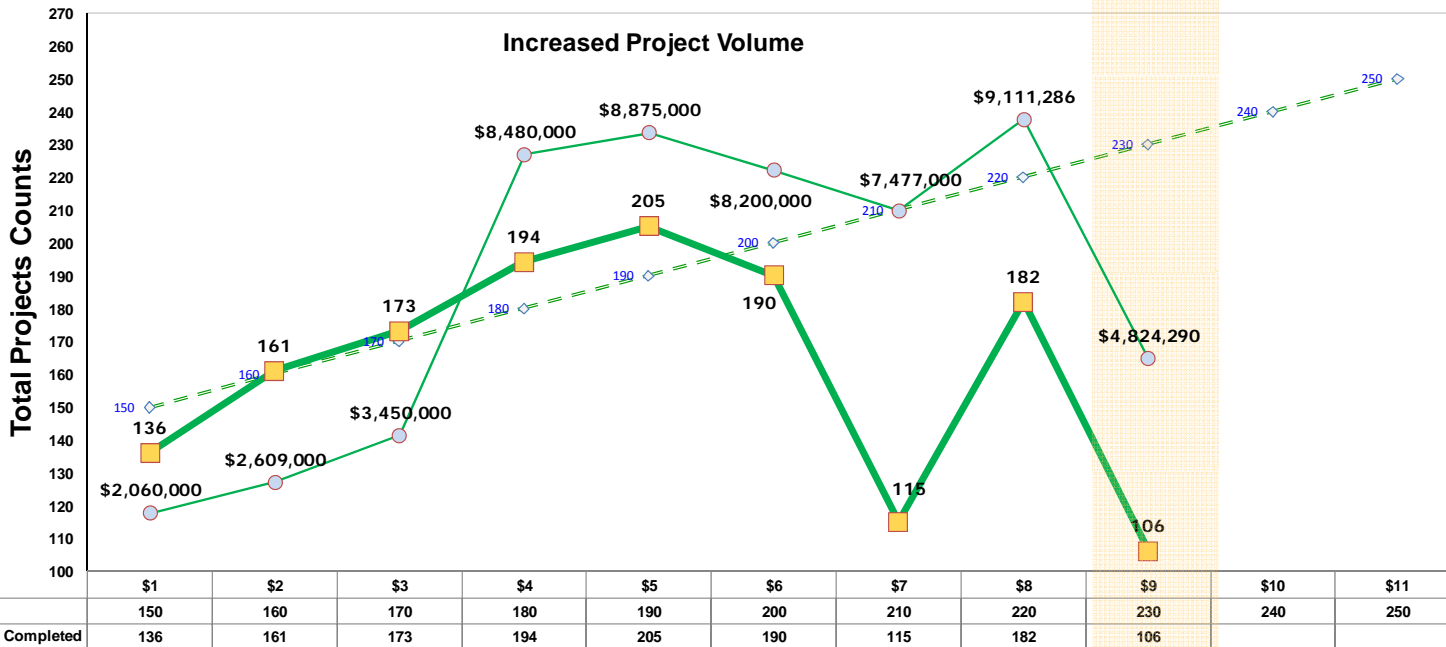
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: 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
	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
	136	161	173	194	205	190	115	182	106		
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,286	\$4,824,290		
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$45,512		



GOAL
100%

STATUS
46.1%

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

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

Lead
Design
Services

ACTION PLAN

2.2.6 - Actions Completed:

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

2.2.6 - Actions Planned:

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

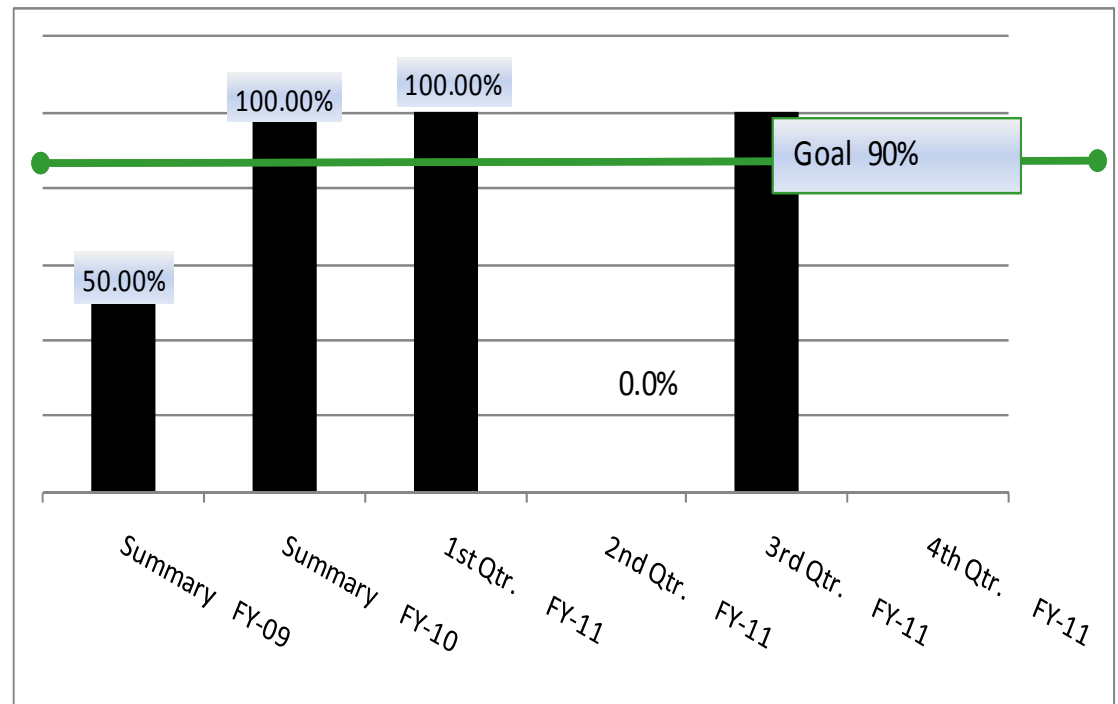
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

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

Balanced Scorecard Category: Internal Business Process

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



Actual for 3rd Quarter is 100%
 Year to date is 83%

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. Completed Tennis Phase I

- Actions Planned
 - 1. Complete New Outdoor Recreational Fields (SCO Inspection 4-20-2011)
 - 2. Complete Prospector Phase II
 - 3. Complete Center City Classroom
 - 4. Complete SAC Office Renovation (football offices)

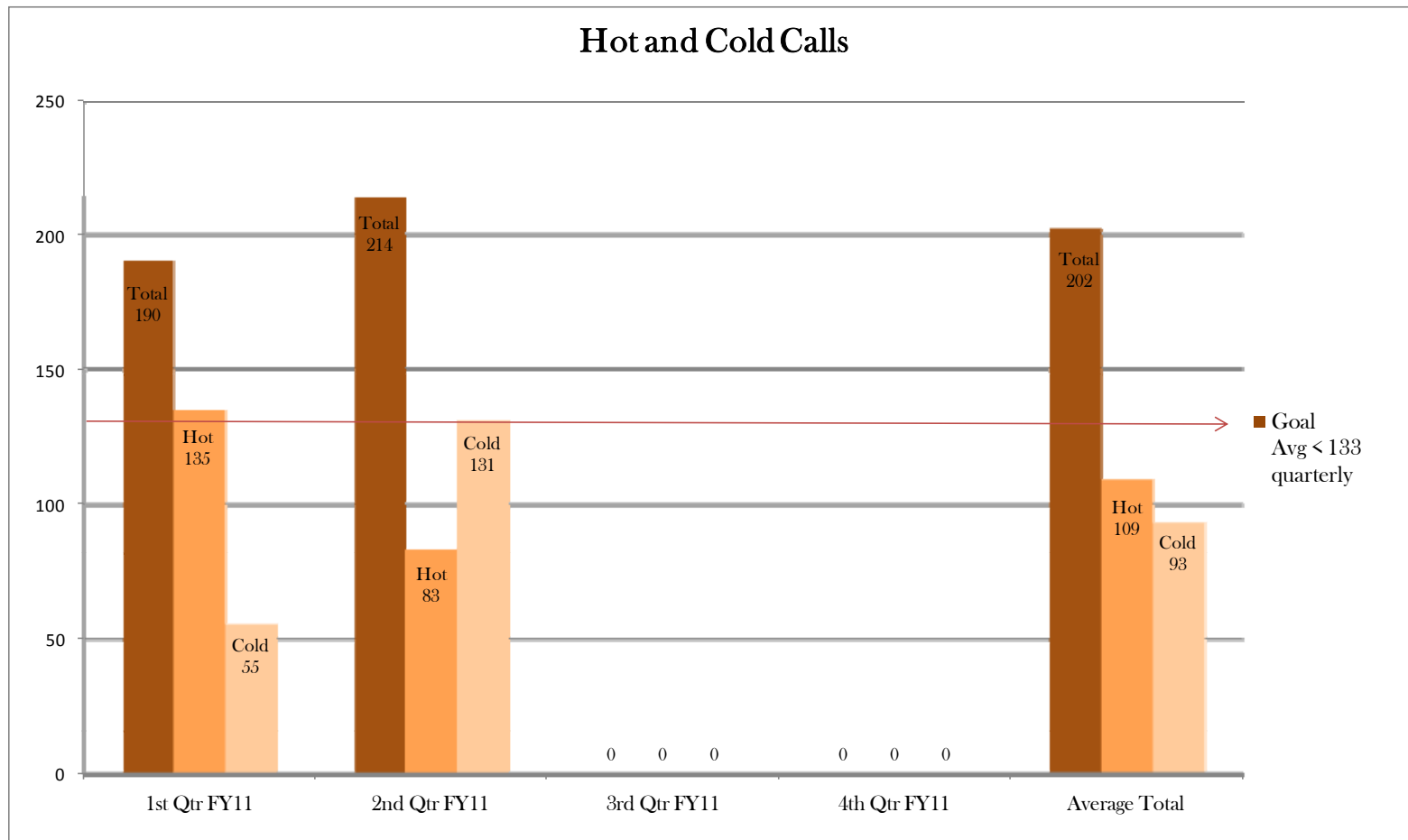
GOAL #4 – Perfect a Customer Focused Organization

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

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

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective



STATUS

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
F. O.

ACTION PLAN

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

GOAL #4 – Perfect a Customer Focused Organization

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

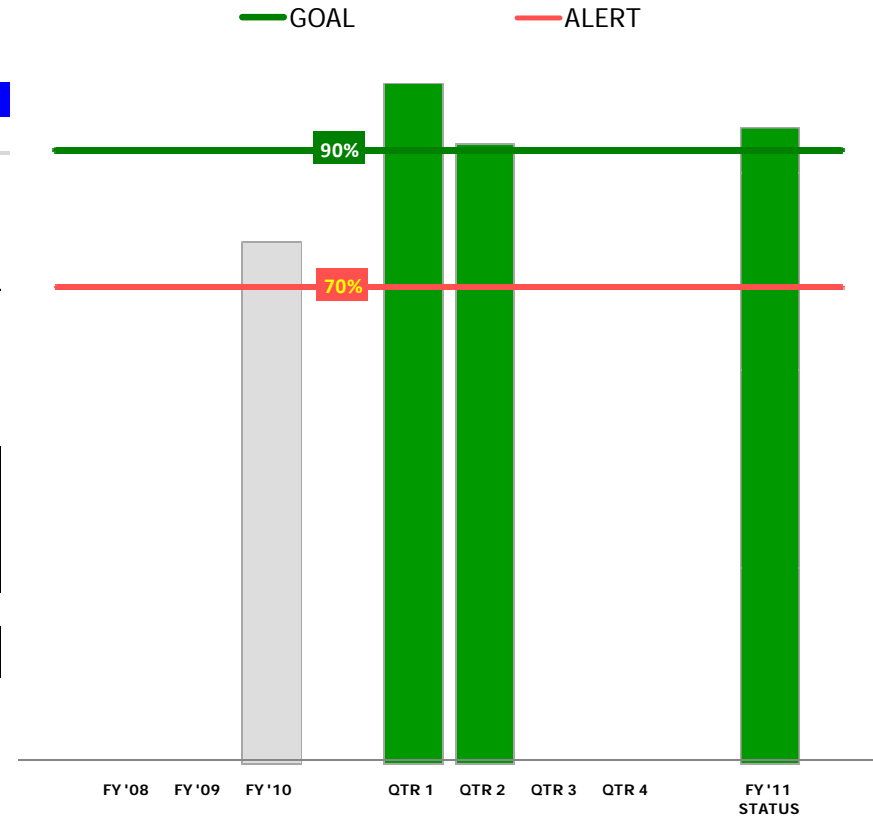
Measure: Results from Interactive Web-based Customer Questionnaire. (Process automated through Archibus)

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY SURVEY	Number of Projects Surveyed	Very Satisfied 4	Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied
FY '08	0	0	0	0	0	0	0.0%
FY '09	0	0	0	0	0	0	0.0%
FY '10	30	18	5	6	1	0	76.7%
QTR 1	4	3	1	0	0	0	100.0%
QTR 2	11	8	2	0	1	0	90.9%
QTR 3	Surveys not recorded in Archibus during 3rd Quarter						#VALUE!
QTR 4	0	0	0	0	0	0	0.0%
FY '11 STATUS	15	11	3	0	1	0	93.3%

GOAL: 90.0%



GOAL
90.0%

STATUS
93.3%

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

Lead
Design
Services

ACTION PLAN

4.1.1 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys

4.1.1 - Actions Planned:

- Review Customer Satisfaction Survey responses and implement appropriate actions.

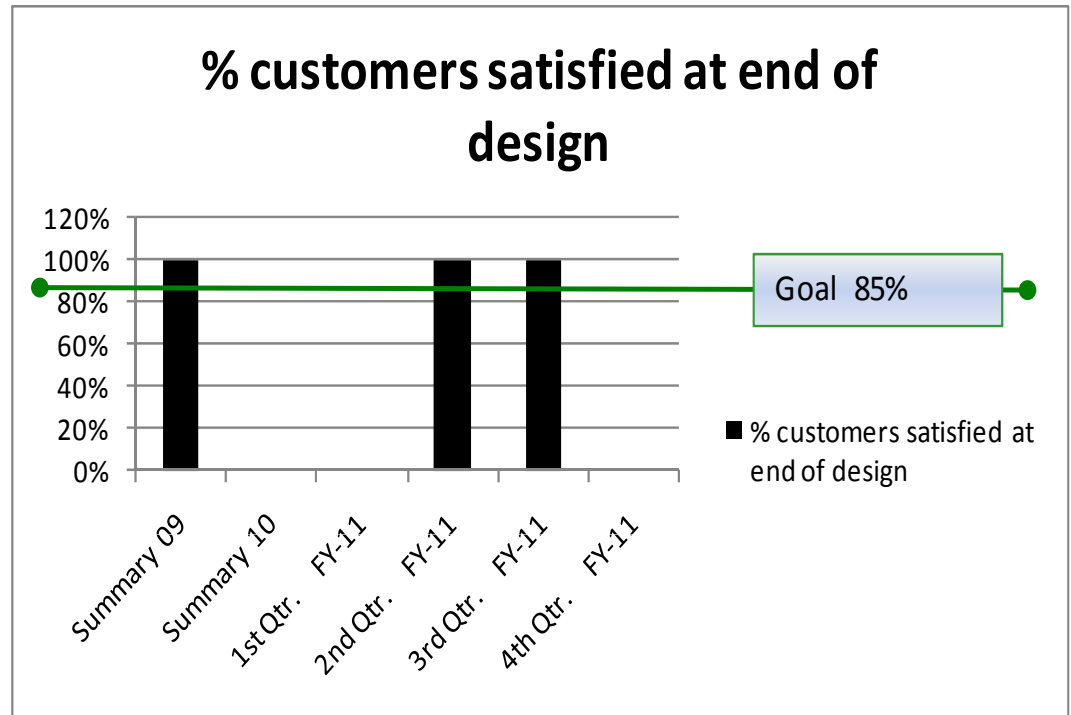
GOAL #4 – Perfect a Customer Focused Organization

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

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary FY-09	2	1	0	100%
Summary FY-10	9	0	0	No Data
1st Qtr. FY-11	0	0	0	No Data
2nd Qtr. FY-11	4	2	0	100%
3rd Qtr. FY-11	3	1	0	100%
4th Qtr. FY-11		0	0	



No data is a result of customer not answering questionnaire

Actual for 3rd Quarter is 100%
Year to date is 100%

GOAL #4 – Perfect a Customer Focused Organization

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

Lead
Capital

ACTION PLAN

- Actions Complete
 - 1. Submitted surveys to customers for Residence Hall Fire Sprinklers Moore/Sanford, Recreational Fields Relocation 8 & 9, SAC Office Renovations. Responses from one customer only (rating was 6 items satisfied, 4 neutral).
- Actions Planned
 - 1. Need to submit satisfaction survey to customers on:
Parking Deck I

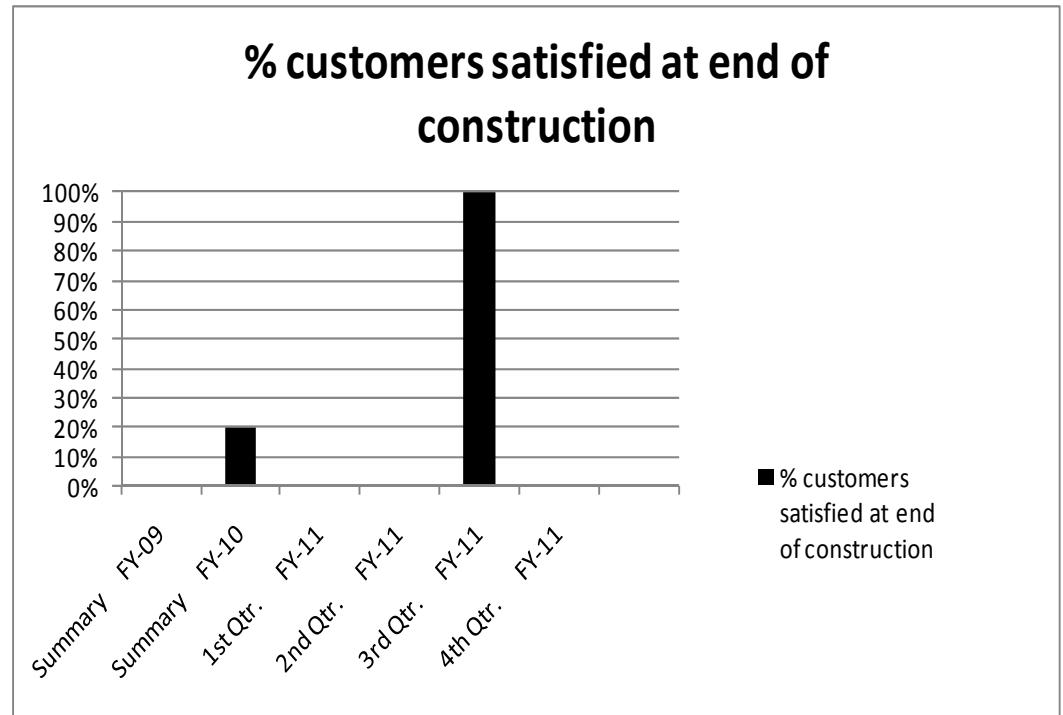
GOAL #4 – Perfect a Customer Focused Organization

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

Measure: Results from Interactive Web-based Customer Questionnaire.

Balanced Scorecard Category: Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary FY-09	no data	0	0	0.0%
Summary FY-10	5	1	0	20.0%
1st Qtr. FY-11	0	0	0	0.0%
2nd Qtr. FY-11	1	0	0	0.0%
3rd Qtr. FY-11	4	1		100%
4th Qtr. FY-11				



Actual for 3rd Quarter is 100%
 Year to date is 100%

Status

GOAL #4 – Perfect a Customer Focused Organization

Lead
Capital

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

ACTION PLAN

- Actions Complete
 - 1. Administered satisfaction survey to Prospector Phase 2, New Tennis Phase 1, Reese Building Envelope, New Outdoor Recreational customers. Response received from one customer (rating was 11 items very satisfied, 5 somewhat dissatisfied).
- Actions Planned



Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter
Customer <i>To achieve our vision, how must we view & treat our customers?</i>	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%	56.21%			
		1.3.2	Decrease Work Request Cycle Time by 5%	<300 hrs	209			
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	98%			
		1.5.3	Reduce Unscheduled HV outages by 10%	<=0.3%	0.126%			
	Improve Process Reliability	1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%	2.5%			
		2.2.1	Increase on-time delivery	95% of Projects Designed on Time	95%	99.5%		
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	94.3%			
		2.2.3	Combined with 2.2.2					
		2.2.4	All IP construction meets BOD	90%	96.7%			
		2.2.5	Combined with 2.2.4					
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 210	46.7%	Annual	Annual	Annual
	Enhance customer satisfaction	3.4.1	90% Cap Construction Projects on Schedule	90%	83%			
		4.1.1	Improve: Overall satisfaction rating	85%		Annual		
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%		Annual		
		4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-15% or <133	no data			
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	93.3%			
4.1.5		Improve: Capital Projects rating (sat./very sat.) - design	85%	100%				
4.1.6		Improve: Capital Projects rating (sat./very sat.) - constr	85%	100%				
	NEW	All measures positive on customer sat survey	<2% S Dis; < 5% Dis or Neu	no data				



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**

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

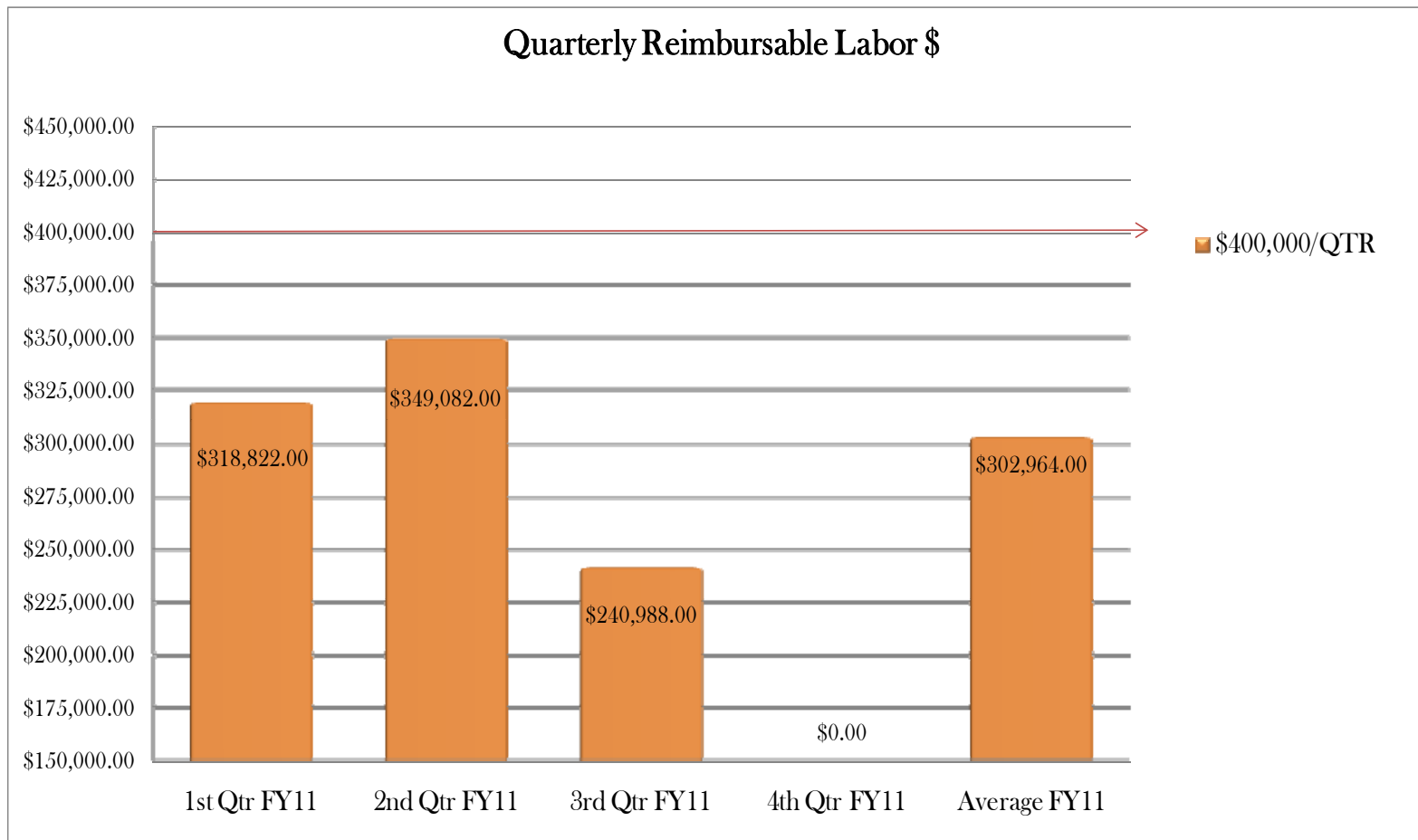
GOAL #6 – Promote Good Stewardship

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

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

Goal: \$400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
F. O.

ACTION PLAN

- **Actions Complete**

- 1 – Utilized in-house staffing from other areas of Facilities Operations on projects rather than going to outside resources.

Actions Planned

- 1 – Continue to look for opportunities to expand reimbursable PM work to level peaks and valleys.
- 2 – Continue to look within our Facilities Operations Labor pool before going outside for additional staff support.



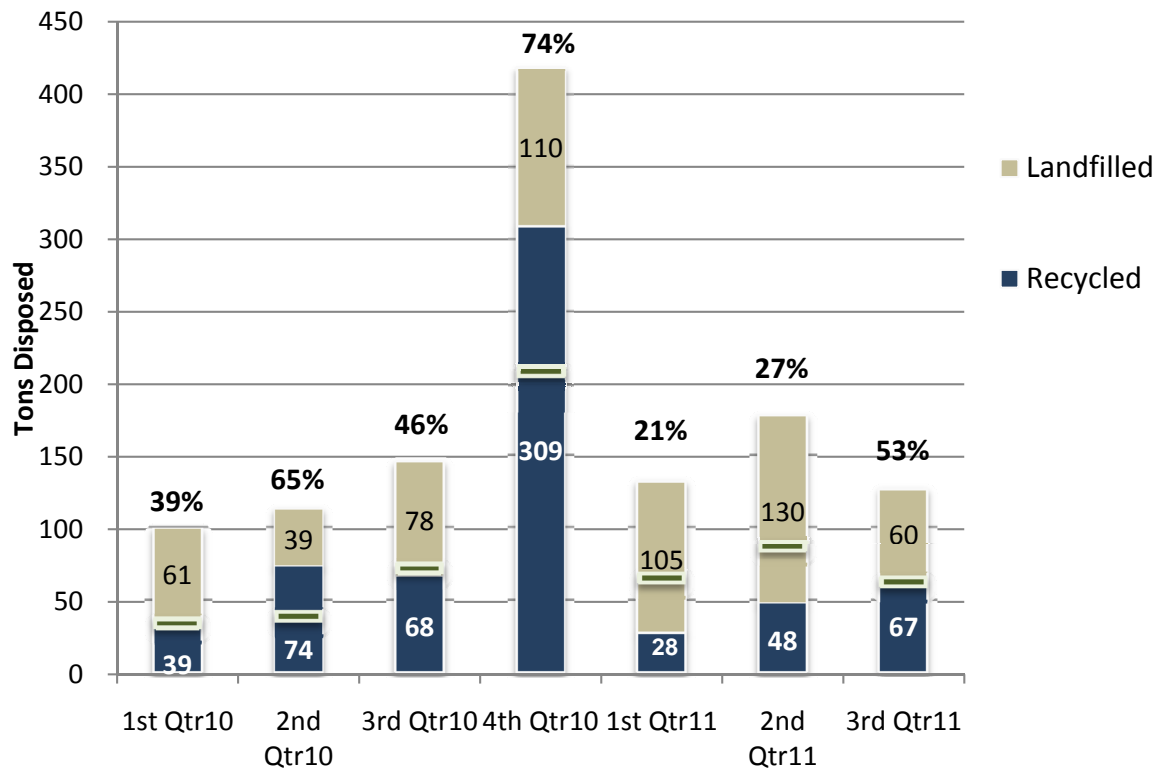
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Informal Projects - Materials Disposed
3rd Qtr FY11



Year to date
 33%



GOAL #6 – Promote Good Stewardship

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



ACTION PLAN

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



GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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



GOAL #6 – Promote Good Stewardship

Strategy

6.2 Develop a Sustainable Campus

Objective

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



ACTION PLAN

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

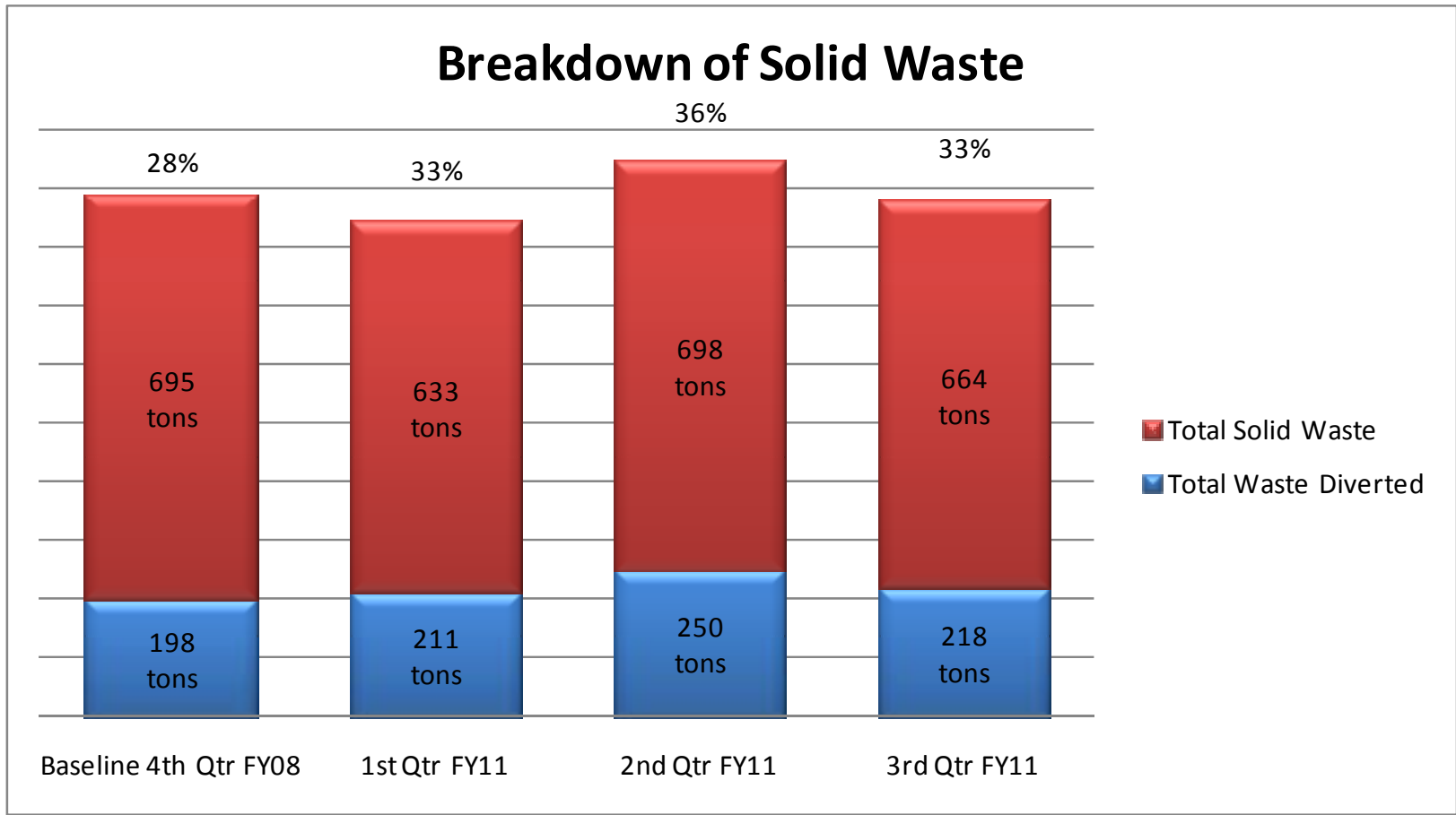


GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective



GOAL #6 – Promote Good Stewardship

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



ACTION PLAN

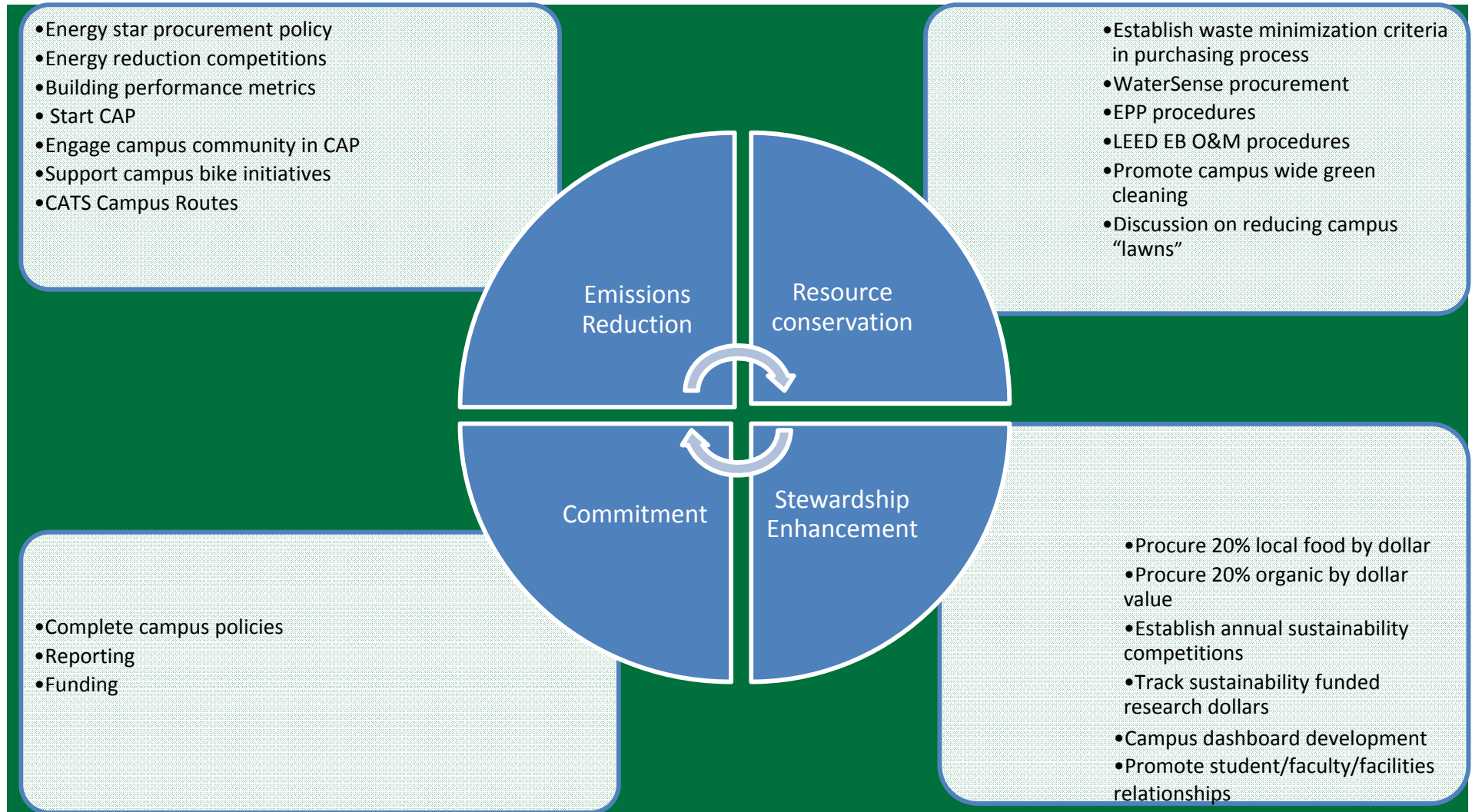
- **Actions Complete - TOTAL recycling for quarter 31%**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
 - Completed inventory of all recycling bins on campus and bar-coded all of them
 - Continue to Partnered with Housekeeping –pilot office trash can reduction program added Library
 - working on designs for a comprehensive composting program
 - Continue educational outreach and promotion
 - Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
 - continue to be advisors to EARTH Club and CGI
 - working with 2012 NCAPPA conference committee
 - Kathy presented with Greg Kish at 2011 NCAPPA conference March 2-3
 - Shannon and Kathy presented at 2012 CRA conference in March 30-31
 - Held Campus Clean UP – April 6th – over 150 volunteers and & 1500 pounds of trash
 - Success EARTH Day Festival on April 20th
 - Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**
- **2nd Quarter Actions Planned**
 - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
 - Continue to research markets and collection options for more efficient recycling, especially paper
 - Continue educational outreach and promotion
 - will attend all SOAR and summer orientation session
 - 2 Master Students from Civil Engineering will assist Recycling/Grounds/ Sustainability Departments to design comprehensive food composting program Summer 2011 semester
 - Designing Zero Waste Options for FOOTBALL
 - Student Government writing a resolution for a ZERO WASTE FOOTBALL Stadium
 - finalize SOP for trash and recycling bin placement and design

GOAL #6 – Promote Good Stewardship

Lead
RELU

Strategy 6.2 **Develop a Sustainable Campus**

Objective 6.2.4 Implementation of sustainability plan actions



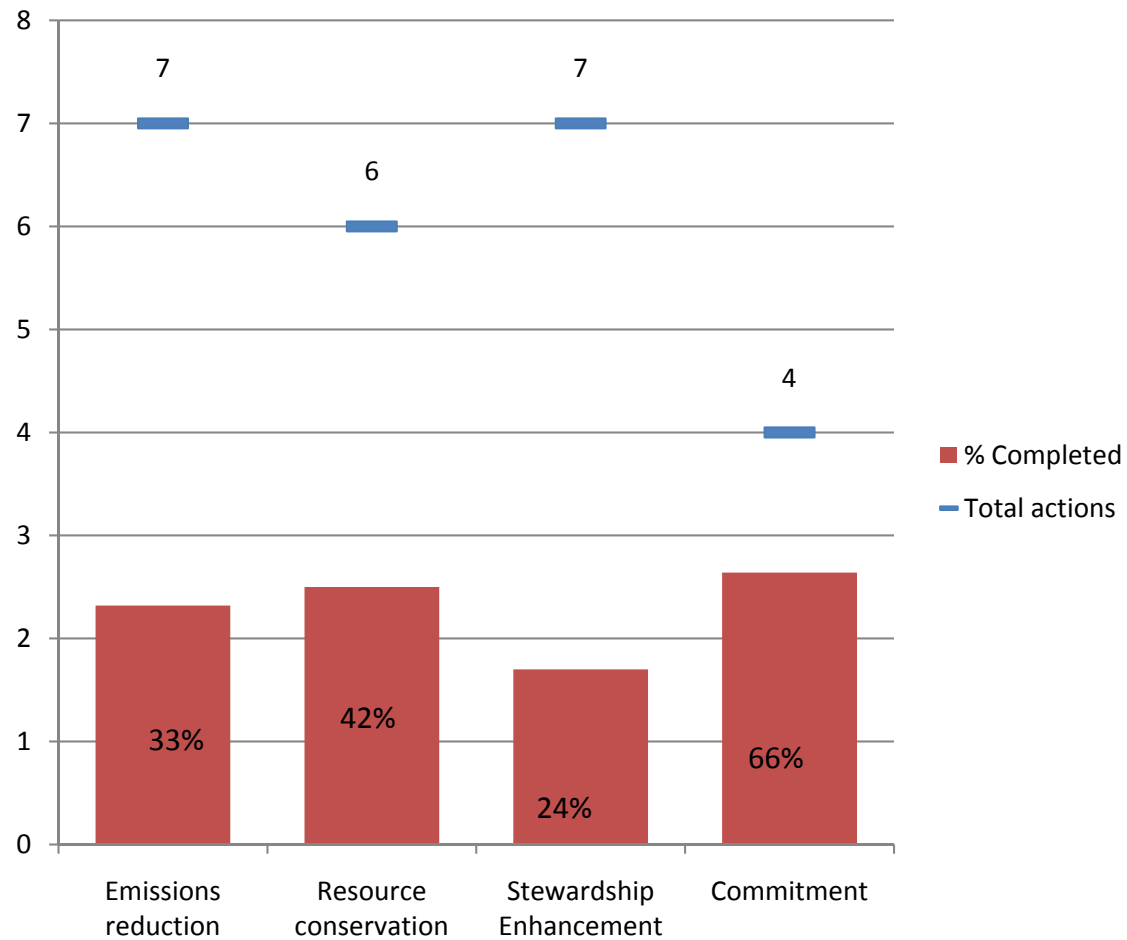
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

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

Measure: Number of actions completed in each category

Balanced Scorecard Category: Innovation and Learning



Status

GOAL #6 – Promote Good Stewardship

Strategy 6.2 **Develop a Sustainable Campus**

Objective 6.2.4 Implementation of sustainability plan actions

Lead
Planning

ACTION PLAN

Actions Completed

- Sustainability Curriculum Progress
 - Initial Freshman Seminar Development
 - Freshman Seminar Training
- Climate Action Plan Kickoff
- Campus Sustainability Policy Completed draft
- Hired 1st Campus Sustainability Interns who are working on
 - STARS Data Collection
 - Communications strategy
 - GHG Inventory Update

GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

Objective 6.2.4 Implementation of sustainability plan actions

Lead
RELU

ACTION PLAN

- **Actions Planned**

- Emissions reduction:

- Climate Action Planning

- CAP Task Force Management

- CAP Task Force Training

- CAP Task Force Mitigation Strategies Development

- GHG Inventory 2010 input

- Emissions reduction competitions

- Resource Conservation

- Identify current environmental procurement policies in different purchasing categories.

GOAL #6 – Promote Good Stewardship

Strategy 6.2 **Develop a Sustainable Campus**

Objective 6.2.4 Implementation of Sustainability plan actions

Lead
RELU

ACTION PLAN

Actions Planned

- Stewardship Enhancement
 - Develop campus dashboard
 - Track % of dollar spent on local/organic food
 - Track % of dollar spent on sustainability based research
 - Continue Sustainability Freshman Seminar Development

- Commitment
 - Secure sustainability program funding
 - Hire sustainability intern
 - On campus sustainability marketing
 - Campus speakers

Lead
Capital

GOAL #6 – Promote Good Stewardship

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

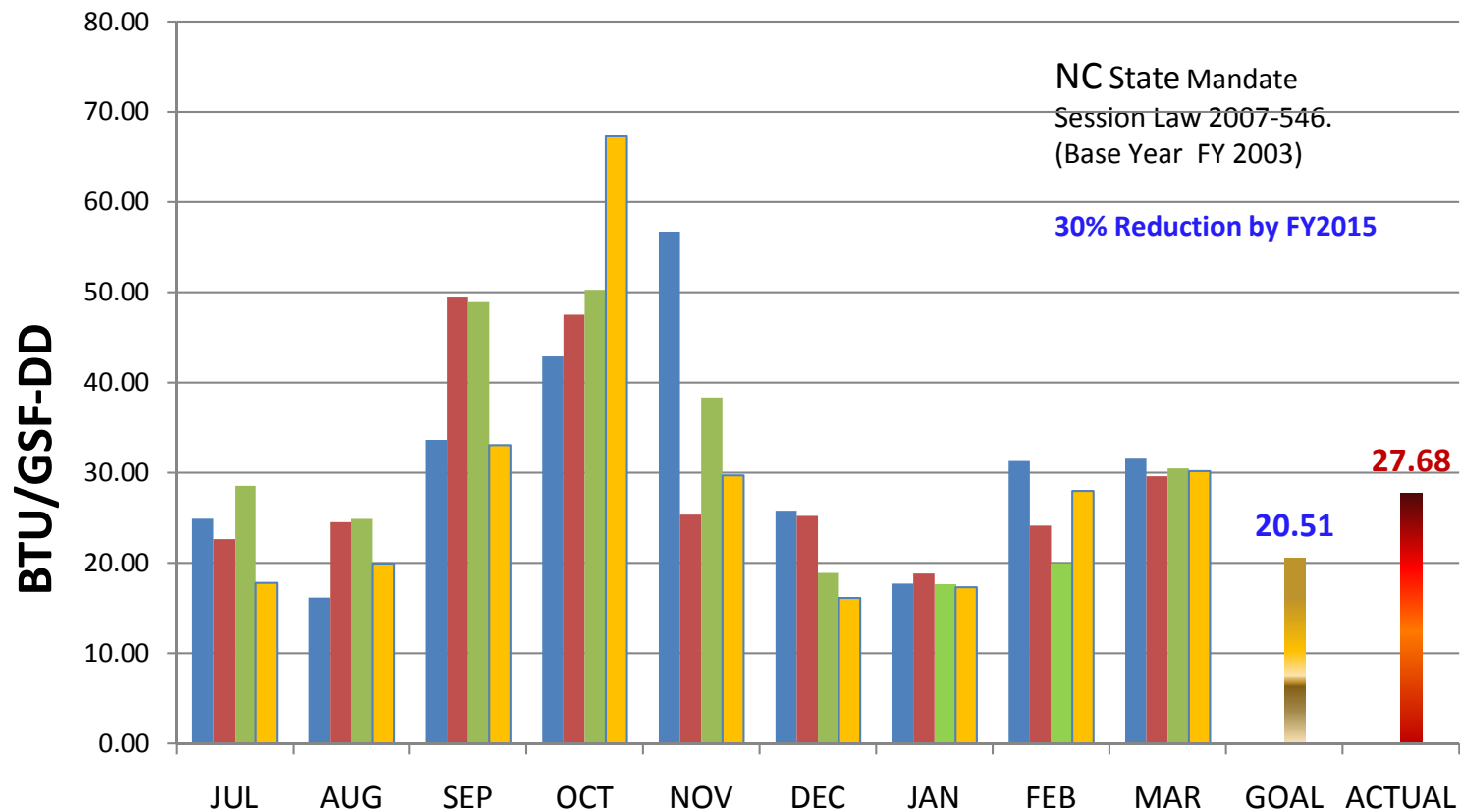
Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

CAMPUS ENERGY USAGE
BTU/GSF-DD (Heated Gross Feet)

■ FY08 ■ FY09 ■ FY10 ■ FY11



GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN -ENERGY

STATUS

- **Actions Complete**
 - Performance contract progressing.
 - Hired Energy Manager
 - Finalized space temperature guidelines.

- **Actions Planned**
 - Hire Energy Analyst with ARRA funding, permanent time-limited. (End 2-29-12)
 - Complete Engineering and Zone coordination for energy operation.
 - Focus on identifying problem buildings and root causes for energy inefficiencies.

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN - ESPC

STATUS

Energy Savings Performance Contract

- **Actions Complete**
 - ESCO (Ameresco) completed 60% IGA. 60% IGA under review and revision.
 - 3rd Party consultant, Celtic Energy, continues to provide support and evaluation of IGA.
- **Actions Planned**
 - Investment Grade Audit (IGA) 90% submission
 - Finalize acceptable ECMs.
 - Energy Services Agreement (ESA) signed (August 2011)

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
Capital

GOAL #6 – Promote Good Stewardship

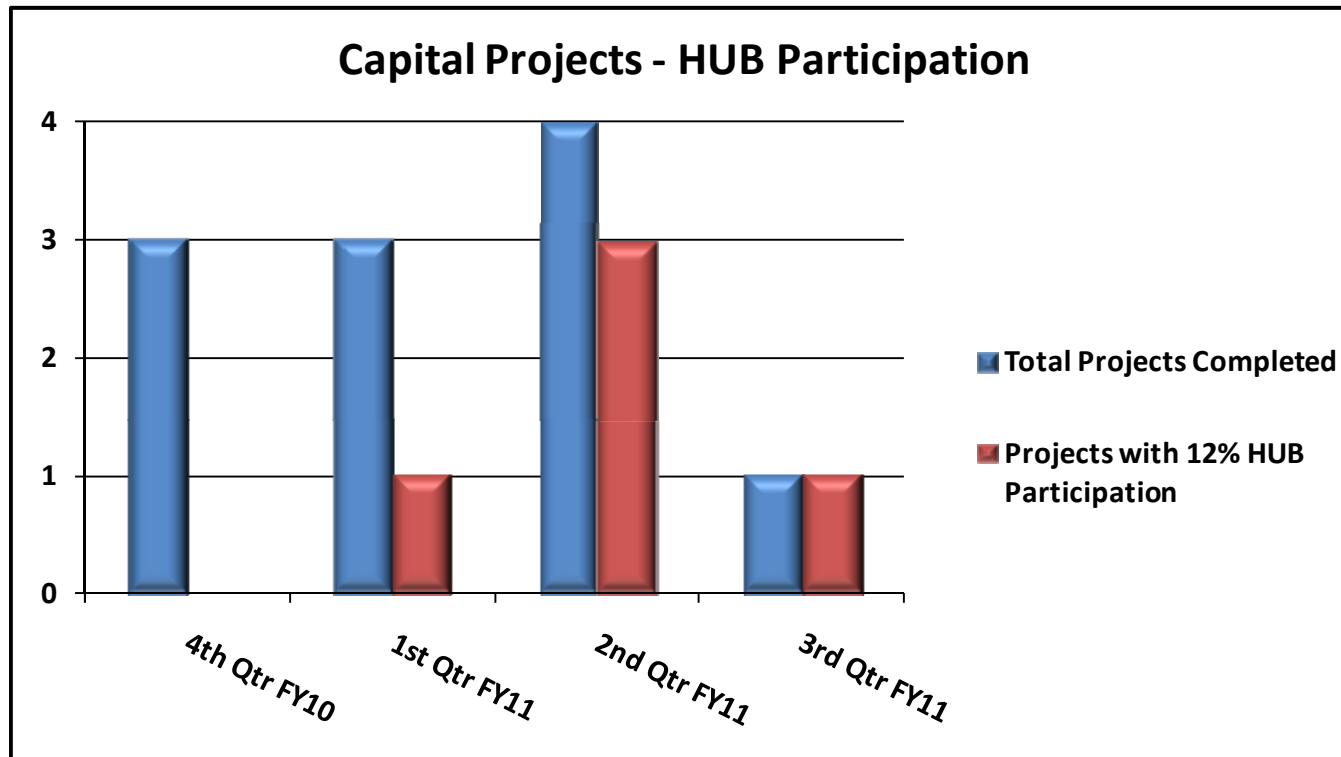
Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation
Objective 6.5.1 12% HUB participation on 80% of Capital Projects

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

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Projects Completed	Projects with 12% HUB Participation	Percentage of Total Projects with 12% HUB Participation 80% GOAL
4th Qtr FY10	3	0	0%
1st Qtr FY11	3	1	33%
2nd Qtr FY11	4	3	75%
3rd Qtr FY11	1	1	100%

New Outdoor Recreation Fields



Year to date 63%

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 Completed**

- ✓ Conducted Informal Construction Projects “Meet & Greet” between JOC Contractors/GCs/CMs working on campus and the small business community
- ✓ Conducted Architectural & Engineering Designer Symposium
- ✓ Project Information & Vendor Outreach session for Football Complex project

- **Actions Planned**

1. Continue –

- Encourage GCs to exceed 10% HUB participation goal
- Work with GC/CMs to identify HUB subcontractors/partners
- Promote mentor-protégé/partnerships/joint venture relationships at 1st tier subcontractor level
- Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
- Monitor Pay Applications/Good Faith Efforts
- Provide project/event information to the public
- Educate business community on the process
- Community outreach efforts

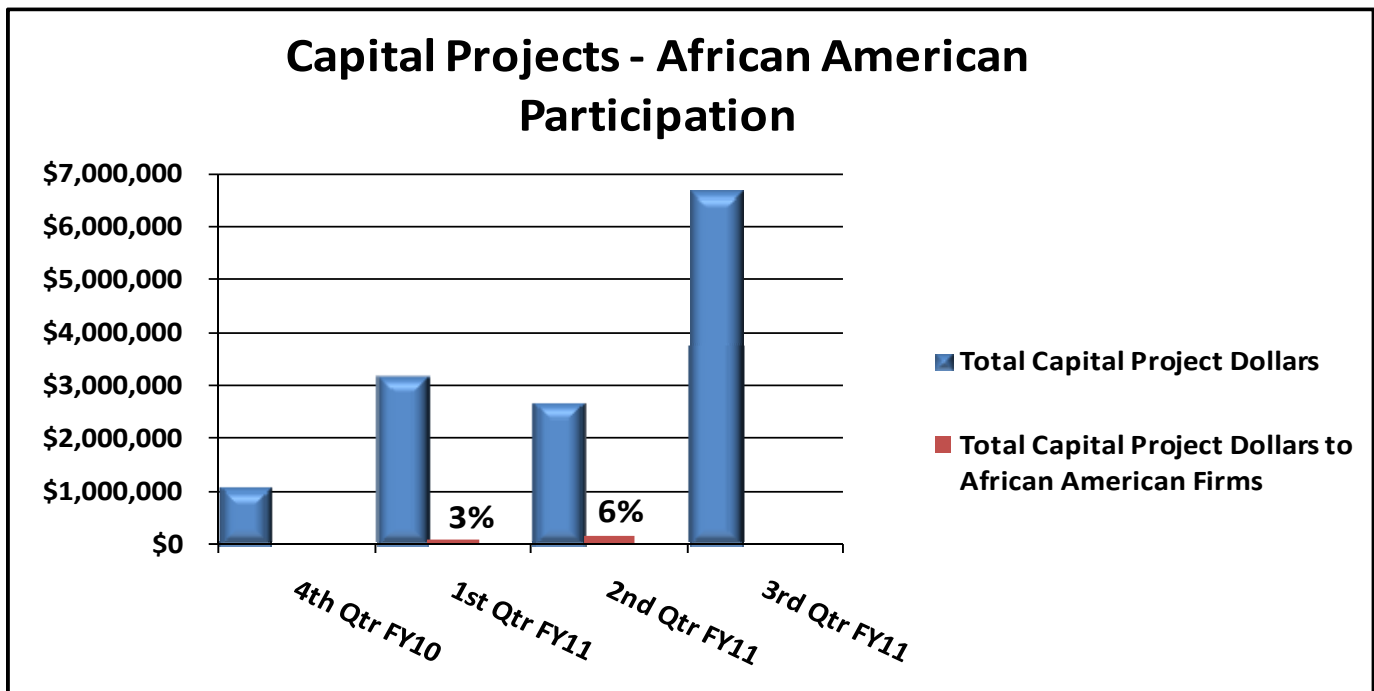
GOAL #6 – Promote Good Stewardship

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

Measure: Percentage of Capital Dollars awarded to African American Firms

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Capital Project Dollars	Total Capital Project Dollars to African American Firms	Percentage of Capital Project Dollars to African American Firms 3% Goal
4th Qtr FY10	\$1,081,641	0	0%
1st Qtr FY11	\$3,190,214	\$80,864	3%
2nd Qtr FY11	\$2,677,018	\$165,262	6%
3rd Qtr FY11	\$6,653,139	\$6,125	0%



Year to date 2%

STATUS

GOAL #6 – Promote Good Stewardship

Lead
Capital

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

ACTION PLAN

- **Actions Completed**

- ✓ Conducted Project Information/HUB Participation Q&A session on the Football Complex project to the Metrolina Minority Contractors Association (MMCA)
- ✓ Conducted Informal Construction Projects “Meet & Greet” between JOC Contractors/GCs/CMs working on campus and minority contractors

- **Actions Planned**

- Conduct Bonding workshop with Swimmer Insurance Agency

Continue –

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

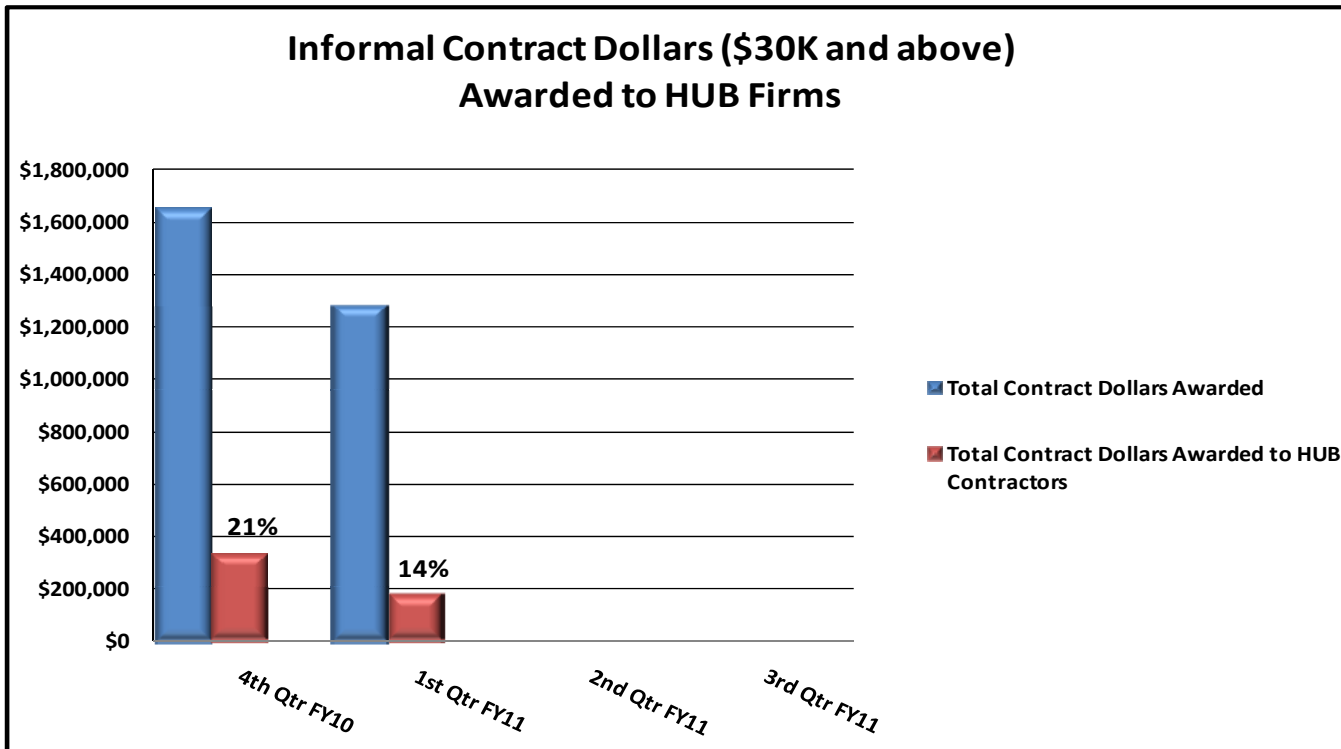
GOAL #6 – Promote Good Stewardship

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

Measure: Percentage of Informal Contract Dollars awarded to HUB Contractors

Balanced Scorecard Category: Internal Business Process

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



STATUS

GOAL #6 – Promote Good Stewardship

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

Lead
Capital

ACTION PLAN

- **Actions Complete**

- ✓ Conducted Informal Construction Projects “Meet & Greet” between JOC Contractors/GCs/CMs working on campus and minority contractors

- **Actions Planned**

Continue –

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

GOAL # 6 – Promote Good Stewardship

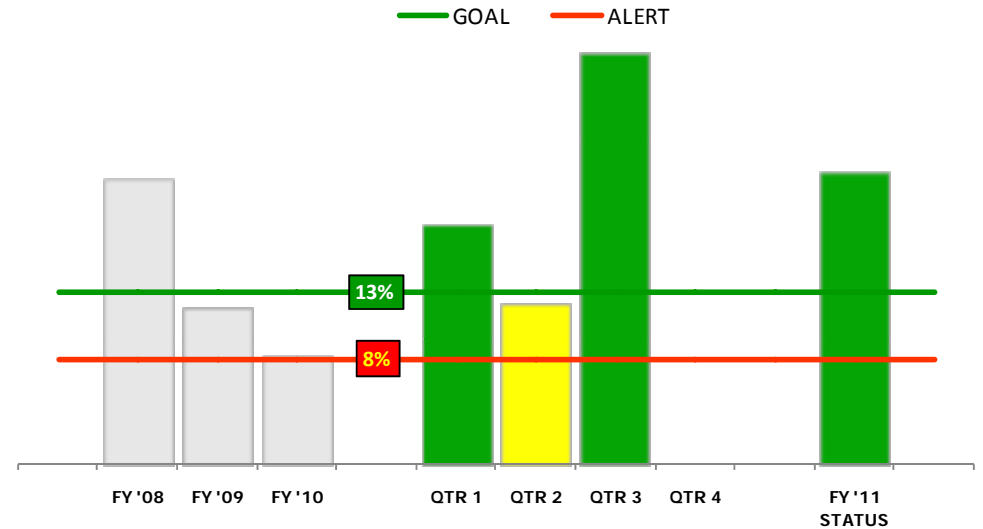
Strategy 6.5 Improve Historically Underutilized Business Participation
Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Internal Business Process

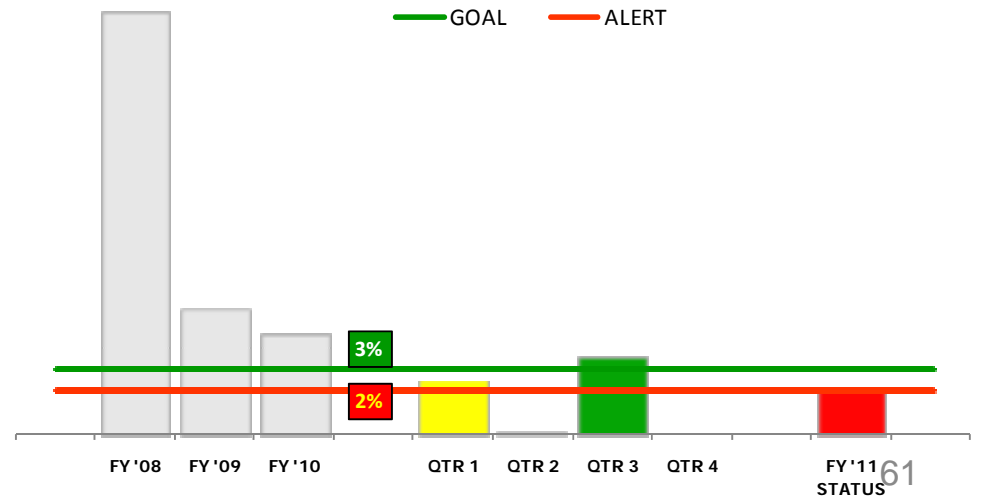
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '08	\$ 2,861,776	\$ 608,415	21.3%
FY '09	\$ 1,404,456	\$ 163,049	11.6%
FY '10	\$ 2,626,647	\$ 214,381	8.2%
QTR 1	\$ 684,520	\$ 122,224	17.9%
QTR 2	\$ 1,400,523	\$ 167,415	12.0%
QTR 3	\$ 1,839,059	\$ 567,486	30.9%
QTR 4	\$ -	\$ -	0.0%
FY '11 STATUS	\$ 3,924,102	\$ 857,124	21.8%



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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
FY '10	\$ 2,626,647	\$ 113,196	4.3%
QTR 1	\$ 684,520	\$ 15,750	2.3%
QTR 2	\$ 1,400,523	\$ 625	0.0%
QTR 3	\$ 1,839,059	\$ 61,002	3.3%
QTR 4	\$ -	\$ -	0.0%
FY '11 STATUS	\$ 3,924,102	\$ 77,377	2.0%



GOAL # 6 – Promote Good Stewardship

Lead
Design
Services

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

ACTION PLAN

6.5.3 - Actions Completed:

N/A

6.5.4 - Actions Planned:

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

Balance Score Card

DISCUSSION

FINANCIAL PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter		
	Manage Budget	6.1.1	Balanced Budget @ End of Year	100%		Annual FY 10				
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%		Annual FY 11				
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5%"		Awaiting APPA 2010 Survey Results				
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results				
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results				
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"		Awaiting APPA 2010 Survey Results				
Financial <i>To financially sustain our mission, what must we focus on?</i>		6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	\$302,964					
	Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	33%					
		6.2.2	C&D Recycling Capital Projects	50%	85%					
		6.2.3	Increase % Solid Waste Recycled (Baseline 2007)	5% (25.27%)	33%					
		6.2.4	Implement 50% of each 2008 Sustainability goals	50%	41%					
	Conserve Natural Resources	6.3.1	Energy Usage by 2015	-30%						
	Improve HUB Participation	6.5.1	12% HUB participation on 80% of Capital Projects	80%	63%					
		6.5.2	3% African American Participation on Capital Projects	3%	2%					
		6.5.3	13% HUB participation on Informal Proj \$30K and above	13%	no data					
		6.5.4	13% HUB for Informal Proj below \$30,000 inc. 3% AA	13%/3%	21.8%/2%					
		6.5.5	Combined with 6.5.4							



UNC CHARLOTTE

Balance Score Card

INTERNAL PROCESSES

Perspective

Strategic Objectives:

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

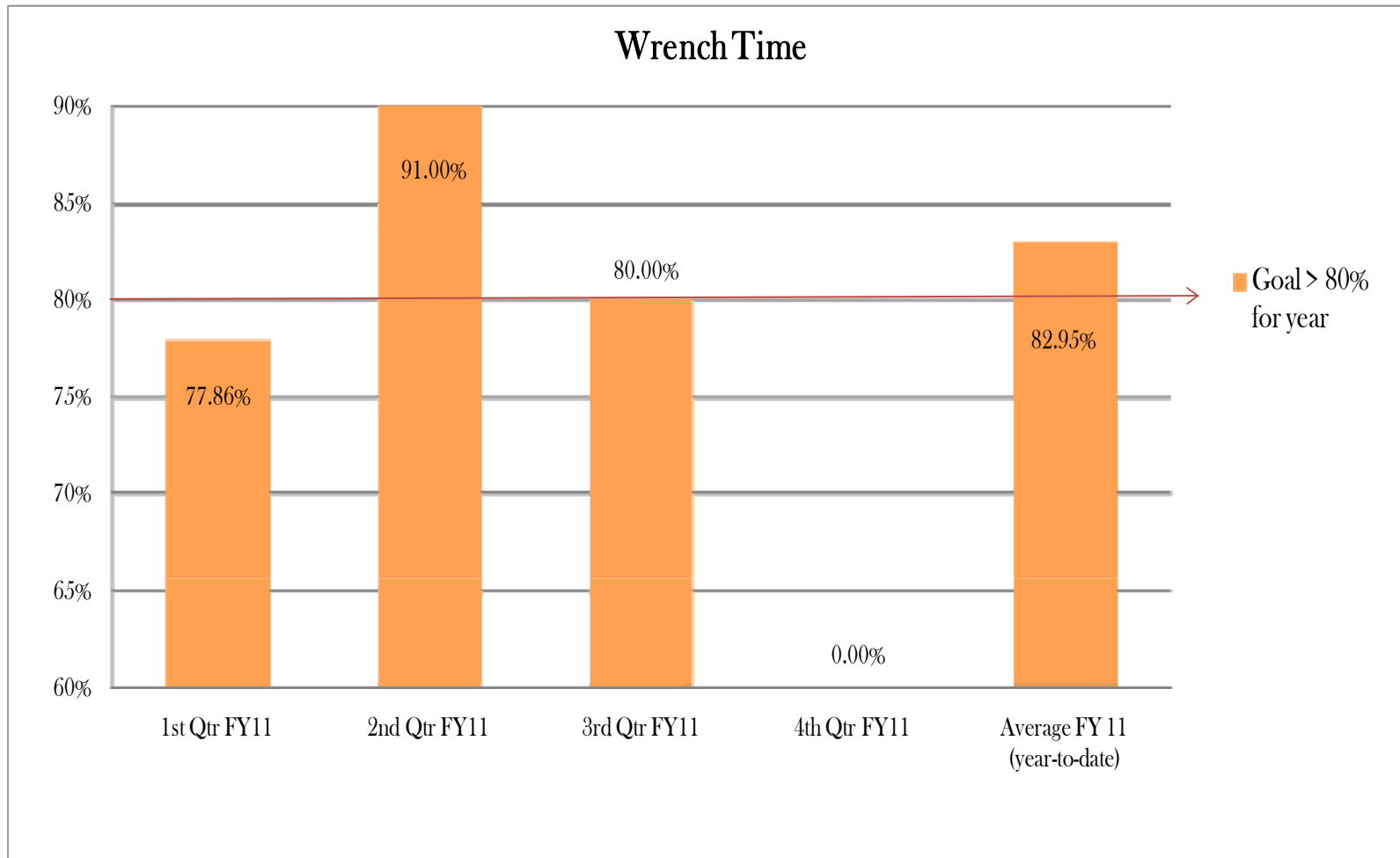
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 80% for the year

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

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

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

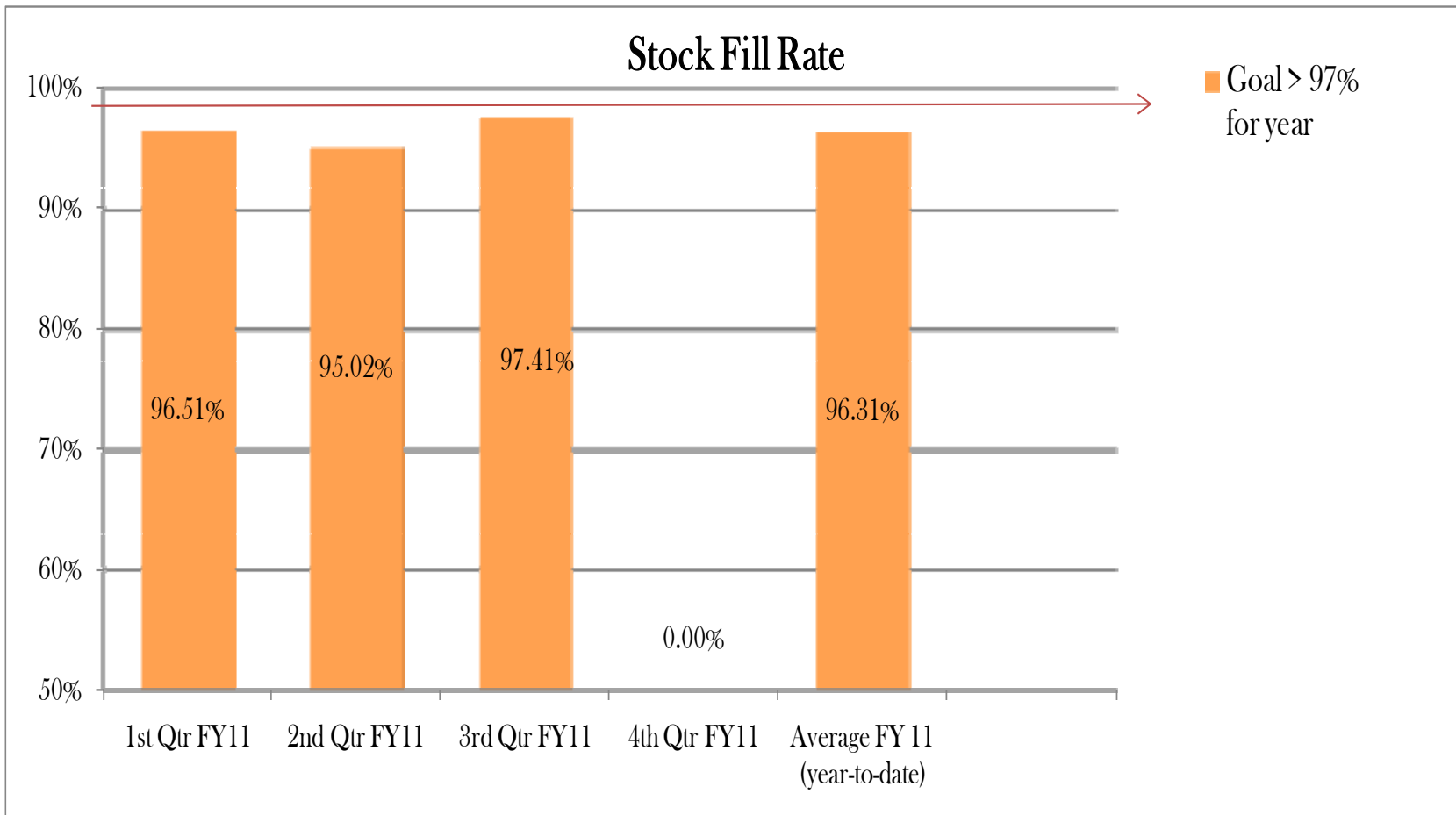
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process



Goal > 97%
for year

STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

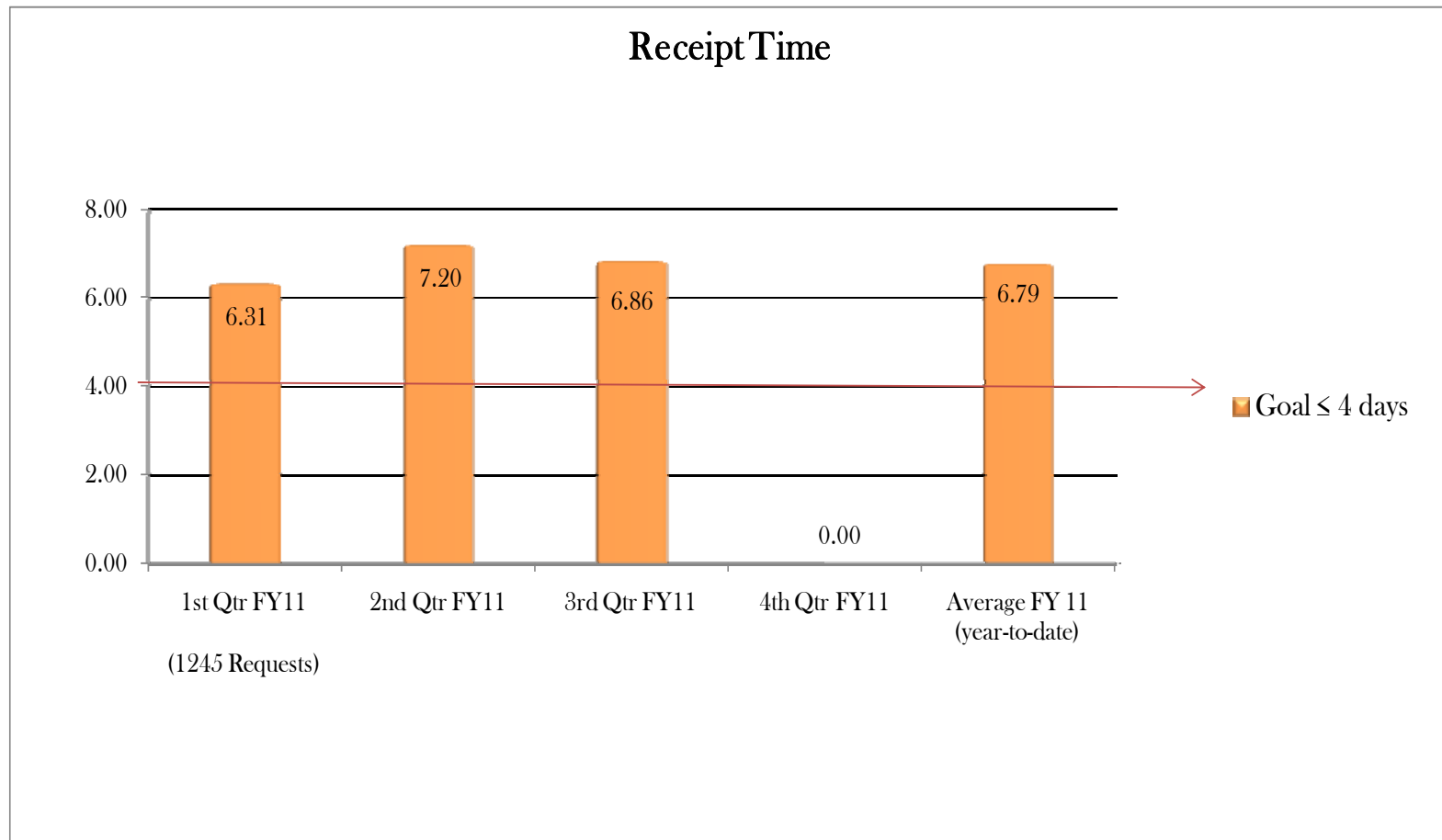
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Less than 4 days

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Complete
 - 1 – Supervisors average approval time decreased from 10.6 hrs. in 2nd Qtr of this year to 8.65 hrs. in 3rd Qtr.
 - 2 – Monthly non-stock orders averaged 366 for all of FY10. First 3 Qtrs FY11 averaged 290 a month; a 20% decrease over FY10's average.
- Actions Planned
 - 1 – Non-stock items that have been ordered on a recurring basis are being added to stock inventory as ORO (Ordered On Request Only).

Facilities Management Strategic Planning Session - Third Quarter FY 2011

Lead
F. O.

GOAL #1 – Improve maintenance and operations of the Campus

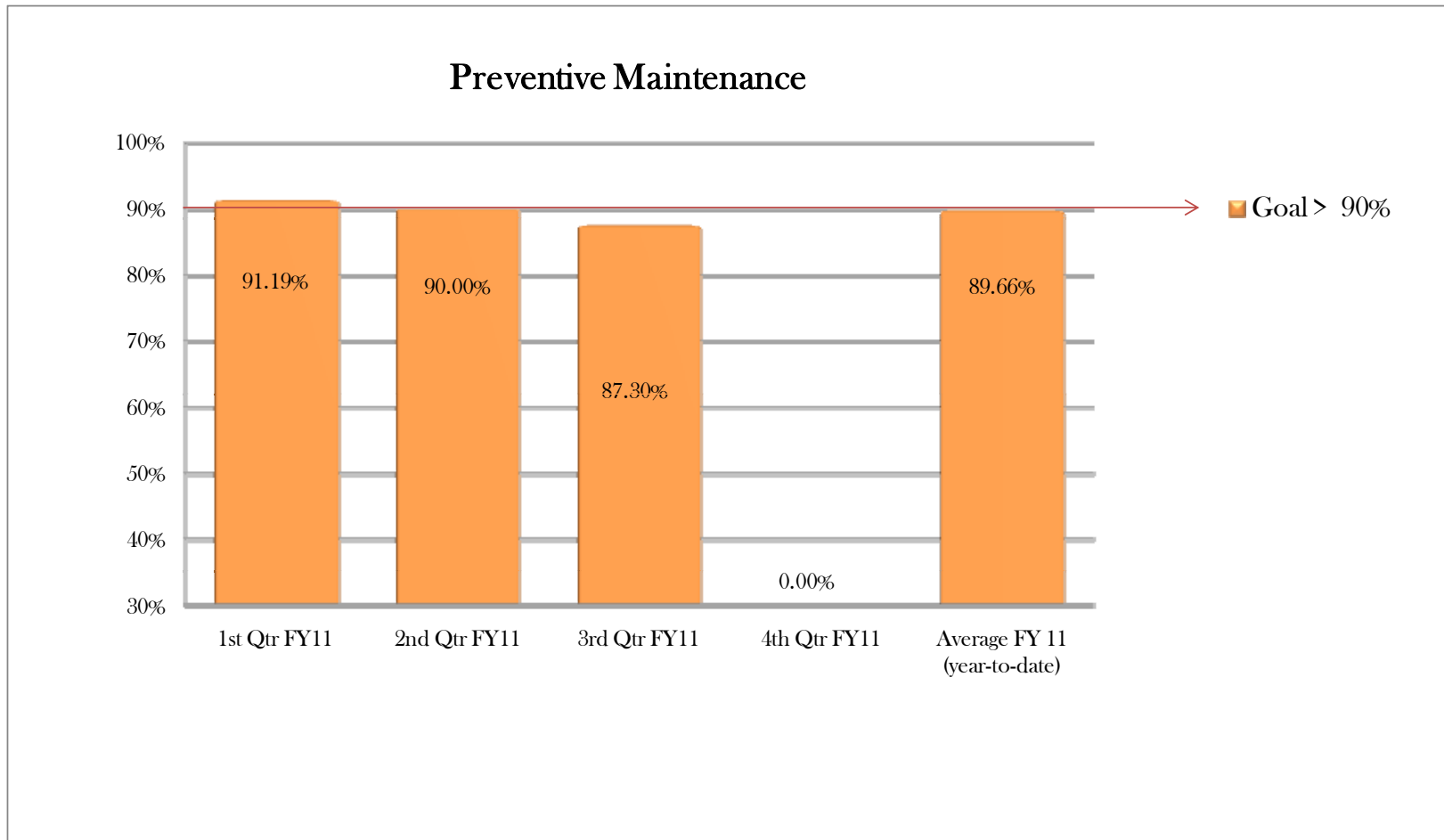
Strategy: 1.5 Improve Reliability

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

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

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Strategy: 1.5 Improve Reliability

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

Lead
F. O.

ACTION PLAN

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

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
F. O.

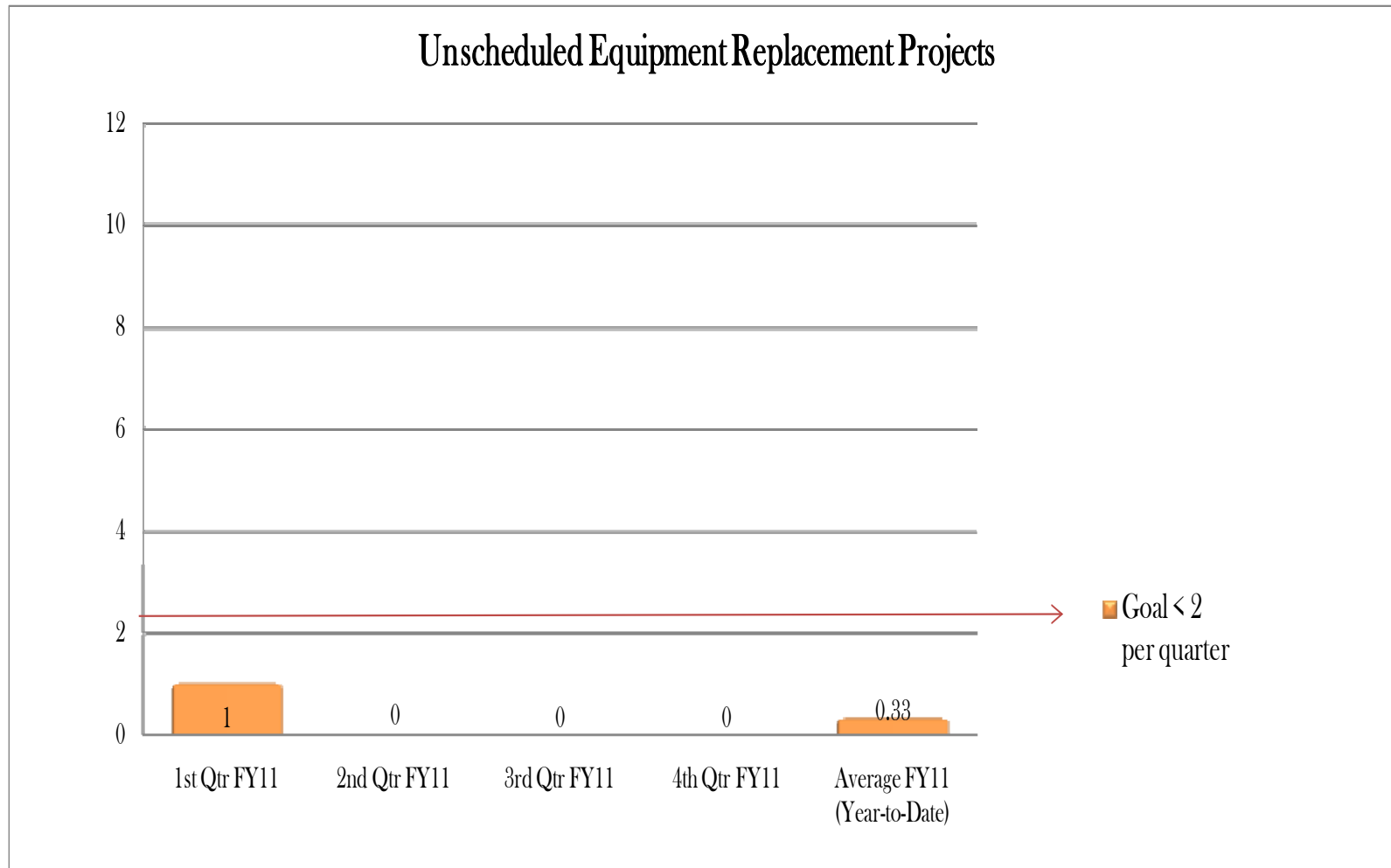
GOAL #1 – Improve maintenance and operations of the Campus

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

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process



STATUS

GOAL #1 – Improve Facilities Operations

Strategy: 1.5 Improve Reliability

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

Lead
F. O.

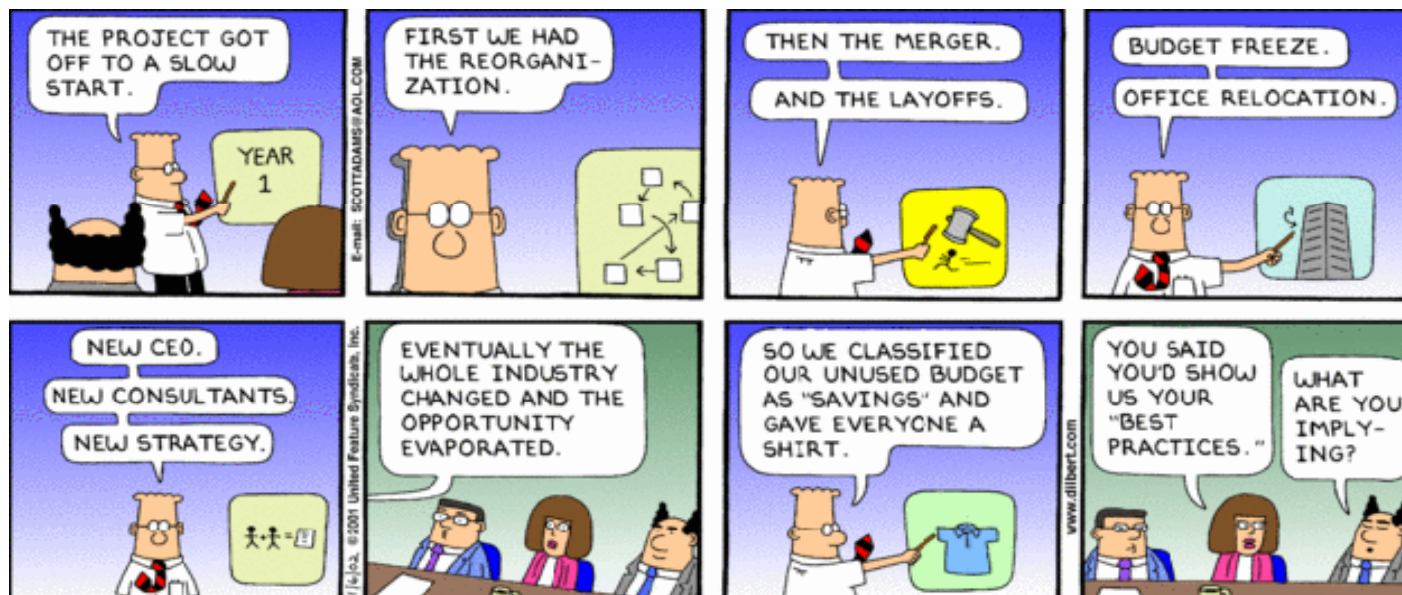
ACTION PLAN

- Actions Complete
 - 1 – Continued adding equipment to PM program.

- Actions Planned
 - 1 – Continue expansion of PM Program.
 - 2 – Continue expansion of predictive maintenance program.

FM 5YP Prioritized Projects – FY11

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



Facilities Management Strategic Planning Session – Third Quarter FY 2011

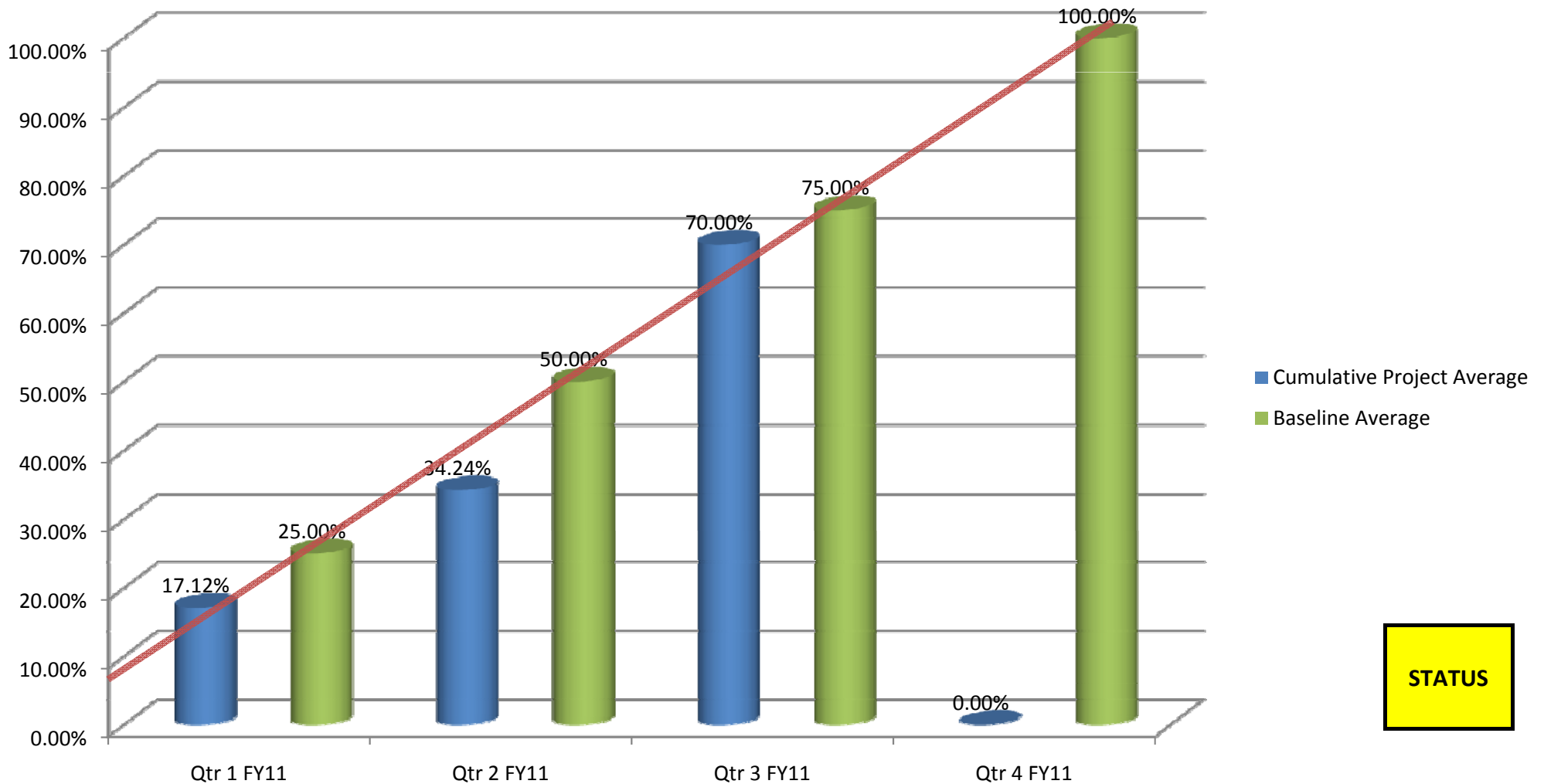
Lead
FIS

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

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

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

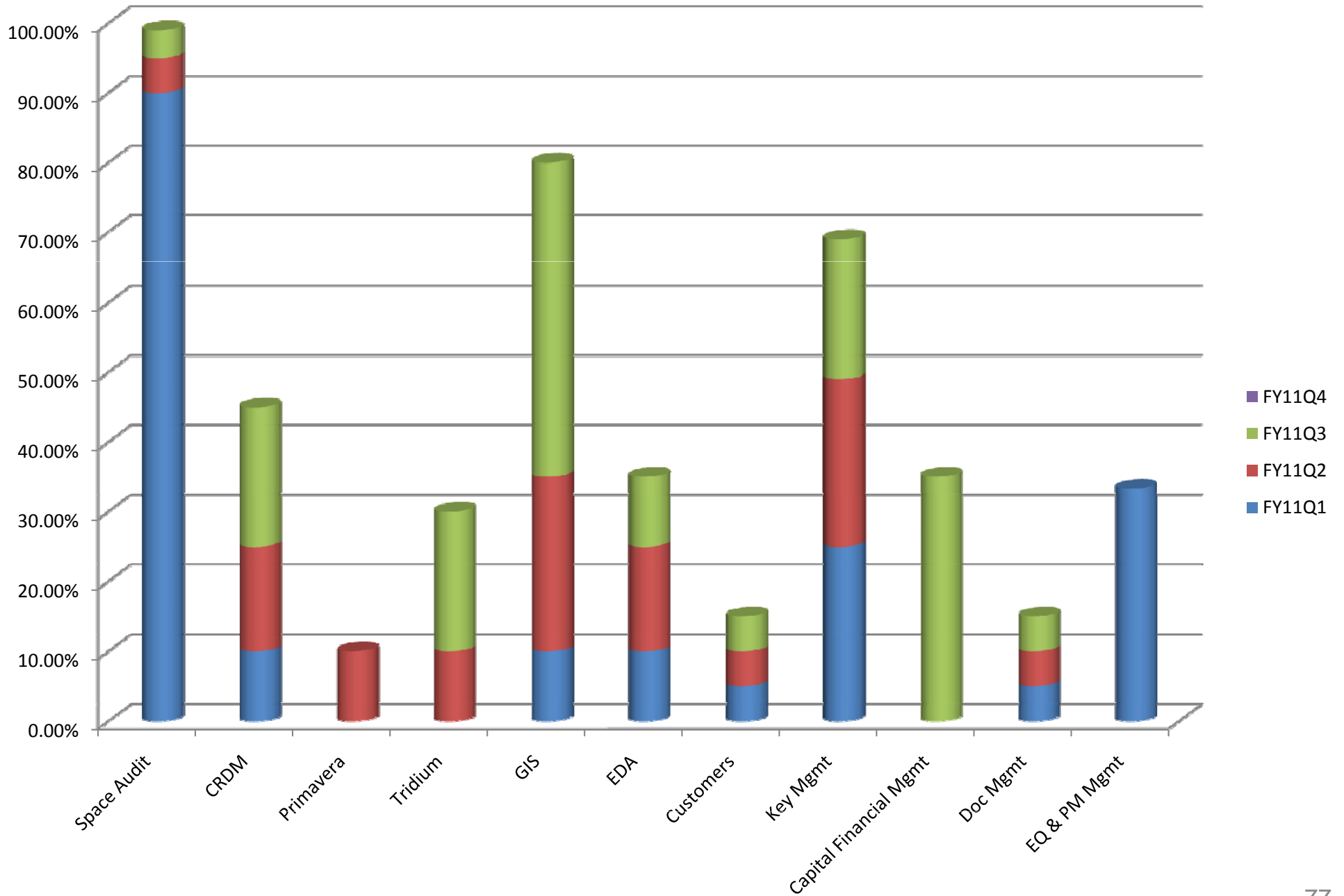
Balanced Scorecard Category: Internal Processes



Facilities Management Strategic Planning Session – Third Quarter FY 2011

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

Lead
FIS



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

Lead
FIS

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

ACTION PLAN

Actions Completed:

1. Completed Space Audit open training sessions and finalized reports.
2. Completed Requirements gathering and have begun development of the Capital Renewal/Deferred Maintenance (CRDM) Process.
3. BAS/Tridium – BAS Inventory is completed and is now in ARCHIBUS EQ inventory.
4. Key Management - Now live with Phase One. Phase two meetings have begun.
5. Completed requirements collection for Customer Workgroups for ARCHIBUS Project Management.
6. Enterprise Data Assistant (EDA) –
 1. Completed Barcodes for all space related to pilot.
 2. Completed correction of network and EDA OS errors.
 3. Recycling Pilot will begin at beginning of May
7. GIS and Drawings – Completed upgrade to 10.1.
8. Collected Requirements for ARCHIBUS Capital Financial Management.

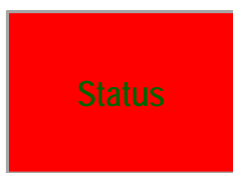
Actions Planned:

1. Enterprise Data Assistant (EDA) –Begin pilot for Recycling and FO pilot shops.
2. CRDM - Perform User Testing and Go Live with Phase one pilot.
3. BAS/Tridium – Build Operational Dashboards and convert BAS SITREP to system generated.
4. Receive signoff on ARCHIBUS Capital Financial Management Requirements to begin development.

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

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

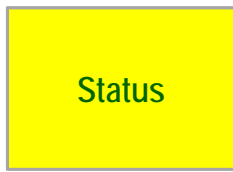
Strategy 2.3: Improve capital renewal/ deferred maintenance planning; prioritization, estimation, and funding process



Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

Measure: % of projects documented and input into the CRDM system by July, 2011.

Lead: **Architectural Planning Dept**



Objective 3.2.1
100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by Fall, 2011

Measure: % of projects with completed (pre-programs, OC25s, and Approvals).

Lead: **Architectural Planning Dept**

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

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

Strategy 3.5: Improve Infrastructure improvement planning

Status

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

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)

Lead: **Architectural Planning Dept**

Status

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

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

Measure: % of sections updated and posted.

Lead: **“Architectural Planning Dept”**

Status

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1 100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.

Lead: **“Architectural Planning Dept”**

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

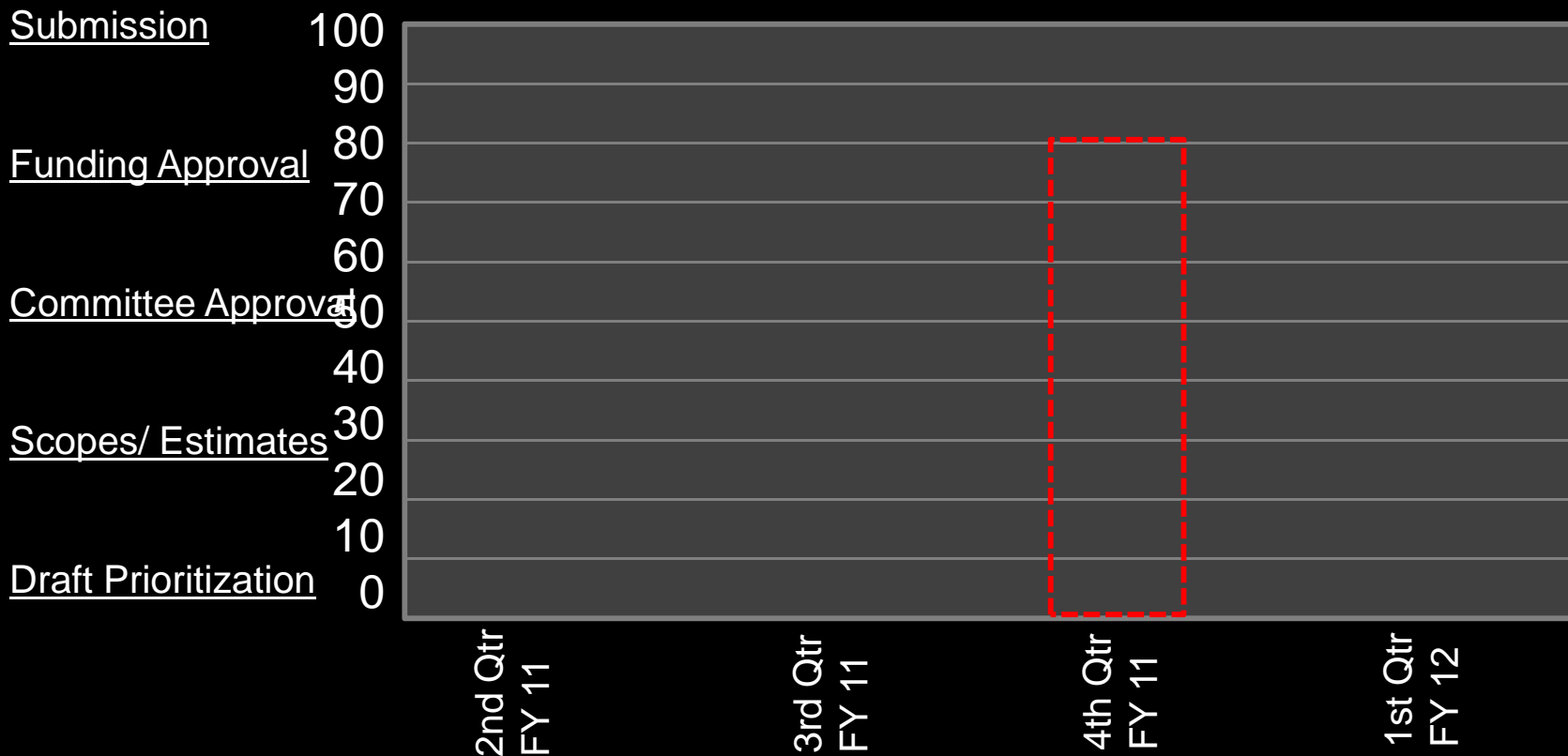
Strategy 2.3: Improve capital renewal/ deferred maintenance planning; prioritization, estimation, and funding process

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.

Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

Percentage of Completion – 0%



Status

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

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

Objective 2.3.1. 80% of existing projects documented and input into the CRDM system by July 2011.
Measure: % of projects documented and input into the CRDM system.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- Actions Complete
 - Consolidated R & R List
 - List under review by M & O
 - Worked with FIS to develop CRDM in Archibus

- Actions Planned:
 - Implementation of CRDM
 - Receive review by M & O
 - Data entry of existing list
 - Prioritization
 - Prep for committee meetings/ funding meetings/ submission

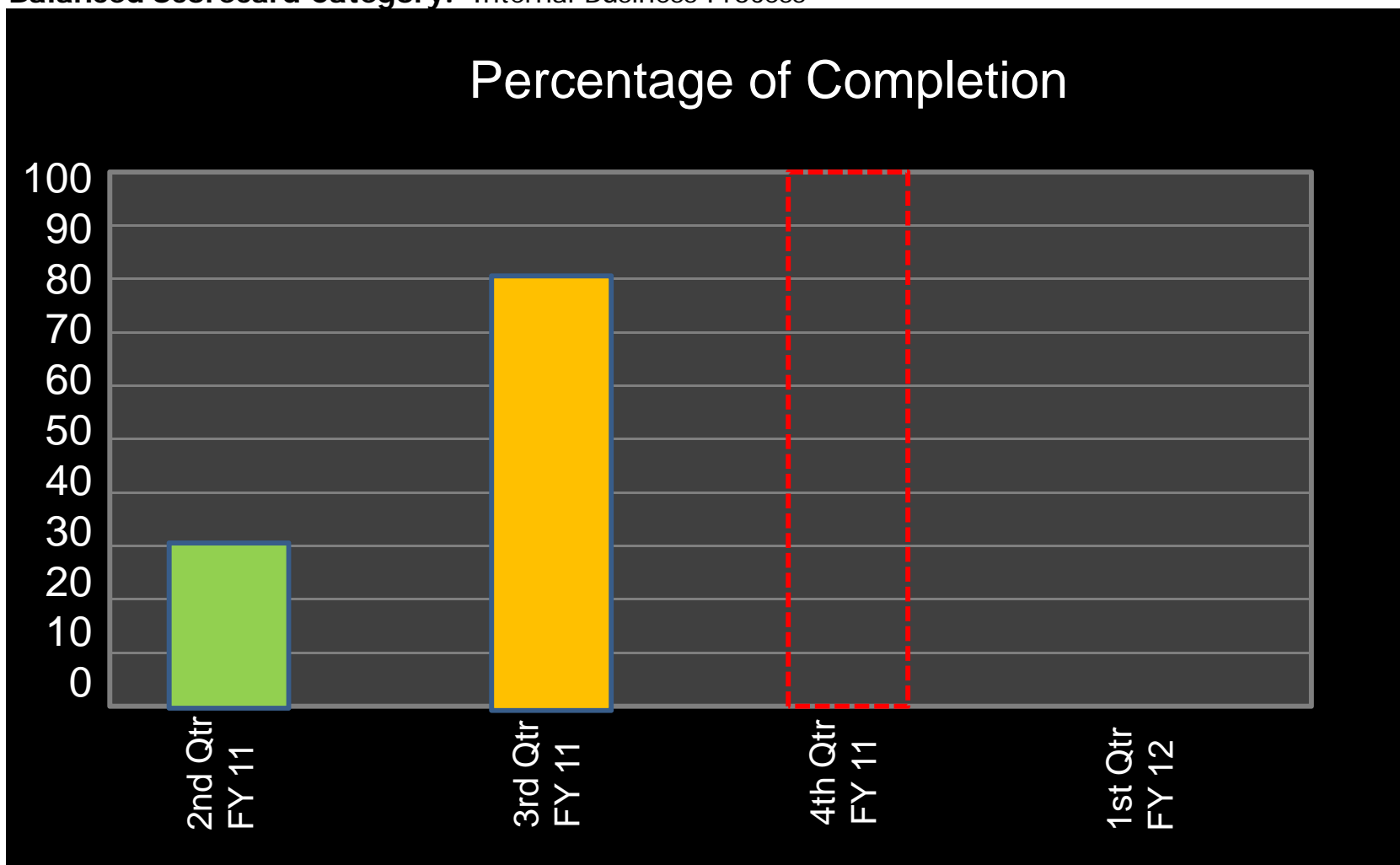
GOAL #3 – Deliver New Facilities that Support the University’s Mission

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements plan are approved and ready for submission to GA by Fall, 2011

Measure: % of projects with completed (pre-programs, OC25s, and Approvals).

Balanced Scorecard Category: Internal Business Process



Status

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

Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

ACTION PLAN

Appropriated Projects

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

* Pending AA review , changes, and approval

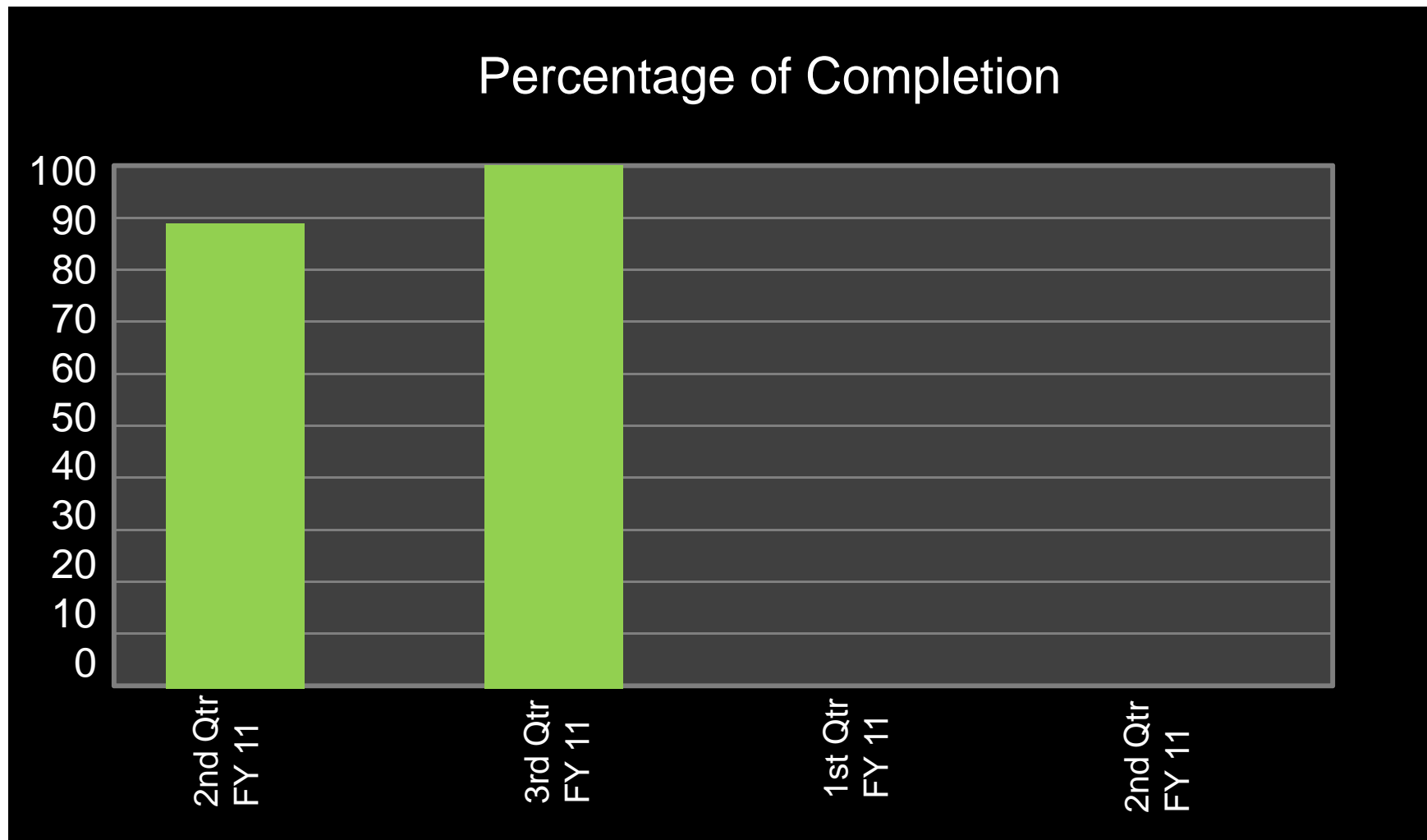
- Actions Complete
 - Appropriated List submitted
- Actions Planned: Validating Programs
 - Science Building: Pending meeting with AA
 - Burson: Pending meeting with AA
 - Student Academic Success and Retention Center: Pending meeting with AA
 - Atkins Library: Pending meeting with new University Librarian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

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

Strategy 3.5: Improve Infrastructure improvement planning

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

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)



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

Strategy 3.5: Improve Infrastructure improvement planning

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

Measure: % infrastructure projects associated with Capital Projects on the 6 year plan (appropriated and non-appropriated)

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Complete:**
 - Receive list of projects and estimates from ASG
 - Establish Capital Project Areas of Responsibility
 - Integrate List of Infrastructure into Capital Projects
 - Add estimates of probable costs for infrastructure to the estimates
 - Submitted revised estimates to GA

- **Actions Planned:**
 - Updates as required

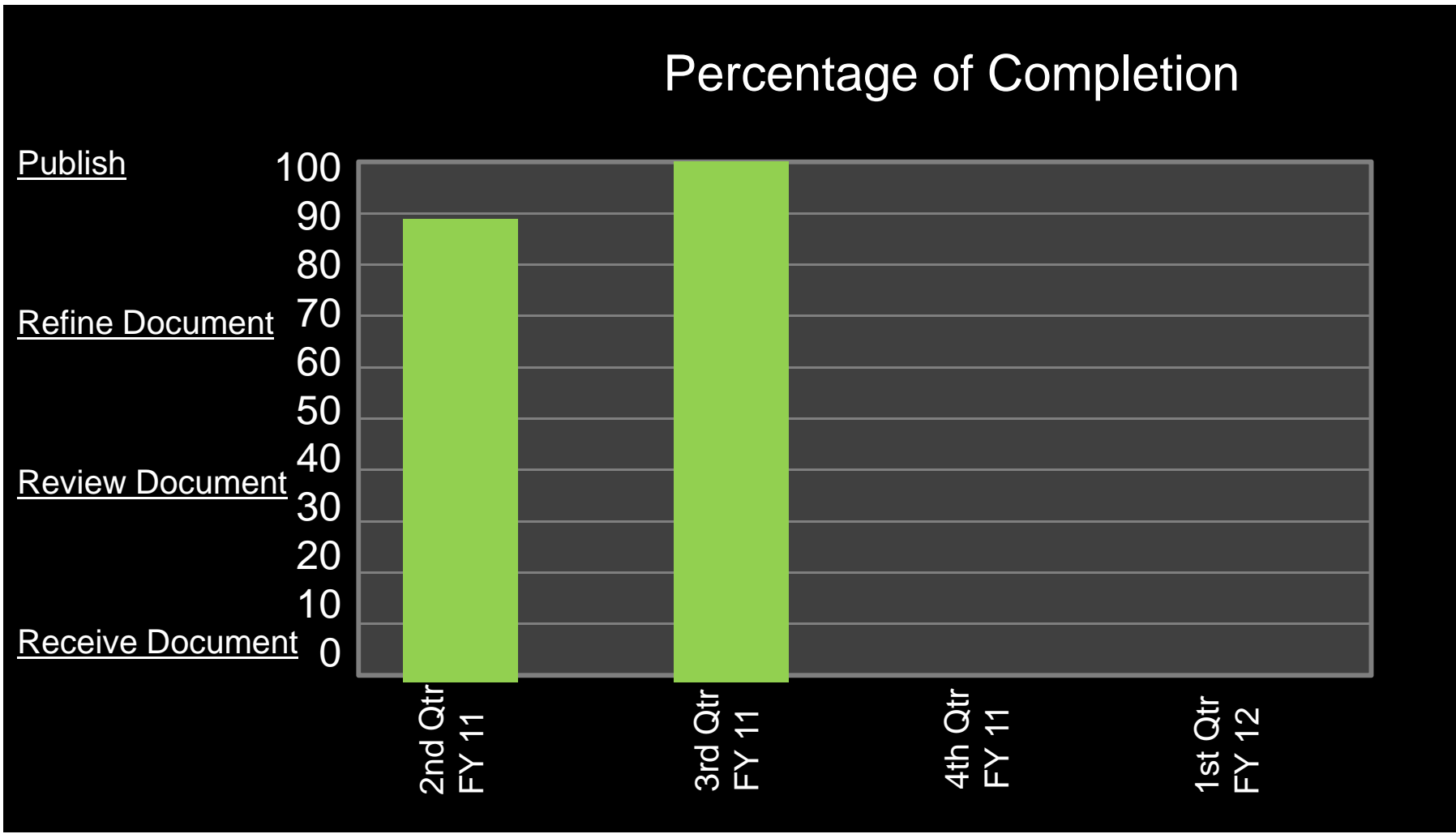
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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

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

Measure: % of sections updated and posted.

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

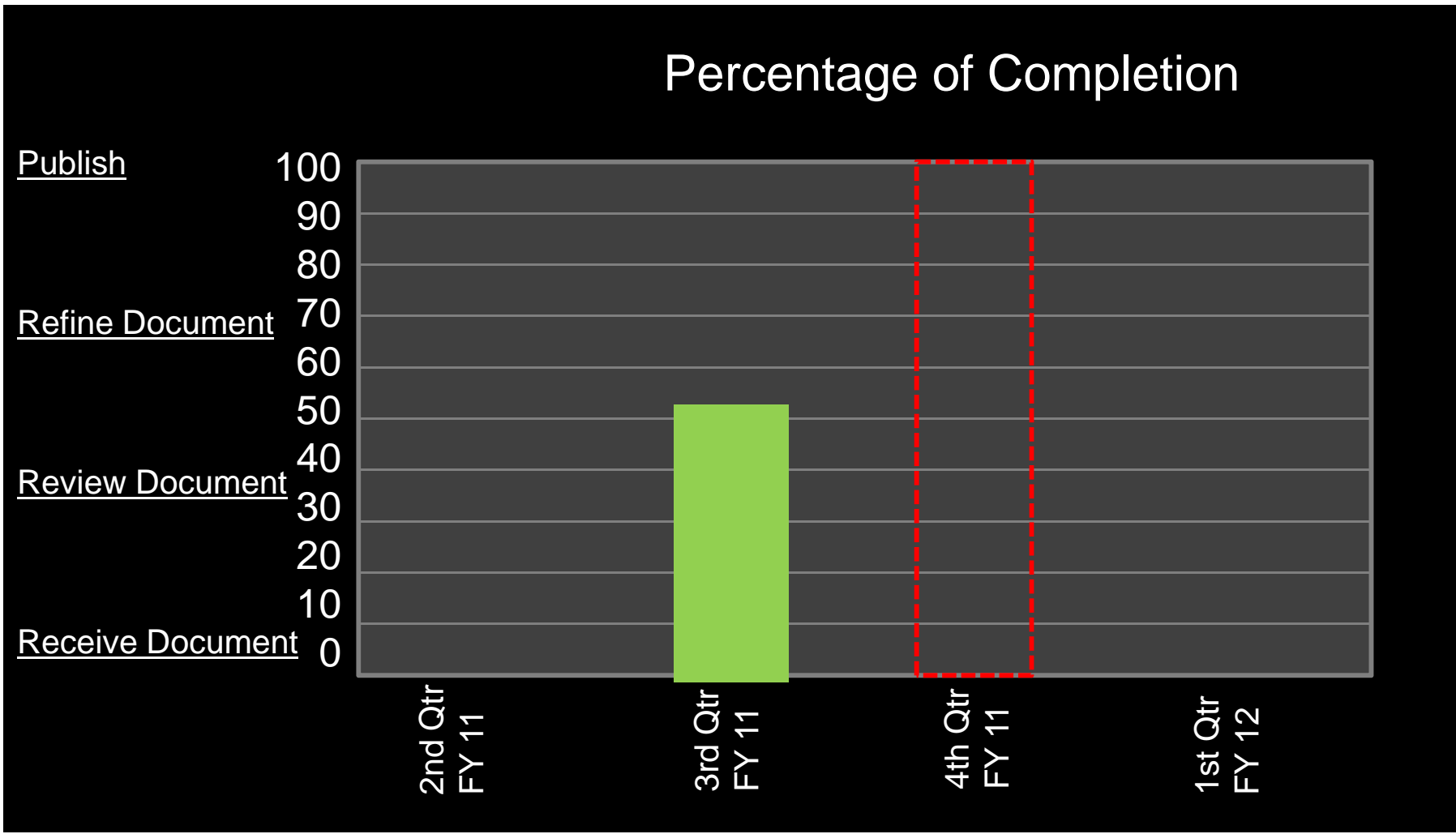
- **Actions Complete:**
ASG has provided their “final” product
Architectural Planning Team has gone through entire document for corrections
Design manual has been posted
- **Actions Planned:**
Receive input from the Departments
Conduct quarterly updates

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

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1 100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.



Status

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

Strategy 3.7: Improve space utilization throughout the university.

Objective 3.7.1.1 100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process

ACTION PLAN

- **Actions Complete:**
 - Began work on BA Audit
 - Facilitated AA Audit

- **Actions Planned:**
 - AA complete NLT end of June, 2011
 - BA completed NLT end of July, 2011
 - Remainder completed NLT Oct, 2011
 - Spot inspections/ checks completed NLT Dec 2011

Facilities Management Strategic Planning Session – Third Quarter FY 2011

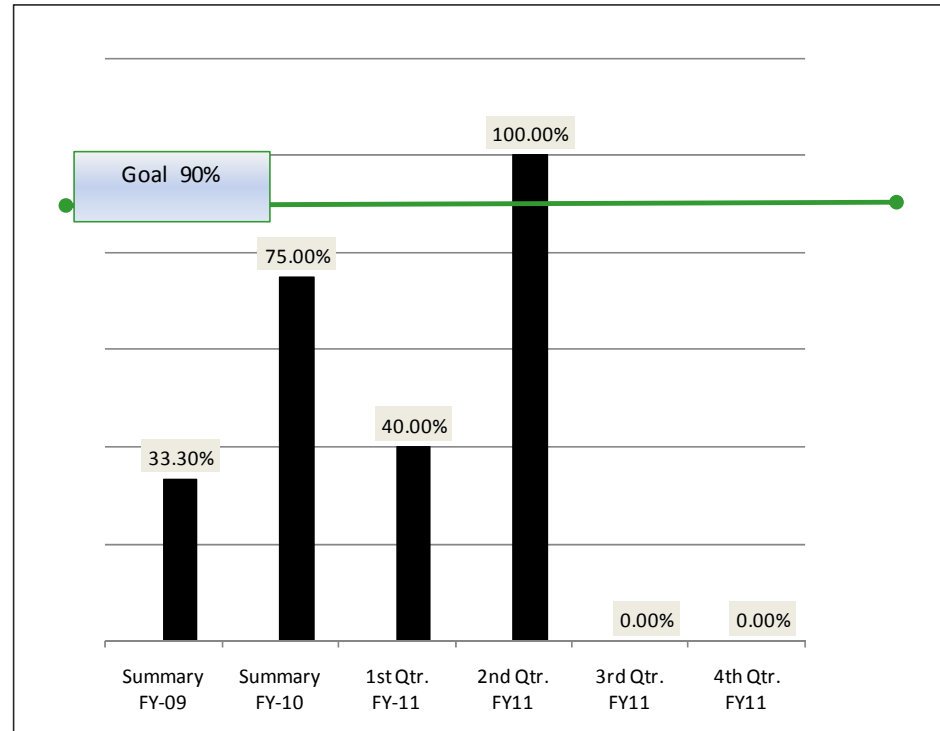
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

Measure: Percentage of designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-09	9	3	4	33.30%
Summary FY-10	10	9	3	75.0%
1st Qtr. FY-11	5	0	2	40.0%
2nd Qtr. FY-11	4	1	0	100.0%
3rd Qtr. FY-11	2	0	3	0.0%
4th Qtr. FY-11				



Actual for 3rd Quarter is 0%
 Year to date is 25%

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. Contracted for advance planning on Phase XI
 - 2. Selected designers for Parking Deck J and Student Housing Demolition
 - 3. Initiated advance planning for RDH
 - 4. Contracted for design services for Phase X
- Actions Planned
 1. Contract for design services for Phase XI (fee has already been negotiated)
 2. Contract for design services for Parking Deck J
 3. Contract for design services for RDH
 4. Contract for design services for Phase III Student Housing Demolition

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead Capital

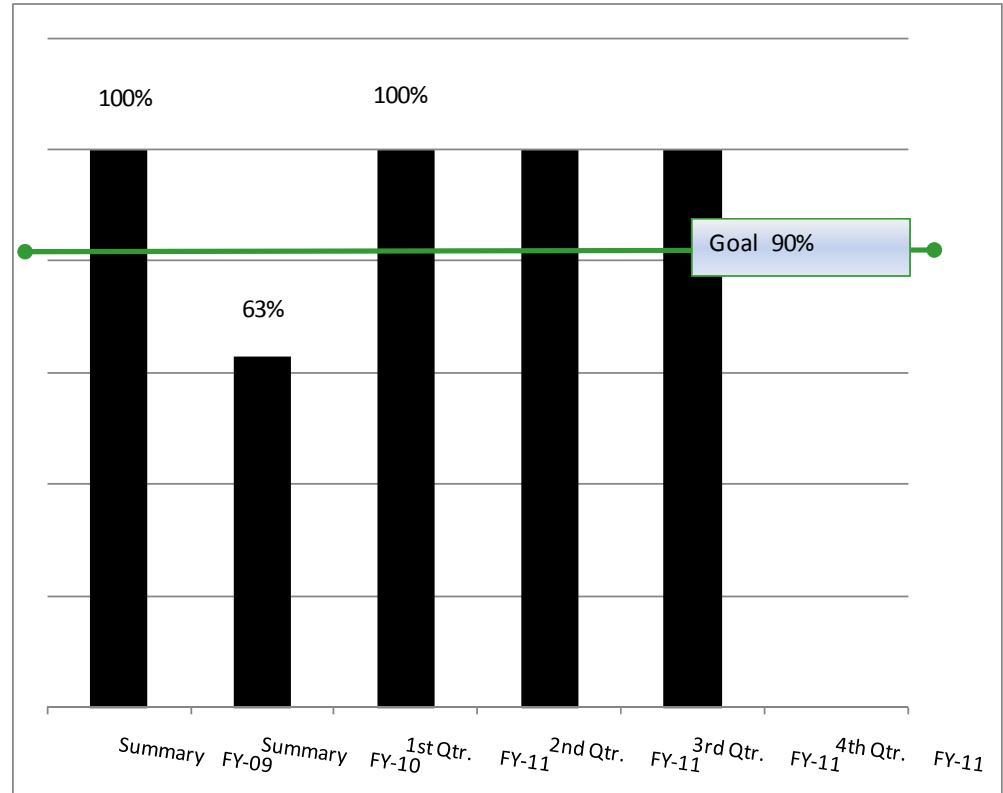
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

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

Balanced Scorecard Category: Internal Business Process

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



Actual for 3rd Quarter is 100%
 Year to date is 100%

Status

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. Completed advance planning for Residence Hall X
 - 2. Started advance planning for Residence Hall XI & RDH
 - 3. Completed design for fire protection at Moore & Sanford Halls
 - 4. Completed Football Stadium & approved by SCO
- Actions Planned
 1. Complete design for Heck Dam Repairs/Replacement
 2. Complete design for Demolition of Phase III Student Housing
 3. Complete CDs for Residence Hall X
 4. Start designs for Residence Hall XI, RDH, Parking Deck J

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
Capital

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

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

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

Balanced Scorecard Category: Financial Perspective

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 &	Percent Difference Between Initial & Final	Completed Within Design Budget
Football/Sports	\$3,950,000	\$2,739,800	\$3,224,472	-30.6%	17.7%	0
Motorsports II	\$399,000	\$303,000	\$303,700	-24.1%	0.2%	0
Parking Deck I	\$1,701,000	\$1,044,000	\$802,869	-38.6%	-23.1%	1
Parking Deck J	\$2,211,057	\$0	\$0	0.0%	0.0%	0
RDH Renovation	\$1,742,048	\$0	\$0	0.0%	0.0%	0
Res. Hall Ph. X	\$2,809,632	\$2,167,790	\$0	-22.8%	0.0%	0
Res. Hall Ph. XI	\$3,695,657	\$2,078,598	\$0	-43.8%	0.0%	0
Res. Hall Moore & Sanford	\$503,000	\$435,000	\$435,000	-13.5%	0.0%	1
Tennis Courts	\$292,972	\$275,000	\$275,000	-6.1%	0.0%	1
Heck Dam	\$190,000	\$185,650	\$0	-2.3%	0.0%	0
Demo Phase III	\$45,455	\$0	\$0	0.0%	0.0%	0

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

Actual is 100%

Status

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. Completed design for fire protection at Moore & Sanford Halls
 - 2. Completed Football Stadium & approved by SCO Actions Planned
- Actions Planned
 - 1. Complete design for Heck Dam Repairs/Replacement
 - 2. Complete design for Demolition of Phase III Student Housing

Facilities Management Strategic Planning Session – Third Quarter FY 2011

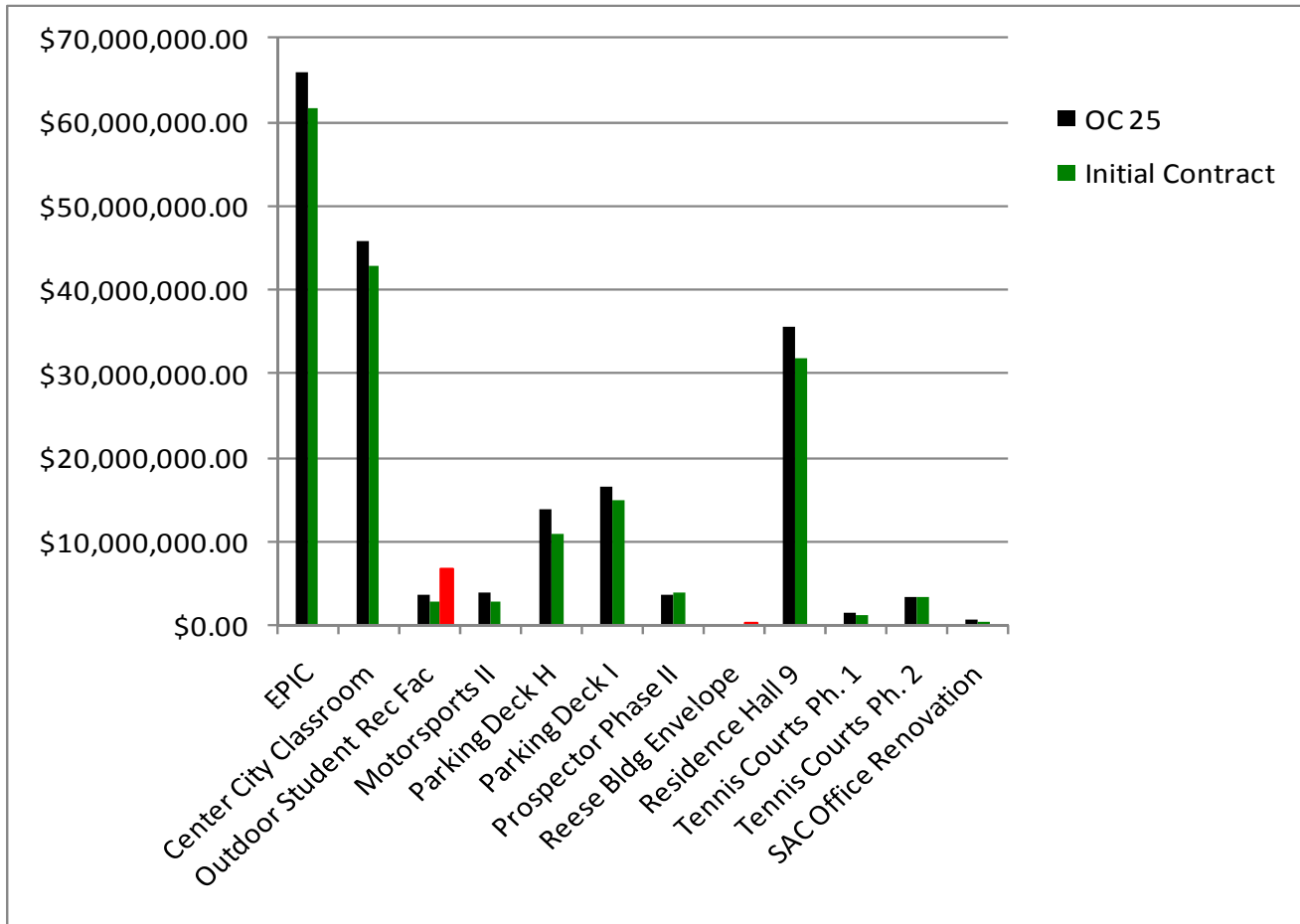
Lead
Capital

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

Strategy Objective 3.4 Improve Administration of the Capital Construction Process
 3.4.2 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



Two projects completed - **Outdoor Recreational Fields & Reese Exterior**. Both were over initial budget amounts.

Status

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

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

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

Lead
Capital

ACTION PLAN

- Actions Completed
 - 1. In the process of closing out Tennis Phase 1

- Actions Planned



Balance Score Card

DISCUSSION

INTERNAL PROCESSES PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter
	Labor Availability	1.1.1	Increase Wrench Time	>80%	82.95%			
	Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	96.81%			
	Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	6.79			
<u>Internal Processes</u> <i>To satisfy and delight our customers, which operational processes must we excel in?</i>	Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	89.7%			
		1.5.2	Reduce Unscheduled equipment repl projects by 15%	<2	0.33			
	Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	75%			
	Master/Project Planning Process	2.3.1	80% of existing projects documented and input into the CRDM by July 2011. (updated Third Qtr FY11)	80%	0%			
		3.2.1	100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by Fall 2011	100%	80%			
		3.2.2	Projects on the Non-appropriated Six Year Plan have completed pre-programs	80%	removed			
		3.5.1	80% of infrastructure projects integrated into Capital Construction Project Scopes	80%	100%			
		3.6.1	80% of revisions integrated into the Design and Construction Manual.	80%	100%			
		3.7.1	100% of space audits by Division ; Documented and updated into Archibus NLT December 2012.	100%	51%			
		Capital Project Administration	3.3.1	Designers under contract w/in 120 days of posting in CAPSTAT	90% w/in 120	25%		
		3.3.2	90% of designs complete by scheduled comp. date	90%	100%			
		3.3.3	90% of designs w/in design budgeted fee	90%	100%			
		3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%	0%			



UNC CHARLOTTE

Balance Score Card

Learning & Growth

Perspective

Strategic Objectives:

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

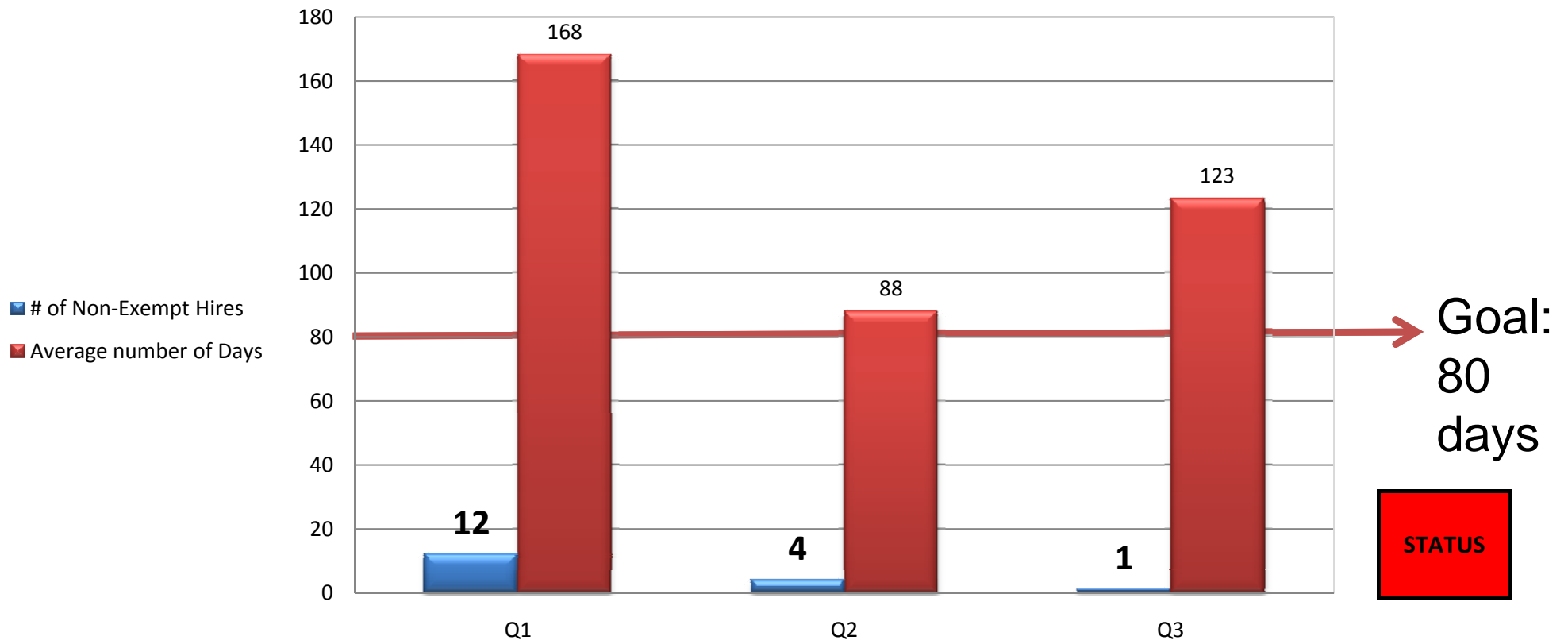
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

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

Average Number of Days to Fill Nonexempt (Hourly) Vacancies



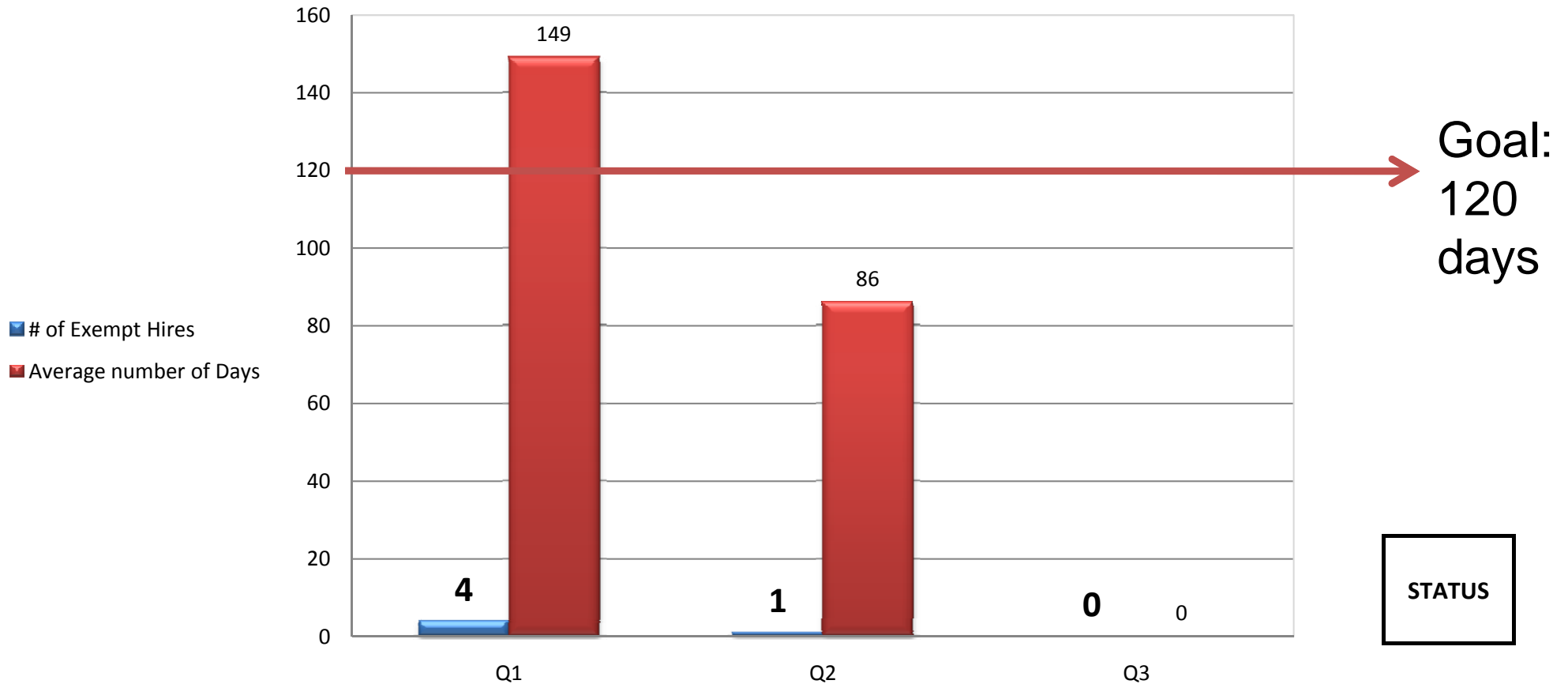
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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



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

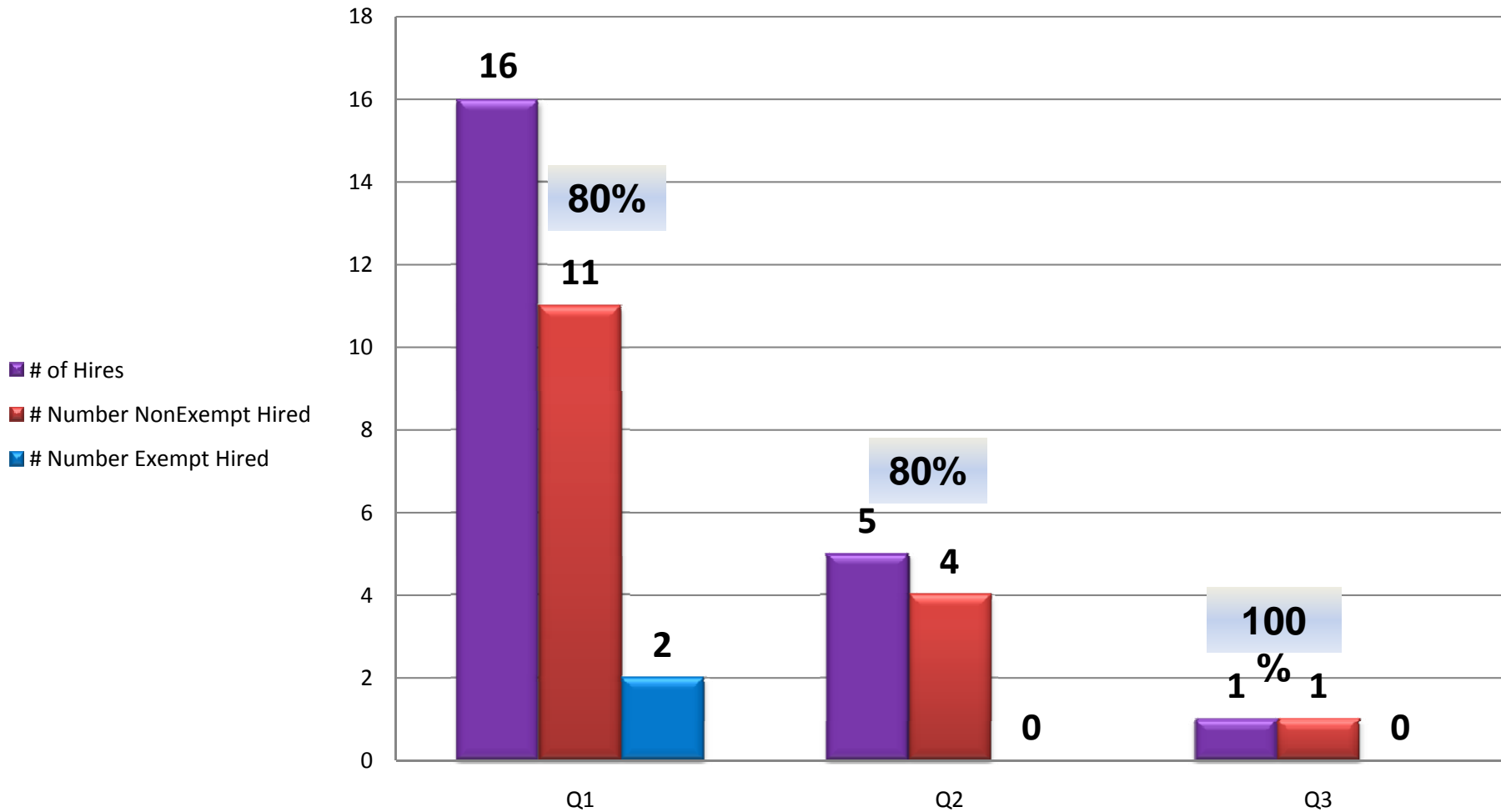
(22%)

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

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

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

Positions filled using Targeted Selection



Year to date 81%

STATUS

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

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

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

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

ACTION PLAN

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

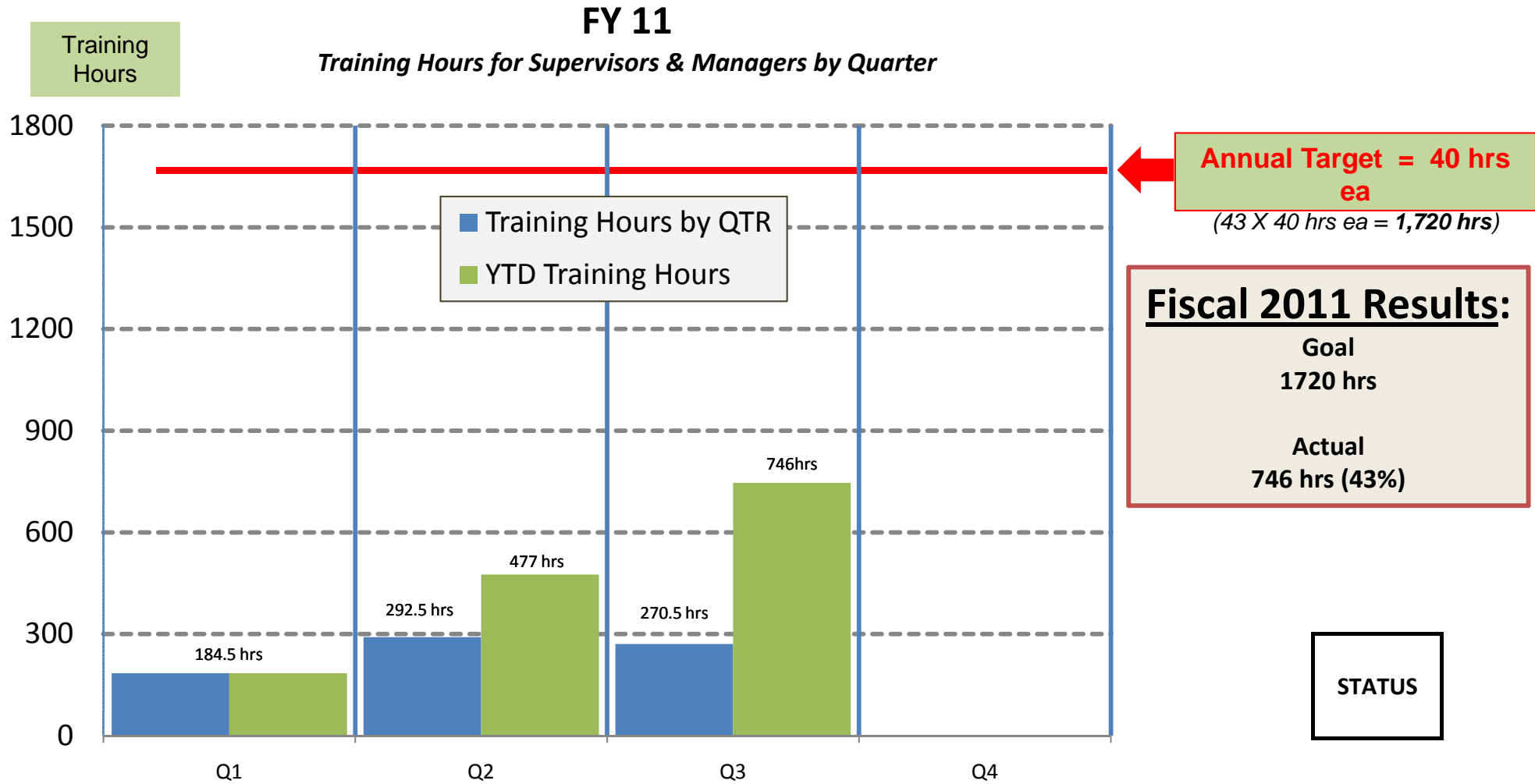
- **Actions Planned**
 1. Communication to Managers and Supervisors – more guidance on process
 2. Develop Targeted Selection on-line training session

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

Strategy 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. Reassess target
 3. Develop compliance training and mission specific training metrics

Facilities Management Strategic Planning Session – Third Quarter FY 2011

Lead
FBO

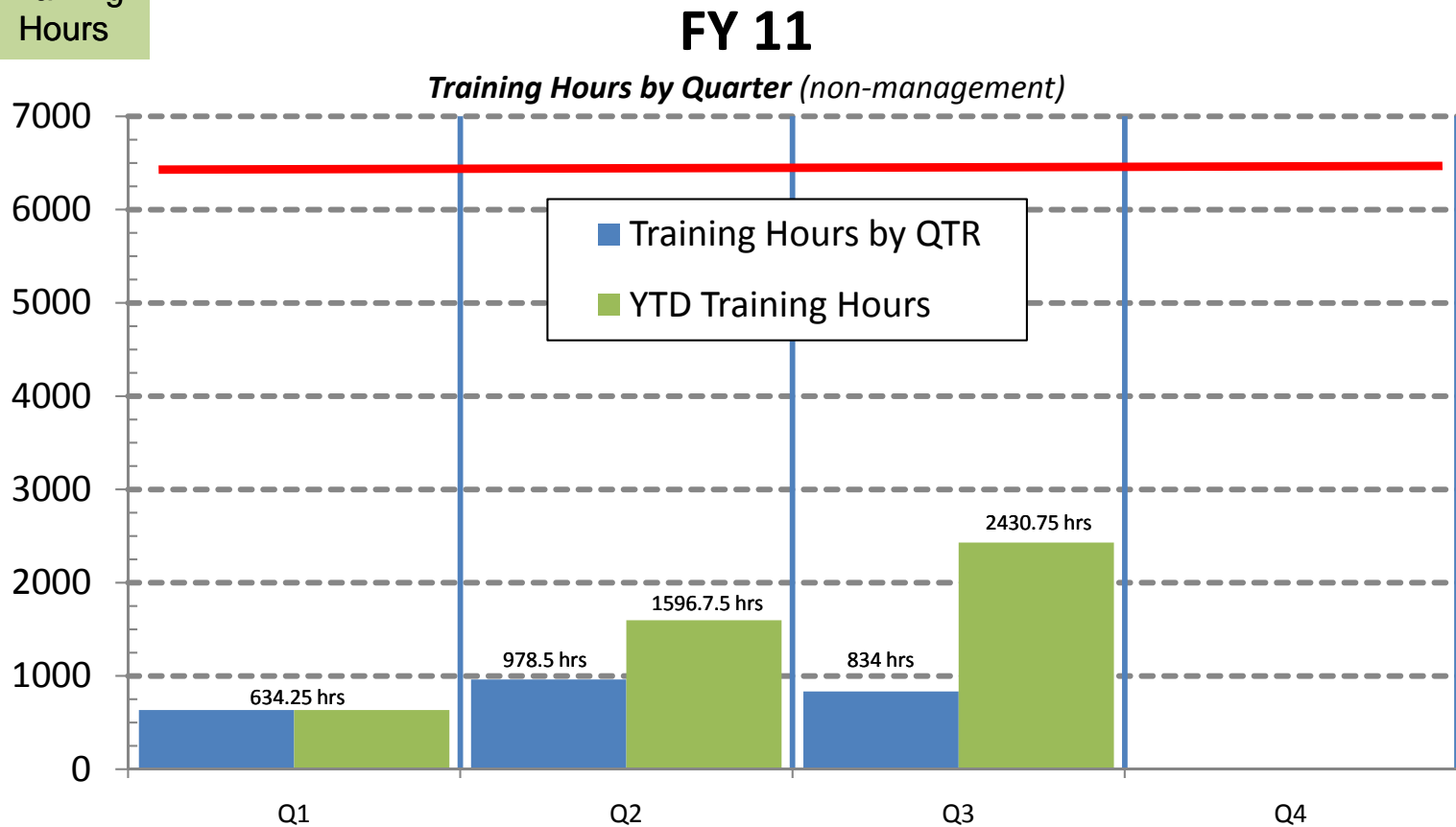
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

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

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

Training
Hours



Annual Target - 20 hrs ea
 (323 employees x 20 hrs ea
 = 6,460 hrs total)

Fiscal 2011 Results:
 Goal
 6,460 hrs
 Actual
 2430.75 hrs (38%)

STATUS

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

Lead
FBO

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

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

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

ACTION PLAN

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

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

2010~11 YTD Training Hours - Percentage of Yearly Target
(3rd Quarter Standings)

Unit/Zone	YTD
Design Services	43%
Grounds	4%
FIS	77%
Steam Plant	36%
Zone 7	2%
Capital Projects	61%
Housekeeping	42%
Lock Shop	8%
Zone 5	12%
High Voltage & Fire Alarms	32%
Zone 1	26%
Zone 6	26%
Zone 2	26%

Unit/Zone	YTD
Facilities Operations Admin	56%
Zone 4	41%
Central Operations	73%
Auto	36%
Recycling	54%
Planning/Architectural	121%
Real Estate/Land Use	126%
Business Office	59%

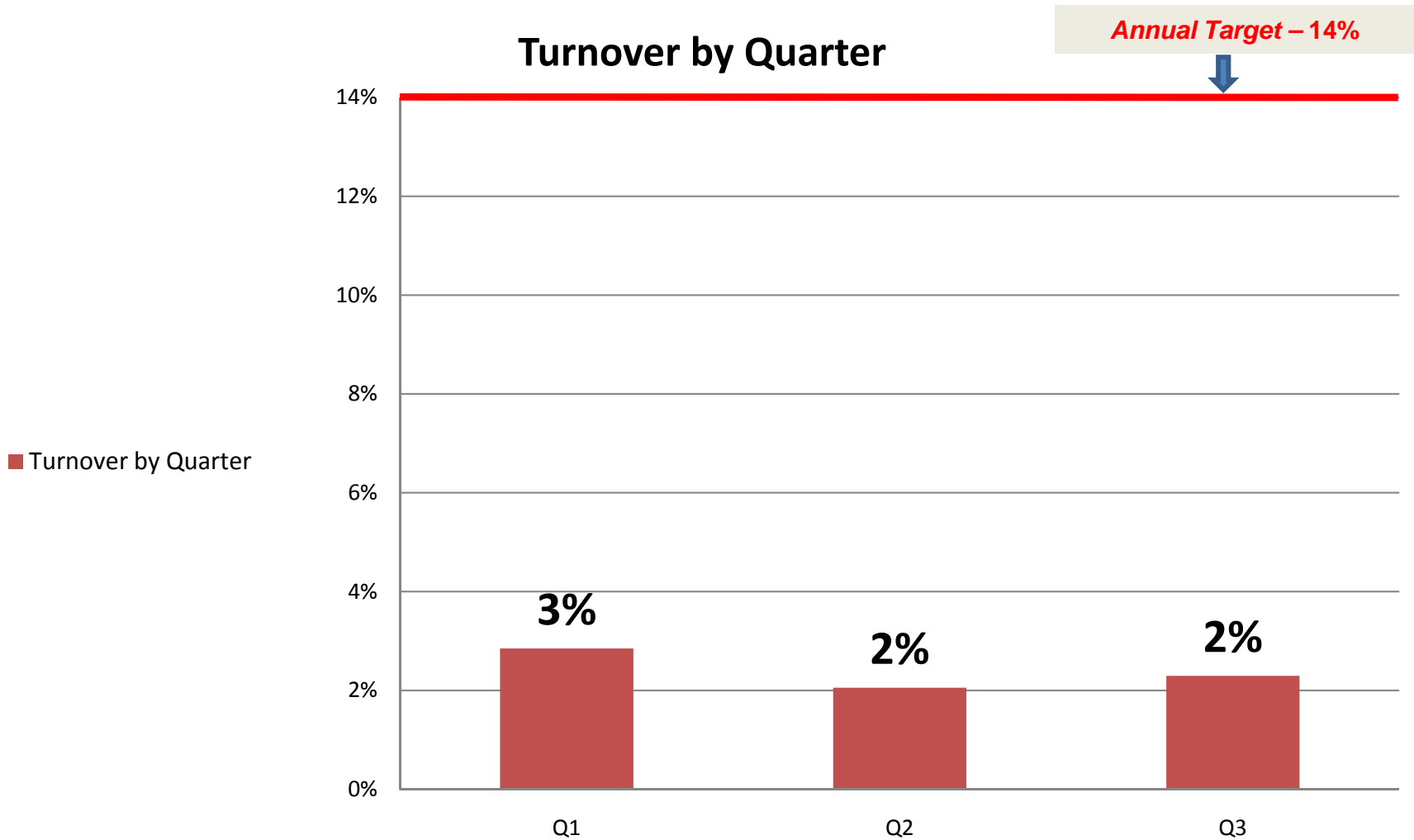
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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 2011

Lead
F.BO

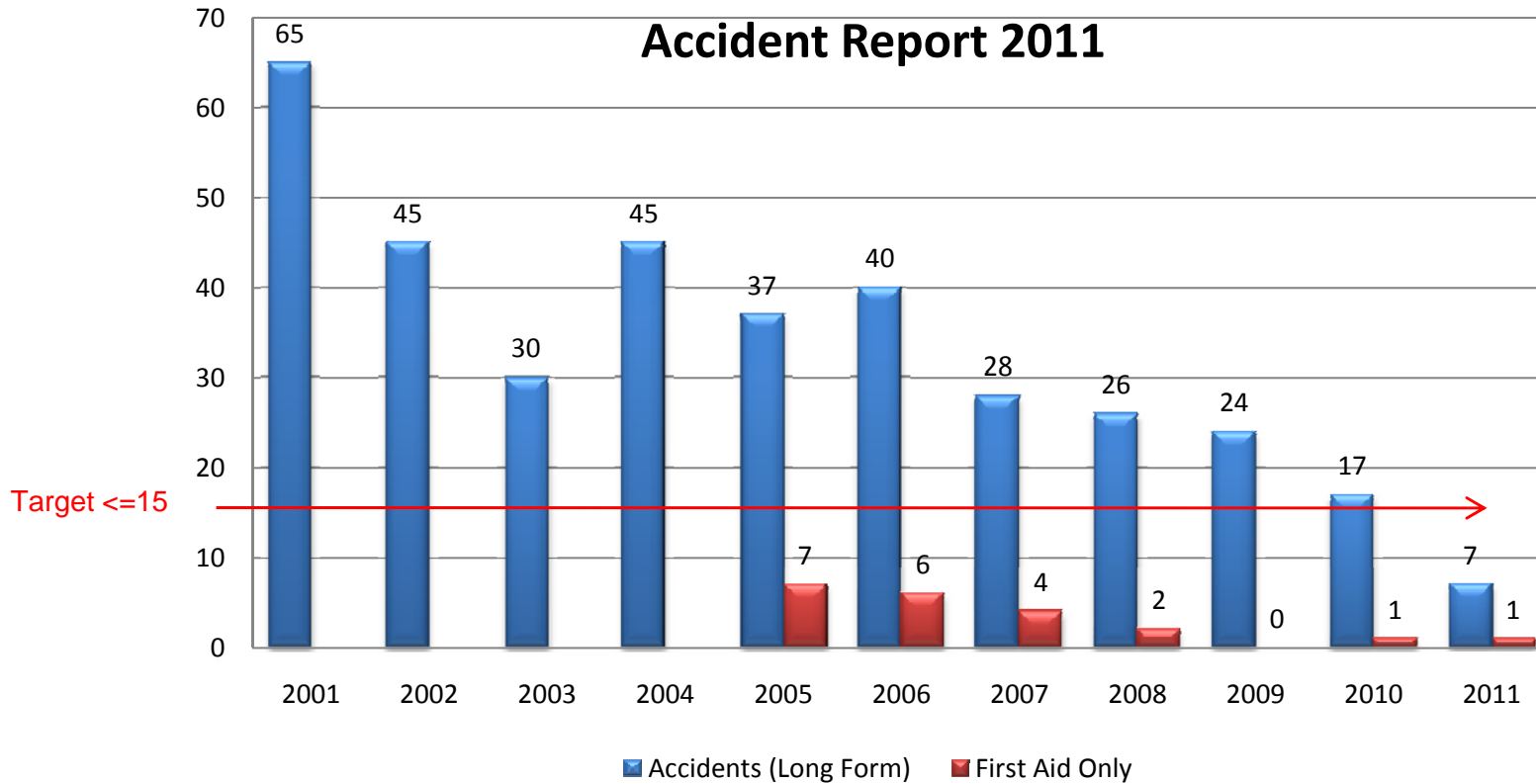
GOAL #6 – Promote Good Stewardship

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: <=15

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



STATUS

GOAL #6 – Promote Good Stewardship

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

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ACTION PLAN

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

