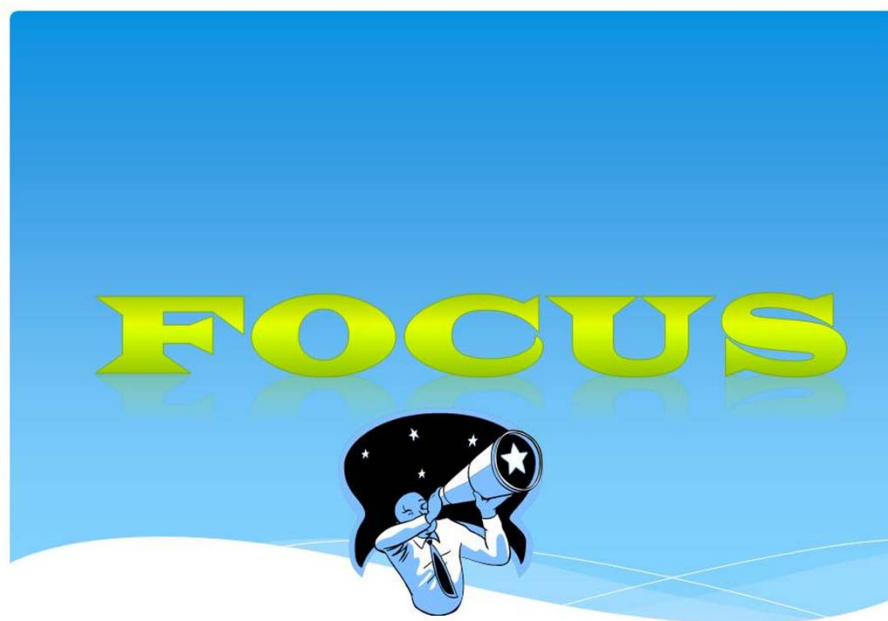*Facilities Management*

Strategic Planning Session

Third Quarter – Fiscal Year 2012
April 24, 2012

…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

"**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

GOAL #3

Deliver New Facilities that
Support the University's Mission

GOAL #4

Perfect a Customer Focused Organization

THINK
OUR GOAL IS CUSTOMER SATISFACTION

GOAL #5

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

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

-- Brian Tracy, Speaker, Author, Consultant

GOAL #6

Promote Good Stewardship

Balance Score Card
CUSTOMER
Perspective

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

GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

- Actions Planned
    - 1 – Continue to build PM program to cover all equipment.
    - 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.
    - 4 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
    - 5 – Hire UPA to clean up FO "dirty laundry"

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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
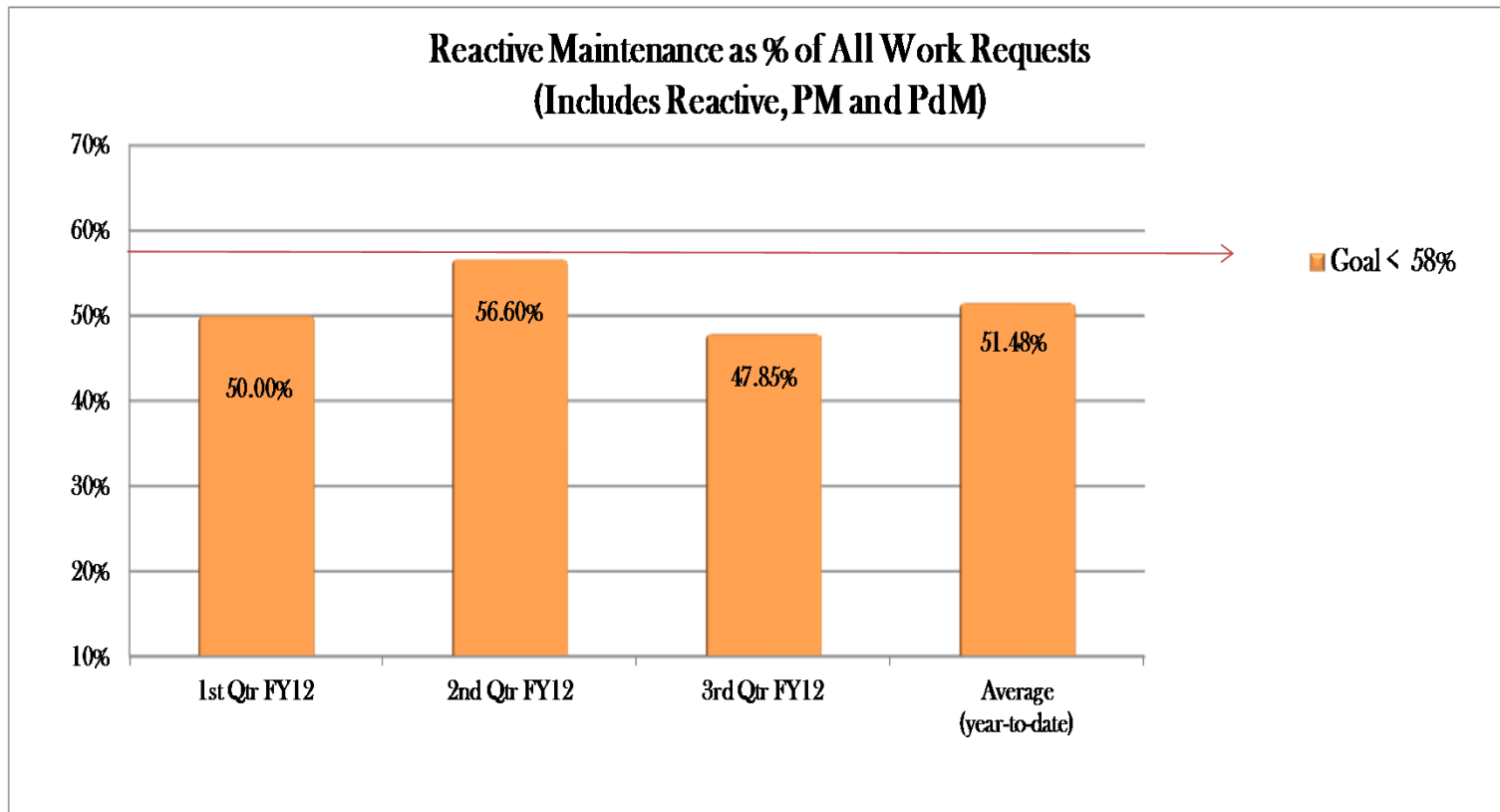
Lead
F. O.

STATUS

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

- 1st Qtr FY12: 50.00%
- 2nd Qtr FY12: 56.60%
- 3rd Qtr FY12: 47.85%
- Average (year-to-date): 51.48%

Goal < 58%

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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

Lead
F. O.

Archibus
Report
In error
Working w/FIS

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
    - Established Program Development and Education Coordinator Position

- Actions Planned
    - Continue quarterly self audits
    - Hire Program Development and Education Coordinator

Facilities Management Strategic Planning Session – 3ʳᵈ Quarter FY 2012

GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

Balanced Scorecard Category: Customer Perspective

Lead
Housekeeping

Percentage = 91%

APPA LEVELS

	90%	94%	94%	91%
	FY11-4th QTR	FY12-1st QTR	FY12-2nd QTR	FY12-3rd QTR
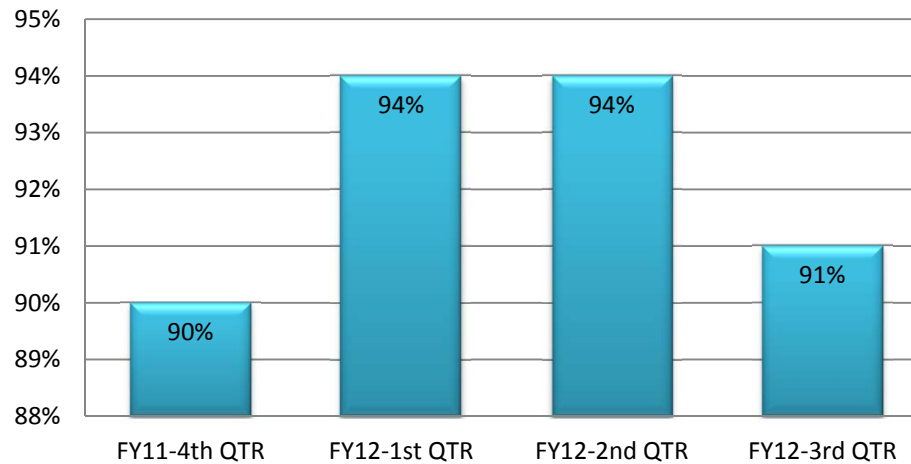
STATUS

Housekeeping Work Request Customer Satisfaction

FY12 3rd QTR Percentages

FY12 3rd QTR Percentages

- % Satisfied
- % Not Satisfied
- % N/A

- % Satisfied
- % Not Satisfied
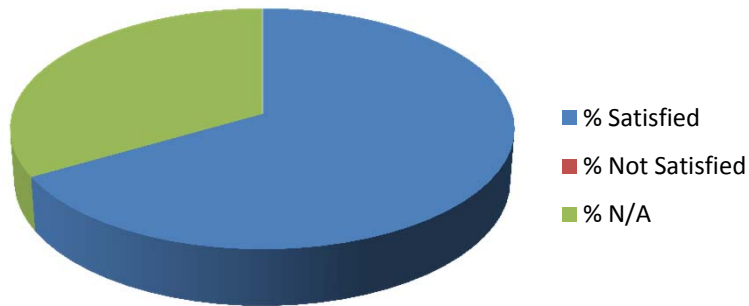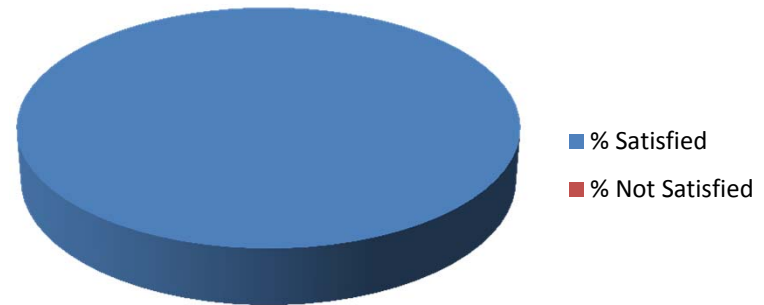
Customer Satisfaction of those surveyed:
- FY11 4th QTR =   96%
- FY12 1st QTR = 100%
- FY12 2nd QTR = 100%
- FY12 3rd QTR = 100%

GOAL #1 – Improve Facilities Operations

Strategy: **1.5**   Improve Reliability
Objective: **1.5.3**   Reduce Unscheduled High Voltage Electrical System Outages by 10%
                    1.5.4   Reduce Unscheduled Fire Alarm Network Outages by 10%

Lead
F. O.

ACTION PLAN

- Actions Planned

    1 – Complete development of PM Program. Focus on new buildings (CCB and EPIC)

    2 – Closer monitoring of PM completions by Supervisors and Managers.

    3 – Continue expansion of PM Program and predictive maintenance program. Work with key customers.

    4 – Prepare program for major equipment repairs and replacement.

    5 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

    6 – Continue working with Simplex to bring the new buildings online with the network.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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: Customer Perspective
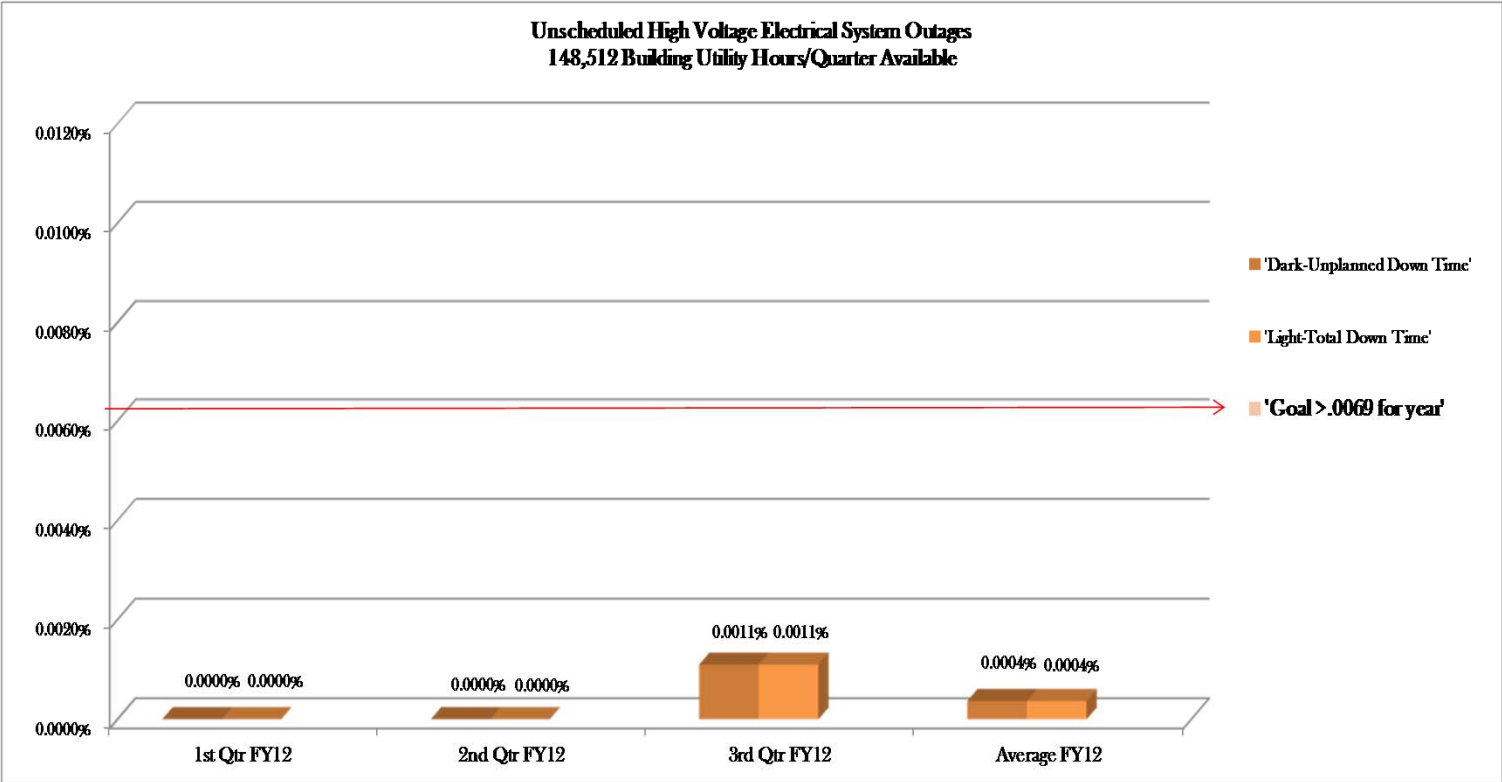
Lead
F. O.

STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Less than 10%

Balanced Scorecard Category: Customer Perspective

Lead
F. O.
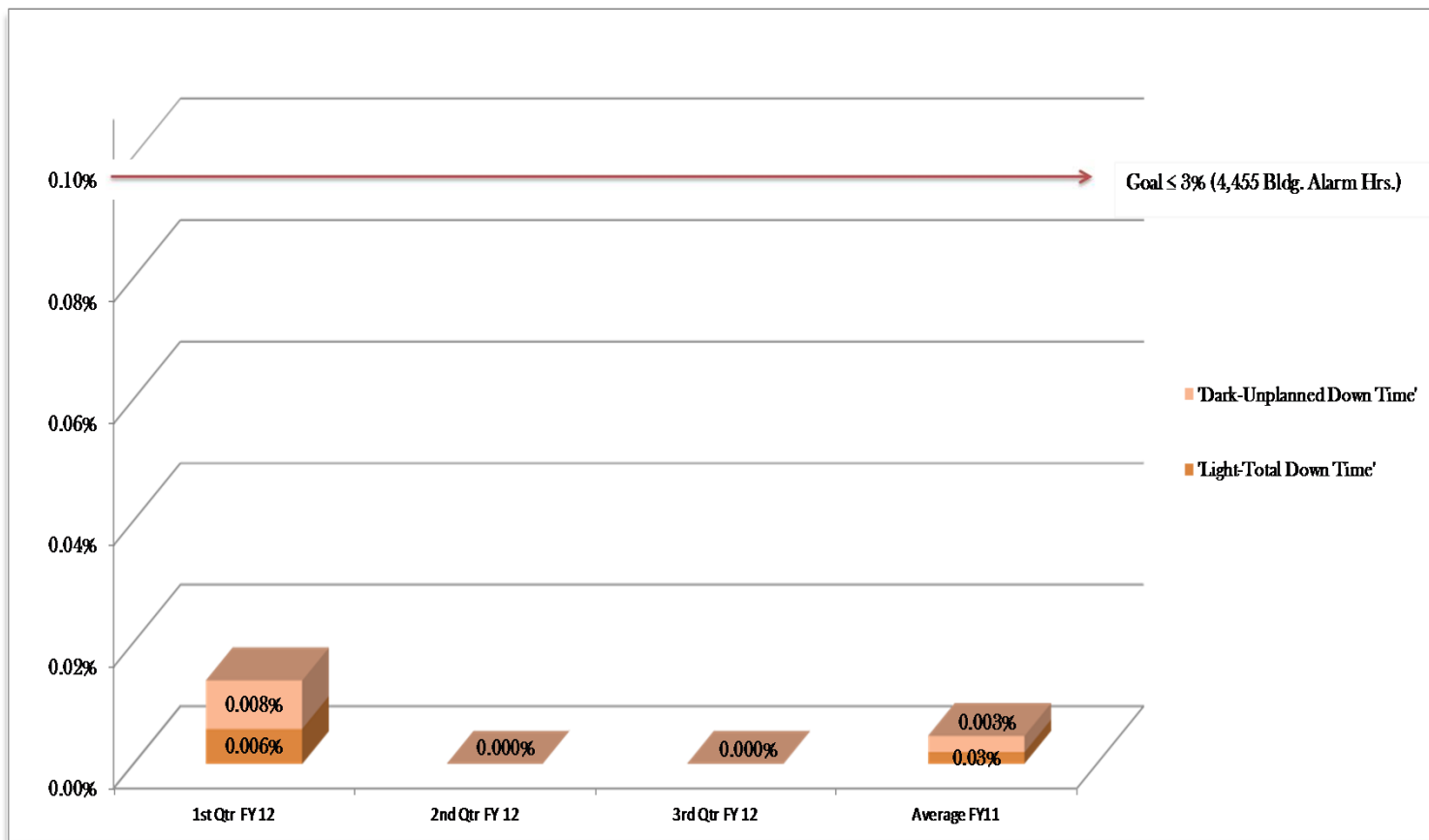
STATUS

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
Objective   2.2.2   85% of Estimates for in house construction within +/- 10% of Actual
Objective   2.2.4   90% of All Construction Projects Meet Scheduled Beneficial Occupancy Date
Objective   2.2.6   Increase Project Volume by 10 projects per year - Project Counts by Phase

ACTION PLAN FOR IMPROVEMENT

☐ **"Wildly Important Goal" - Handout guiding Customers through Design Services' project processes and Archibus - To be completed within the next 90 days.**

☐ Complete Classroom Capacity and egress information by developing individual building standards - **This is an ongoing process driven by building and project needs**.

IMPLEMENTED ACTION PLANS

☐ Project schedules from Scope & Budget phase through, Design, Construction and Closeout - **This is an ongoing process.**

☐ Continue to establish proven steps to beneficial occupancy via departmental meetings - **This is an ongoing process.**

☐ "Wildly Important Goal" - Customer involvement with project Punch List process   - **This is an ongoing process.**.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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

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

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

Balanced Scorecard Category: Customer Perspective

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 '09	86	82	4	95.3%
FY '10	121	119	2	98.3%
FY '11	202	201	1	99.5%
QTR 1	22	22	0	100.0%
QTR 2	37	36	1	97.3%
QTR 3	58	57	1	98.3%
QTR 4	0	0	0	0.0%
FY '12 STATUS	117	115	2	98.3%

GOAL — ALERT

85%

65%

FY '09 FY '10 FY '11 QTR 1 QTR 2 QTR 3 QTR 4 FY '12 STATUS
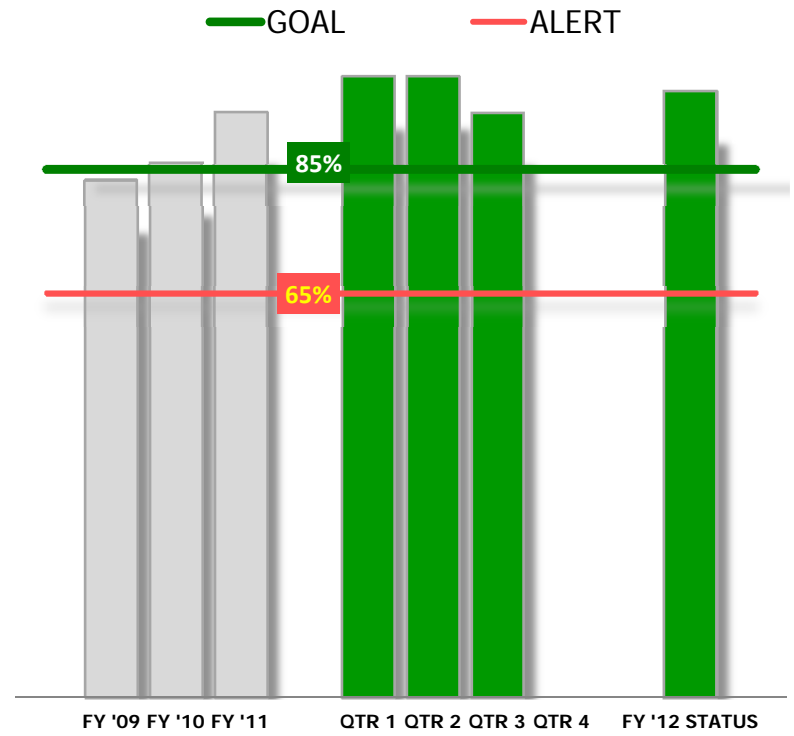
GOAL 95.0%   **STATUS 98.3%**

19

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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

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

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

Balanced Scorecard Category: Customer Perspective

Lead Design Services

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

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY '09	78	65	13	83.3%
FY '10	144	124	20	86.1%
FY '11	122	115	7	94.3%
QTR 1	32	32	0	100.0%
QTR 2	46	46	0	100.0%
QTR 3	51	48	3	94.1%
QTR 4	0	0	0	0.0%
FY '12 STATUS	129	126	3	97.7%

GOAL 85.0%

STATUS 100.0%

20

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

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

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

Balanced Scorecard Category: Customer Perspective

Lead Design Services

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

QUARTERLY REVIEW	No. of Projects	No. of met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '09	79	68	11	86.1%
FY '10	144	136	8	94.4%
FY '11	120	118	2	98.3%
QTR 1	32	32	0	100.0%
QTR 2	46	46	0	100.0%
QTR 3	51	47	4	92.2%
QTR 4	0	0	0	0.0%
FY '12 STATUS	129	125	4	96.9%

GOAL   ALERT

90%

70%

FY '09 FY '10 FY '11   QTR 1 QTR 2 QTR 3 QTR 4   FY '12 STATUS

GOAL 90.0%   STATUS 100.0%

21

Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements
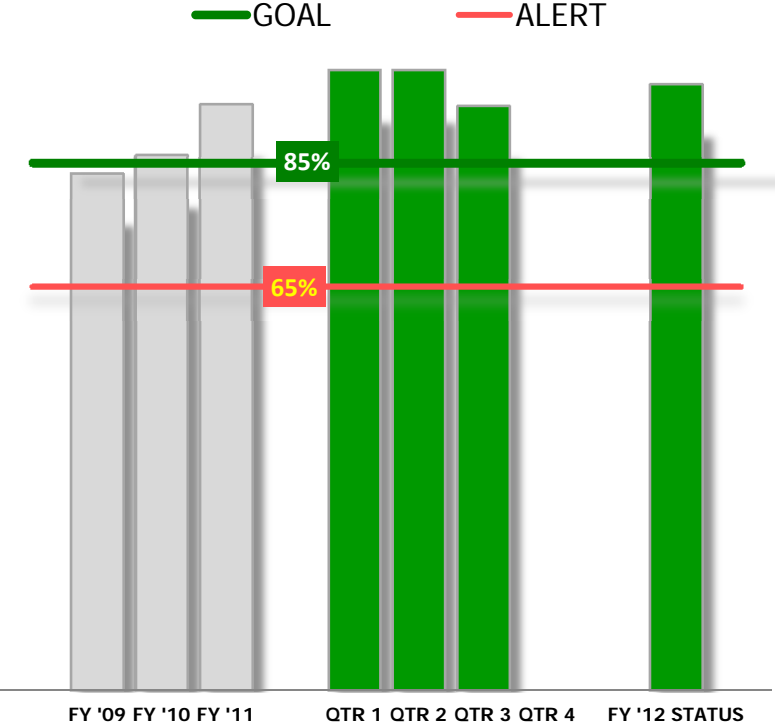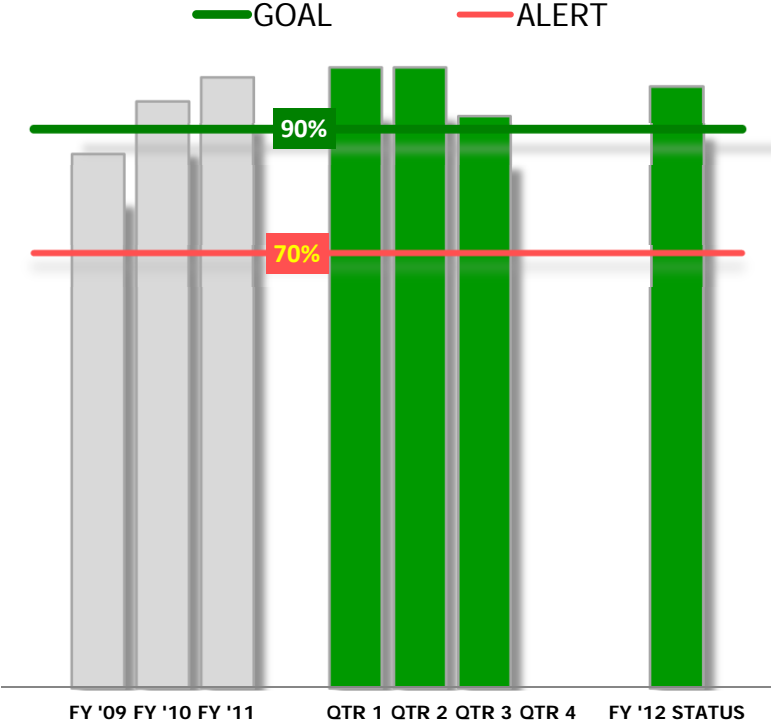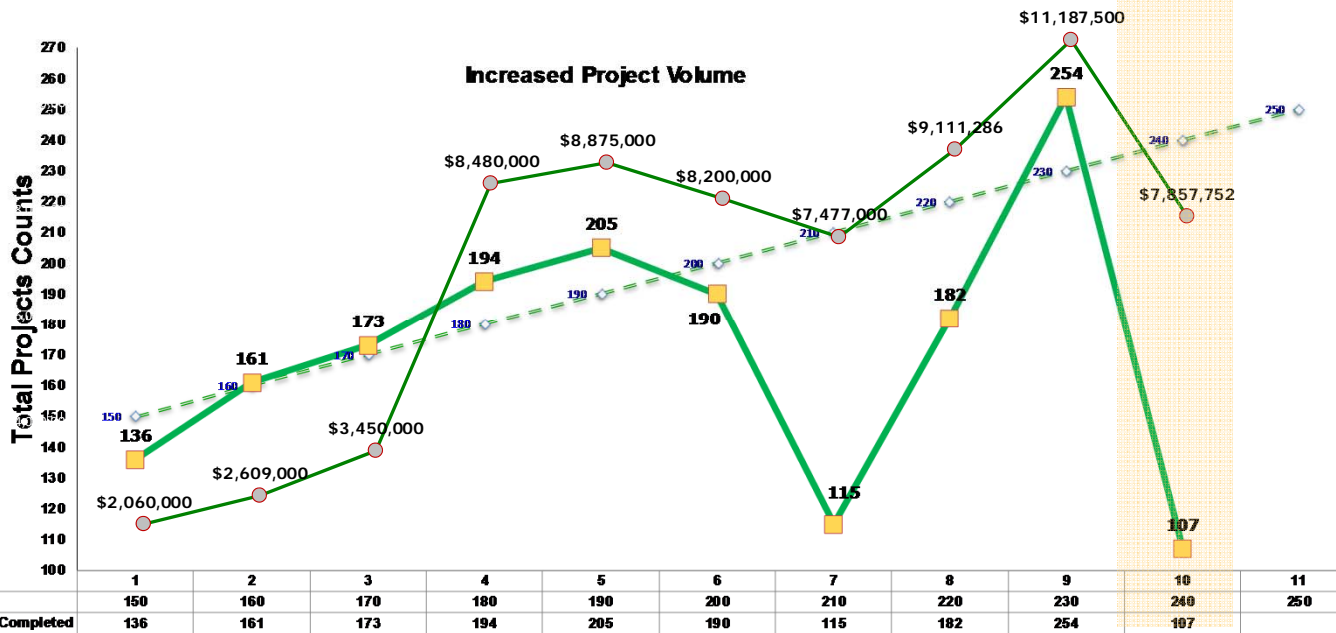
Strategy	2.2	Improve Informal Project Design and Construction Process
Objective	2.2.6	**Increase Project Volume by 10 projects per year - Project Counts by Phase**

Measure: The 2008 Benchmark is 200 projects.

Balanced Scorecard Category: Customer Perspective

	Increase Project Volume by 10 Projects per year - Project Counts by Phase										
	1	2	3	4	5	6	7	8	9	10	11
GOAL	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	254	107	
Projects completed through 3rd Quarter:							75	85	106	107	
Projects completed through 3rd Quarter:								$3,075,745	$4,824,290	$7,857,752	

Increased Project Volume

Total Projects Counts

$11,187,500 — 254
$9,111,286
$8,480,000 — 226
$8,875,000 — 205
$8,200,000
$7,477,000
$3,450,000 — 173
$2,609,000
$2,060,000 — 136
194
190
182
115
$7,857,752 — 107

250
240
230
220
210
200
190
180
170
160
150

	1	2	3	4	5	6	7	8	9	10	11
GOAL	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	136	161	173	194	205	190	115	182	254	107	

THIS IS A FISCAL YEAR GOAL - REVIEWED QUARTERLY

44.6%

GOAL	STATUS
240	107

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

ACTION PLAN

- Actions Complete

- Actions Planned
    1. Keep schedules <u>current</u> & refer to them monthly
    2. Discuss schedule (baseline & current) with end users

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

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

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

Balanced Scorecard Category: Customer Perspective

Lead Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary FY-09	4	2	50%
Summary FY-10	6	0	100%
Summary FY-11	7	1	88%
1st Qtr. FY-12	4	2	67%
2nd Qtr. FY-12	1	0	100%
3rd Qtr. FY-12	0	4	0%
4th Qtr. FY-12	n/a	n/a	n/a
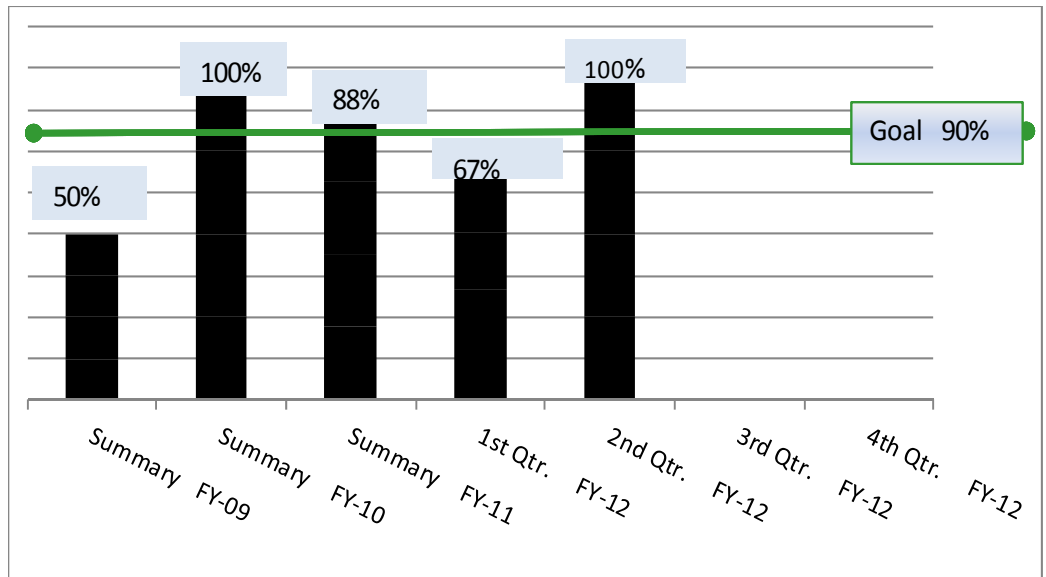
3rd Qtr. Objective is 0%
Year to date is 67%

Status

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction
        Objective 4.1.1 Achieve Overall FM Customer Satisfaction of 85%
        Objective 4.1.2 Achieve overall FM Unit Customer Satisfaction of 85% (Units are Motor Fleet, M&O, Housekeeping, Recycling, Grounds, and Billing/FBO)

ACTION PLAN

❑ Website W.I.G. - Continue development of new web pages for Safety, Training, and Customer Information for both internal and external customers. Currently working with Public Relations department. Awaiting hire of Communications Officer position to continue development.

❑ Hire Communications Officer position (new). Recruitment plan using a hybrid of Vice Chancellor's Model is under development. Committee membership identified; Posting has been submitted to HR; Anticipated closing date is May 4th.

❑ Review processes and procedures from the Business and HR side

    ❑ Concerns continue to surface regarding the impact of new technology on processes/procedures. Examples are People Admin and 49er Mart.

    ❑ Review (lean) Time Sheet Processing. Processes have been mapped. Project slowed due to new university initiative.

❑ Develop plan with UNC Charlotte Urban Institute to administer the FY 12 Customer Satisfaction Survey.

    ❑ Review current questions on the survey and seek input from Directors to ensure the survey asks the right questions.

    ❑ Submit survey questions to AVC for review and final approval in early April. Target administration date is April 16th.

    ❑ Schedule briefing with Directors and FM at large to review survey results once survey is completed. Compare Customer Satisfaction results with specific Employee Satisfaction Survey questions to the Customer survey.

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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%

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

Lead FBO

Annual objective

STATUS

26

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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)

Measure: **Annual** Customer Survey Results

Balanced Scorecard Category: Customer Perspective

Unit Customer Satisfaction Survey Rating Comparison (%)

Goal = 85%

- 2008 Rating (%): Motorfleet 84, Business Office 59, M&O Repairs 66, Housekeeping 65, Recycling 87, Grounds 84
- 2010 Rating (%): Motorfleet 93, Business Office 89, M&O Repairs 89, Housekeeping 82, Recycling 96, Grounds 91

Lead
FBO

Annual objective

STATUS

27

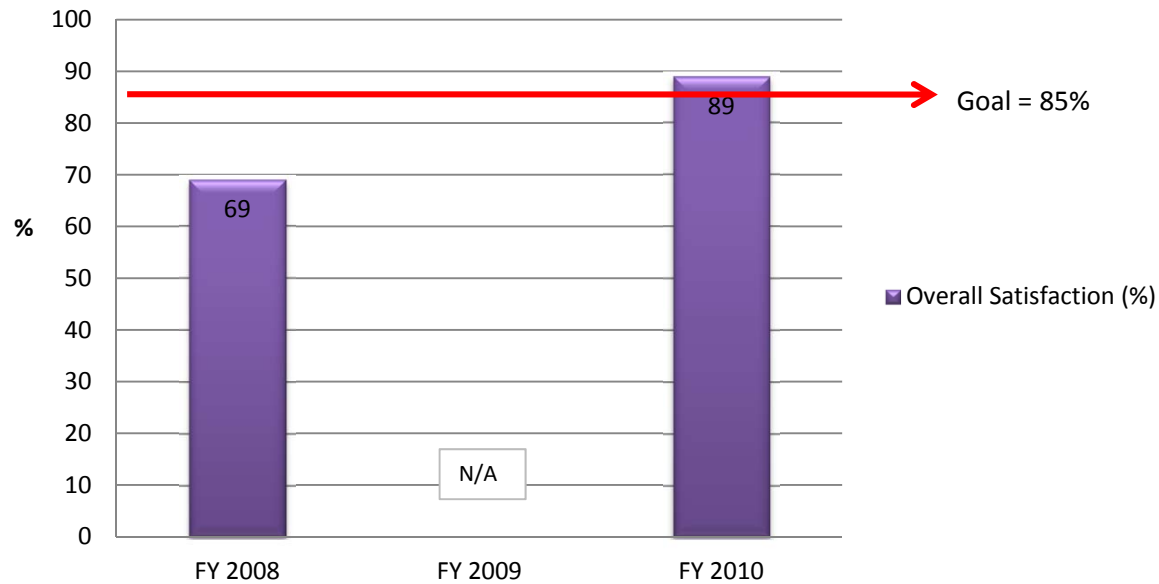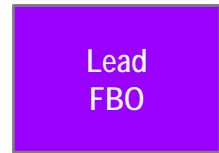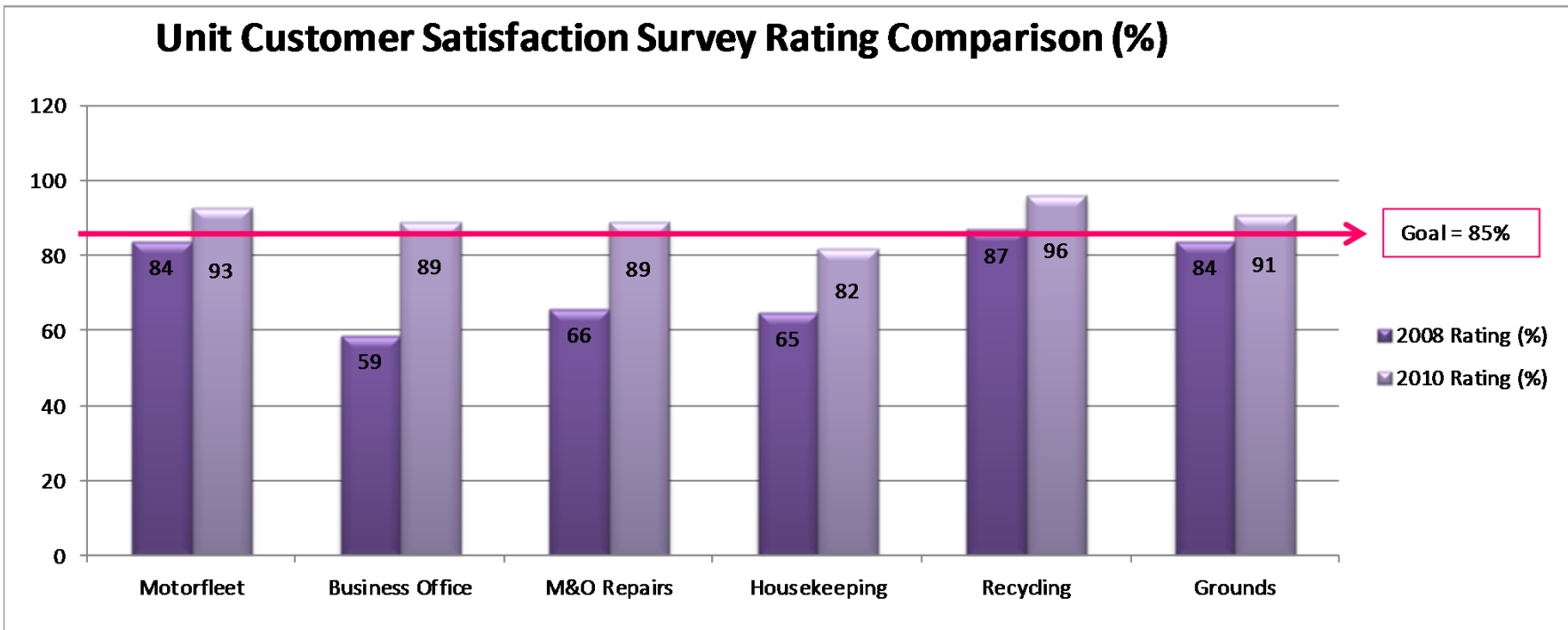**GOAL #4 – Perfect a Customer Focused Organization**

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

ACTION PLAN

- Actions Planned

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

    2 – Ensure that Zones are checking BAS and monitoring conditions

    3 – Develop controls section and cross train with Zones.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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 174 (Goal = 133)

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

Goal: Less than 133 per quarter annual average

Balanced Scorecard Category: Customer Perspective

Lead
F. O.

STATUS

29

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 FOR IMPROVEMENT

☐ Currently Customers are reluctant to respond to the questionnaire due to its length and requested level of detail.

☐ **Work with FIS to revise the questionnaire as currently sent to our Customers - We would like this to be accomplished within the next 90 days.**

☐ The concept of the on-line questionnaire is good. We need to find a way to encourage much more Customer participation.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #4 – Perfect a Customer Focused Organization

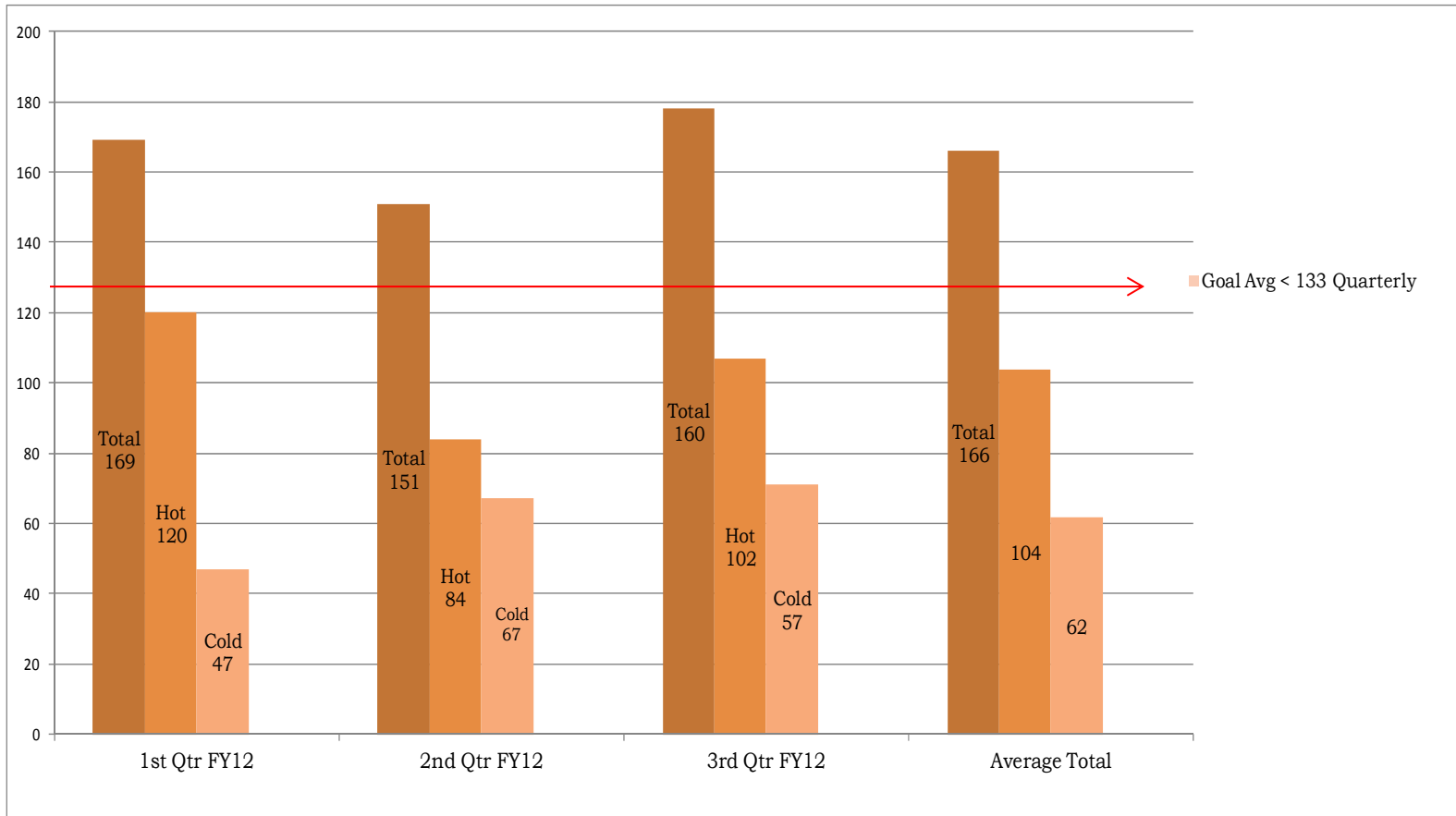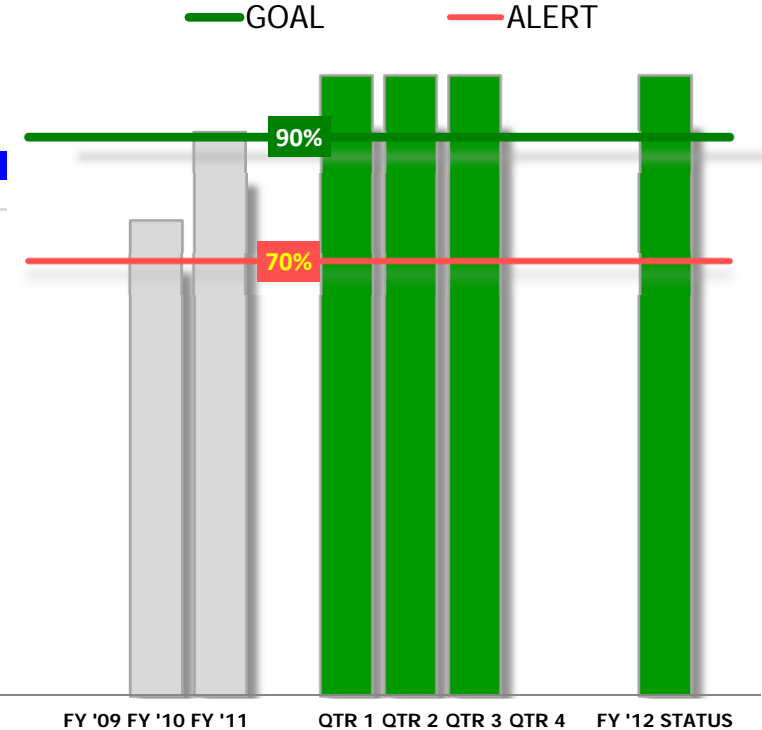|		
Strategy	**4.1**	Continually improve customer service/satisfaction
Objective	**4.1.4**	**90% of Informal Project Customers Satisfied or Very Satisfied**

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 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1 +	Unnsatisfied 0+	Percent Satisfied
FY '09	0	0	0	0	0	0	0	0.0%
FY '10	30	18	5	0	6	1	0	76.7%
FY '11	33	24	6	2	0	1	0	90.9%
QTR 1	1	1	0	0	0	0	0	100.0%
QTR 2	3	2	1	0	0	1	0	100.0%
QTR 3	4	4	0	0	0	0	0	100.0%
QTR 4	0	0	0	0	0	0	0	0.0%
FY '12 STATUS	8	7	1	0	0	1	0	100.0%

GOAL 90.0%	**STATUS 100.0%**

31

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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 FY-09	2	1	0	100%
Summary FY-10	9	0	0	No Data
Summary FY-11	7	3	0	100%
1st Qtr. FY-12	2	1	0	100%
2nd Qtr. FY-12	0	0	0	No Data
3rd Qtr. FY-12	3	2	0	100%
4th Qtr. FY-12	0	0	0	No Data

% customers satisfied at end of design

Goal 85%

■ % customers satisfied at end of design

No data is a result of customer not answering questionnaire or questionnaire not being sent out for the quarter

Objective for 3rd Quarter is 100%
Year to date is 100%
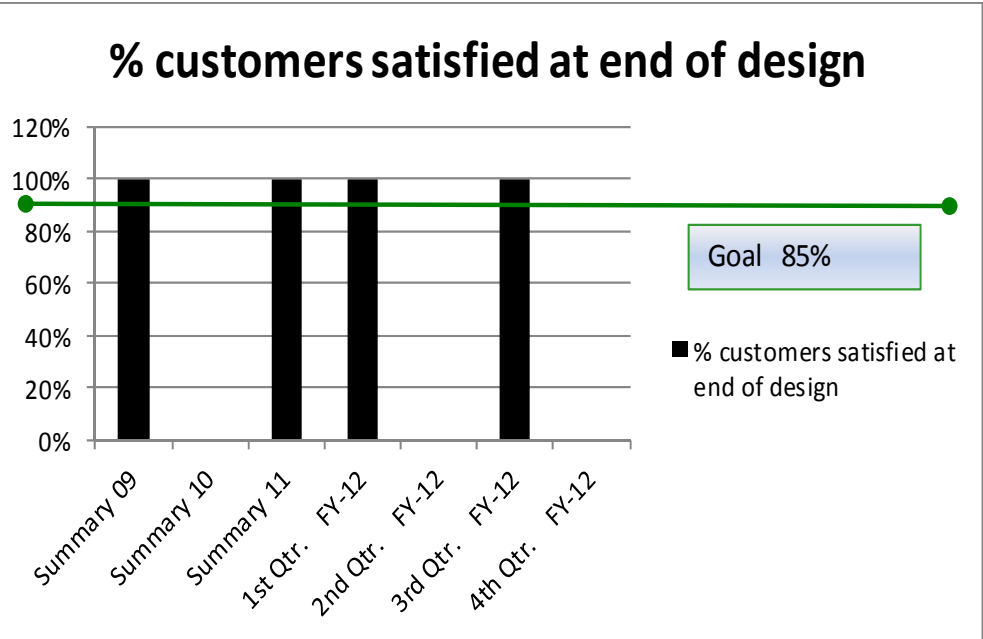
Status

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

ACTION PLAN

- Actions Complete
  - 1. Produced surveys for PORTAL, Residence Hall Phase X and Scott Hall Fire Suppression.

- Actions Planned
  - 1.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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	

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%
Summary FY-11	5	1	0	100%
1st Qtr. FY-12	3	1	0	100%
2nd Qtr. FY-12	0	0	0	0.0%
3rd Qtr. FY-12	0	0	0	0.0%
4th Qtr. FY-12	0	0	0	0.0%

% customers satisfied at end of construction

Legend: ■ % customers satisfied at end of construction

Objective for 3rd Quarter has no data
Year to date is 100%

Status

34

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

ACTION PLAN

- Actions Complete

  - 1. Produced surveys for Motorsports and Student Housing Demolition.

- Actions Planned

  - 1.

Balance Score Card

DISCUSSION

CUSTOMER PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter
Customer *To acheive our vission, how must we view & treat our customers?*	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%	51.40%	[green]	[green]	[green]
		1.3.2	Decrease Work Request Cycle Time by 5%	<300 hrs	n/a			
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	91%	[yellow]	[yellow]	[yellow]
	Improve Process Reliability	1.5.3	Reduce Unscheduled HV outages by 10%	<=0.0069	0.0004%	[green]	[green]	[green]
		1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%	0.03%	[yellow]	[green]	[green]
	Increase on-time delivery	2.2.1	95% of Projects Designed on Time	95%	98.3%	[green]	[green]	[green]
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	94.1%	[green]	[green]	[green]
		2.2.3	*Combined with 2.2.2*					
		2.2.4	All IP construction meets BOD	90%	92.2%	[green]	[green]	[green]
		2.2.5	*Combined with 2.2.4*					
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 250	107	Annual	Annual [green]	Annual [green]
		3.4.1	90% Cap Construction Projects on Schedule	90%	0%	[red]	[red]	[red]
	Enhance customer satisfaction	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	-10% or <133	160	[yellow]	[red]	[red]
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	100.0%	[green]	[green]	[green]
		4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	100%	[green]		[green]
		4.1.6	Improve: Capital Projects rating (sat./very sat.) - constr	85%	100%	[green]		[green]
		4.1.7	All measures positive on customer sat survey	<2% S Dis; < 5% Dis or Neu	n/a			

Balance Score Card
FINANCIAL
Perspective

Strategic Objectives:

Manage Budget, Maximize Revenue Stream

Promote Fiscal Responsibility

Sustainable Practices

Conserve Natural Resources

Improve Employee Safety

Improve HUB Participation

GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

Objective 6.1.1	Effectively tracking and monitoring expenditures to ensure funds/accounts are not over-expended at the end of each month.
Objective 6.1.2	Increase Grants and Supplemental Funding to the Department by 25%
Objective 6.1.3	Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

CONTINUOUS IMPROVEMENT ACTION PLAN

❑ Periodically review expenditure reports; Ensure that FM does not overspend its operating and supplemental budgets. While several individual funds met the goal, FM did not reach our target spend of **75% spent by end of the third quarter, March 2012** across the board.

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

❑ Improve communication with the Controller's Office, the Budget Office and FM (Capital, Design Services and Real Estate/Land Use). Meetings are underway to develop guidelines for Financial Statement reporting and Fixed Assets concerns. Additionally, meeting invitations were sent to external to FM units to provide Informal Project updates by fund type. Next meeting to be held on April 9th.

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

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

GOAL #6 – Promote Good Stewardship

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

Measure: Main Operating Fund Variance Report

Balanced Scorecard Category: Financial Perspective

Lead
FBO

FACILITIES MANAGEMENT OPERATIONS: April 11, 2012 mid-month

ACCOUNT DESCRIPTION	2011-12 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
OVERTIME AND PREMIUM PAY	$ 294,000	7%	$ 166,333	$ -	$ 166,333	$ 127,667	$ 127,667 F
STUDENT AND TEMPORARY WAGES	$ 39,000	1%	$ 16,038	$ 2,000	$ 18,038	$ 20,963	$ 20,963 F
PERSONAL SERVICE CONTRACTS	$ 130,650	3%	$ 96,458	$ 7,406	$ 103,864	$ 26,786	$ 26,786 F
CORPORATE SERVICES CONTRACTS (Srv Agr)	$ 961,496	24%	$ 660,983	$ 151,055	$ 812,039	$ 149,457	$ 149,457 F
OTHER ADMINISTRATIVE EXPENSES	$ 101,500	3%	$ 15,901	$ 16,940	$ 32,841	$ 68,660	$ 68,660 F
DOMESTIC TRAVEL/TRAINING	$ 97,600	2%	$ 61,349	$ -	$ 61,349	$ 36,251	$ 36,251 F
FIXED PURCHASED SERVICES (Maint Agr)	$ 344,820	9%	$ 237,853	$ 49,375	$ 287,228	$ 57,592	$ 57,592 F
OTHER PURCHASED SERVICES	$ 370,200	9%	$ 159,006	$ 124,720	$ 283,726	$ 86,474	$ 86,474 F
SUPPLIES	$ 1,262,088	32%	$ 940,053	$ 167,977	$ 1,108,029	$ 154,059	$ 154,059 F
EQUIPMENT/IT	$ 286,675	7%	$ 144,404	$ 130,668	$ 275,072	$ 11,603	$ 11,603 F
CAPITAL OUTLAY	$ 14,400	0%	$ 12,324	$ -	$ 12,324	$ 2,076	$ 2,076 F
FIXED CHARGES	$ 35,350	1%	$ 18,281	$ -	$ 18,281	$ 17,069	$ 17,069 F
RECYCLING	$ 37,515	1%	$ 30,337	$ 1,263	$ 31,600	$ 5,915	$ 5,915 F
FACILITIES MANAGEMENT Main Operating Funds	3,975,294		2,392,984.83	651,404.19	3,044,389.02	930,904.98	$ 930,905

LENGTH OF TIME:10 MONTHS	83.33%
Percentage of Actual Expenditures	64.38%
Percentage: Actuals + Pending Commitments	80.77%

STATUS

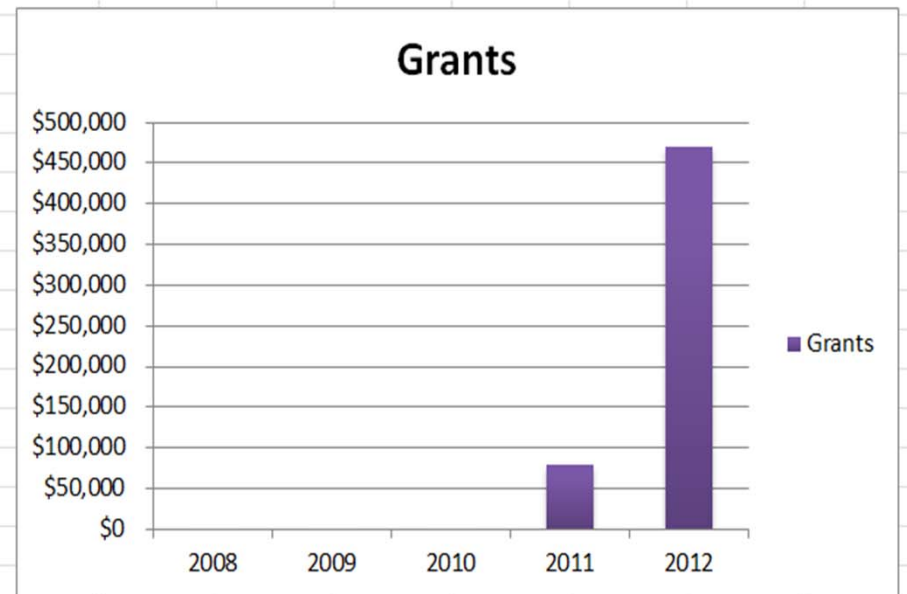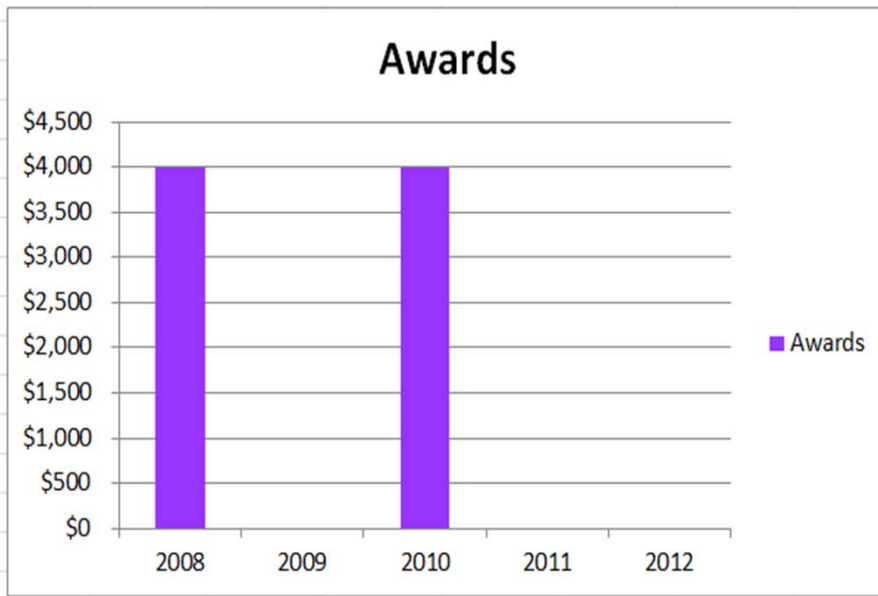**Facilities Management Strategic Planning Session – 3rd Quarter FY 2012**

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

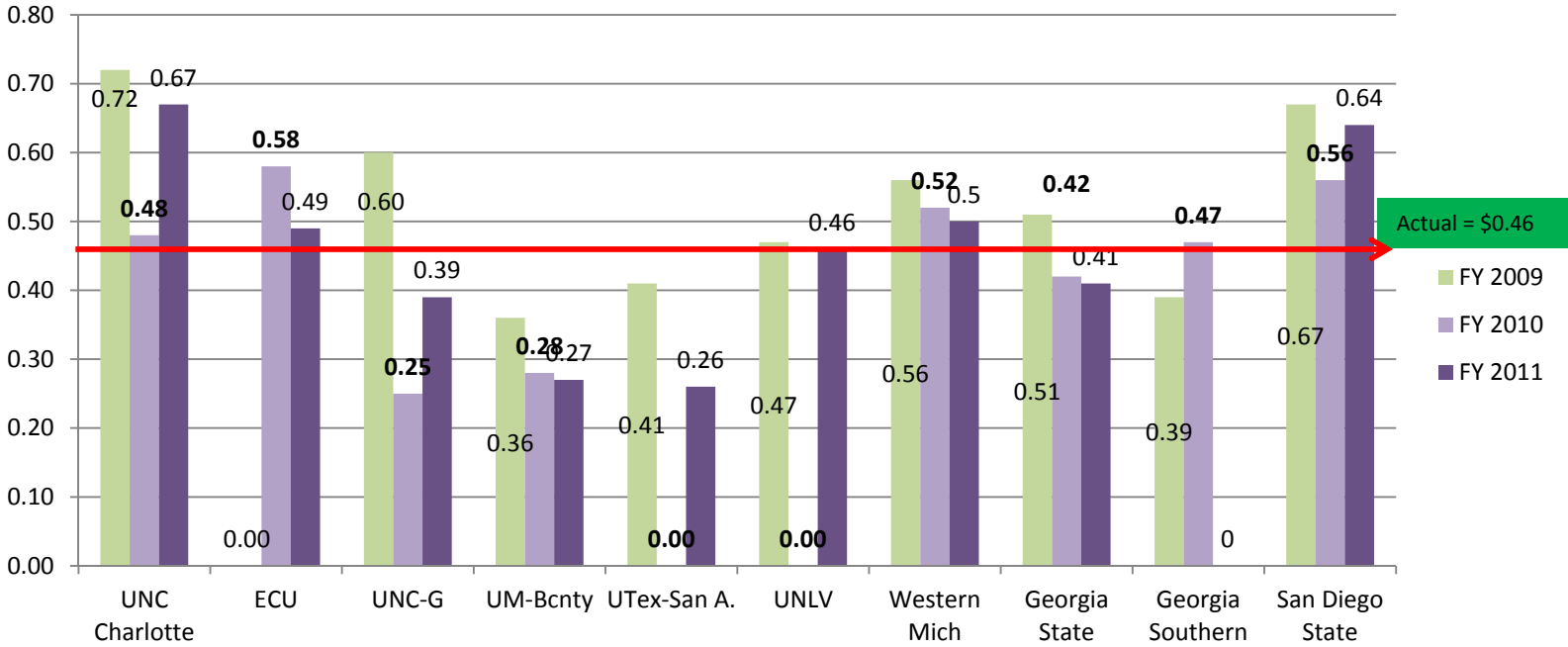**Facilities Management Strategic Planning Session – 3rd Quarter FY 2012**

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead
FBO

Total Administrative Cost/GSF

Actual = $0.46

FY 2009
FY 2010
FY 2011

STATUS -
HOLD

41

GOAL #6 – Promote Good Stewardship

Strategy	**6.1**	Promote Fiscal Responsibility
Objective	**6.1.4**	Achieve Custodial Costs/Student FTE 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.

Lead Housekeeping

ACTION PLAN

- Actions Complete

  – Changed objective from cost per GSF to cost per student FTE

- Actions Planned

  – Monitor and report custodial cost/student FTE on an annual basis using data from APPA survey

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

GOAL #6 – Promote Good Stewardship

Strategy	**6.1**	Promote Fiscal Responsibility
Objective	**6.1.4**	Achieve Custodial Costs/Student between 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/Student from annual APPA Facilities Performance Indicators Report (APPA Benchmark) = Salaries + Supplies/GSF

Balanced Scorecard Category: Financial Perspective
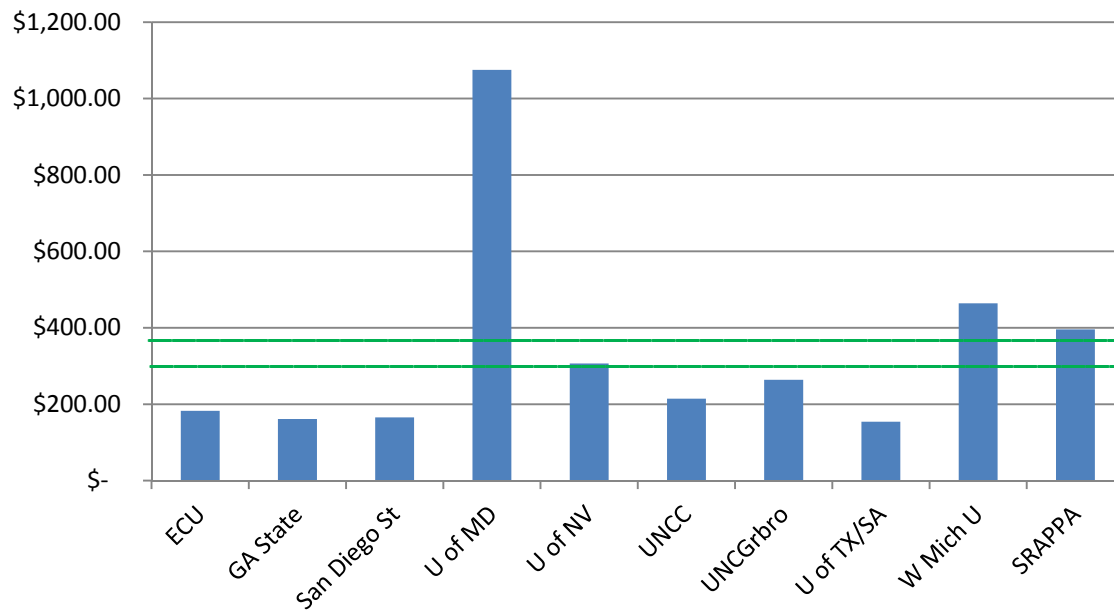
Avg. cost/student = $338.35

UNCC = 37% below average

$355.26 plus 5% of avg.
$321.43 minus 5% of avg.

STATUS

43

GOAL #6 – Promote Good Stewardship

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

Lead
F. O.

ACTION PLAN

- Actions Planned

    1 – Make sure that data submitted is correct.

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

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

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

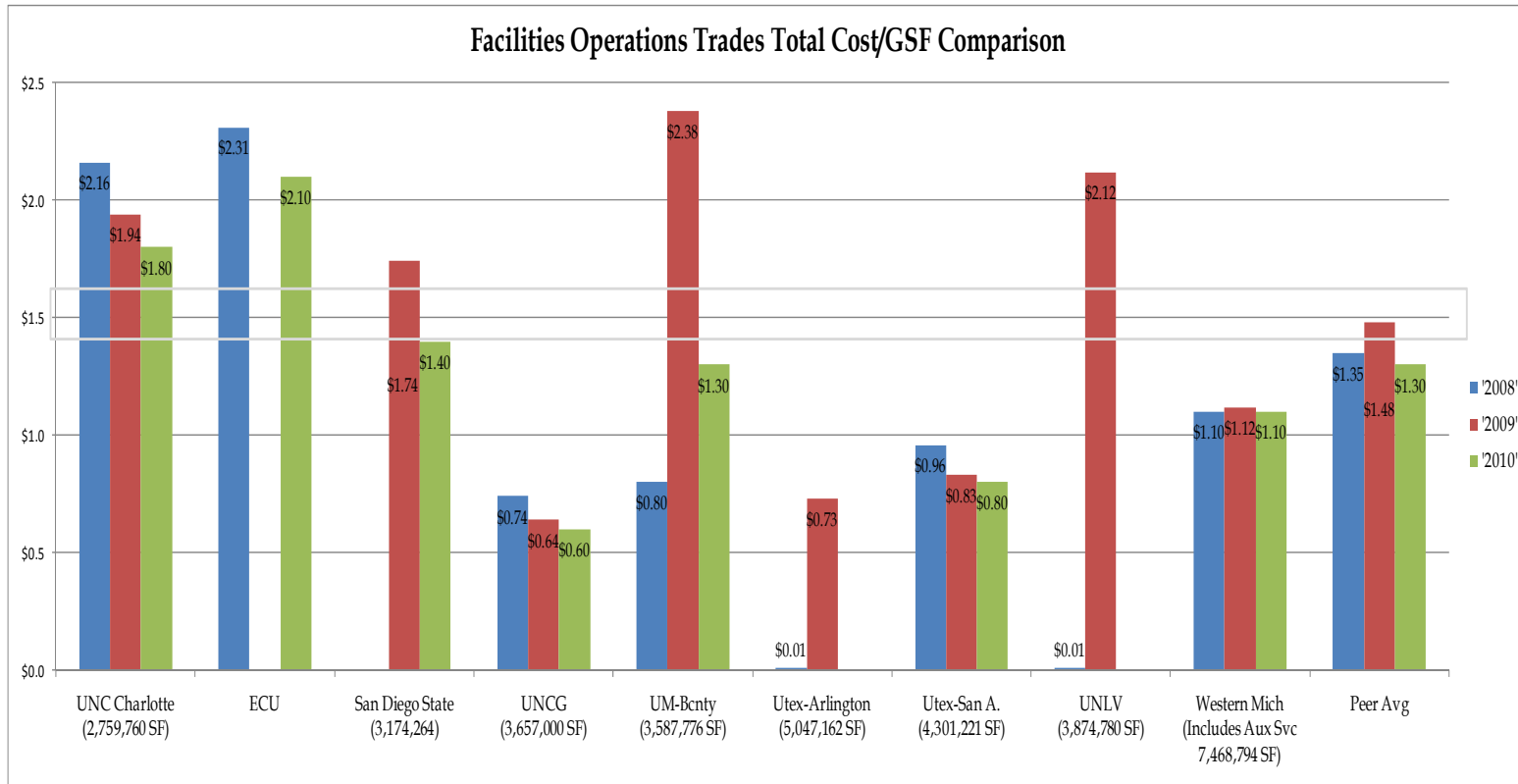**Facilities Management Strategic Planning Session – Third Quarter FY 2012**

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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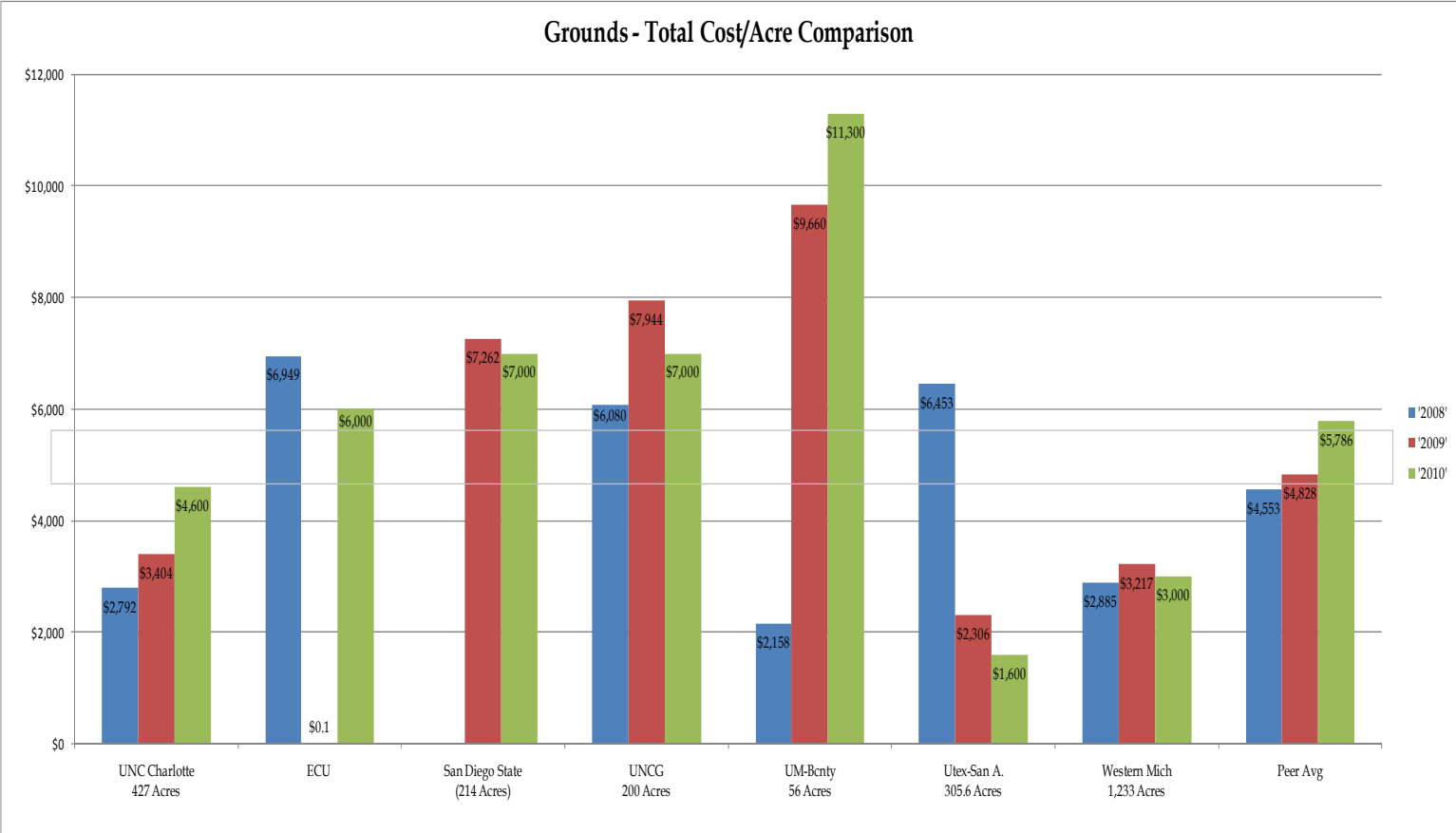

Facilities Operations Trades Total Cost/GSF Comparison

Lead F. O.

STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead
F. O.

STATUS

Grounds - Total Cost/Acre Comparison

Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #6 – Promote Good Stewardship

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

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

Goal: $400,000.00/Qtr

Balanced Scorecard Category: Financial Perspective
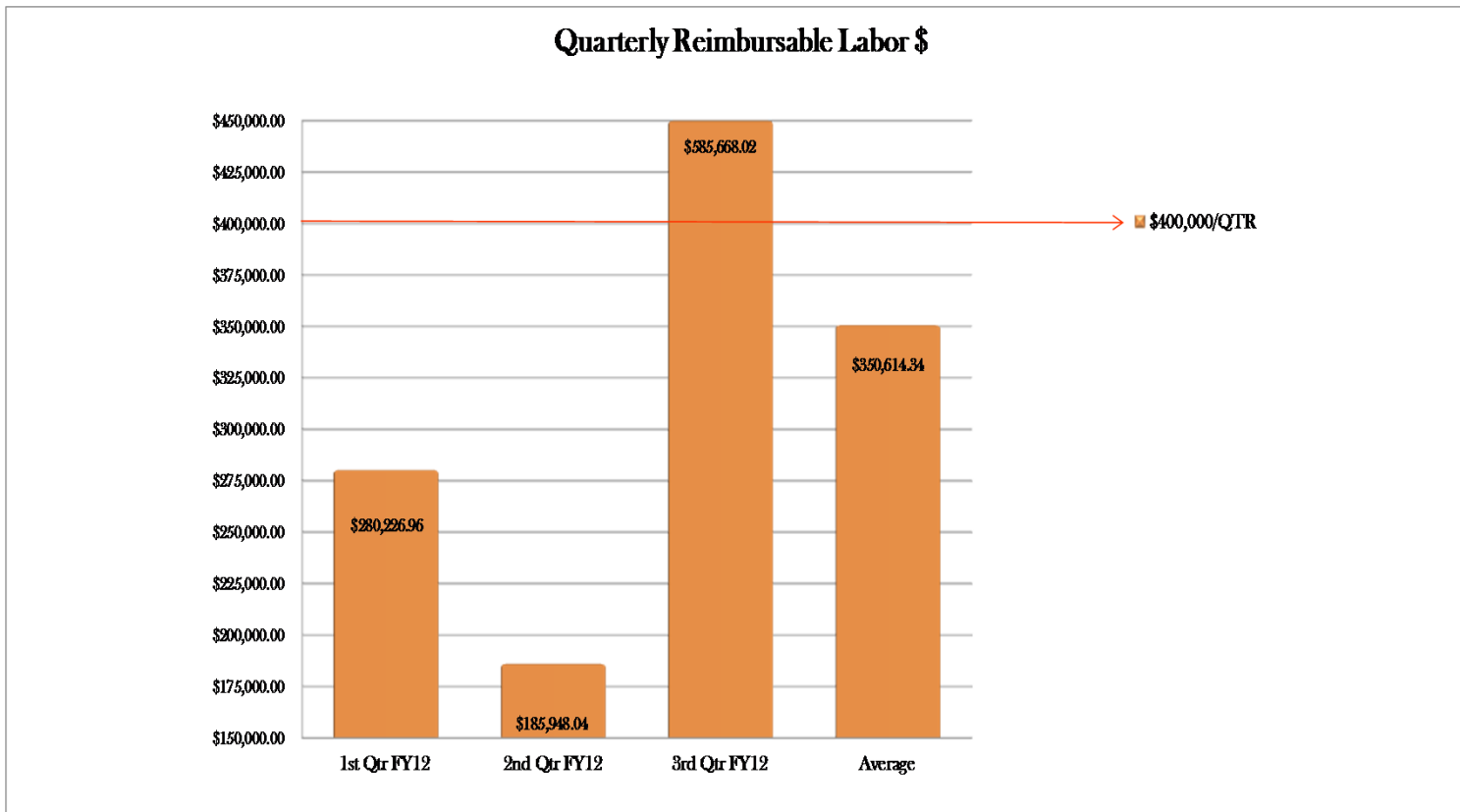
Lead
F. O.

STATUS

Quarterly Reimbursable Labor $

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead Recycling

Informal Projects - Materials Disposed
3rd Qtr FY12
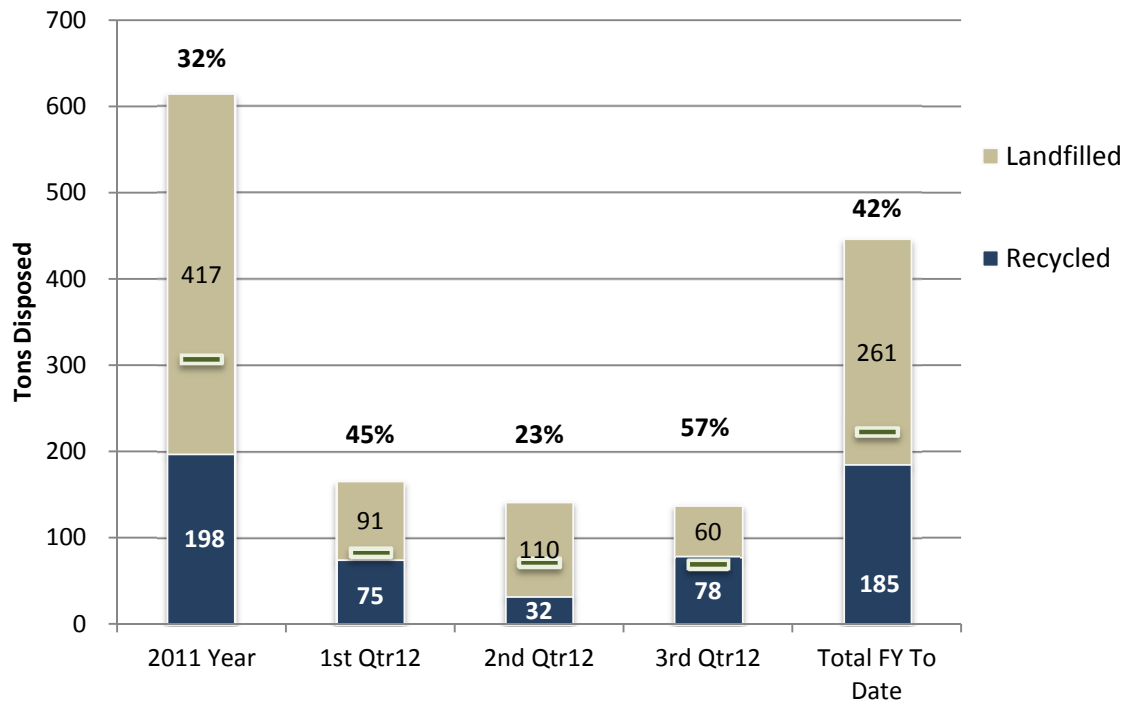
Lead
Recycling

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

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

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

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

- Actions Planned

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

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

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead
Recycling

Capital Projects - Materials Disposed
3rd Qtr FY12
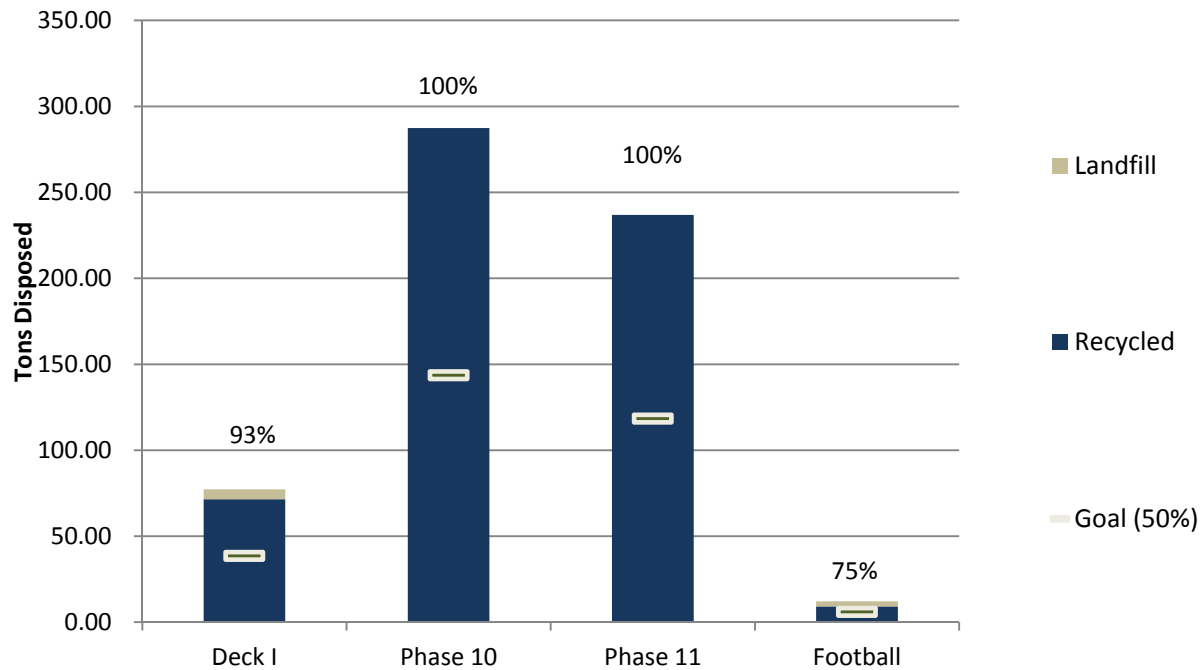
GOAL #6 – Promote Good Stewardship

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

Lead Recycling

ACTION PLAN

- Actions Complete

    – .

- Actions Planned

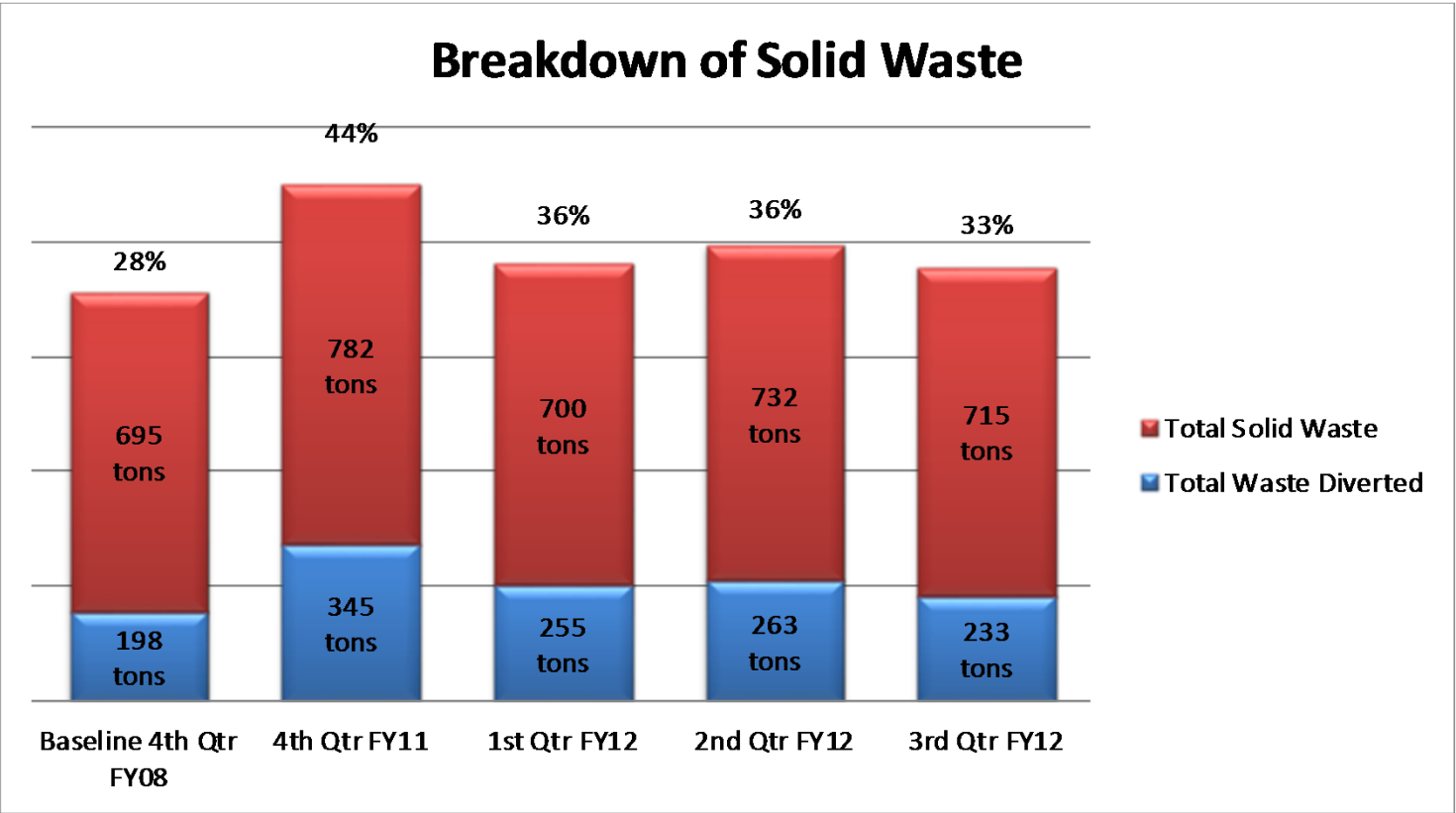   – Continue monitoring projects and acting as resource for contractors.

Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

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

Breakdown of Solid Waste

Quarter	Total Solid Waste	Total Waste Diverted	Percent
Baseline 4th Qtr FY08	695 tons	198 tons	28%
4th Qtr FY11	782 tons	345 tons	44%
1st Qtr FY12	700 tons	255 tons	36%
2nd Qtr FY12	732 tons	263 tons	36%
3rd Qtr FY12	715 tons	233 tons	33%

Lead
Recycling

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 Planned**
  - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
  - Designing Zero Waste Options for FOOTBALL- work with FOOTBALL committees
  - Designing Comprehensive Compost program for campus

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**
  - Complete STARS Assessment
  - Submit CAP to ACUPCC
  - GHG Inventory 2 – data gathering
  - Campus Sustainability Report (draft)

Facilities Management Strategic Planning Session – 2nd Quarter FY 2012
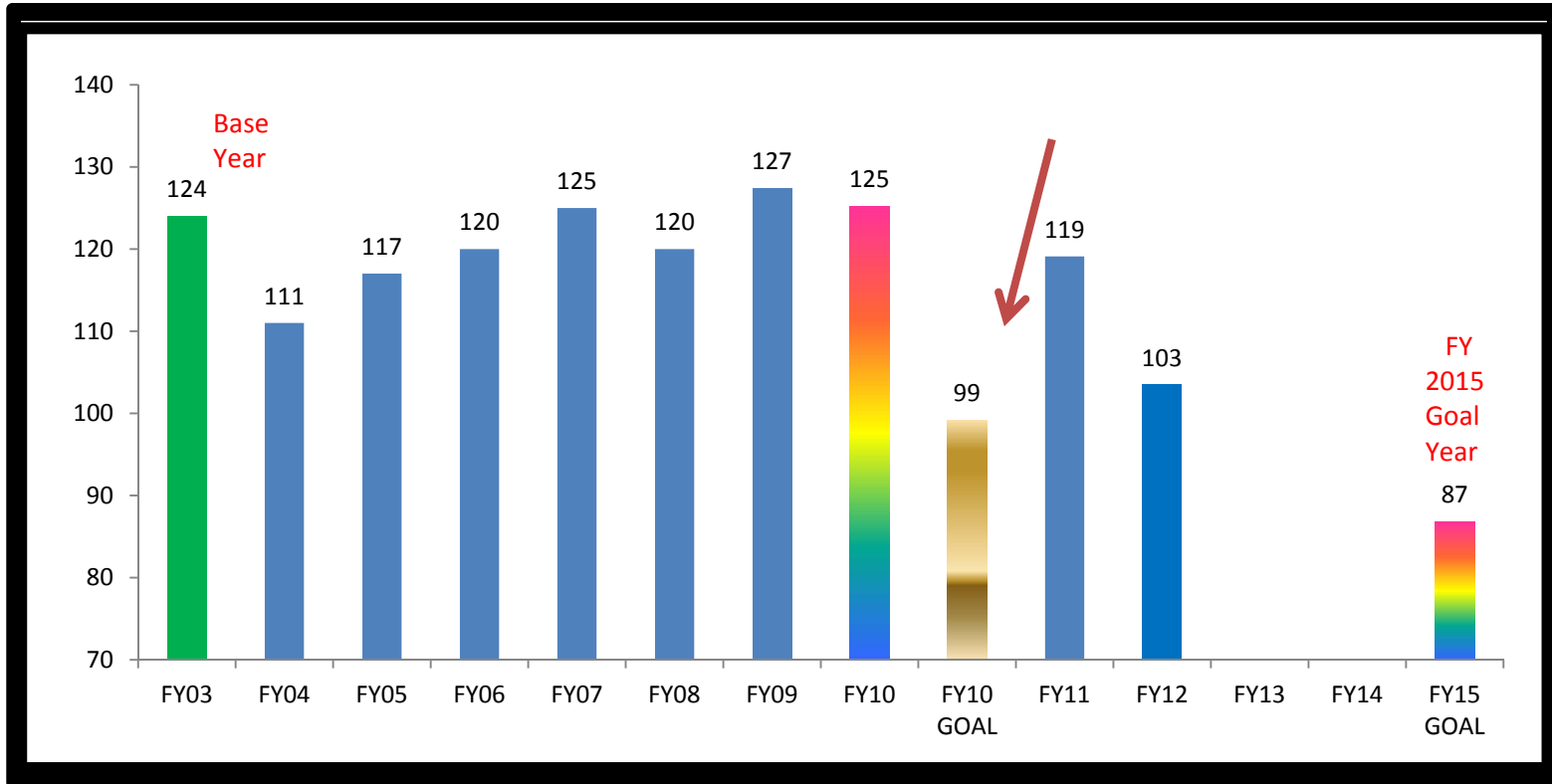
GOAL #6 – Promote Good Stewardship

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

Lead Capital

STATUS

CAMPUS ENERGY USAGE
BTU/GSF/YEAR

GOAL #6 – Promote Good Stewardship

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

Lead Capital

ACTION PLAN -ENERGY

STATUS

- **Actions Planned**
    - Complete Engineering and Zone coordination for energy operation.
    - Retro-commission Rowe
    - Retro-commission Robinson
    - Activate CCB building schedule

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 Planned**

  - Investment Grade Audit (IGA) submission to SCO

  - Finalize ECMs.

- **Schedule**

  - Present to SCO in May
  - Present to Counsel of State in Jun-Jul
  - Start construction late Summer.

Lead
Capital

ACTION PLANS FOR IMPROVEMENT

Continue –

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

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

- Program Compliance

- Education & Outreach

GOAL #6 – Promote Good Stewardship

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

Measure: Number of Individual Capital Projects achieving 12% HUB participation divided into Total Projects Completed
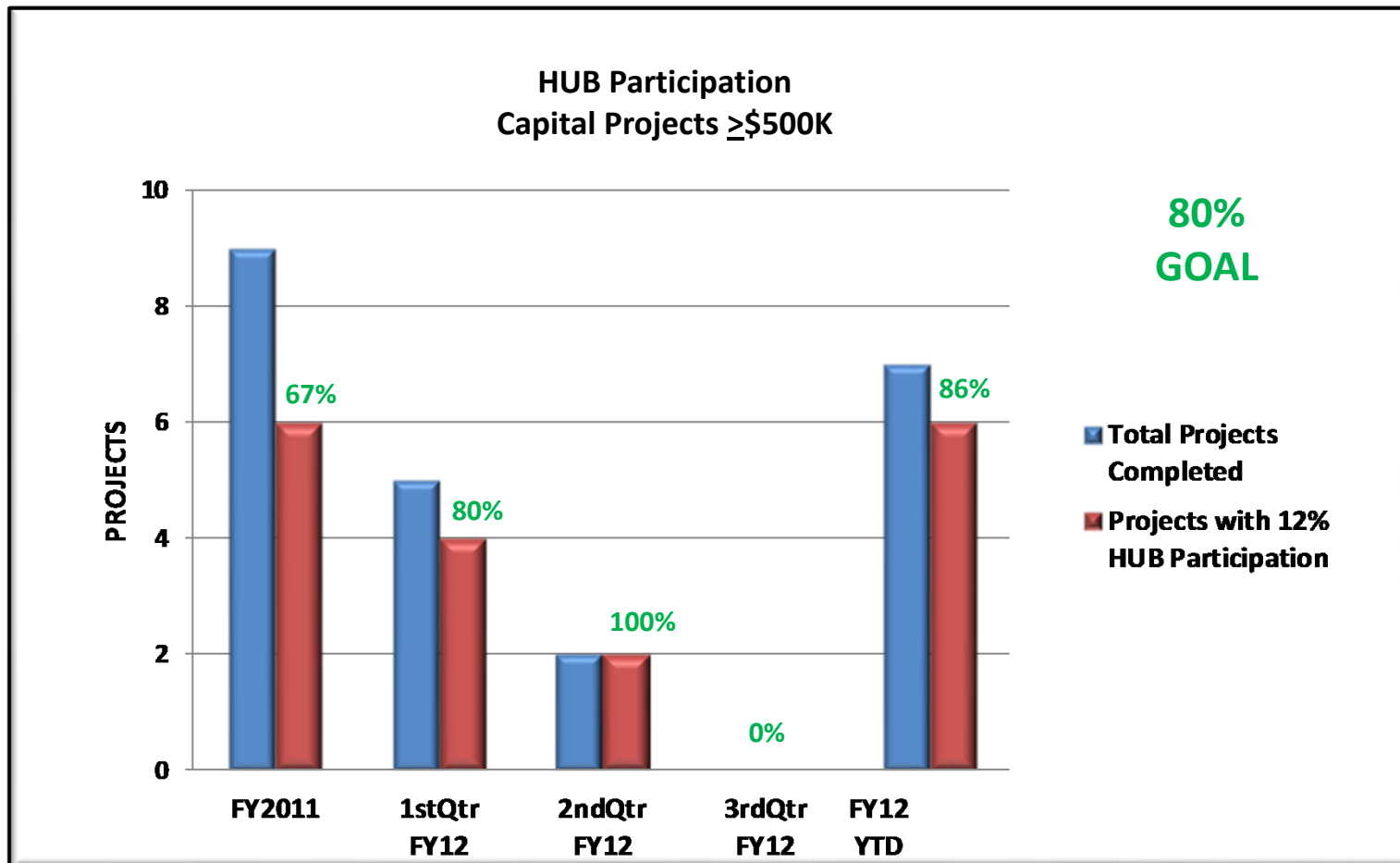
Balanced Scorecard Category: Financial Perspective

Lead
Capital

HUB Participation
Capital Projects >$500K

**80%
GOAL**

67%

80%

100%

0%

86%

■ Total Projects Completed

■ Projects with 12% HUB Participation

PROJECTS

FY2011 1stQtr FY12 2ndQtr FY12 3rdQtr FY12 FY12 YTD

STATUS

Lead Capital

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

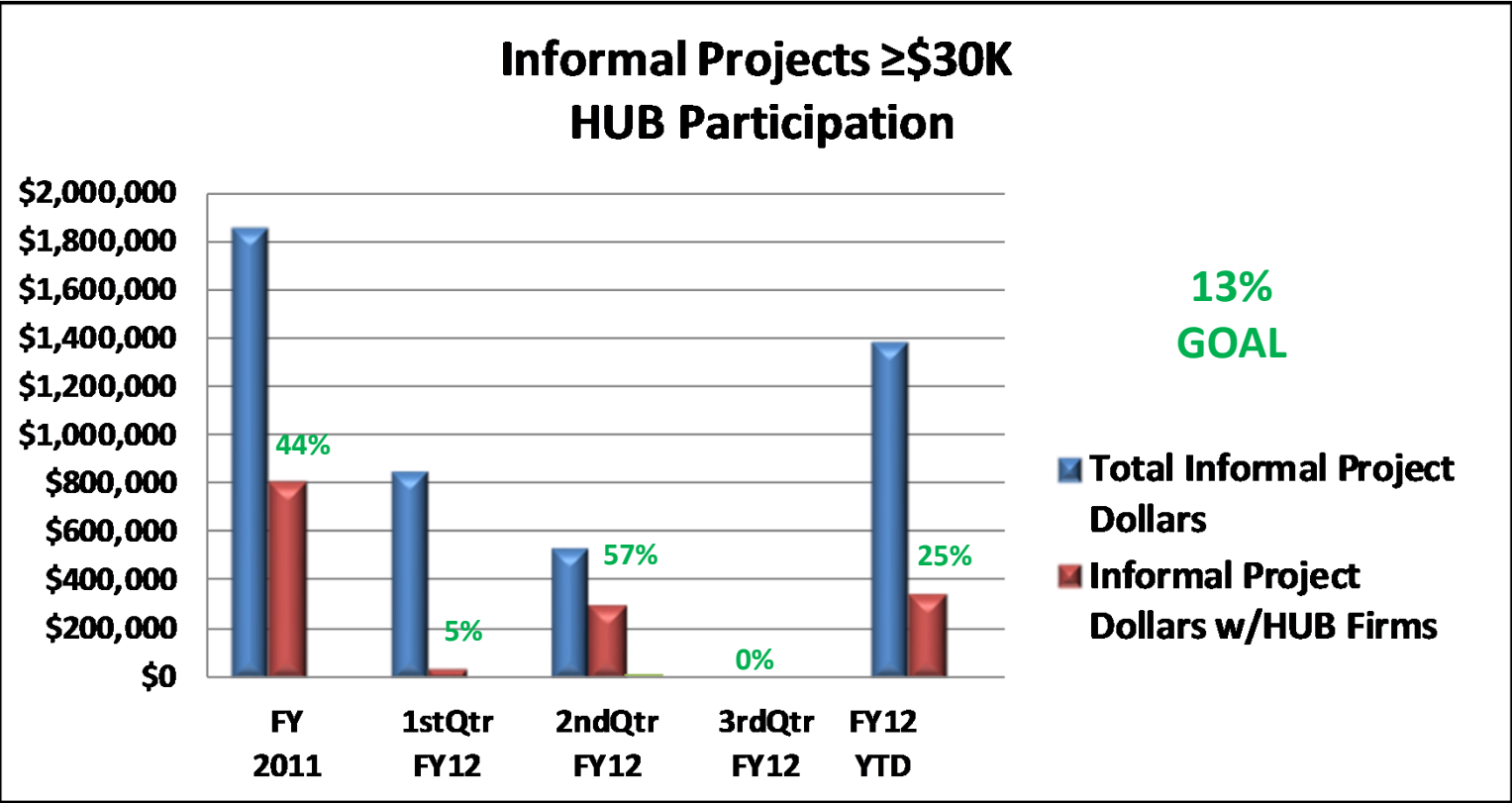## African American Participation
Capital Projects > $500K

3%
GOAL

- ■ **Total Projects Completed**
- ■ **Projects with 12% HUB Participation**

PROJECTS

FY2011: 2%
1stQtr FY12: 4%
2ndQtr FY12: 24%
3rdQtr FY12: 0%
FY12 YTD: 13%

STATUS

60
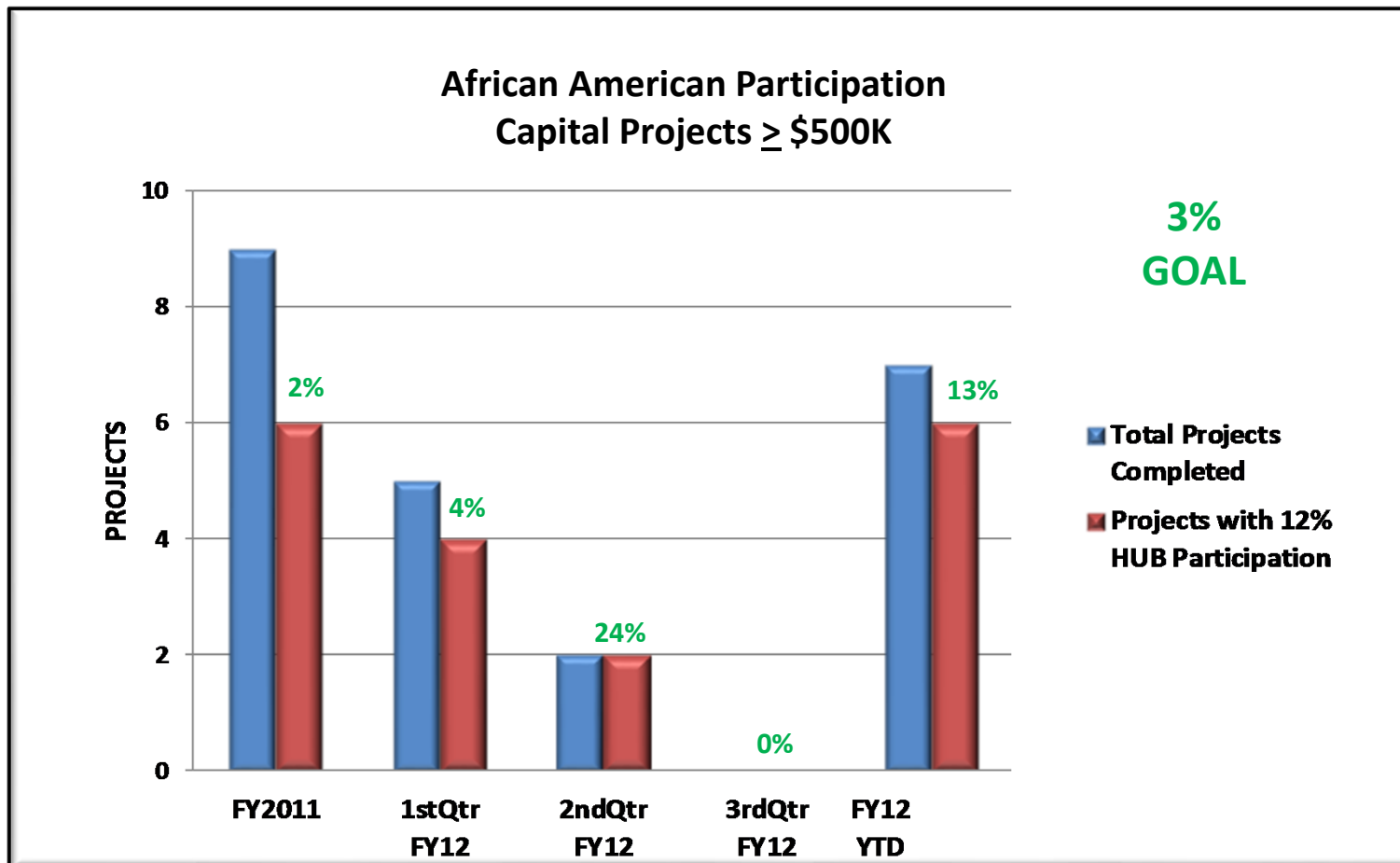
Facilities Management Strategic Planning Session – Third Quarter FY 2012

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

Lead
Capital

STATUS

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 FOR IMPROVEMENT

☐ Amanda Caudle assigned as Design Service Coordinator to work with Dorothy Vick, Doug
Pierce and JOC Contractors in seeking new HUB Contractor opportunities - All Coordinators
are encouraged to try new vendors for work on our Under $30 K projects. Amanda advises
other Coordinators of new opportunities - **This is ongoing.**

☐ Continue refining HUB reporting information in regards to Strategic Planning information -
This is ongoing.

☐ Continue to work with FIS on reports for extracting project data from Archibus -
This is ongoing.

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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 '09	$ 996,756	$ 89,479	9.0%
FY '10	$ 1,452,202	$ 88,703	6.1%
FY '11	$ 3,924,102	$ 857,125	21.8%
QTR 1	$ 798,506	$ 175,620	22.0%
QTR 2	$ 946,904	$ 308,402	32.6%
QTR 3	$ 906,531	$ 283,695	31.3%
QTR 4	$ -	$ -	0.0%
FY '12 STATUS	$ 2,651,941	$ 767,717	28.9%
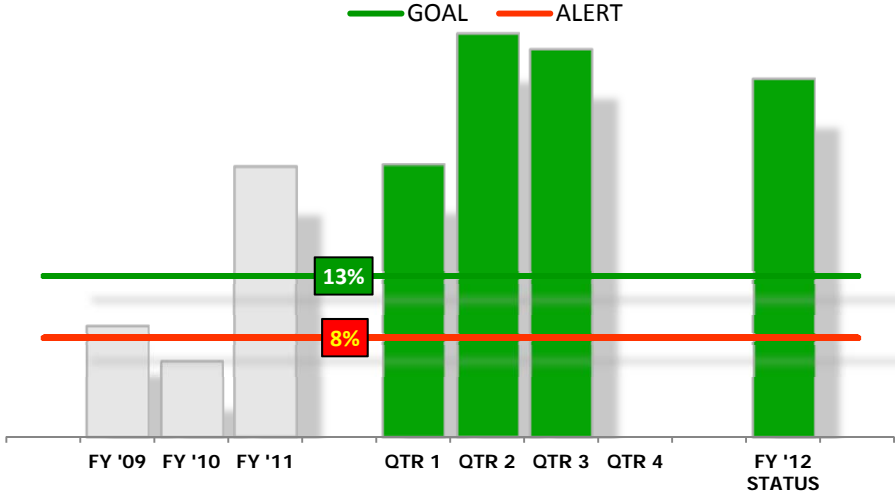
3% African Am. participation on informal projects below $30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '09	$ 996,756	$ 40,894	4.1%
FY '10	$ 1,452,202	$ 73,987	5.1%
FY '11	$ 3,924,102	$ 77,377	2.0%
QTR 1	$ 798,506	$ 700	0.1%
QTR 2	$ 946,904	$ 25,850	2.7%
QTR 3	$ 906,531	$ 4,350	0.5%
QTR 4	$ -	$ -	0.0%
FY '12 STATUS	$ 2,651,941	$ 30,900	1.2%

63
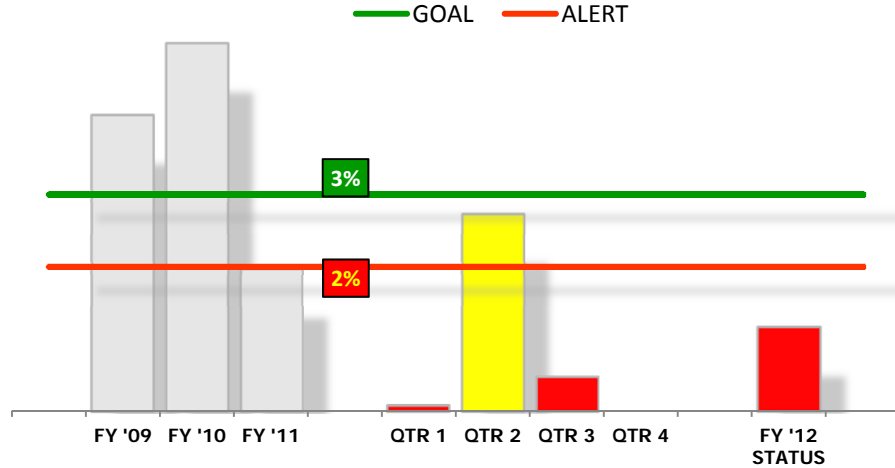
Balance Score Card

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%	64.38%	Annual FY 11	green	green
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%	?	Annual FY 11	green	green
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	"+/-5%"	hold			red
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	"+/-5%"	37%		red	red
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	"+/-5%"			red	red
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	"+/-5%"				
Financial *To financially sustain our mission, what must we focus on?*		6.1.7	Exceed Labor Services Payroll requirements by 10%	$400,000/qtr	$585,668	red	green	green
	Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	42%	yellow	red	yellow
		6.2.2	C&D Recycling Capital Projects	50%	?	green	green	green
		6.2.3	Increase % Solid Waste Recycled (Baseline 2008)	5% (29.4%)	33%	green	green	green
		6.2.4	Achieve 60% of STARS credits	50%	n/a			
	Conserve Natural Resources	6.3.1	Energy Usage by 2015	-30%			red	red
		6.3.2	Water Usage by 2010?	-20% or 43 Gal/GSF	n/a			
	Improve HUB Participation	6.5.1	12% HUB participation on 80% of Capital Projects	80%	n/a	green	green	
		6.5.2	3% African American Participation on Capital Projects	3%	n/a	green	green	
		6.5.3	13% HUB participation on Informal Proj $30K and above	13%	n/a	red	green	
		6.5.4	13% HUB for Informal Proj below $30,000 inc. 3% AA	13%/3%	31.3%/0.5%	green/red	green/yellow	green/red

Balance Score Card
INTERNAL PROCESSES
Perspective

Strategic Objectives:

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

GOAL #1 – Improve Facilities Operations

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

Lead
F. O.

ACTION PLAN

- Actions Planned

    1 – Continue to stress reporting and recording of employee's time.

    a) Meet with shop supervisor and PA's to review

    b) Stress importance with all employees.

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

    2 - Get employees out of the shop

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

Facilities Management Strategic Planning Session – Third Quarter FY 2012

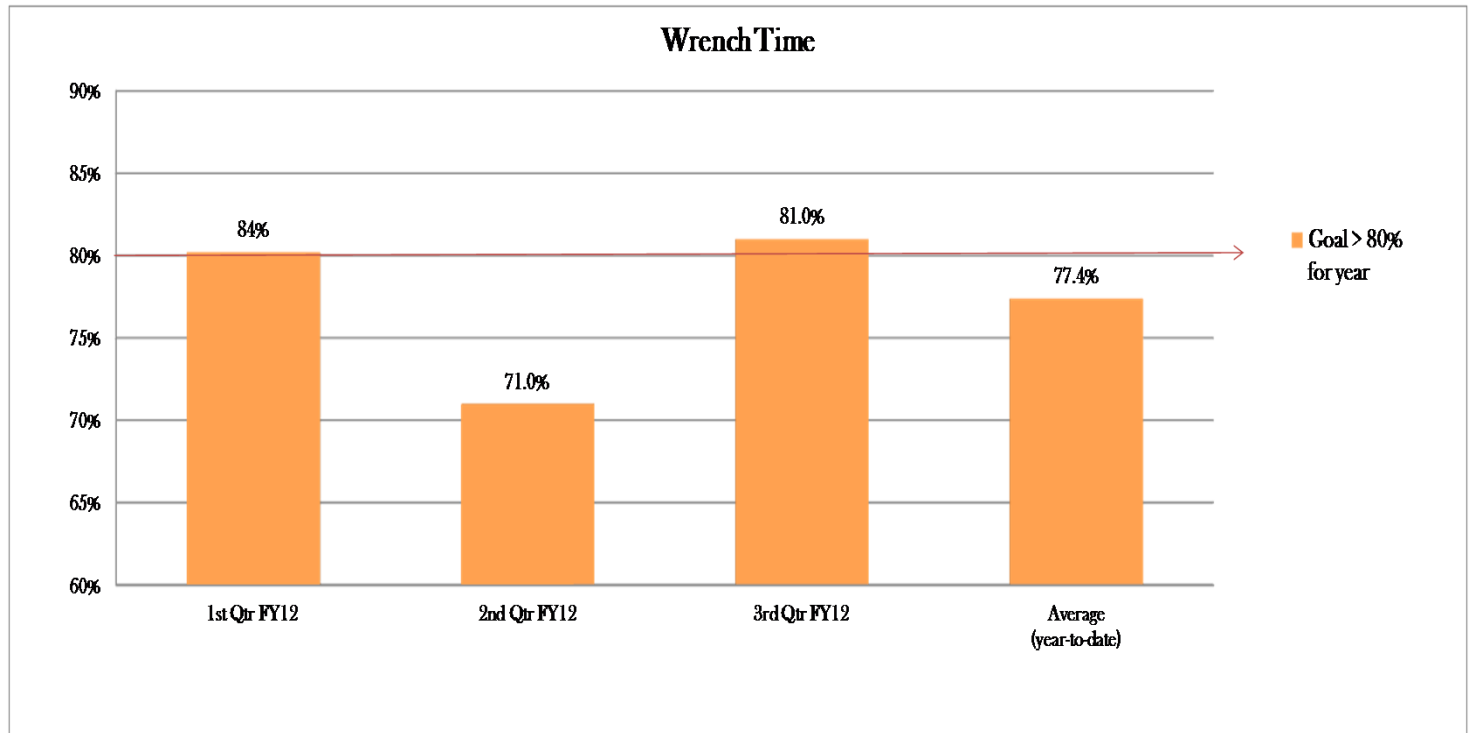**GOAL #1 – Improve maintenance and operations of the Campus**

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

Lead
F. O.

STATUS

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GOAL #1 – Improve Facilities Operations

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

ACTION PLAN

- Actions Planned

    1 – Continue to add items that have been ordered repeatedly as non-stock items to stock as order-on-request items (carried at an inventory level of "zero" but pre-sourced for faster ordering and delivery). Stock sales continue to increase. Up to 420 (highest recorded).

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

    3 – Monitor and reduce Req to PO processing time (continue to decrease to 7.43 hrs)

    4 – 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 2012

GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Greater than 97%

Balanced Scorecard Category: Internal Business Process

Lead
F. O.

STATUS

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**Facilities Management Strategic Planning Session – Third Quarter FY 2012**

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

Lead
F. O.
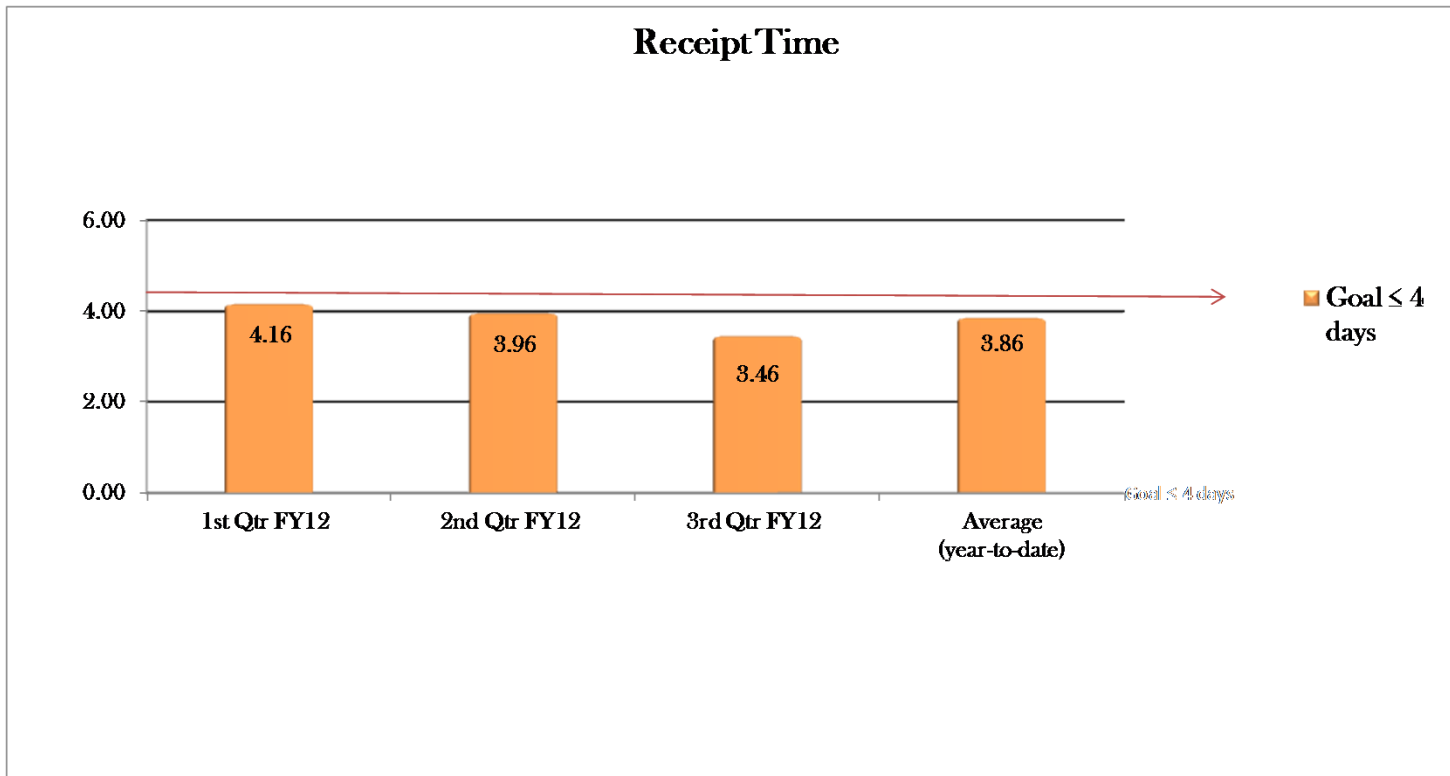
STATUS

GOAL #1 – Improve Facilities Operations

Strategy:	1.5	Improve Reliability
Objective:	1.5.1	Improve Completion of Preventative Maintenance Work Requests to over 90%
	1.5.2	Decrease number of Unscheduled Equipment Replacement Projects by 15%

<div style="float:right; background:orange; color:white;">
Lead
F. O.
</div>

ACTION PLAN

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

Facilities Management Strategic Planning Session – Third Quarter FY 2012

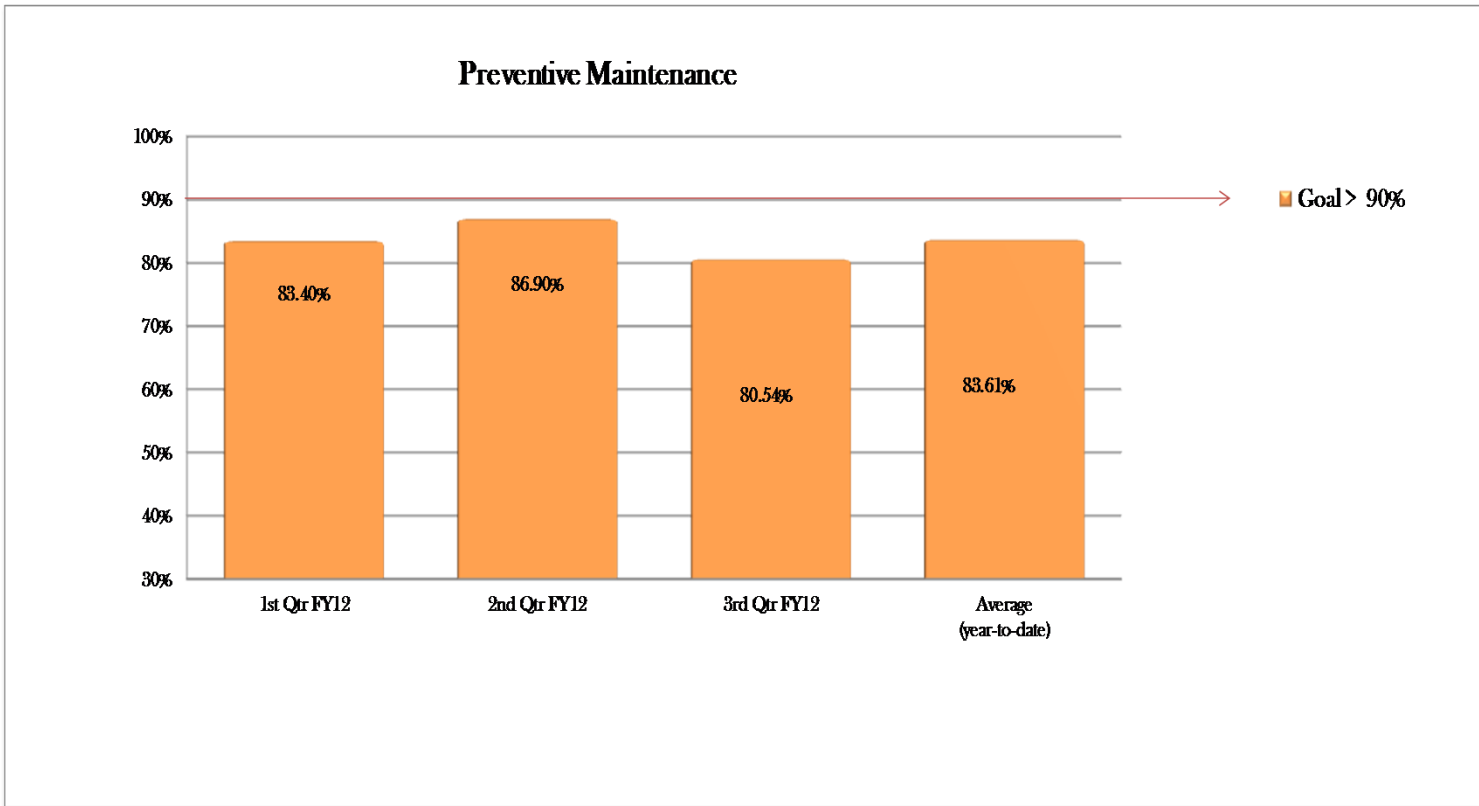**GOAL #1 – Improve maintenance and operations of the Campus**

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

Lead
F. O.

STATUS

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Facilities Management Strategic Planning Session – Third Quarter FY 2012

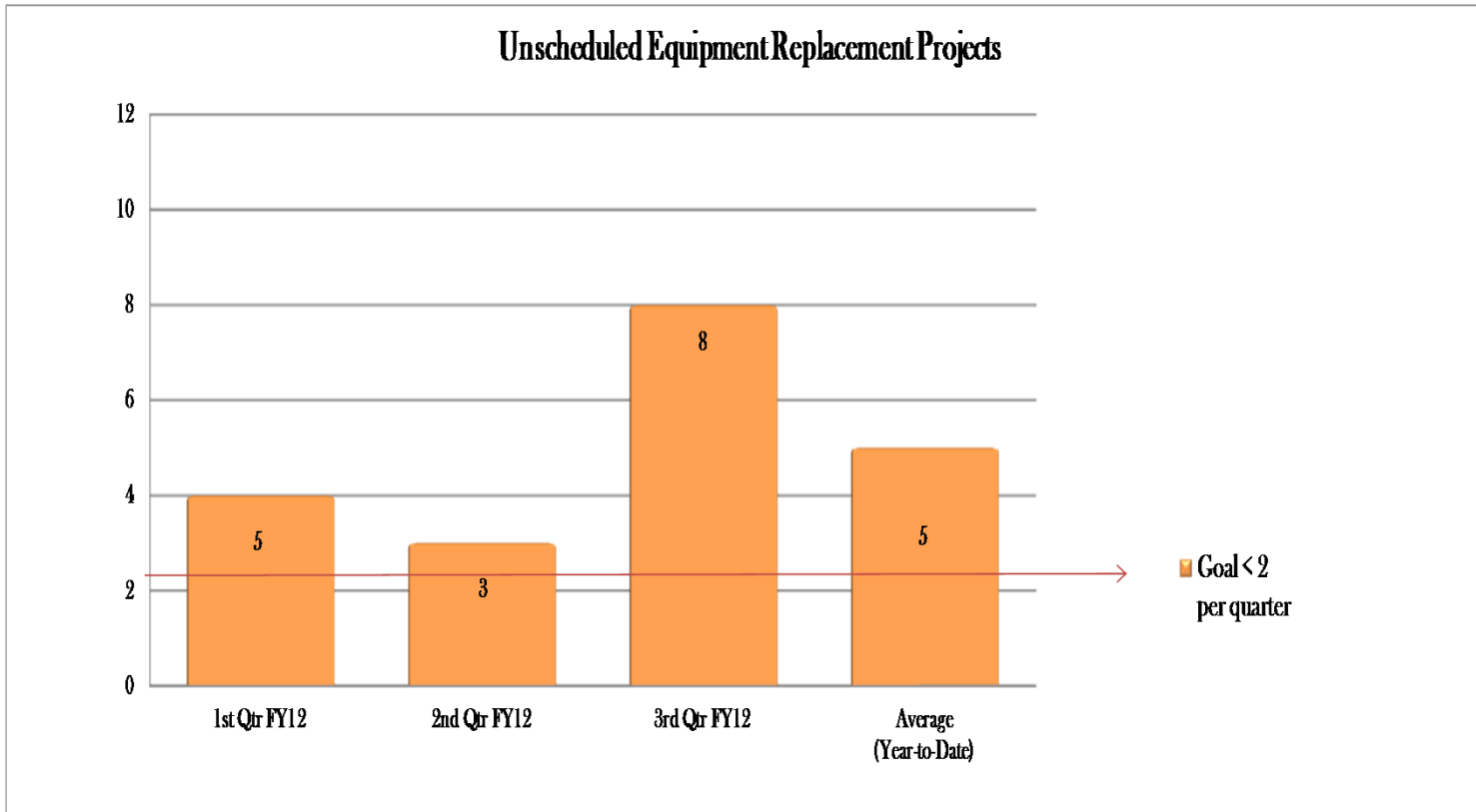**GOAL #1 – Improve maintenance and operations of the Campus**

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

Measure: Number of Unscheduled Equipment Replacement Projects in Quarter

Goal: Less than 8 per year or 2 per quarter

Balanced Scorecard Category: Internal Business Process

Lead
F. O.

STATUS

Unscheduled Equipment Replacement Projects

Bar chart showing number of Unscheduled Equipment Replacement Projects:
- 1st Qtr FY12: 5
- 2nd Qtr FY12: 3
- 3rd Qtr FY12: 8
- Average (Year-to-Date): 5

Goal < 2 per quarter

FM 5YP Prioritized Projects – FY12

1. Capital Renewal/Deferred Maintenance (CRDM) Phase 2 – On **HOLD**
2. Enterprise Data Assistant (EDA) Recycling Project -Completed
3. Enterprise Data Assistant (EDA) FO-WR Project
4. ARCHIBUS Web Central Space Audit – Drawing Updates -Completed
5. ARCHIBUS - Equipment and PM Management – In Development
6. BAS Critical Alarms – Phase One
7. ARCHIBUS Key Management – Phase Two –Pilot with EPIC
8. Capital Funds Phase Two – On **HOLD**
9. Motor Fleet -Completed
10. Parking – Pilot test with Admin Completed
11. SAC Billing -Completed
12. Facilities Condition Assessment Program (FCAP2) – In Development

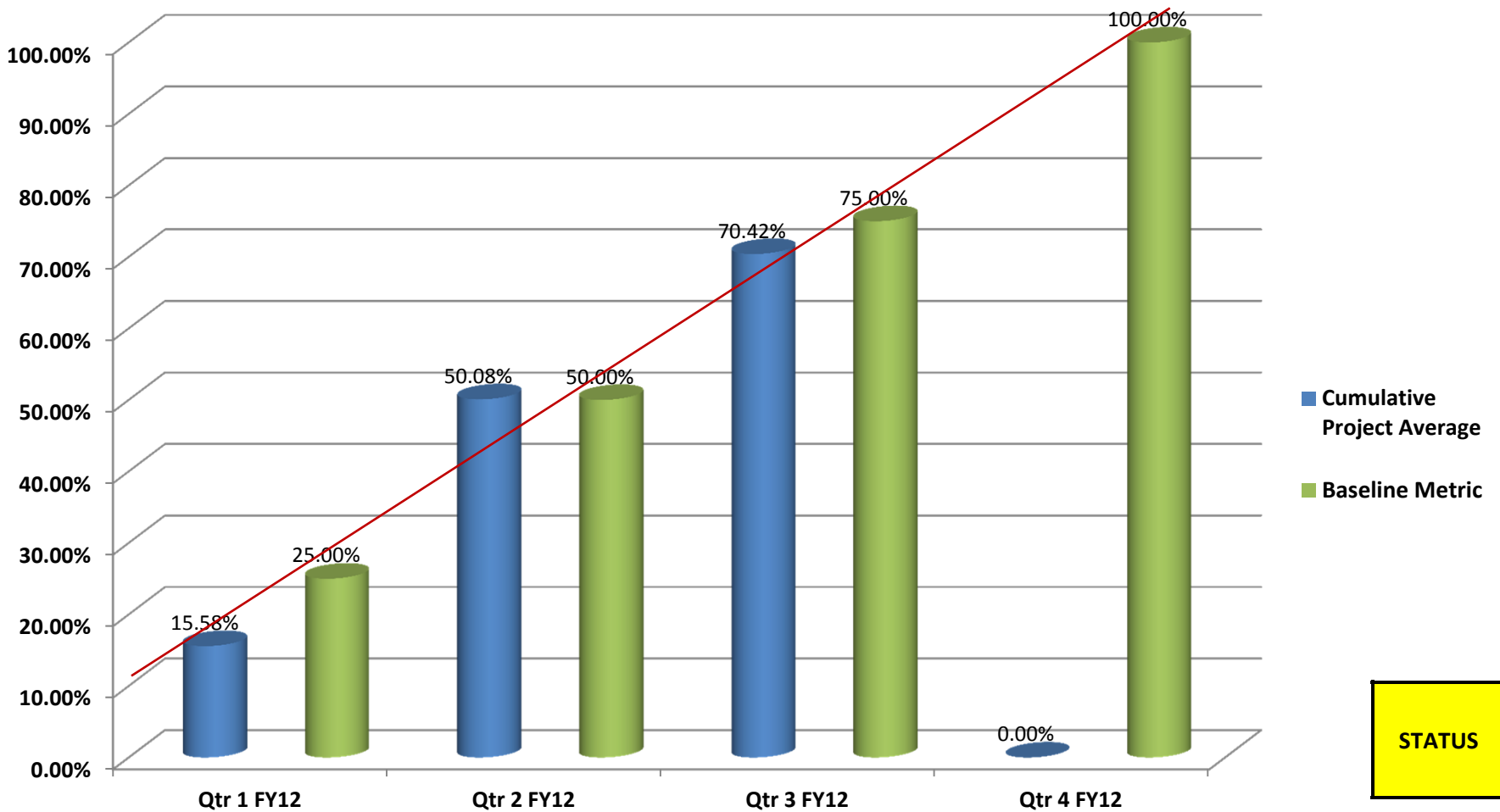**Facilities Management Strategic Planning Session – Third Quarter FY 2012**

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

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

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

Balanced Scorecard Category: Internal Processes

Lead
FIS

- Cumulative Project Average
- Baseline Metric

STATUS

Facilities Management Strategic Planning Session – Third Quarter FY 2012
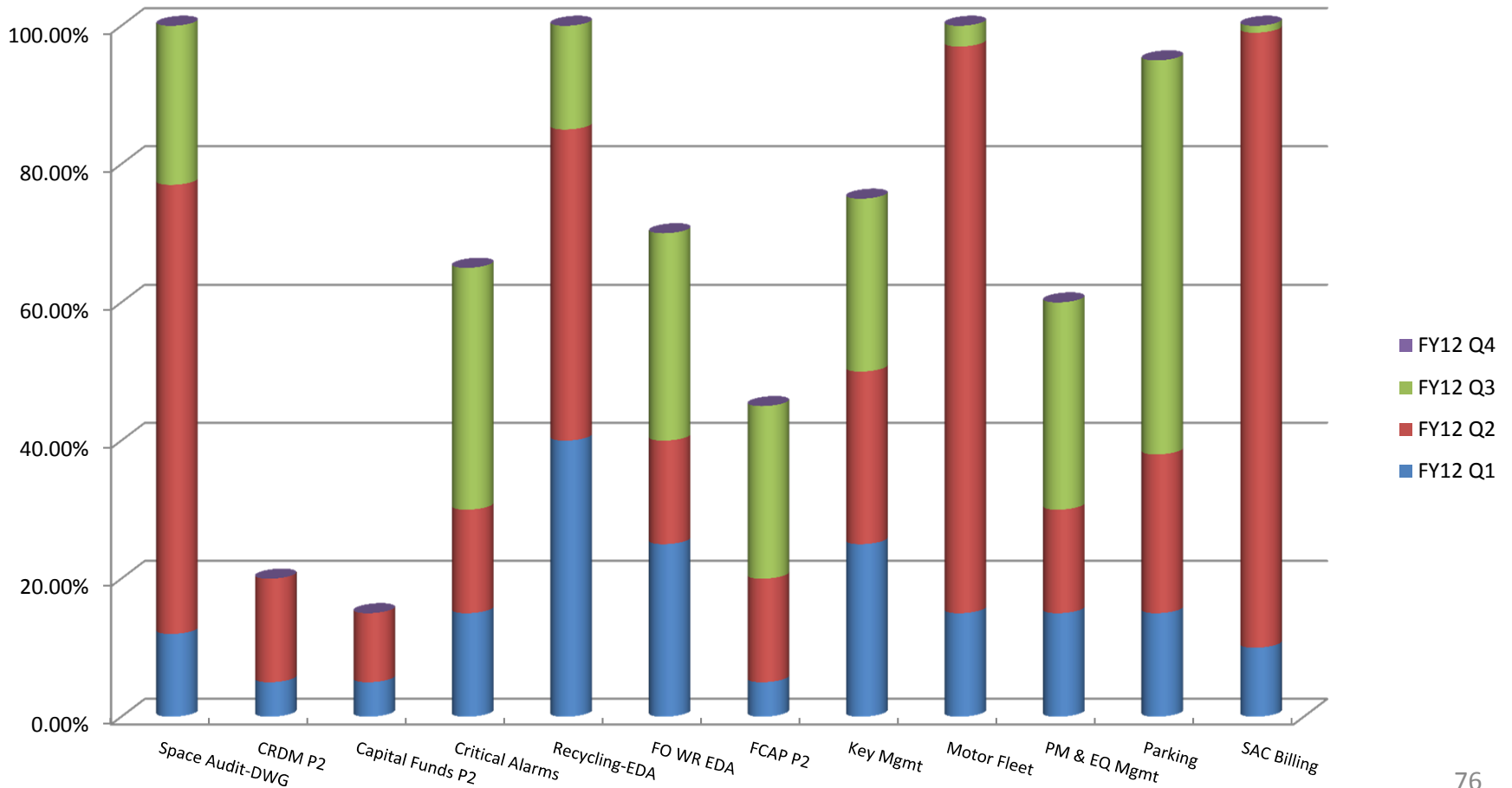
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

Balanced Scorecard Category: Internal Processes

Lead
FIS

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

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

Lead
FIS

ACTION PLAN

Actions Planned:

1. Enterprise Data Assistant (EDA) FO-WR Project – Continue Pilot with additional users

2. BAS Critical Alarms – Begin Pilot with Bioinformatics.

3. ARCHIBUS Key Management Phase Two – Complete pilot for EPIC. Transition Key Management to other buildings

4. Facilities Condition Assessment Program (FCAP2) – Complete Development perform review and test

5. Equipment and PM Management – Complete Development and Conduct User Acceptance Testing

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

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

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

ACTION PLAN

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

Facilities Management Strategic Planning Session – Second Quarter FY 2012
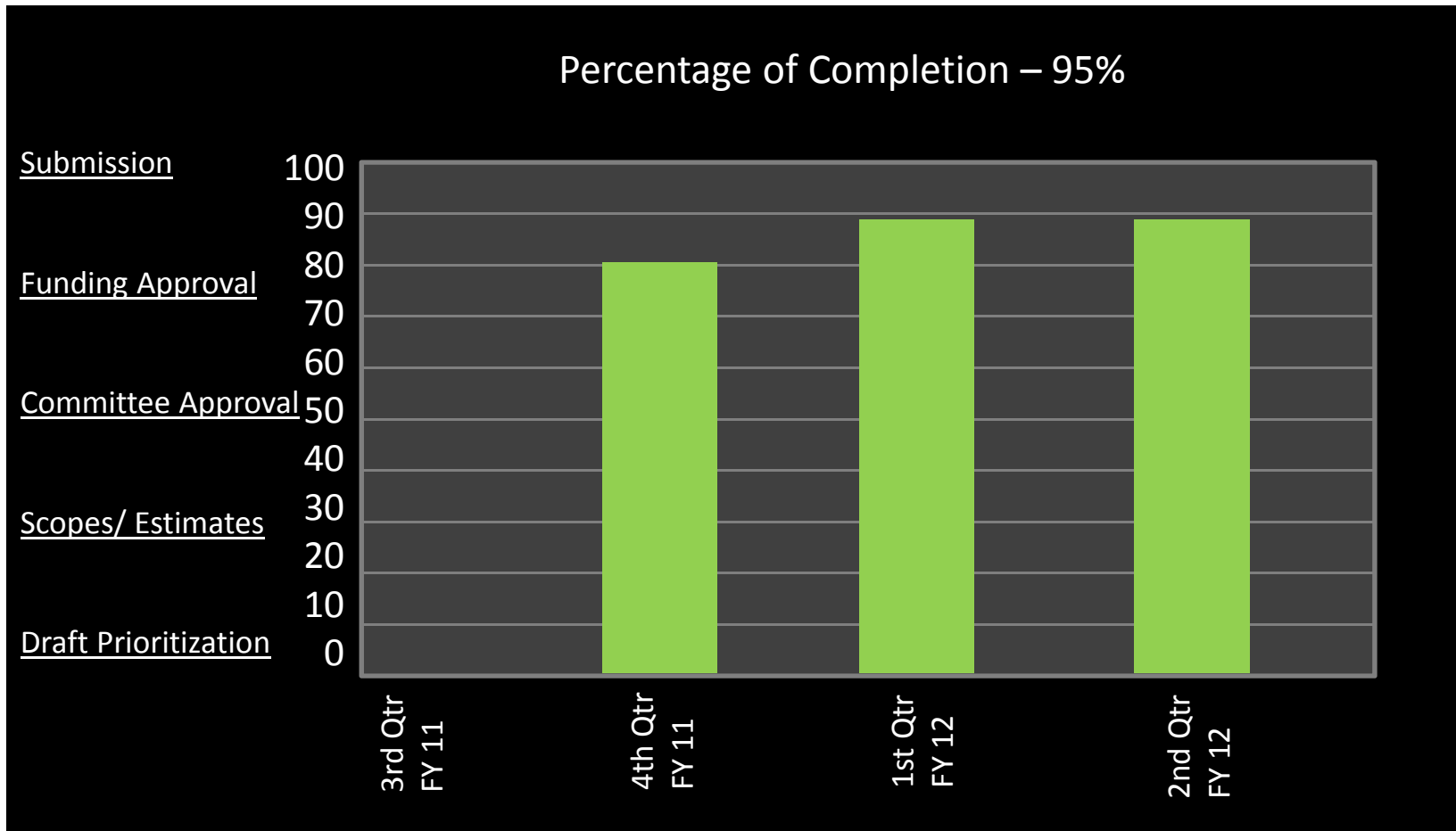
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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.

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

Balanced Scorecard Category: Internal Business Process

Lead Architectural Planning

Percentage of Completion – 95%

Submission

Funding Approval

Committee Approval

Scopes/ Estimates

Draft Prioritization

100
90
80
70
60
50
40
30
20
10
0

3rd Qtr FY 11 — 4th Qtr FY 11 — 1st Qtr FY 12 — 2nd Qtr FY 12

Status

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

Strategy 3.1: Improve space utilization throughout the university.

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

ACTION PLAN

- **Actions Planned:**
  - **SA audit to be completed by end of summer**
  - **Athletics audit to be completed by end of summer**
  - **Spot inspections/ checks continue**
  - **Add EPIC into Archibus space database**
  - **Continue updating drawings**

**Facilities Management Strategic Planning Session – Third Quarter FY 2012**

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

Strategy 3.1: Improve space utilization throughout the university.

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

Measure: % Initial audits and updates completed.

Balanced Scorecard Category: Internal Business Process
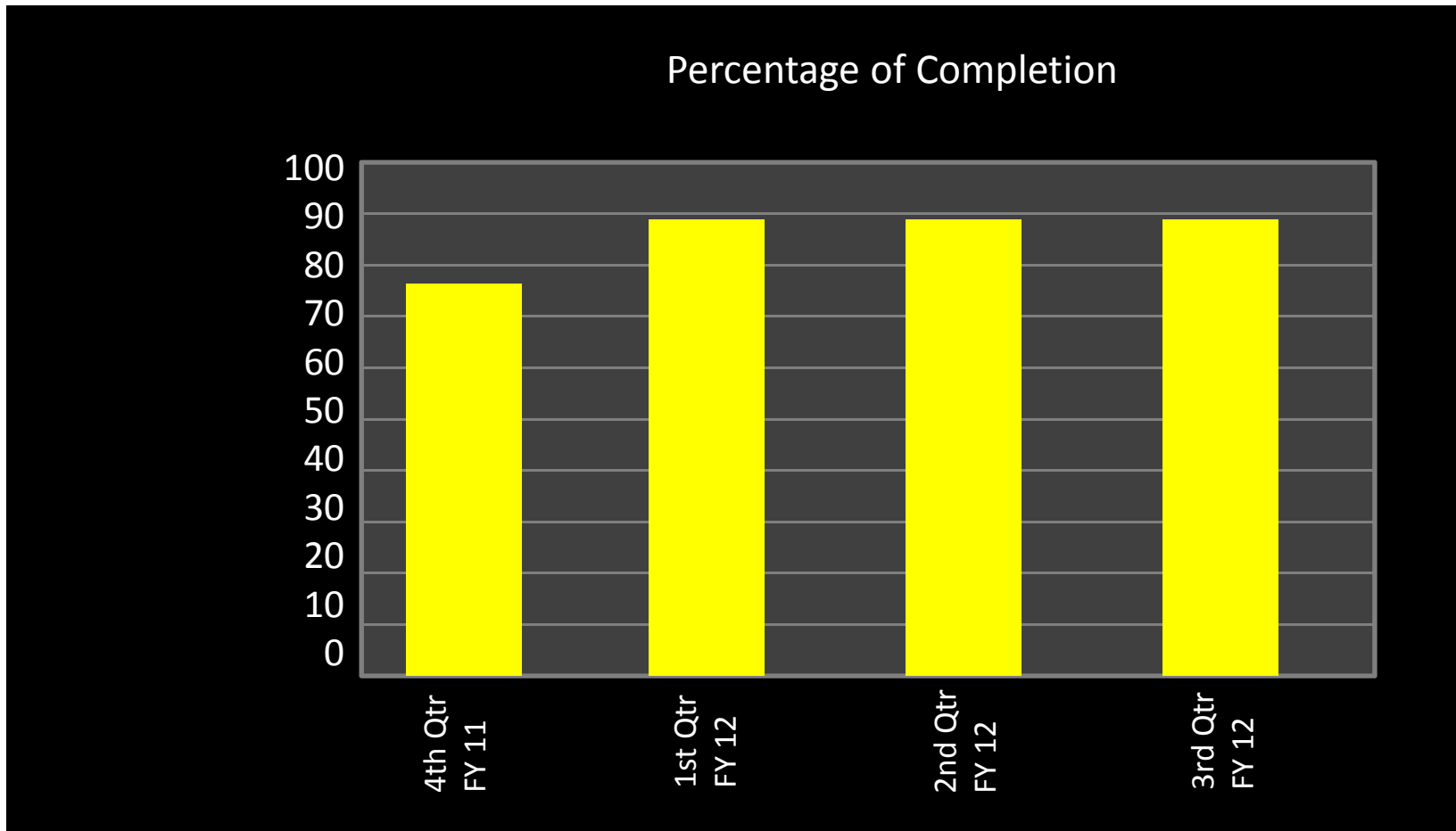
Lead Architectural Planning

Percentage of Completion

Status

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

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

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

Appropriated Projects

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

* Pending AA review , changes, and approval

ACTION PLAN

▪ **Actions Planned:**

   o **Atkins Library:**

      o **Awaiting further info from Library Staff.**

      o **Looking for a solution to the Broadcast Services space issue.**

   o **Obtain guidance on direction of CID in order to determine new set of needs.**

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

Facilities Management Strategic Planning Session – Second Quarter FY 2012

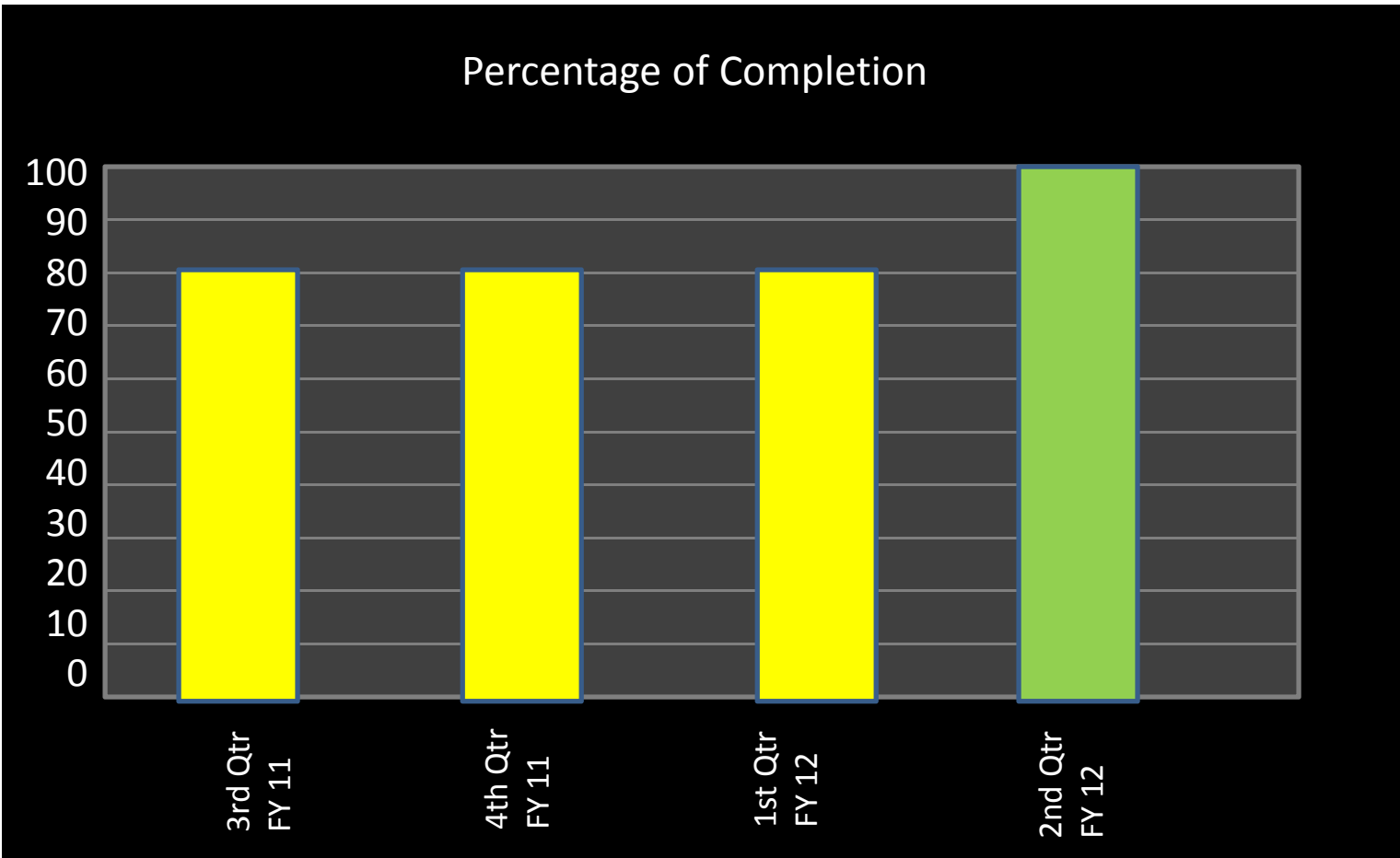**GOAL #3 – Deliver New Facilities that Support the University's Mission**

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

Objective 3.2.1 100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan are approved and ready for submission to GA by end of FY 12.

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

Balanced Scorecard Category: Internal Business Process

Lead Architectural Planning

Status **

** Non-appropriated

Percentage of Completion

(bar chart: 3rd Qtr FY 11 = 80, 4th Qtr FY 11 = 80, 1st Qtr FY 12 = 80, 2nd Qtr FY 12 = 100)

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

Lead Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-09	9	3	4	33%
Summary FY-10	10	9	3	75%
Summary FY-11	11	2	6	25%
1st Qtr. FY-12	2	2	0	100%
2nd Qtr. FY-12	3	n/a	n/a	n/a
3rd Qtr. FY-12	1	n/a	n/a	n/a
4th Qtr. FY-12	n/a	n/a	n/a	n/a

Goal 90%

33%	75%	25%	100%	0%	0%	0%
Summary FY-09	Summary FY-10	Summary FY-11	1st Qtr. FY-12	2nd Qtr. FY12	3rd Qtr. FY12	4th Qtr. FY12
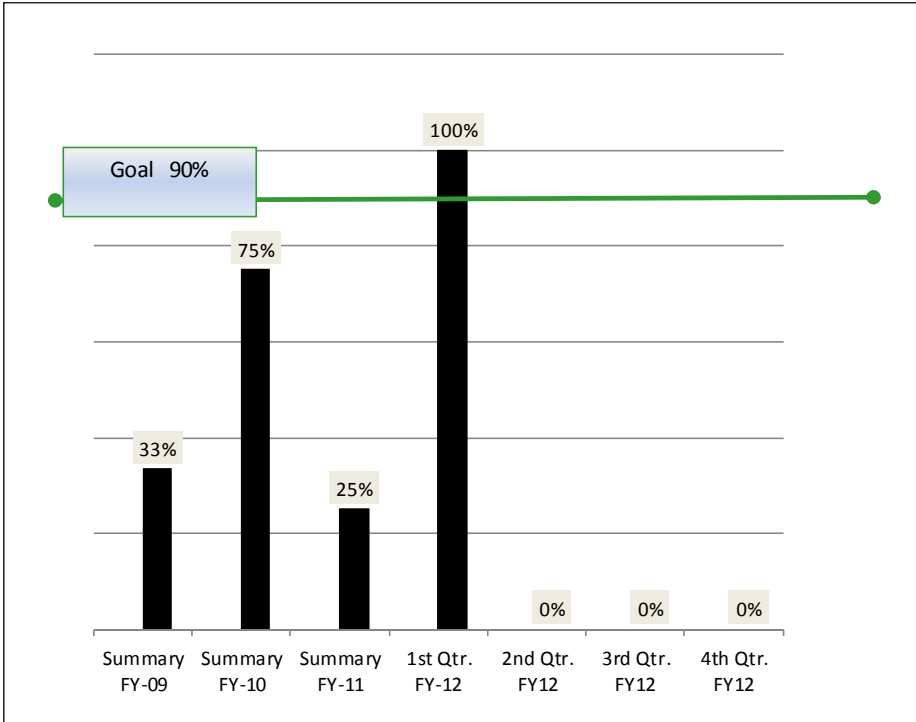
Objective for 3rd Quarter is n/a%
Year to date is 100%

Status

**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

    N/A

- Actions Planned

    1. Baseline Schedules – Accurate

    2. Baseline Schedules – Refer to them

    3. Push Designers to get fee estimates in promptly

    4. Work to allow staff to conduct designer interview without BOT chair.

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

Lead Capital

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	# not completed by scheduled time	% Designs complete by completion time
Summary FY-09	4	0	100%
Summary FY-10	9	5	63%
Summary FY-11	6	0	100%
1st Qtr. FY-12	0	0	n/a
2nd Qtr. FY-12	1	1	50%
3rd Qtr. FY-12	4	2	67%
4th Qtr. FY-12	n/a	n/a	n/a
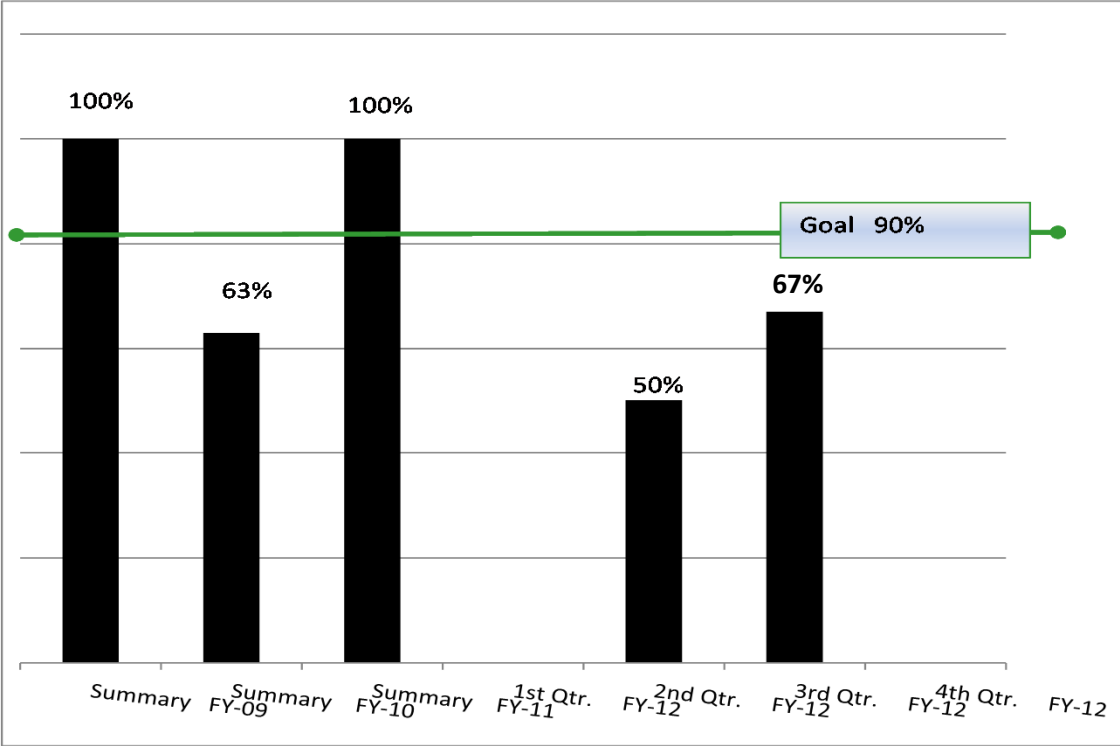
Objective for 3rd Quarter is 67%
Year to date is 75%

Status

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

  N/A

- Actions Planned

  1. Baseline Schedules – Accurate

  2. Baseline Schedules – Refer to them

  3. Keep end users up to date on overall schedule

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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

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

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

Balanced Scorecard Category: Financial Perspective

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 & Initial Contract	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
Football/Sports	$3,950,000	$3,166,022	$3,404,882	-19.8%	7.5%	0
Motorsports II	$399,000	$303,000	$303,700	-24.1%	0.2%	0
Parking Deck I	$1,701,000	$1,044,000	$1,136,083	-38.6%	8.8%	0
Parking Deck J	$2,211,057	$946,200	$946,200	-57.2%	0.0%	1
PORTAL	$2,466,950	$2,200,000	$2,200,000	-10.8%	0.0%	1
RDH Renovation	$1,742,048	$1,981,410	$1,987,410	13.7%	0.3%	0
Res. Hall Ph. X	$2,809,632	$2,147,890	$2,147,890	-23.6%	0.0%	1
Res. Hall Ph. XI	$3,695,657	$2,078,598	$2,078,598	-43.8%	0.0%	1
Res. Hall Ph XII	$3,400,667			0.0%	0.0%	0
Res. Hall Scott	$265,817	$210,000	$210,000		0.0%	1
RUP IV		$385,000	$385,000	0.0%	0.0%	1

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

Objective is 90%

Status

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

- Actions Planned

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

    2. Monitor scope creep.

    3. Protect contingency

Facilities Management Strategic Planning Session – Third Quarter FY 2012

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

Strategy   **3.4**   Improve Administration of the Capital Construction Process

Objective   **3.4.2**   95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

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

Balanced Scorecard Category: Internal Business Process

Lead Capital
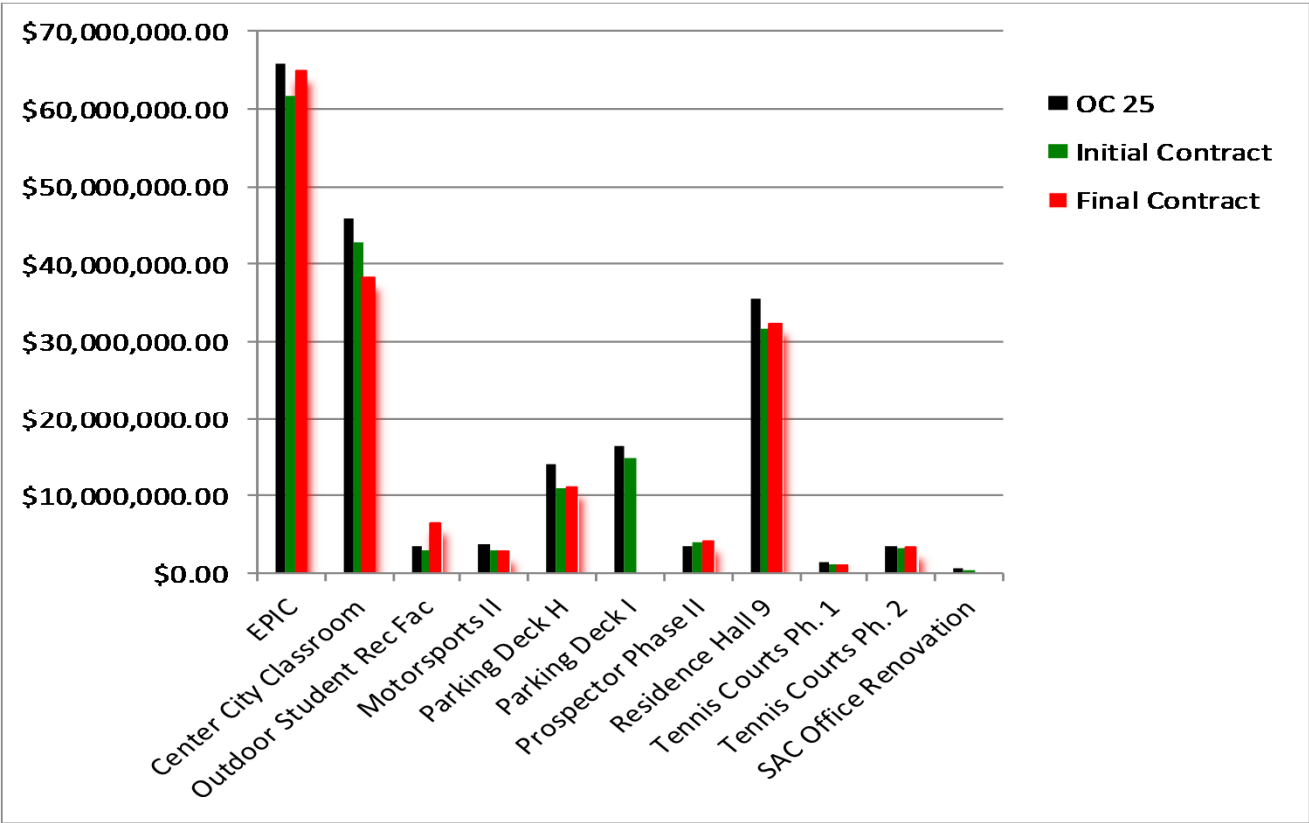
Status

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

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 Planned

    1. Maintain & Print project budgets & account reports monthly

    2. Share budgets with AVC and end users.

    3. Hold contingency for unforeseen conditions & project requirements.

    4. Manage scope creep.

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

Strategy 3.5: Improve Infrastructure improvement planning

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

Lead Architectural Planning

ACTION PLAN

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

Facilities Management Strategic Planning Session – Second Quarter FY 2012
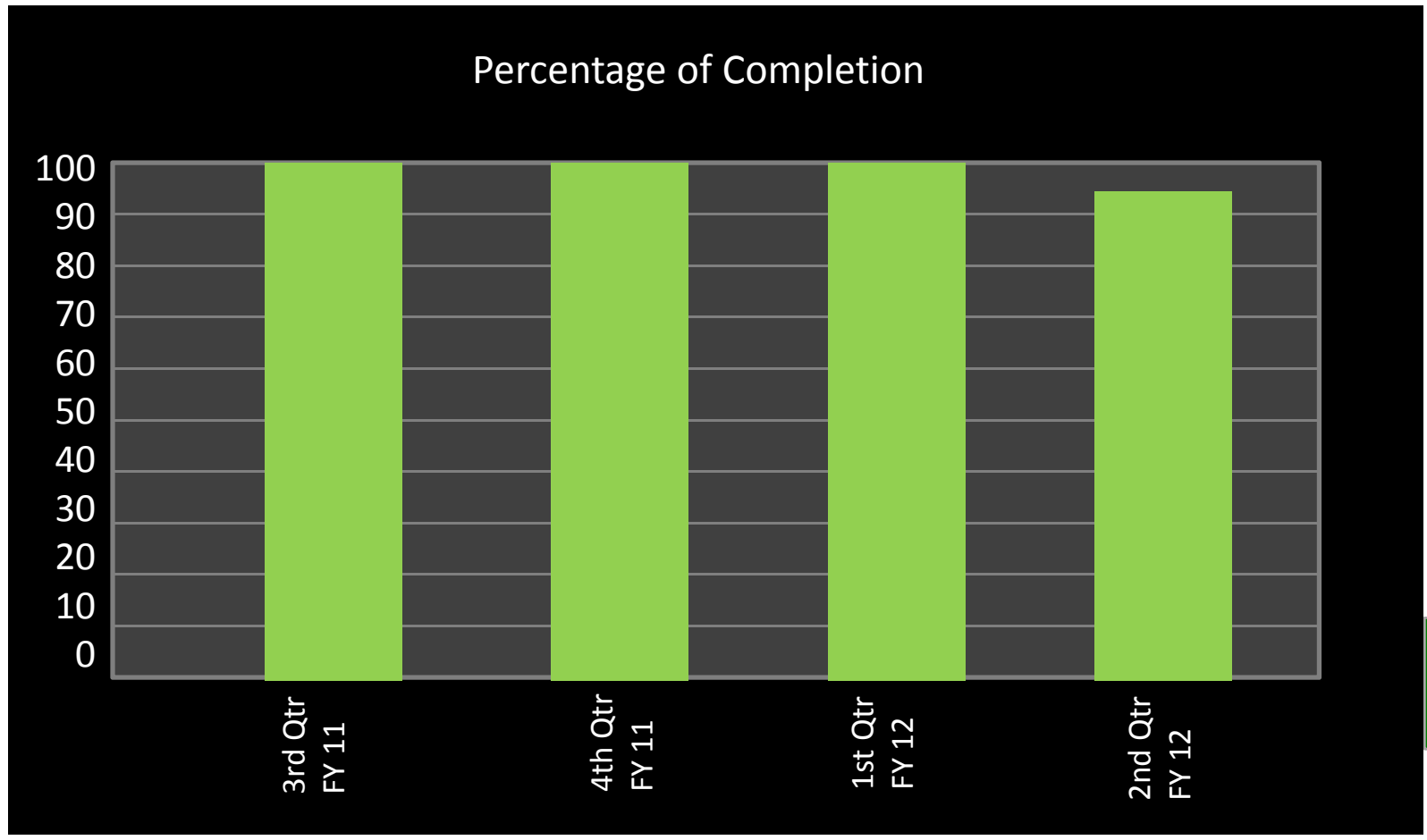
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

Percentage of Completion chart with bars for 3rd Qtr FY 11, 4th Qtr FY 11, 1st Qtr FY 12, and 2nd Qtr FY 12.

Lead Architectural Planning

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.

ACTION PLAN

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

Facilities Management Strategic Planning Session – Second Quarter FY 2012
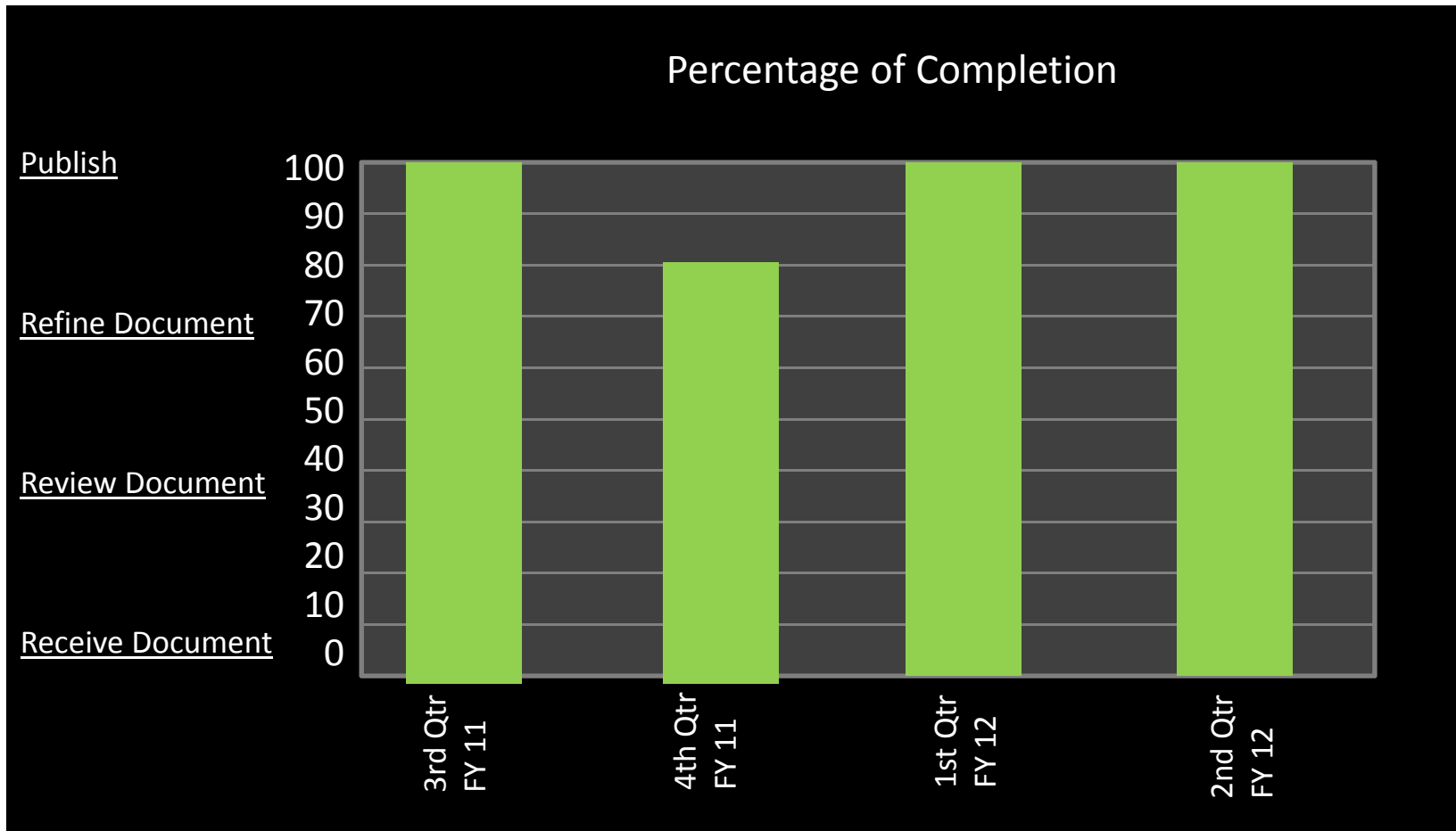
GOAL #3 – Deliver New Facilities that Support the University's Mission

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

Lead Architectural Planning

Percentage of Completion

Publish — 100

90

80

Refine Document — 70

60

50

40

Review Document — 30

20

10

Receive Document — 0

3rd Qtr FY 11 | 4th Qtr FY 11 | 1st Qtr FY 12 | 2nd Qtr FY 12

Status

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%	81.00%	Green	Yellow	Green
	Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	92.75%	Red	Red	Red
	Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	3.46	Green	Green	Green
Internal Processes *To satisfy and delight our customers, which operational processes must we excel in?*	Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	80.54%	Yellow	Red	Red
		1.5.2	Reduce Unscheduled equipment repl projects by 15%	<2	0.08	Red	Red	Red
	Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	70.42%		Green	Yellow
	Master/Project Planning Process	2.3.1	80% of Existing Projects Documented and Input into the CRDM by _____	80%	95%		Green	Green
		3.1.1	100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.	100%	89%	Yellow	Yellow	Yellow
		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 end of FY12	100%	100%	Yellow	Green	Green
	Capital Project Administration	3.3.1	Designers Under Contract w/in 120 days of Posting in CAPSTAT	90% w/in 120	100%	Green	Green	Green
		3.3.2	90% of Designs Complete by Scheduled Comp. Date	90%	63%		Red	Red
		3.3.3	90% of Designs w/in Design Budgeted Fee	90%	100%		Green	Green
		3.4.1	90% of Capital construction Projects Completed on Time	90%	50%			Red
		3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%	90%		Yellow	Yellow
		3.5.1	80% of Infrastructure Projects Integrated into Capital Construction Project Scopes	80%	?	Green	Green	Green
		3.6.1	80% of Revisions Integrated into the Design and Construction Manual.	80%	?	Green	Green	Green

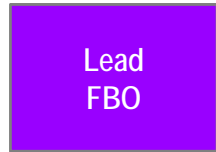# Balance Score Card
Learning & Growth
Perspective

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

Lead FBO

Strategy 5.1 Recruit a talented and diverse workforce in a timely fashion
> **Objective 5.1.1** Benchmark vacancy time of no longer than 80 calendar days – Nonexempt
> Benchmark vacancy time of no longer than 120 calendar days - Exempt
> **Objective 5.1.2** 100% of positions filled through targeted selection process by FY 2010

ACTION PLAN

❑ Experiencing delays across the board in processing due to Campus HR's new HRMM (People Admin) implementation; To assist, in some cases, we have temporarily been doing actual keying of paperwork for Supervisors, Managers, and Directors (new positions). We have also had individual meetings to help explain the process. Campus HR has also scheduled meetings to go through the process. As more guidance on process is obtained from Campus HR, we plan to pass this on.

❑ Continue to work with Budget Office and monitor days unfilled. Currently, receiving a periodic report that provides days vacant. Special note for those positions nearing the 6 month vacant status. These are reported to OSP.

❑ **W.I.G.** Develop Targeted Selection on-line training session

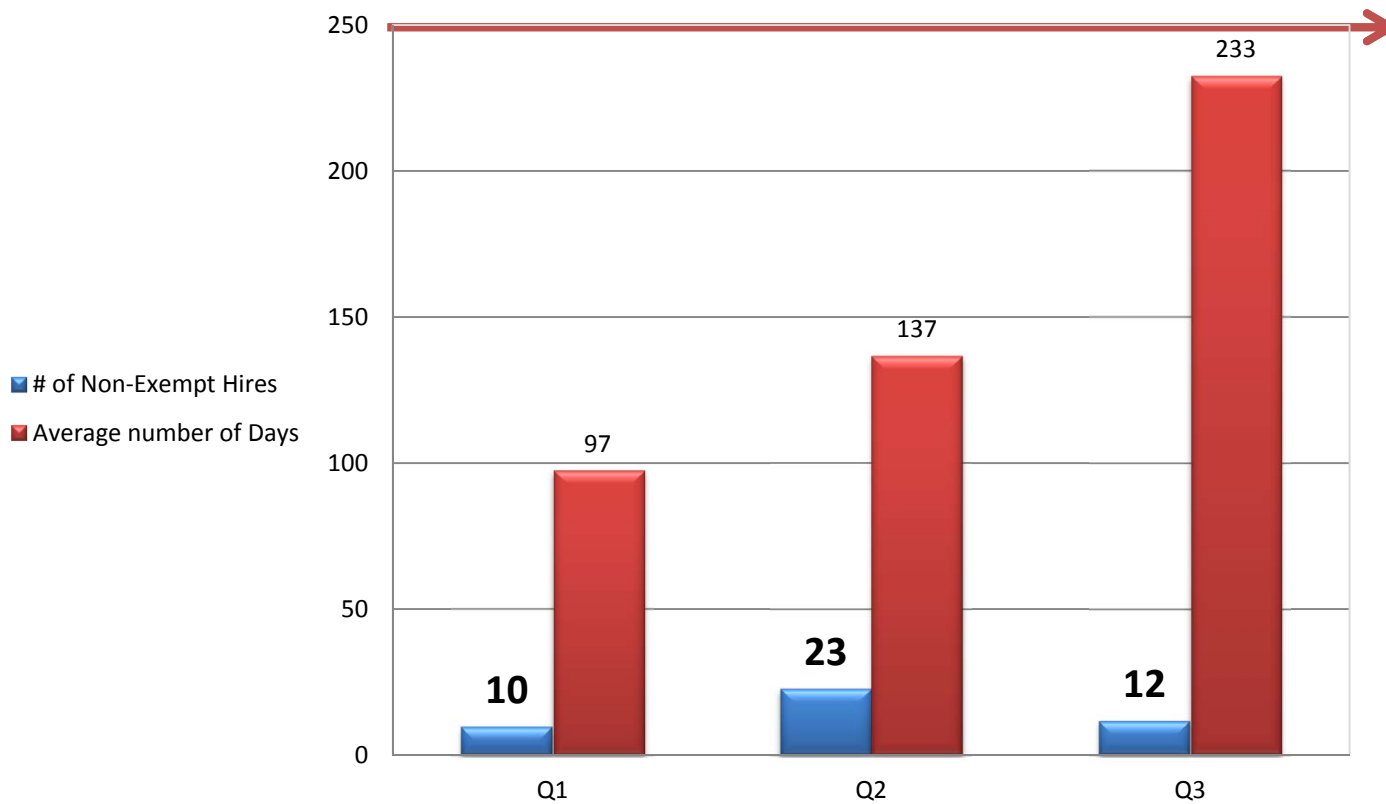**Facilities Management Strategic Planning Session – 3rd Quarter FY 2012**

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

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

Measure: Days needed to fill vacant position

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

Lead FBO

Average Number of Days to Fill Nonexempt (Hourly) Vacancies

Goal: 80 days

Legend:
- # of Non-Exempt Hires
- Average number of Days

Q1: # of Non-Exempt Hires = 10, Average number of Days = 97
Q2: # of Non-Exempt Hires = 23, Average number of Days = 137
Q3: # of Non-Exempt Hires = 12, Average number of Days = 233

STATUS

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

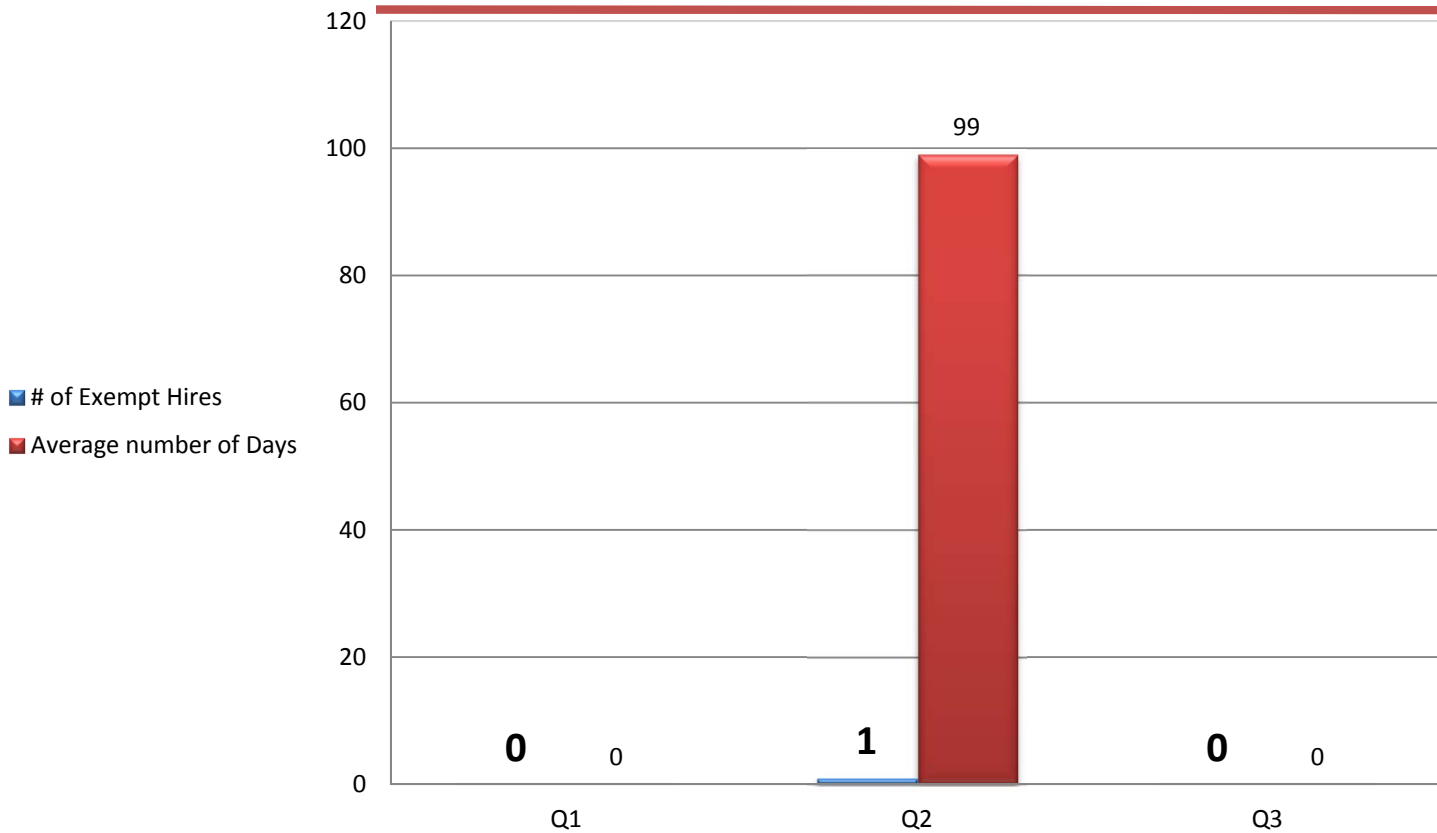**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

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

Measure: Days needed to fill vacant position

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

Lead FBO

Average Number of Days to Fill Exempt (Salaried) Vacancies

Goal:
120 days

- # of Exempt Hires
- Average number of Days

Q1: 0, 0
Q2: 1, 99
Q3: 0, 0

STATUS

100

Facilities Management Strategic Planning Session - 3rd Quarter FY 2012

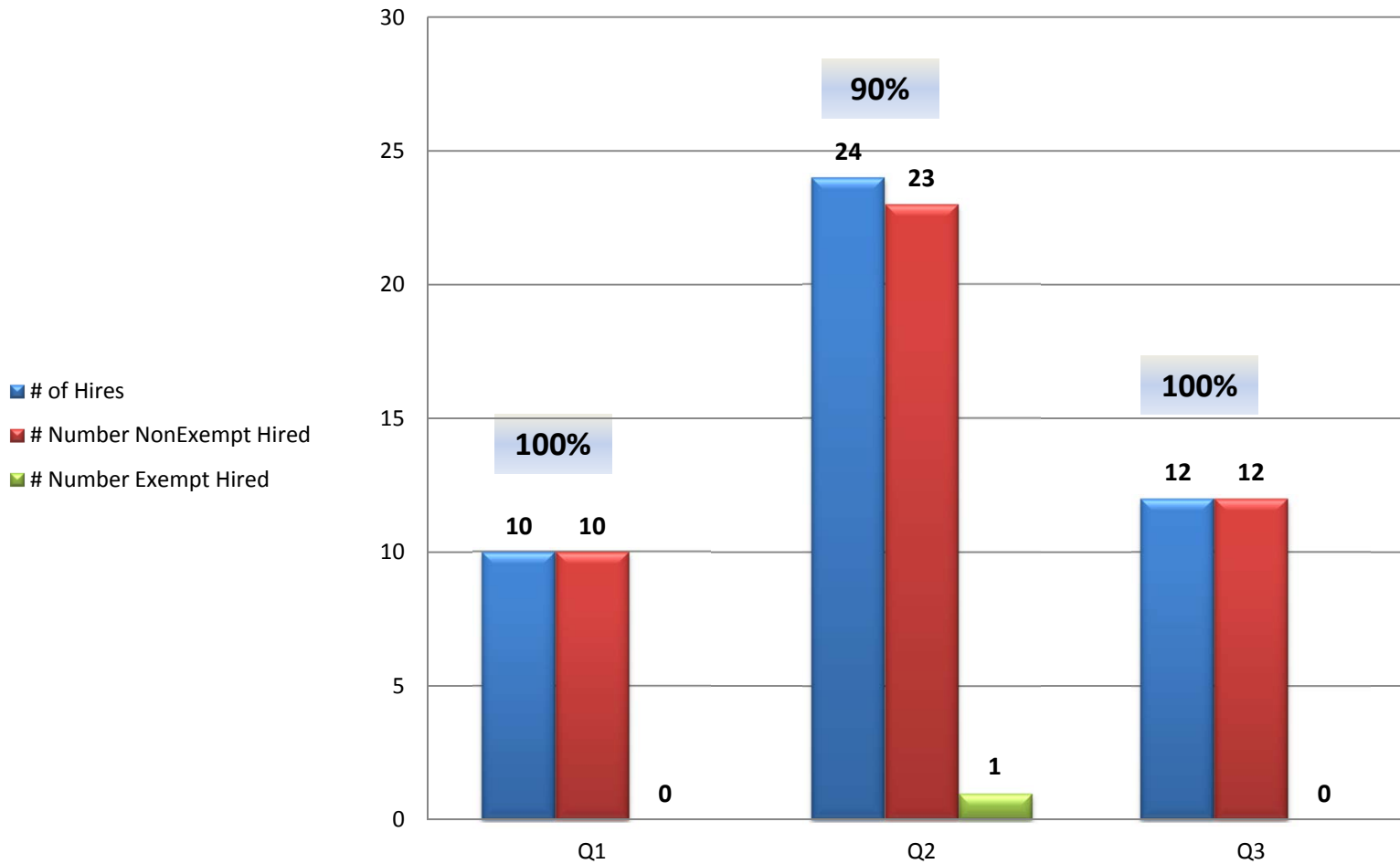**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

(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

STATUS

101

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

ACTION PLAN

❑ Create a "graduation acknowledgement" for participants of the Leadership Academy that completed the program during next AEM.

❑ Continue to identify areas for skill development and enhancement for staff. Work to create programs around these areas.

❑ Identify resources in the Charlotte region that can provide cost-effective, quality training for employees. Attempt to get best "bang for the buck" in this area, reduce travel costs if possible and reach the majority of our employees within targeted training area.

❑ W.I.G.#1 – Develop a funding distribution model for FM training; Continue networking with peer institutions to determine best practices, then incorporate into annual fiscal plan;

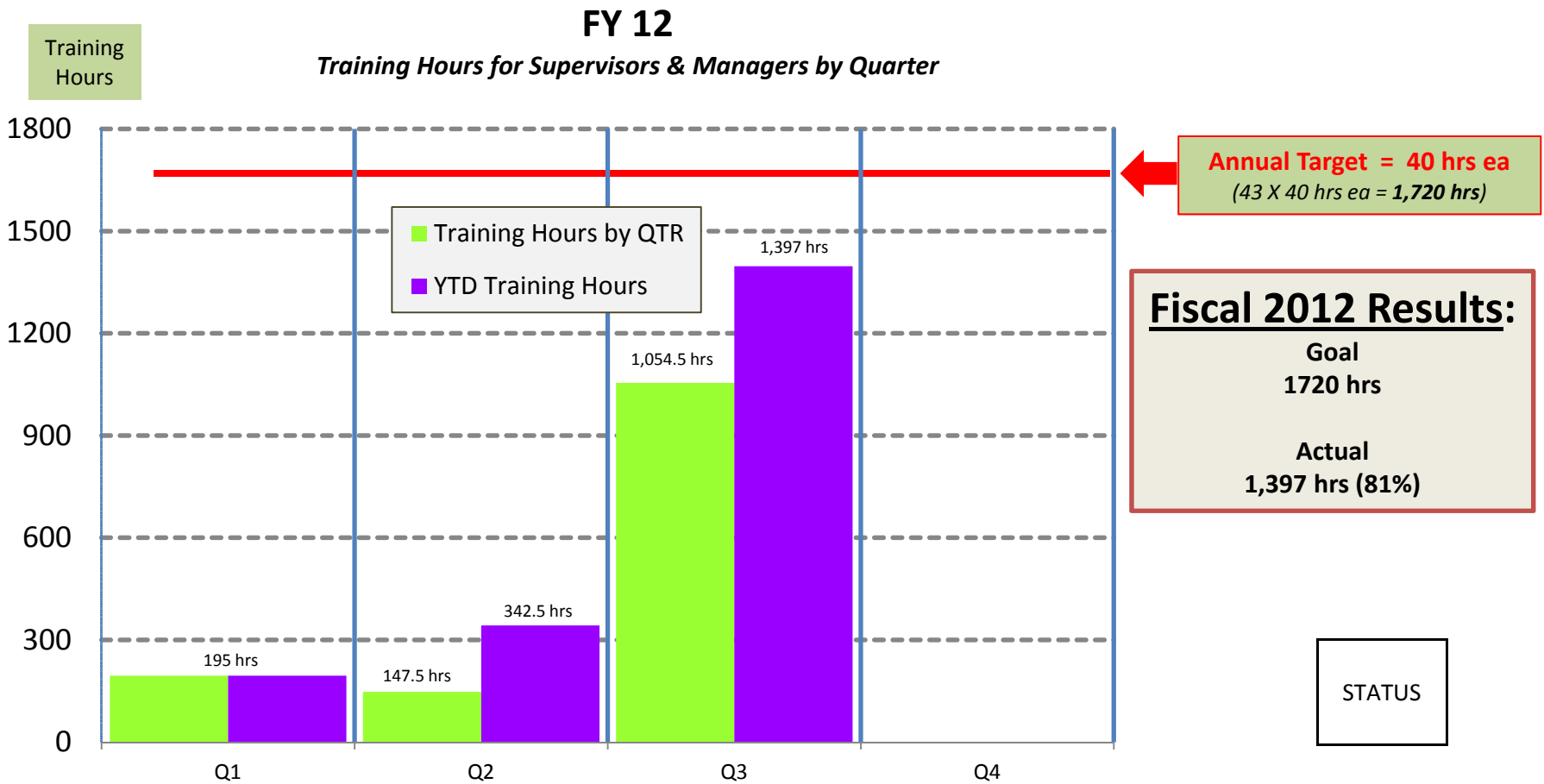**Facilities Management Strategic Planning Session – 3rd Quarter FY 2012**

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

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

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

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

Lead FBO

FY 12
Training Hours for Supervisors & Managers by Quarter

Training Hours

Annual Target = 40 hrs ea
(43 X 40 hrs ea = 1,720 hrs)

Fiscal 2012 Results:
Goal
1720 hrs

Actual
1,397 hrs (81%)

Legend:
- Training Hours by QTR
- YTD Training Hours

Chart values:
- Q1: 195 hrs
- Q2: 147.5 hrs, 342.5 hrs
- Q3: 1,054.5 hrs, 1,397 hrs

STATUS

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

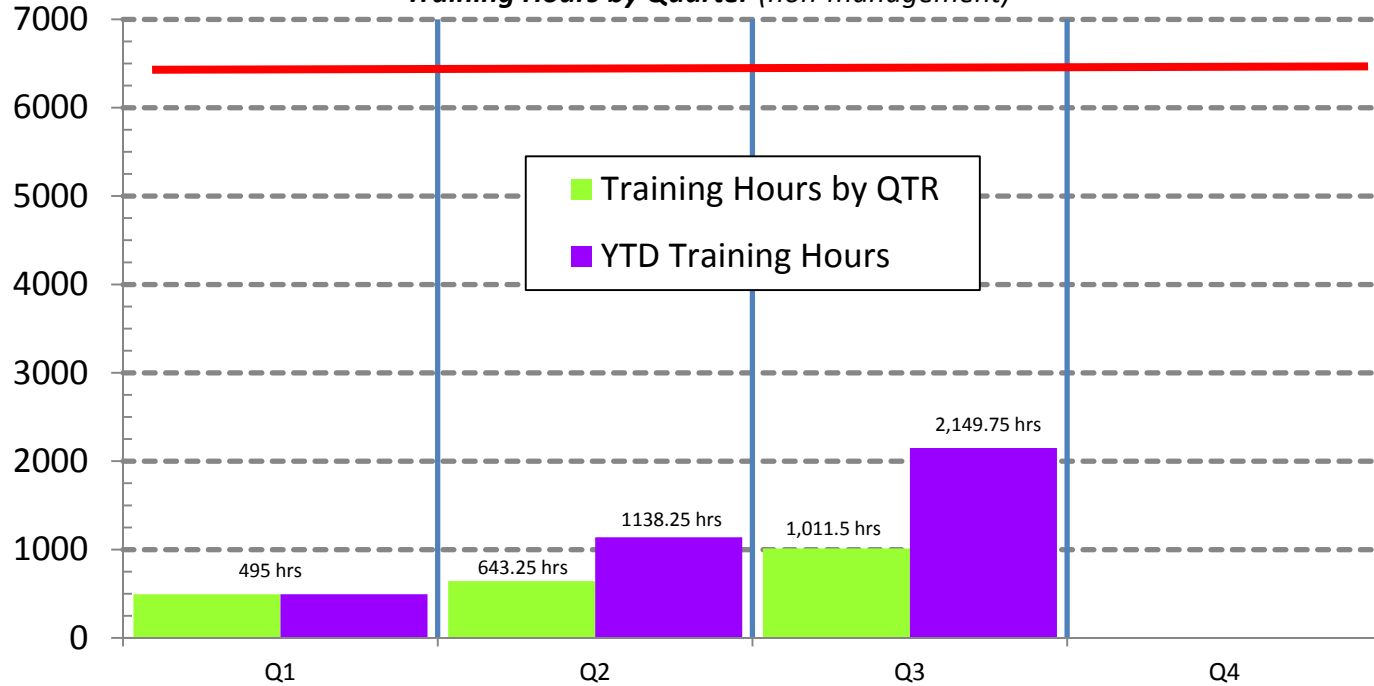|		
Strategy	**5.2**	Implement training system to enhance employee performance and provide career growth
Objective	**5.2.2**	Increase employees training to **20 Hours** per year.

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

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

Lead FBO

Training Hours

FY 12

Training Hours by Quarter *(non-management)*

- Training Hours by QTR
- YTD Training Hours

Q1: 495 hrs
Q2: 643.25 hrs / 1138.25 hrs
Q3: 1,011.5 hrs / 2,149.75 hrs

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

Fiscal 2012 Results:
Goal
6,460 hrs

Actual
2,149.75 hrs (33%)

STATUS

104

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

Strategy 5.3   Retain a Quality Workforce

        Objective 5.3.1   Maintain the Annual Employee Turn-over Rate to <14%

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

Lead FBO

CONTINUOUS IMPROVEMENT ACTION PLAN

- ❑ Survey administration and briefing complete. Final Report under review;

- ❑ Overall satisfaction rating = 89%.

- ❑ Top five challenges for FM under review by Leadership Team; Problem statements development underway.

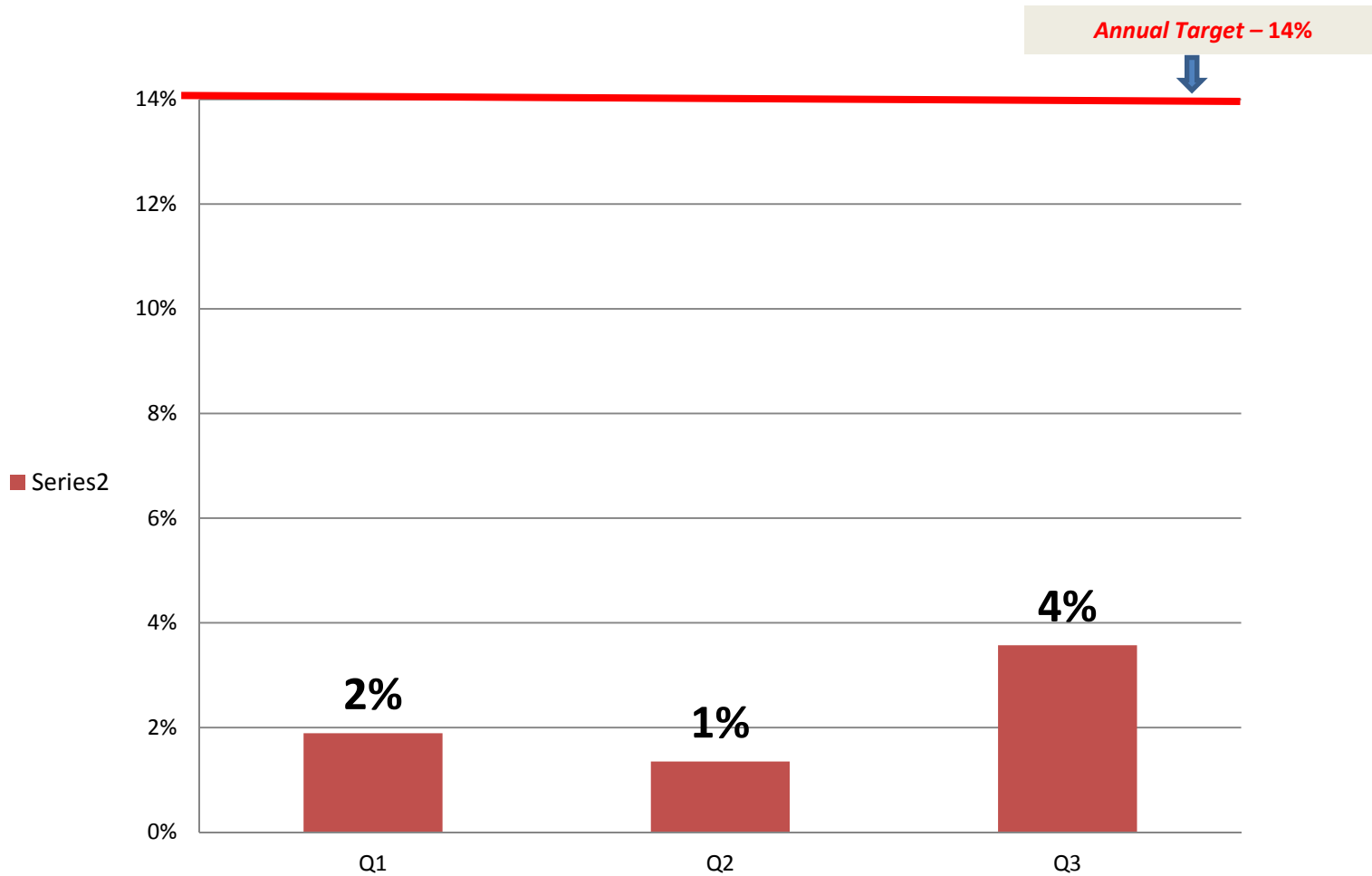**Facilities Management Strategic Planning Session – 3rd Quarter FY 2012**

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

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

Measure: Annual Employee Turn-over Rate

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

Lead
FBO

Annual Target – 14%

■ Series2

2%

1%

4%

STATUS

Q1   Q2   Q3

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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 Rates – Historical Data
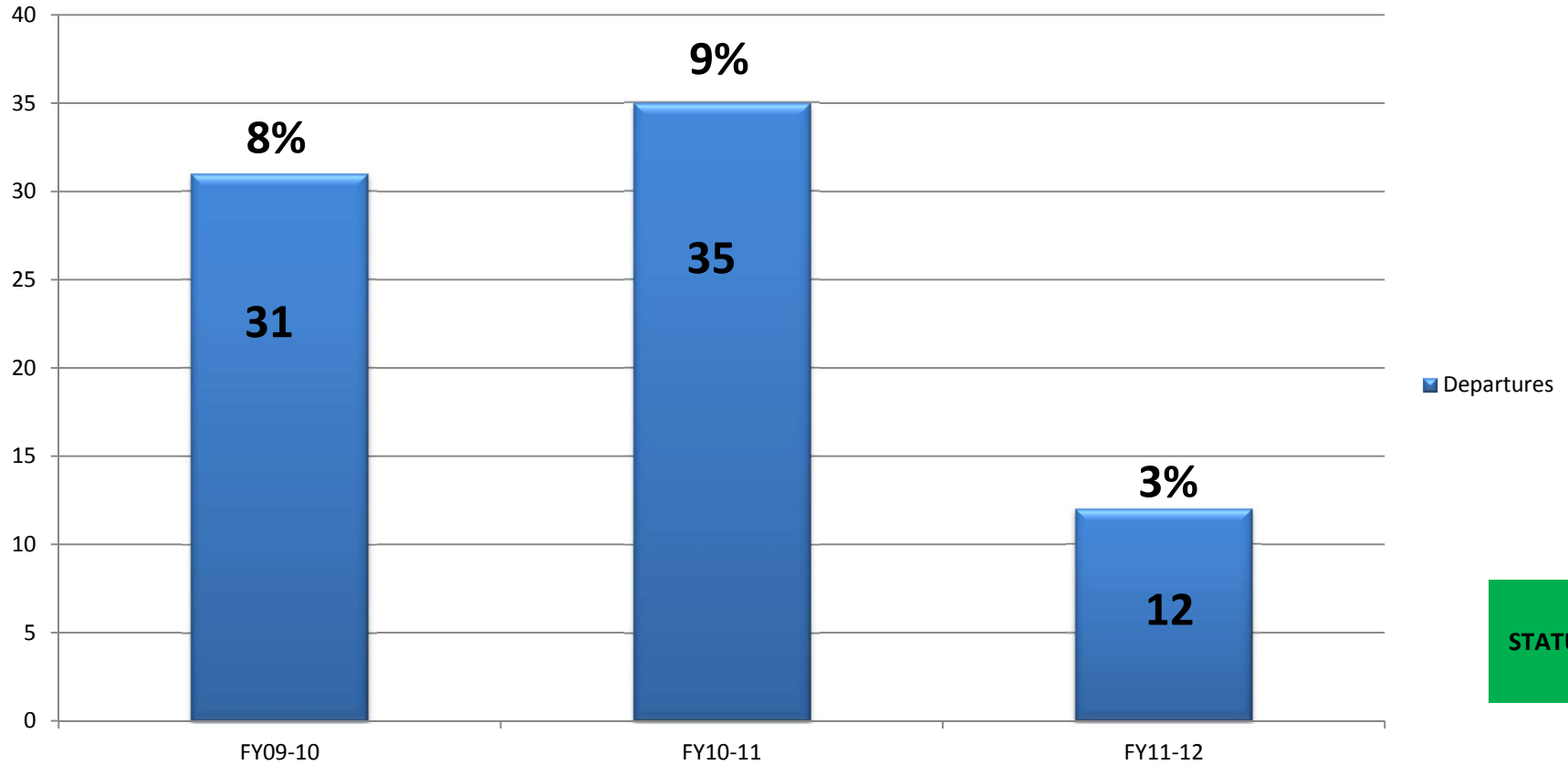
Lead FBO

STATUS

Facilities Management Strategic Planning Session – 3rd Quarter FY 2012

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
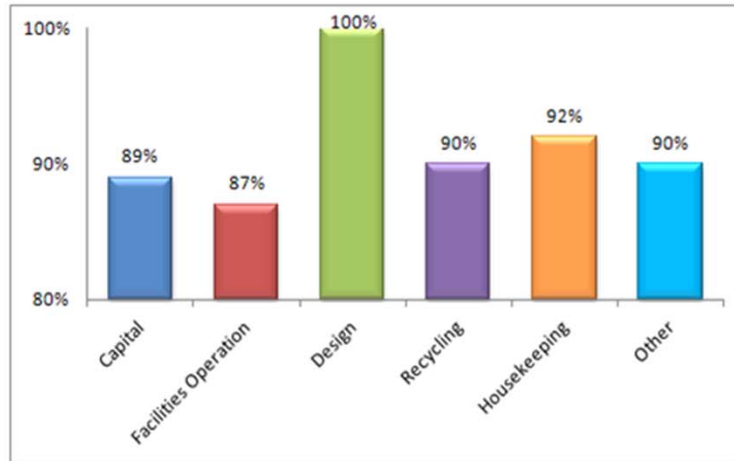
Overall Satisfaction

Overall, how satisfied are you working in the Facilities Management Department (2011)

- 89% Satisfied
- 11% Dissatisfied
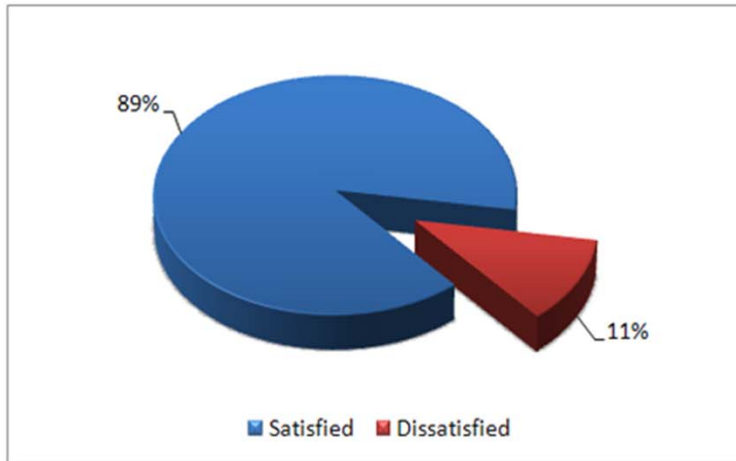
Average = 4.48

By Department (2011)

- Capital 89%
- Facilities Operation 87%
- Design 100%
- Recycling 90%
- Housekeeping 92%
- Other 90%

89% of all respondents expressed satisfaction with working in Facilities Management, matching the total from the 2009 survey. When examining the current data by department, the lowest levels of satisfaction come from Facilities Operations (87%) and Capital Projects (89%)

STATUS

108

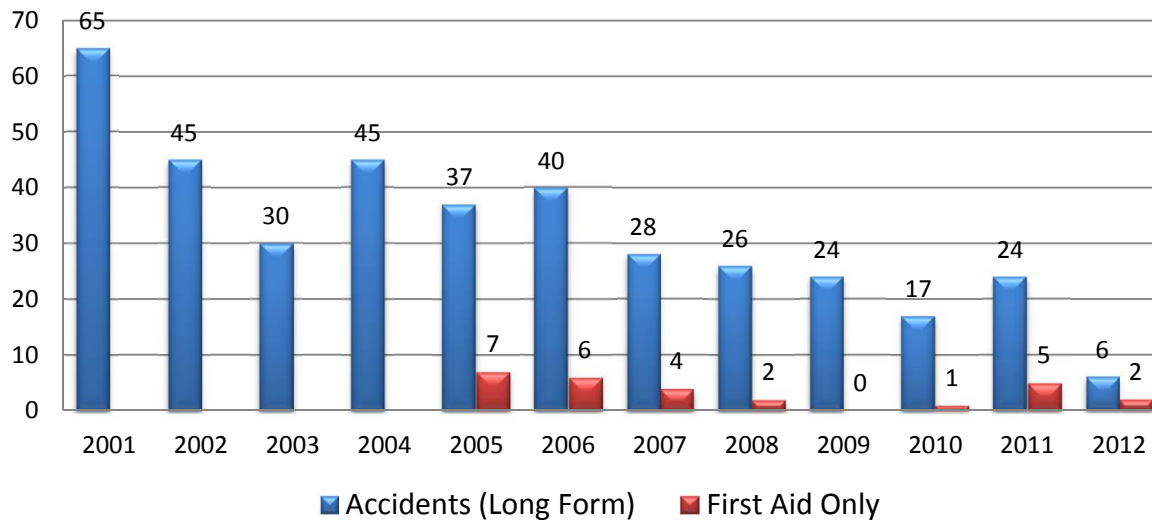**Facilities Management Strategic Planning Session – Third Quarter FY 2012**

GOAL #6 – Promote Good Stewardship

Strategy	**6.4**	Improve Employee Safety
Objective	**6.4.1**	Reduce Accidents to 0 Annually

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

 Goal: =0

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

Lead FBO

STATUS

"Safety Is No Accident"

109

Balance Score Card
DISCUSSION
LEARNING & GROWTH PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter
	Develop high-quality staff	5.1.1	Reduce Vacancy Time Calendar Days	80 days/120 days	233 / 0	[yellow/green]	[red/green]	[red/green]
	Develop high-quality staff	5.1.2	Targeted Selection/Recruitment Training	100%	100%	[green]	[yellow]	[green]
Learning & Growth *How will we sustain our ability to change and improve?*		5.2.1	Supervisor (all levels of supervision) Training Hours	1720 hrs	1397	Annual		
		5.2.2	Staff (non supervisory) Training Hours	6460 hrs	2149.75	Annual		
	Retain high quality staff	5.3.1	Reduce Annual Turnover Rate	<14%	4.0%	[green]	[green]	[green]
	Develop positive culture	5.3.2	Overall Annual Employee satisfaction (No survey in 2010)	85%	89%	Annual	[green]	[green]
	Improve Employee Safety	6.4.1	Reduce Accidents to 0 (CY)	0	6		Calendar Year	[red]

Group Discussion