



UNC CHARLOTTE

*Facilities Management*

# Strategic Planning Session

Fourth Quarter – Fiscal Year 2010

July 30, 2010

First Shift





UNC CHARLOTTE

*Facilities Management*

## **Strategic Planning Session**

**Fourth Quarter – Fiscal Year 2010**

**July 30, 2010**

**Second and Third Shift**



*...Creating a Campus of Distinction*







UNC CHARLOTTE

**Balance Score Card**  
**CUSTOMER**  
**Perspective**

**Strategic Objectives:**  
**Customer Satisfaction**  
**Enhance Customer Satisfaction**





UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

## GOAL #4

Perfect a Customer Focused Organization







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

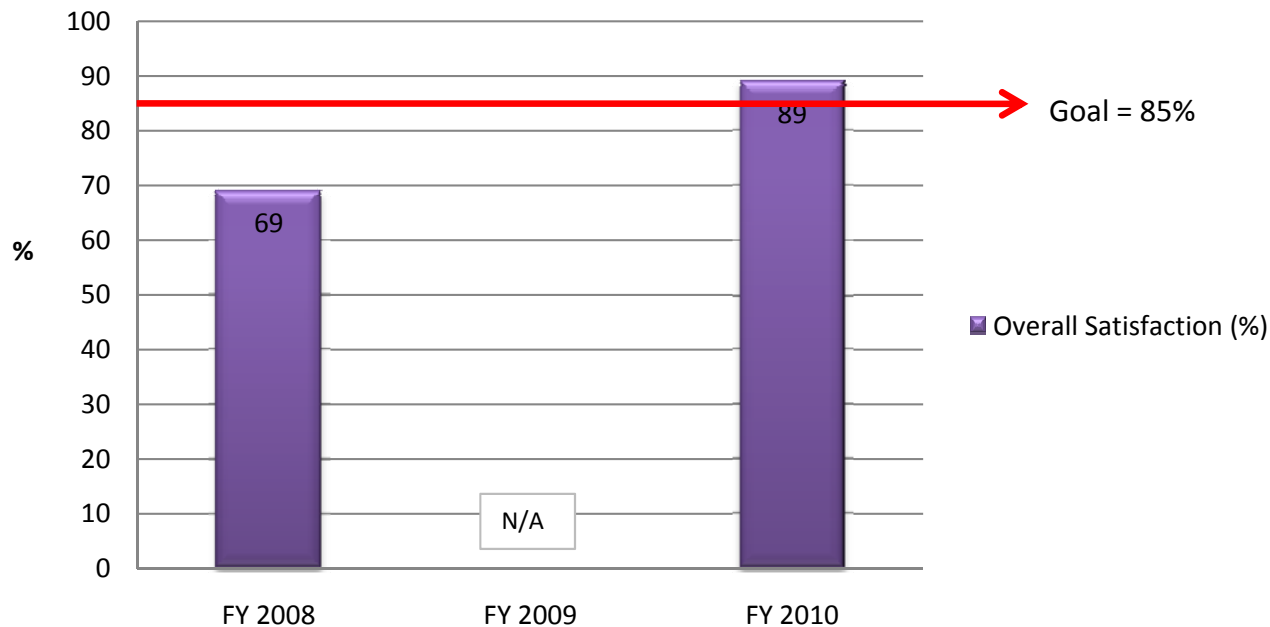
**Strategy Objective**      **4.1**      Continually Improve Customer Service/Satisfaction  
                                 **4.1.1**      Achieve Overall FM Customer Satisfaction of 85%

Annual objective

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

**Balanced Scorecard Category:** Customer Perspective

### Overall Satisfaction with Facilities Management Services



**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%

Lead  
FBO

### ACTION PLAN

- **Actions Complete**
  - ✓ Met with Urban Institute to discuss service provision and administration of survey;
  - ✓ Spoke with Design Services Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  - ✓ Survey conducted March – April 2010.
  
- **Actions Planned**
  - Leadership Team to review results on July 27th.
  - Focused strategic planning session to be held on July 30<sup>th</sup>, 2010 with consultant, Juanita Coston.



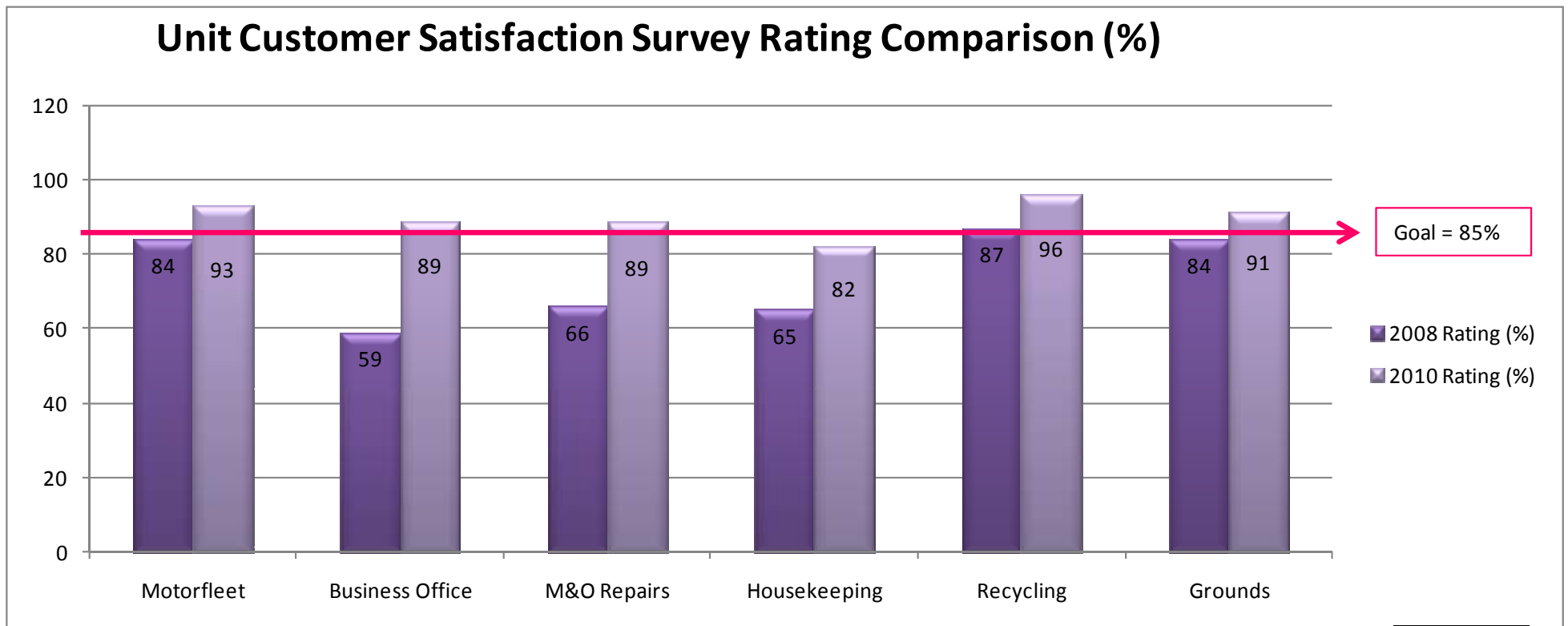
**GOAL #4 – Perfect a Customer Focused Organization**

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

Annual objective

**Measure:** Annual Customer Survey Results

**Balanced Scorecard Category:** Customer Perspective



**STATUS**

## GOAL #4 – Perfect a Customer Focused Organization

Lead  
FBO

- 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)

### ACTION PLAN

- **Actions Complete**
  - ✓ Met with Urban Institute to discuss service provision and administration of survey;
  - ✓ Spoke with Design Services Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  - ✓ Spoke with Facilities Information Systems Director regarding incorporation of their department into the overall survey and inclusion into the survey development.
  - ✓ External customers: Survey conducted by Urban Institute (March – April 2010).
  - ✓ Facilities Business Office:
    - ✓ Internal Customers: Met with key stakeholders to review current business tools for continuous improvement (May 12<sup>th</sup>, 2010).
  
- **Actions Planned**
  - Facilities Business Office:
    - Identify key opportunities for performance enhancements
    - Develop strategic goals (short-term and long-term) to address customer needs expressed
  - Strategic Planning session on Customer Service to be held July 30<sup>th</sup> with Juanita Coston of Coston Associates.





Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

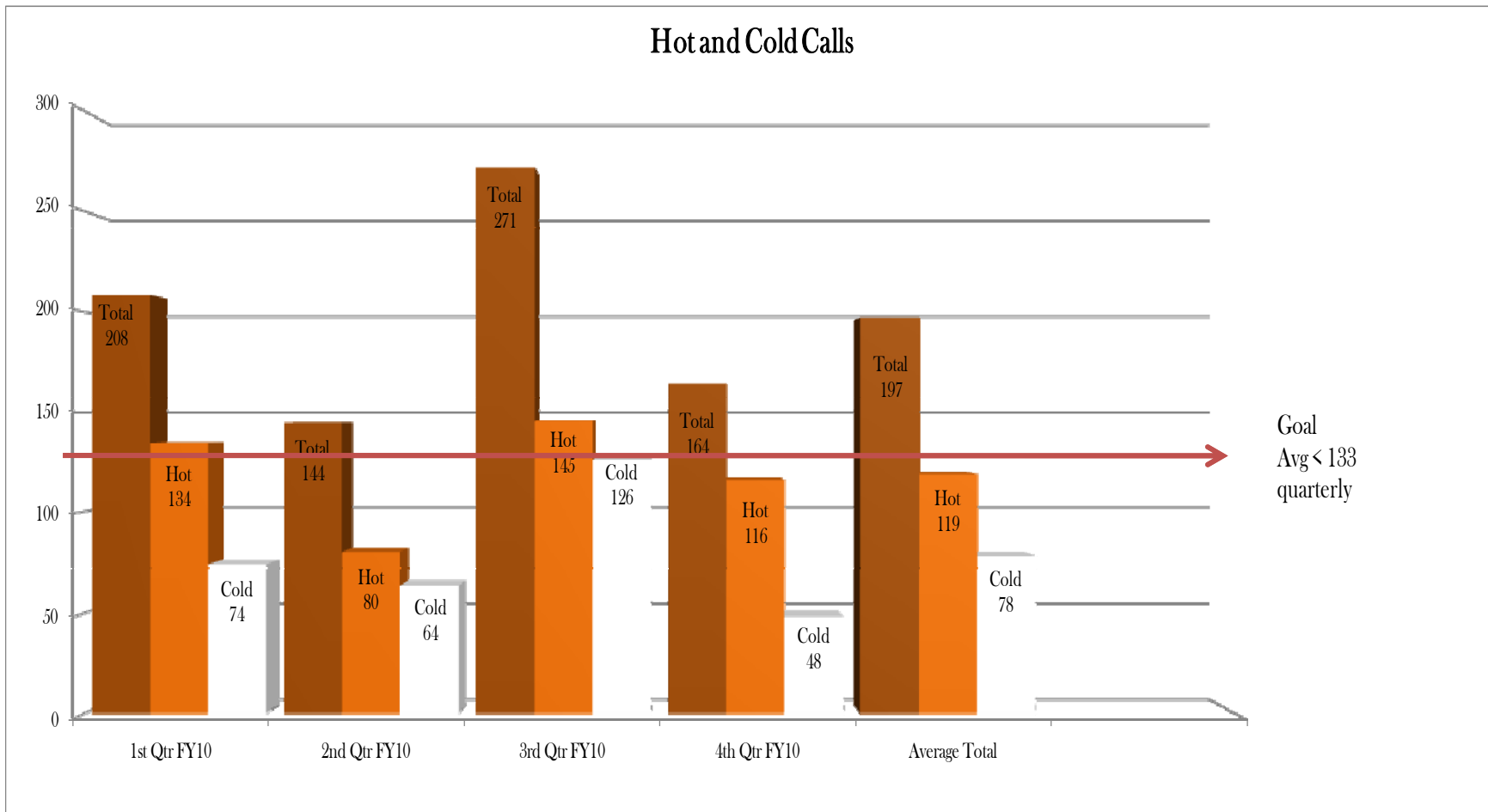
GOAL #4 – Perfect a Customer Focused Organization

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

**Measure:** Number of hot/cold calls submitted on work requests. 4<sup>th</sup> Qtr – Too Hot = 116 Too Cold = 48

**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 – Made repairs to HVAC Systems.
- Actions Planned
  - 1 – Stay abreast of ESCO contract and ensure comfort is not sacrificed for energy.
  - 2 – See what ESCO's might recommend that would improve comfort and seek wider application.







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

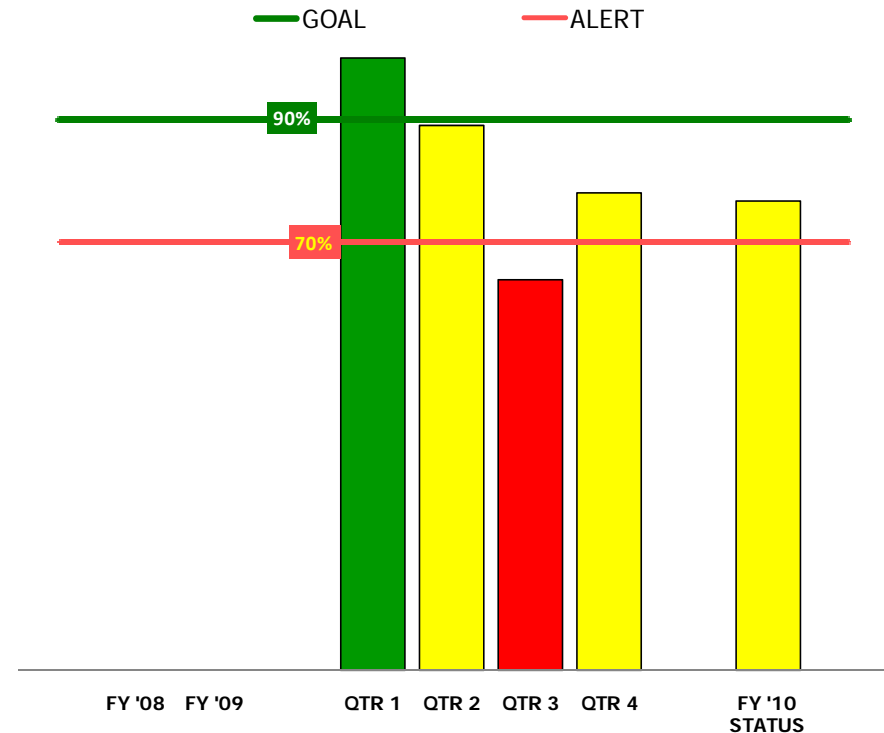
**Strategy** 4.1 Continually improve customer service/satisfaction  
**Objective** 4.1.4 **90% of Informal Project Customers Satisfied or Very Satisfied**

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

**Balanced Scorecard Category:** Customer Perspective

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

QUARTERLY SURVEY	Number of Surveys Completed	Very Satisfied 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied or Very Satisfied
FY '08	0	0	0	0	0	0	0	0.0%
FY '09	0	0	0	0	0	0	0	0.0%
QTR 1	1	1	0	0	0	0	0	100.0%
QTR 2	9	6	2	1	0	0	0	88.9%
QTR 3	11	4	3	1	2	1	0	63.6%
QTR 4	9	7	0	0	2	0	0	77.8%
<b>FY '10 STATUS</b>	30	18	5	2	4	1	0	<b>76.7%</b>
							<b>GOAL:</b>	<b>90.0%</b>



**GOAL**  
90.0%

**FY'10 STATUS**  
76.2%

## GOAL #4 – Perfect a Customer Focused Organization

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

# ACTION PLAN

### 4.1.4 - Actions Completed:

- "Go live" with Customer Satisfaction Surveys

### 4.1.4 - Actions Planned:

- Monitor Customer Satisfaction Survey responses and implement appropriate actions.
- Review with FIS the ability for Design Services to print survey responses from Archibus.
- Reaccess the categories for the customer to select from.
- Reaccess who receives questionnaire.
- Reaccess how we send out the questionnaire.

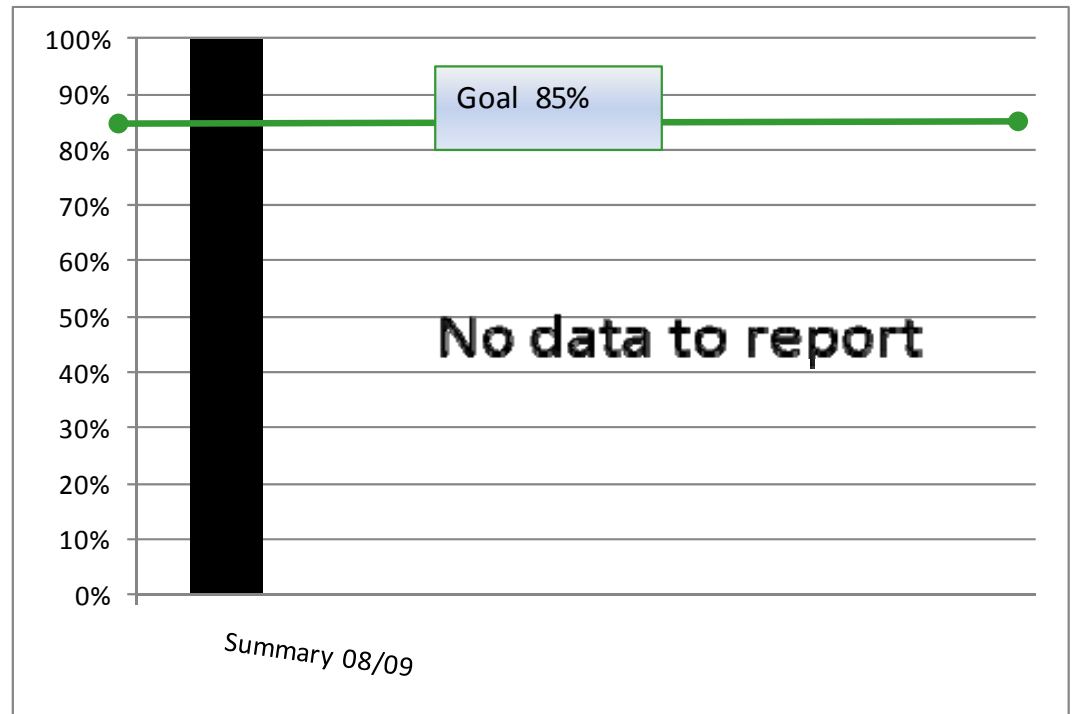
**GOAL #4 – Perfect a Customer Focused Organization**

**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 08/09	2	1	0	100%
Summary 09/10	9	0	0	No Data
1st Qtr. 09/10	2	0	0	No Data
2nd Qtr. 09/10	2	0	0	No Data
3rd Qtr. 09/10	2	0	0	No Data
4th Qtr. 09/10	3	0	0	No Data



No data is a result of customer not answering questionnaire

Status

## GOAL #4 – Perfect a Customer Focused Organization

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

Lead  
Capital

# ACTION PLAN

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





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

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

**Measure:** Results from Interactive Web-based Customer Questionnaire.

**Balanced Scorecard Category:** Customer Perspective

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of Questionnaire Customers	Satisfied with Customer Service	Not Satisfied with Customer Service	% of Satisfied Customers
Summary 08/09	no data	0	0	0.0%
Summary 09/10	5	1	0	20.0%
1st Qtr. 09/10	no data	0	0	0.0%
2nd Qtr. 09/10	2	0	0	0.0%
3rd Qtr. 09/10	0	0	0	0.0%
4th Qtr. 09/10	3	1	0	33.3%



Objective for 4<sup>th</sup> Quarter is 33%

Status

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

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

Lead  
Capital

**ACTION PLAN**

- Actions Complete
  - 1. Administered satisfaction survey to Softball customers
  
- Actions Planned

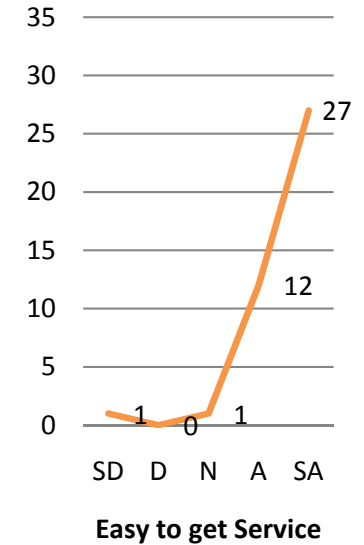
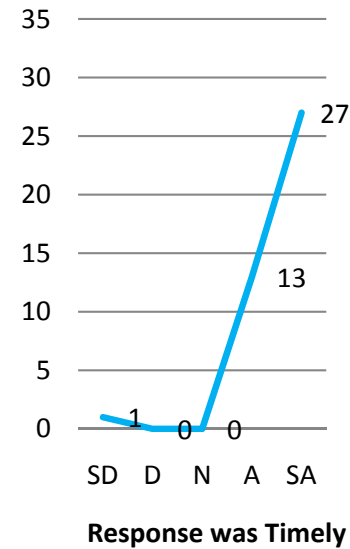
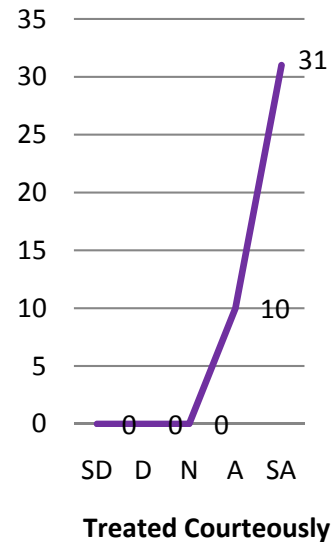
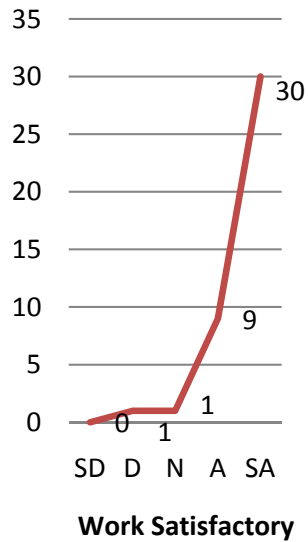
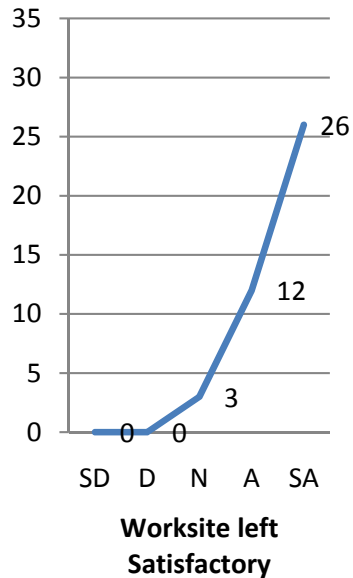
**NEW** Customer Work Request Satisfaction

**Strategy Objective** Improve Customer Satisfaction with Work Request System  
Provide a Positive Customer Experience

**Measure:** Survey Results

**Goal:** All measures on survey positive. Less than 2% Strongly Disagree and 5% Disagree or Neutral.

**Balanced Scorecard Category:** Customer Service



STATUS



## ACTION PLAN

- Actions Complete
  - 1 –
- Actions Planned
  - 1 - Review ease of use measure and comments.
  - 2 – Improve timeliness by continued monitoring of active work requests by Supervisor and four Managers.

# Balanced Scorecard Customer Perspective



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# **Balance Score Card**

## **FINANCIAL**

### **Perspective**

## **Strategic Objectives:**

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



UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

## **GOAL #6**

Promote Good Stewardship



Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
FBO

GOAL #6 – Promote Good Stewardship

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

**Measure:** Main Operating Fund Variance Report

**Balanced Scorecard Category:** Financial Perspective

FACILITIES MANAGEMENT OPERATIONS thru June 30, 2010

ACCOUNT DESCRIPTION	2009-10 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 39,209	1%	\$ 39,209	\$ -	\$ 39,209	\$ -	\$ - F
PERSONAL SERVICE CONTRACTS	\$ 96,910	3%	\$ 95,387	\$ 1,523	\$ 96,910	\$ -	\$ - F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 626,860	21%	\$ 626,044	\$ -	\$ 626,044	\$ 816	\$ 816 F
OTHER ADMINISTRATIVE EXPENSES	\$ 30,406	1%	\$ 25,234	\$ 80	\$ 25,314	\$ 5,092	\$ 5,092 F
DOMESTIC TRAVEL/TRAINING	\$ 42,057	1%	\$ 40,301	\$ 300	\$ 40,601	\$ 1,456	\$ 1,456 F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 239,161	8%	\$ 239,161	\$ -	\$ 239,161	\$ -	\$ - F
OTHER PURCHASED SERVICES	\$ 598,774	20%	\$ 527,719	\$ 70,514	\$ 598,233	\$ 541	\$ 541 F
SUPPLIES	\$ 1,021,084	34%	\$ 956,072	\$ 19,035	\$ 975,106	\$ 45,978	\$ 45,978 F
EQUIPMENT	\$ 282,580	9%	\$ 246,480	\$ 5,835	\$ 252,315	\$ 30,265	\$ 30,265 F
CAPITAL OUTLAY	\$ 3,512	0%	\$ 1,756	\$ 1,756	\$ 3,512	\$ -	\$ - F
FIXED CHARGES	\$ 20,303	1%	\$ 20,303	\$ -	\$ 20,303	\$ -	\$ - F
RECYCLING	\$ 36,250	1%	\$ 25,248	\$ -	\$ 25,248	\$ 11,002	\$ 11,002 F
<b>FACILITIES MANAGEMENT Main Operating Funds</b>	<b>3,037,106</b>		<b>2,842,913.85</b>	<b>99,041.82</b>	<b>2,941,955.67</b>	<b>95,150.05</b>	<b>\$ 95,150</b>

STATUS

## GOAL #6 – Promote Good Stewardship

Lead  
FBO

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

### ACTION PLAN

#### • Actions Complete

- ✓ Periodically review expenditure reports as part of continuous improvement effort;
- ✓ Development of new budget request tools and comprehensive instructions completed;
- ✓ Rollout of new budget request process with comprehensive instructions occurred on April 2<sup>nd</sup> ;
- ✓ Reviewed existing procurement/budget tracking tools; Met with key stakeholders from Facilities Ops. on May 12<sup>th</sup>.
- ✓ Development of first training course entitled “How to complete a FM purchase requisition form”. First run to be held on July 12<sup>th</sup>. Taping scheduled for July 15<sup>th</sup>. Video to be available no later than last week of July 2010.

#### • Actions Planned

- As part of Leadership Development Training Program, create training course - FM Budgeting 101 - which will focus on budget management skills. Anticipated development completion date has been pushed back to late 2010;
- Develop scope of analysis and map Motor Fleet procurement/fiscal processes. [Efforts underway; Anticipated completion date: December 2010.];
- Develop scope of analysis, identify process gaps , prepare input and output gap analysis and create system map of current FM procurement processes. Continue process mapping efforts for the DPR and Purchase Order processes. [Continued efforts postponed due to Year-end closeout and e-procurement ];

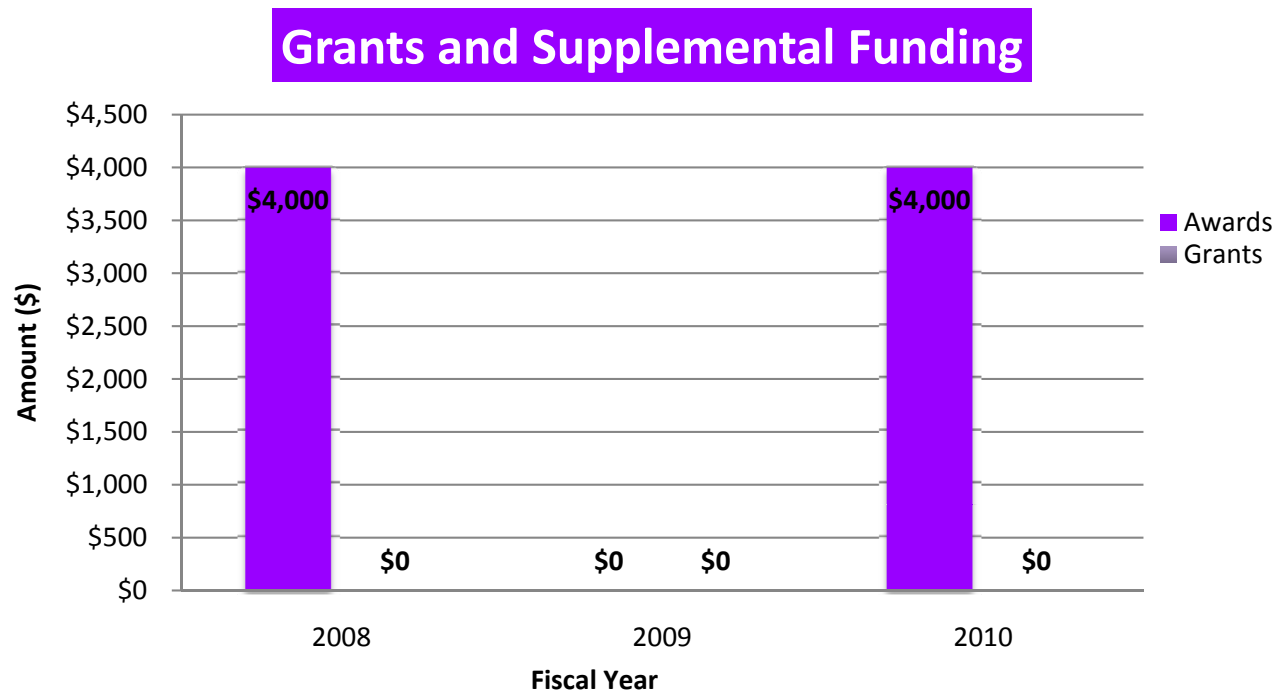
Lead  
FBO

**GOAL #6 – Promote Good Stewardship**

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

**Measure:**        Total dollar amount of grants and supplemental funding

**Balanced Scorecard Category:** Financial Perspective



**STATUS**

## GOAL #6 – Promote Good Stewardship

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

Lead  
FBO

### ACTION PLAN

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

**GOAL #6 – Promote Good Stewardship**

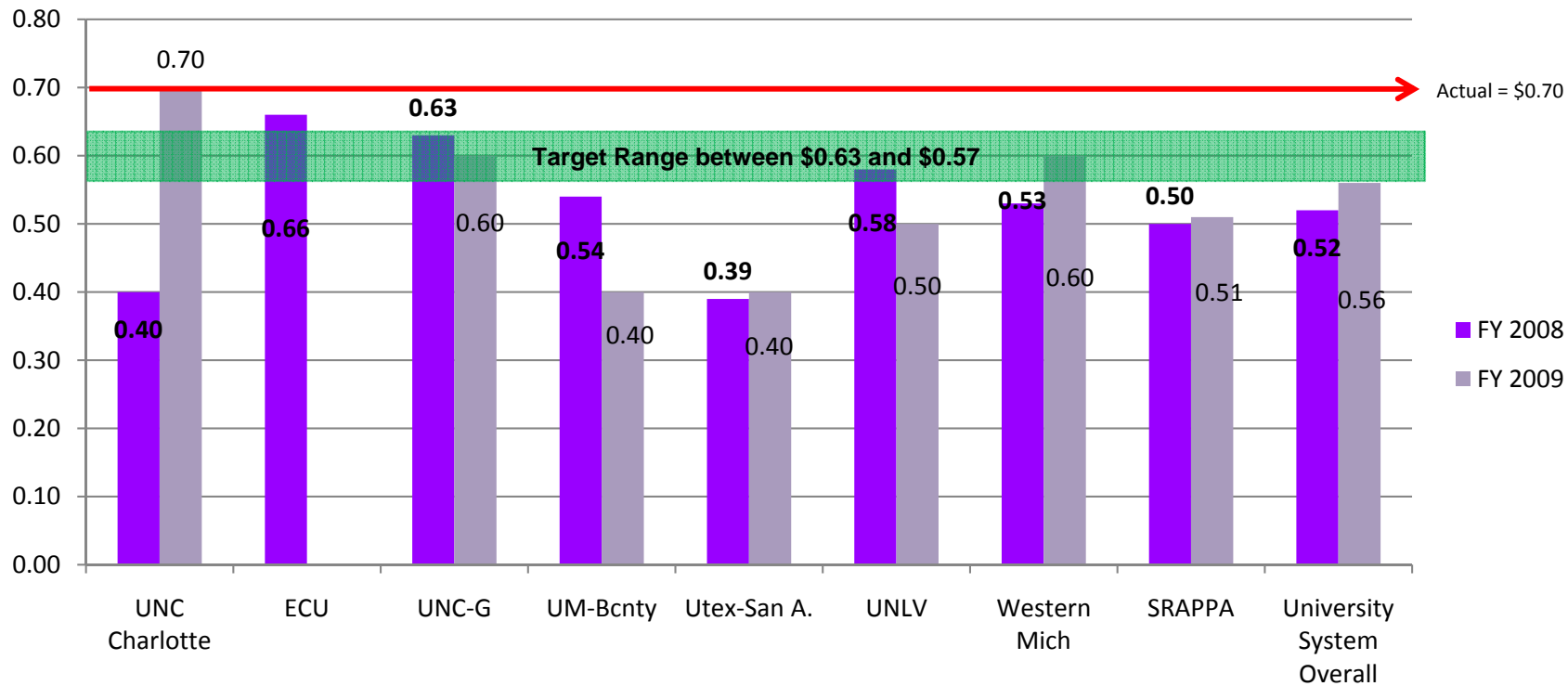
**Strategy** 6.1 Promote Fiscal Responsibility  
**Objective** 6.1.3 Lower Administrative Cost/GSF to +/-5% of the APPA Average for Peer Institutions

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

**Balanced Scorecard Category:** Financial Perspective

APP A Facilities Performance Indicators Report

**Total Administrative Cost/GSF**



**STATUS**

## GOAL #6 – Promote Good Stewardship

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

Lead  
FBO

### ACTION PLAN

- **Actions Complete**
  - ✓ APPA FY 2009 FPI Survey completed on time; (1<sup>st</sup> week of December 2009)
  - ✓ Participated in new APPA Survey beta test; Survey now includes interactive dashboards.
  - ✓ Survey to be published in April 2010.
  - ✓ Complete new Budget Realignment Proposal to improve data collection process (proposal must be in effect July 1<sup>st</sup>).
- **Actions Planned**
  1. Continue review of survey data;
  2. Analyze impact of administrative staff realignment from FY 08 to FY 09.
  3. Review data collection tools and begin preparations for upcoming FY 10 survey after year-end close out.
  4. Propose FM purchase and use of interactive dashboard reporting to Directors.







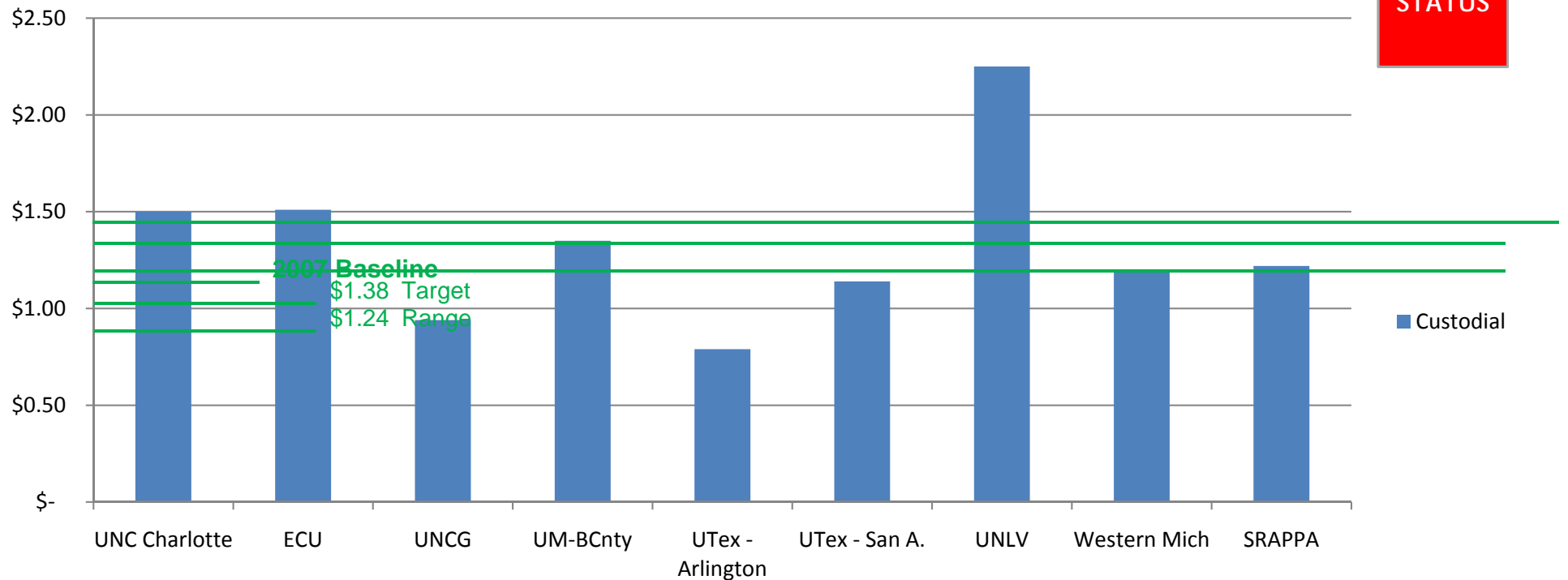
**GOAL #6 – Promote Good Stewardship**

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

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

**Balanced Scorecard Category:** Financial Perspective

**Custodial-Total Cost/GSF Comparison**



## GOAL #6 – Promote Good Stewardship

Lead  
Housekeeping

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

### ACTION PLAN

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

GOAL #6 – Promote Good Stewardship

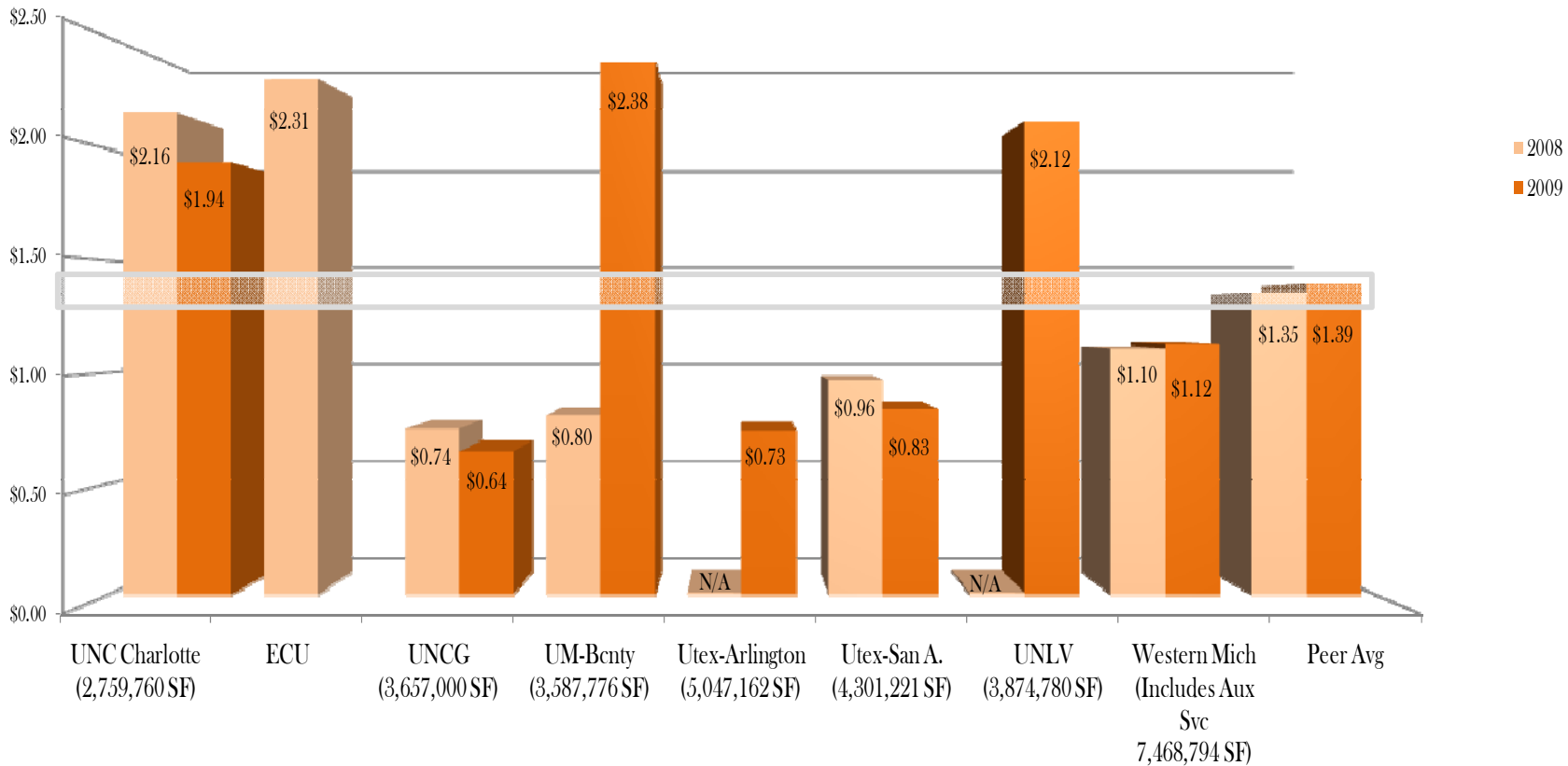
Strategy 6.1 Promote Fiscal Responsibility

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

Facilities Operations Trades-Total Cost/GSF Comparison



STATUS

**GOAL #6 – Promote Good Stewardship**

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

Lead  
F. O.

**ACTION PLAN**

- Actions Complete
  - 1 – Pulled data from APPA RPI Report 2007/08.
- Actions Planned
  - 1 – Review how data was compiled and submitted.
  - 2 – Meet with FBO and Ray to concur on method for compilation.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

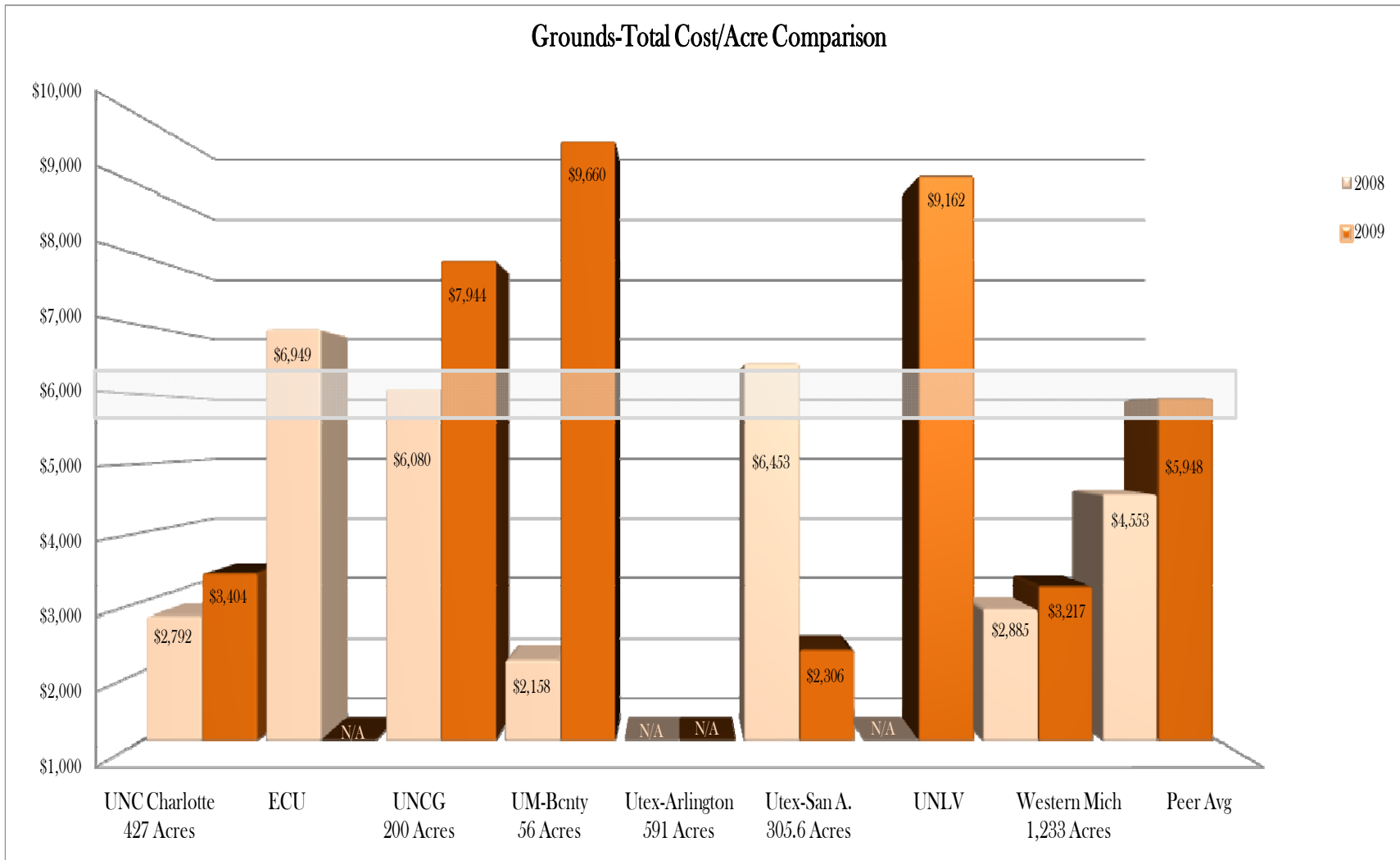
GOAL #6 – Promote Good Stewardship

Strategy 6.1 Promote Fiscal Responsibility

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

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

Balanced Scorecard Category: Financial Perspective



STATUS

## GOAL #6 – Promote Good Stewardship

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

Lead  
F. O.

### ACTION PLAN

- Actions Complete
  - 1 – Pull new data from 2009 APPA RDI Report.
  - 2 – Requested additional staffing to raise level of maintenance. No staff provided due to budget constraints.
- Actions Planned
  - 1 – Review the manner in which data was collected and provided for the FPI Report.



Lead  
F. O.

**GOAL #6 – Promote Good Stewardship**

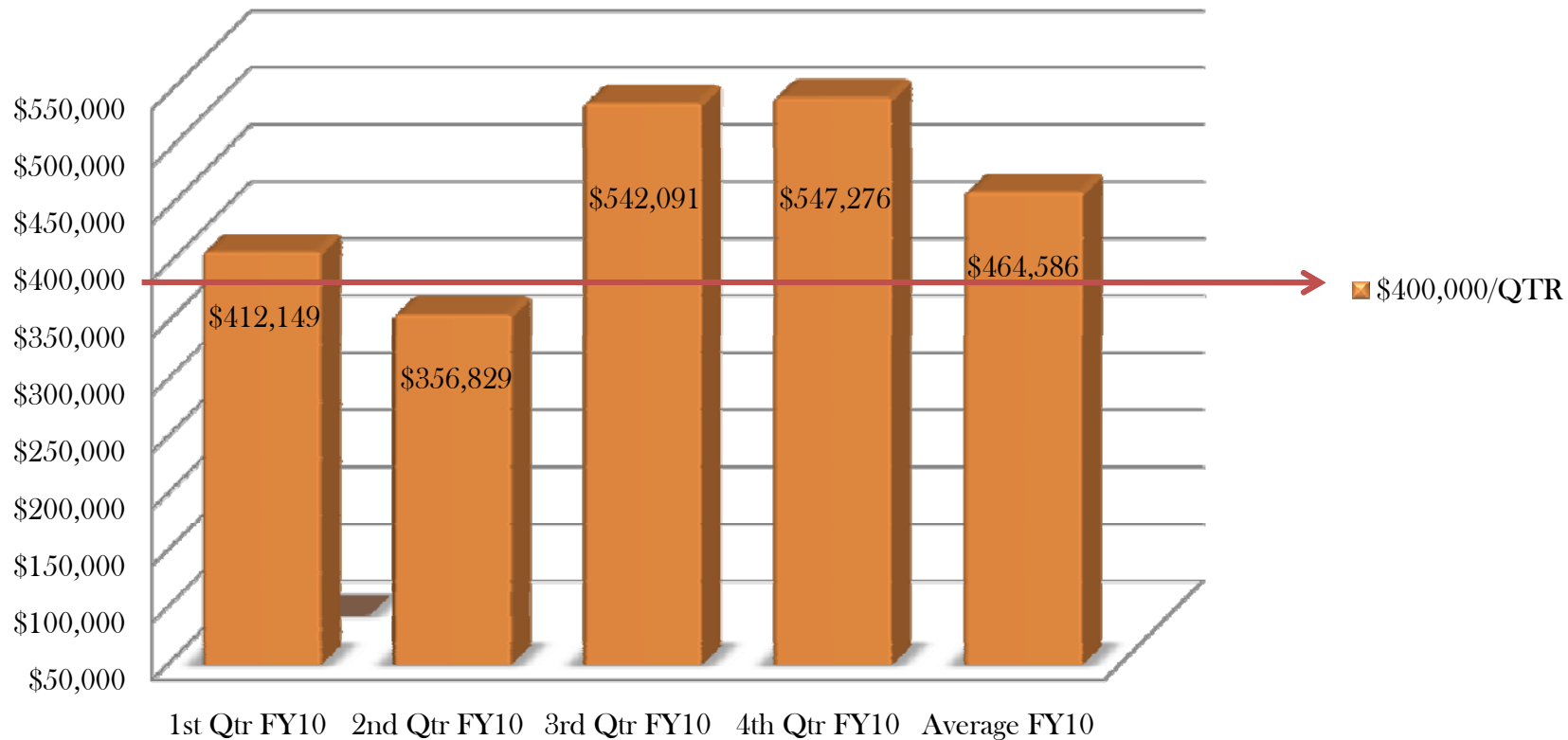
**Strategy** 6.1 Promote Fiscal Responsibility  
**Objective** 6.1.7 Exceed Labor Services Payroll requirements by 10%

**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

### Quarterly Reimbursable Labor \$



STATUS

## GOAL #6 – Promote Good Stewardship

<b>Strategy</b>	<b>6.1</b>	Promote Fiscal Responsibility
<b>Objective</b>	<b>6.1.7</b>	Exceed Labor Services Payroll Requirements by 10%

Lead  
F. O.

### ACTION PLAN

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







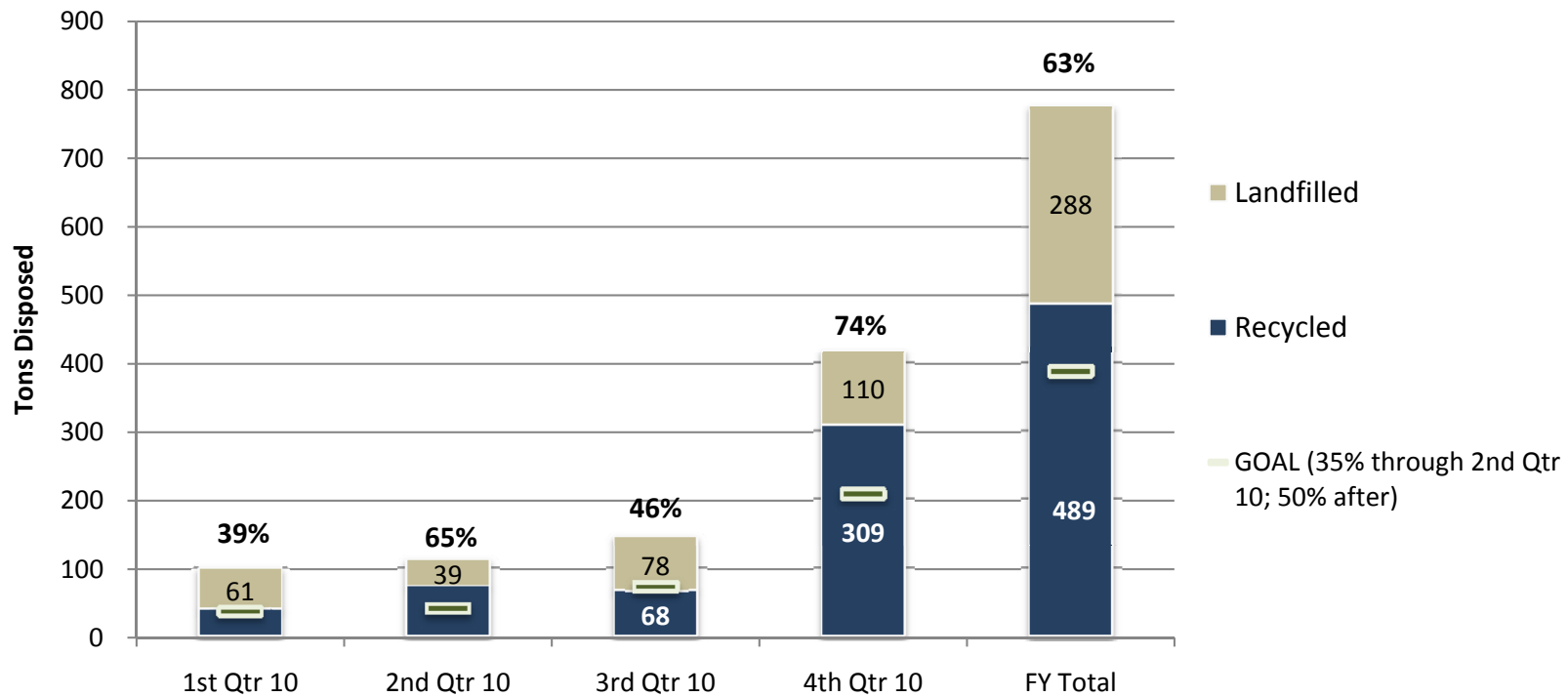
**GOAL #6 – Promote Good Stewardship**

**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  
4th Qtr FY10**





## GOAL #6 – Promote Good Stewardship

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



### ACTION PLAN

- Actions Complete
  - Diversion rate for informal projects is 74% for 4<sup>th</sup> quarter FY10, and 63% overall for FY10.
  - FINALLY...12 transformers behind Student Health are gone, thanks to Mike B & Anthony H.
- Actions Planned
  - Pursue partnerships that allow for alternative disposal methods.



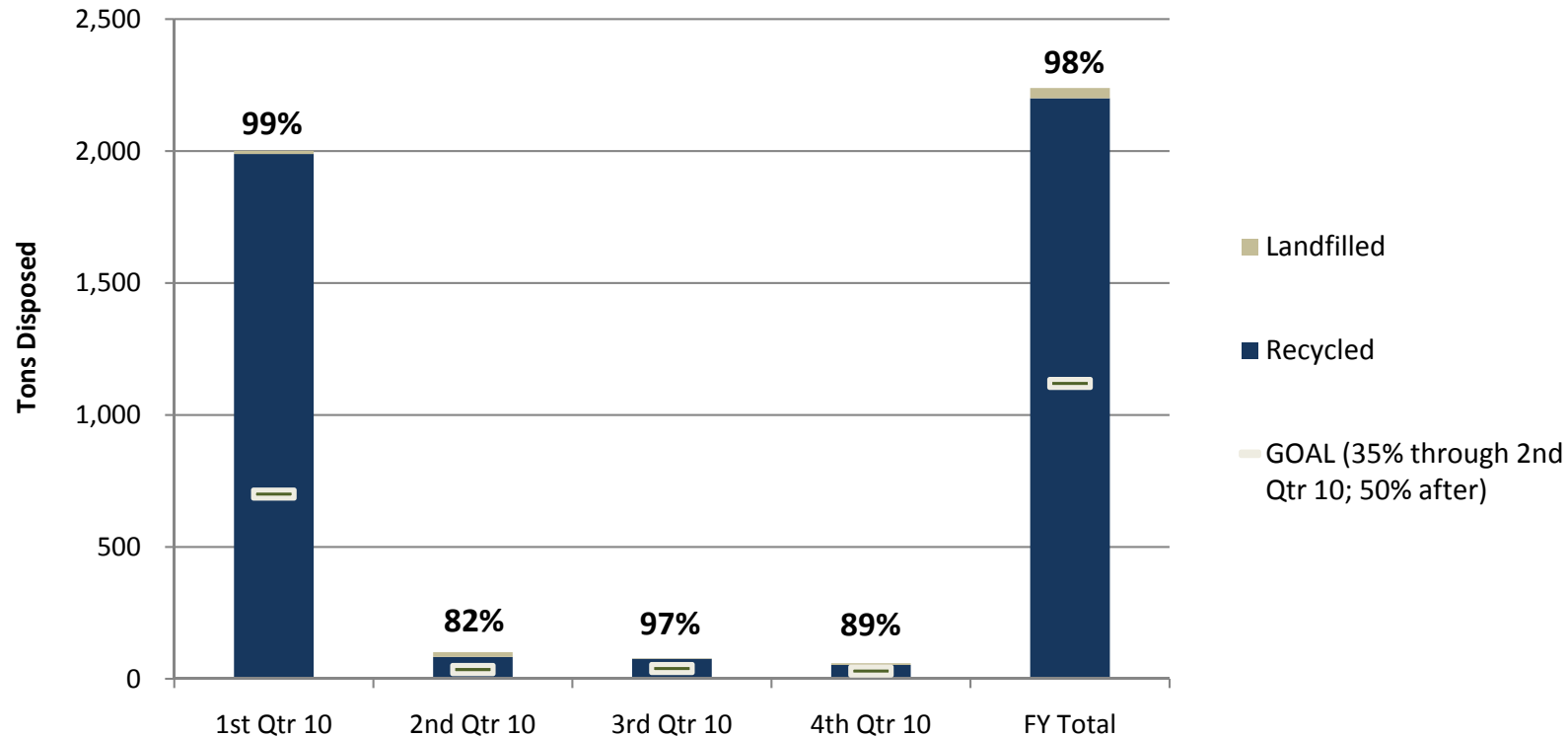
**GOAL #6 – Promote Good Stewardship**

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

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

**Balanced Scorecard Category:** Financial Perspective

**Capital Projects - Materials Disposed**  
**4<sup>th</sup> Qtr FY10**





## GOAL #6 – Promote Good Stewardship

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



### ACTION PLAN

- Actions Complete
  - Diversion rate is 89% for 4<sup>th</sup> quarter; 98% overall for fiscal year.
  - Increased diversion goal to 50% as discussed at previous Strategic Planning sessions to reflect LEED and UNC Sustainability Policy requirements.
- Actions Planned
  - Participate in LEED class in October.
  - Helping coordinate Construction & Demolition recycling conference in December to strengthen existing partnerships and form new ones.

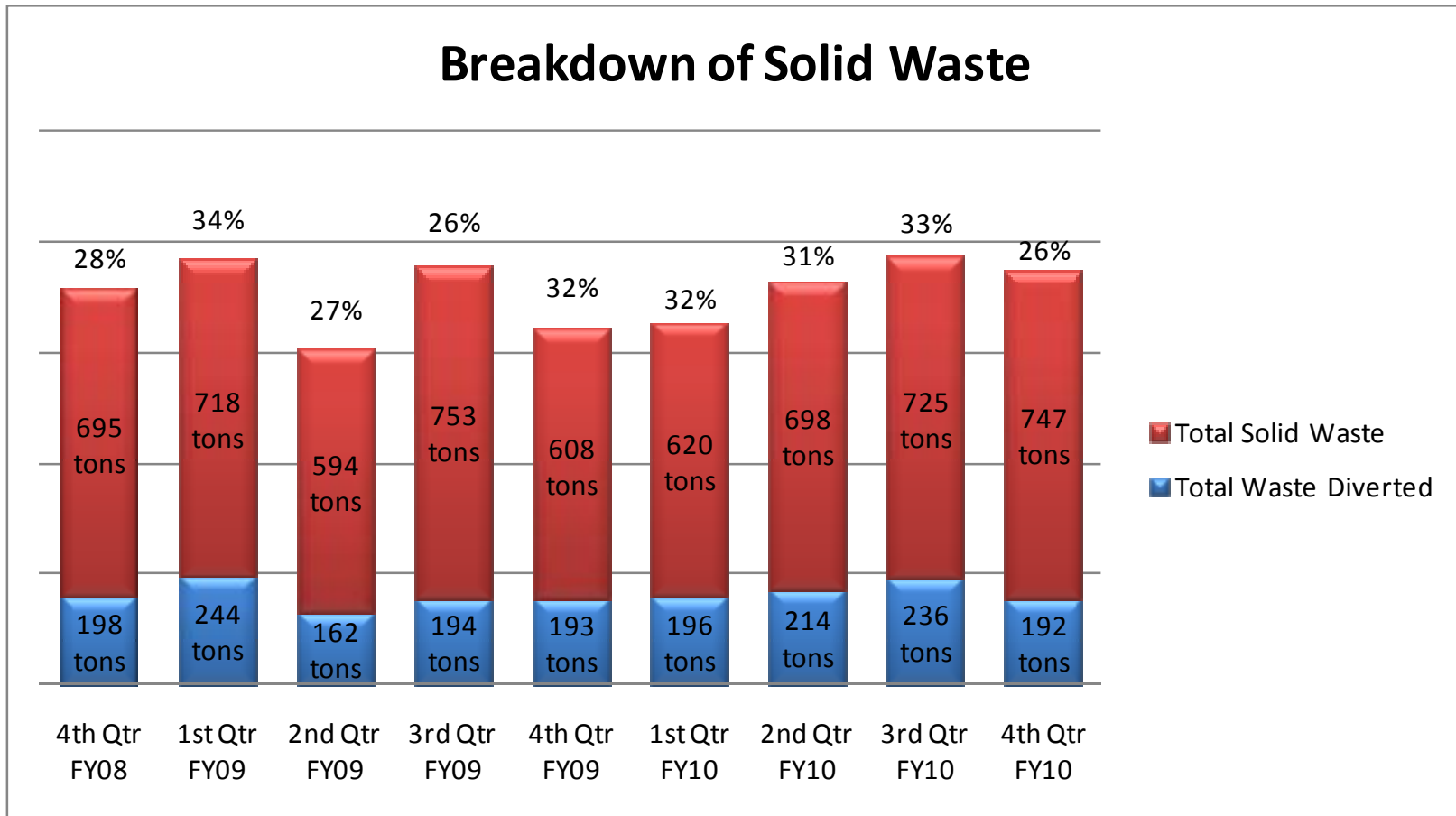


**GOAL #6 – Promote Good Stewardship**

**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 year 30%

- Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
- Continue outreach efforts to University community (student volunteers, environmental tours, promoted Adopt-A-Spot program (10 groups), advise EARTH Club, Charlotte Green Initiative and Global Architecture Brigade)
  - Held first Keep Charlotte Green Forum – partnered with Library staff
- Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
- Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**
- Presented and attended the APPA conference in July, accepted national award
- Partnered with Housekeeping – classroom trashcan removal project and pilot office trash can consolidation program

Quarter	Total Waste Diverted	Total Solid Waste	% Diverted	Tons diverted	Tons Total Solid Waste
4th Qtr FY08	395,581	1,390,905	28%	198	695
1st Qtr FY09	487,715	1,435,915	34%	244	718
2nd Qtr FY09	323,562	1,188,802	27%	162	594
3rd Qtr FY09	388,609	1,506,909	26%	194	753
4th Qtr FY09	385,961	1,215,381	32%	193	608
1st Qtr FY10	392,701	1,239,541	32%	196	620
2nd Qtr FY10	425,182	1,393,820	31%	213	697
3rd Qtr FY10	476,987	1,456,207	33%	238	728
4th Qtr FY10	384,520	1,493,420	26%	192	747

### 1st 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
- Continue educational outreach and promotion (Sustainable Campus tour, Adopt-A-Spot program, advising EARTH Club, Global Architecture Brigade and Charlotte Green Initiative)
  - Second Keep Charlotte Green Forum – partnering with Student Union Staff in August
- Coordinate MOVE OUT with Housing and Residence Life
- Coordinate Campus Clean UP
- Design comprehensive food composting program
- Need comprehensive resource management action for all staff at UNC Charlotte

Lead  
Capital

GOAL #6 – Promote Good Stewardship

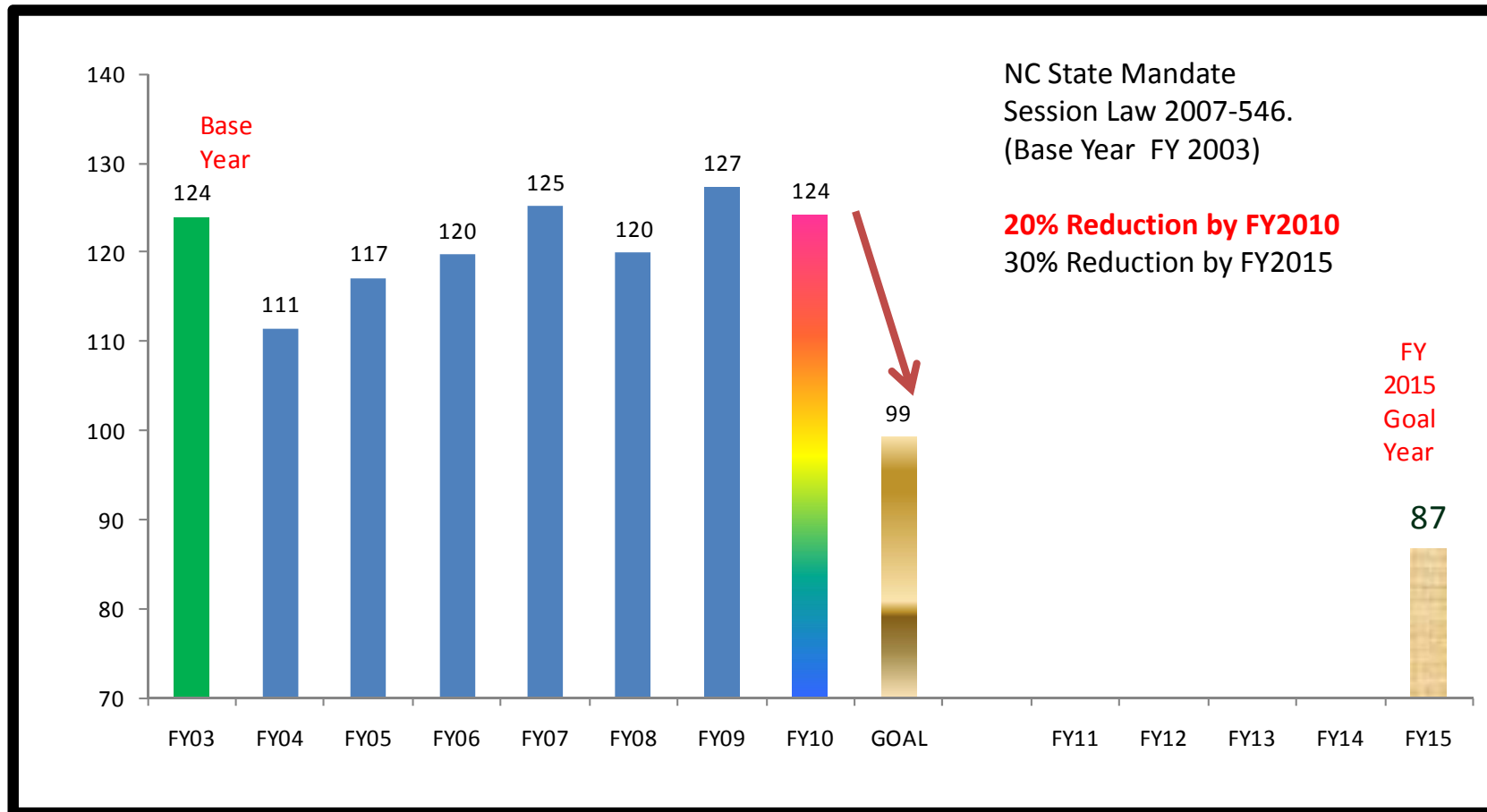
Strategy 6.3 Conserve Natural Resources  
Objective 6.3.1 Decrease Energy Usage by 20% by FY2010

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

**CAMPUS ENERGY USAGE**  
**Kbtu/GSF**



GOAL #6 – Promote Good Stewardship

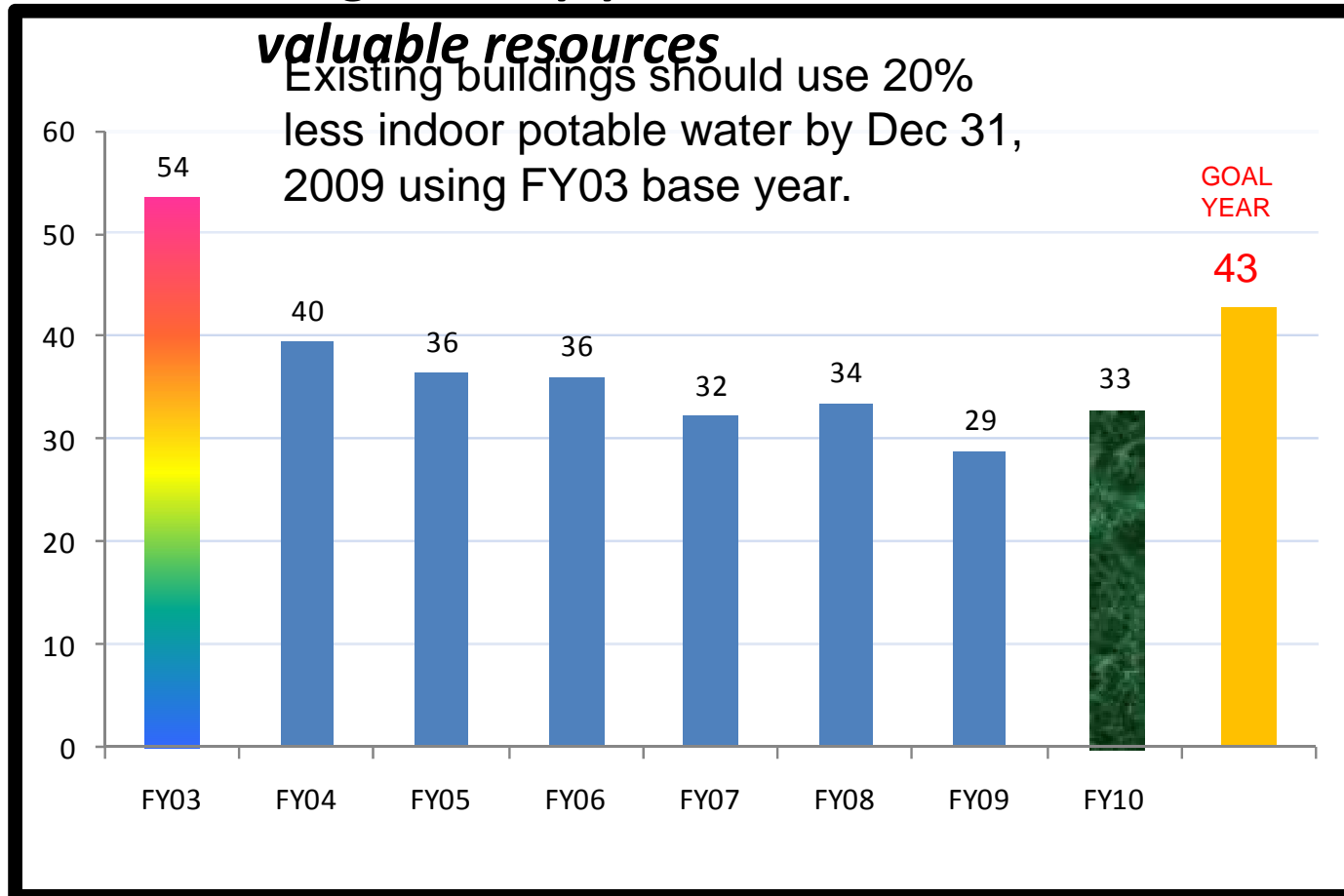
Strategy 6.3 Conserve Natural Resources  
Objective 6.3.2 Decrease Water Usage by 20% by FY2010

Measure: Gallons/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

***Still need to reduce water usage to help preserve valuable resources***



GOAL #6 – Promote Good Stewardship

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

Lead  
Capital

**ACTIONS TO REDUCE CAMPUS  
ENERGY USAGE**

STATUS

**ENGINEERING and ZONE COORDINATION MEETING  
August 11, 2010**

- *Review existing electrical load shedding of HVAC and lighting.*
- *Establish recommendations for campus wide comfort temperature control.*
- *Identify details of Zone energy monitoring, i.e. identify checklists needed, measurements, acceptable variances, etc.*
- *Schedule Engineering meeting with individual Zones to develop plan for buildings within that Zone.*
- *Identify training needs/requirements.*
- *Review existing HVAC and lighting setback (buildings and schedules).*



GOAL #6 – Promote Good Stewardship

Lead  
Capital

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

**HISTORICAL ACTIONS TO  
REDUCE CAMPUS ENERGY  
USAGE**

**STATUS**

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

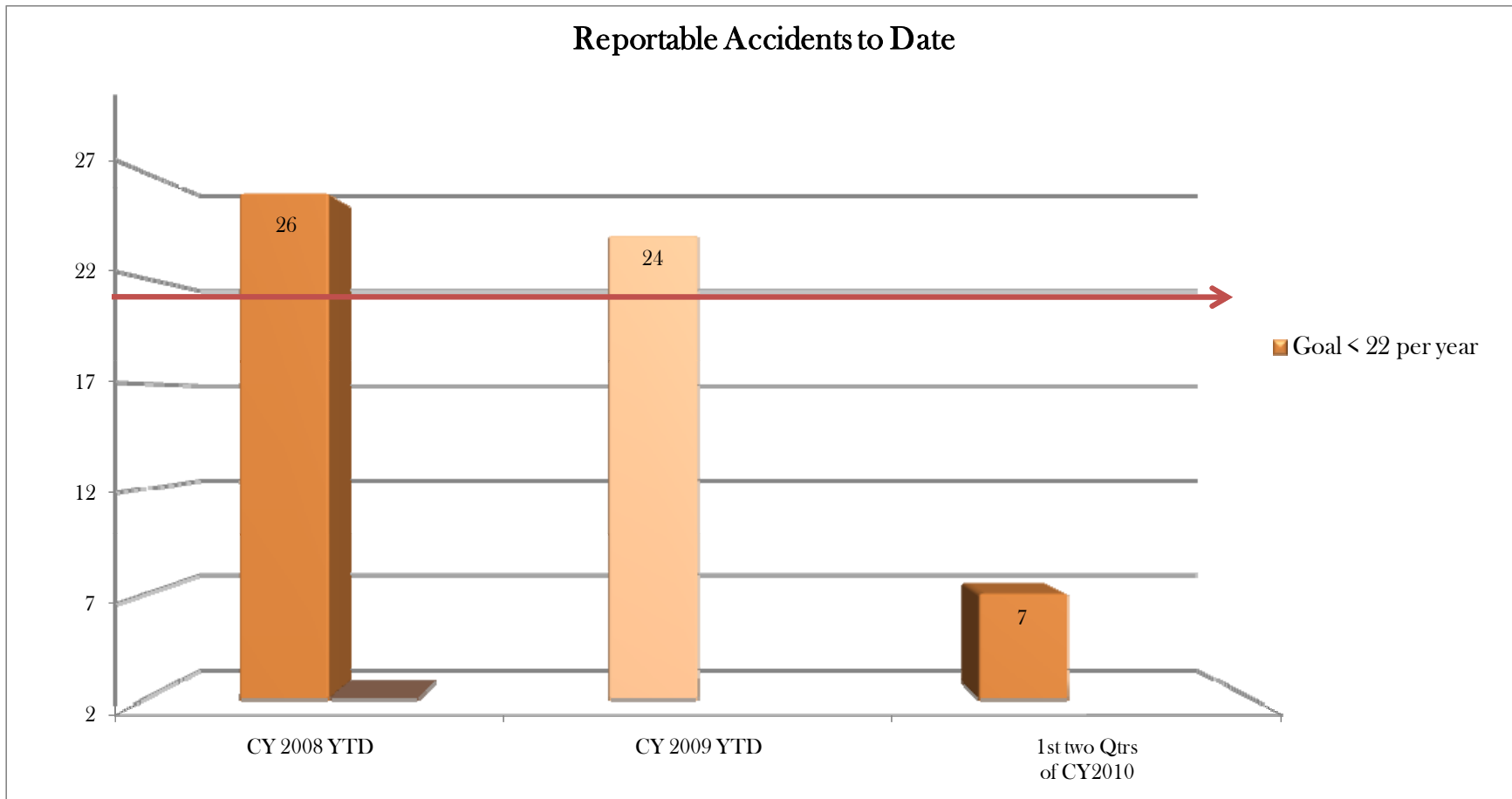
**GOAL #6 – Promote Good Stewardship**

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

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

**Goal:**    Less than 23 per year

**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 15 Percent Annually

Lead  
F. O.

### 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.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
Capital

GOAL #6 – Promote Good Stewardship

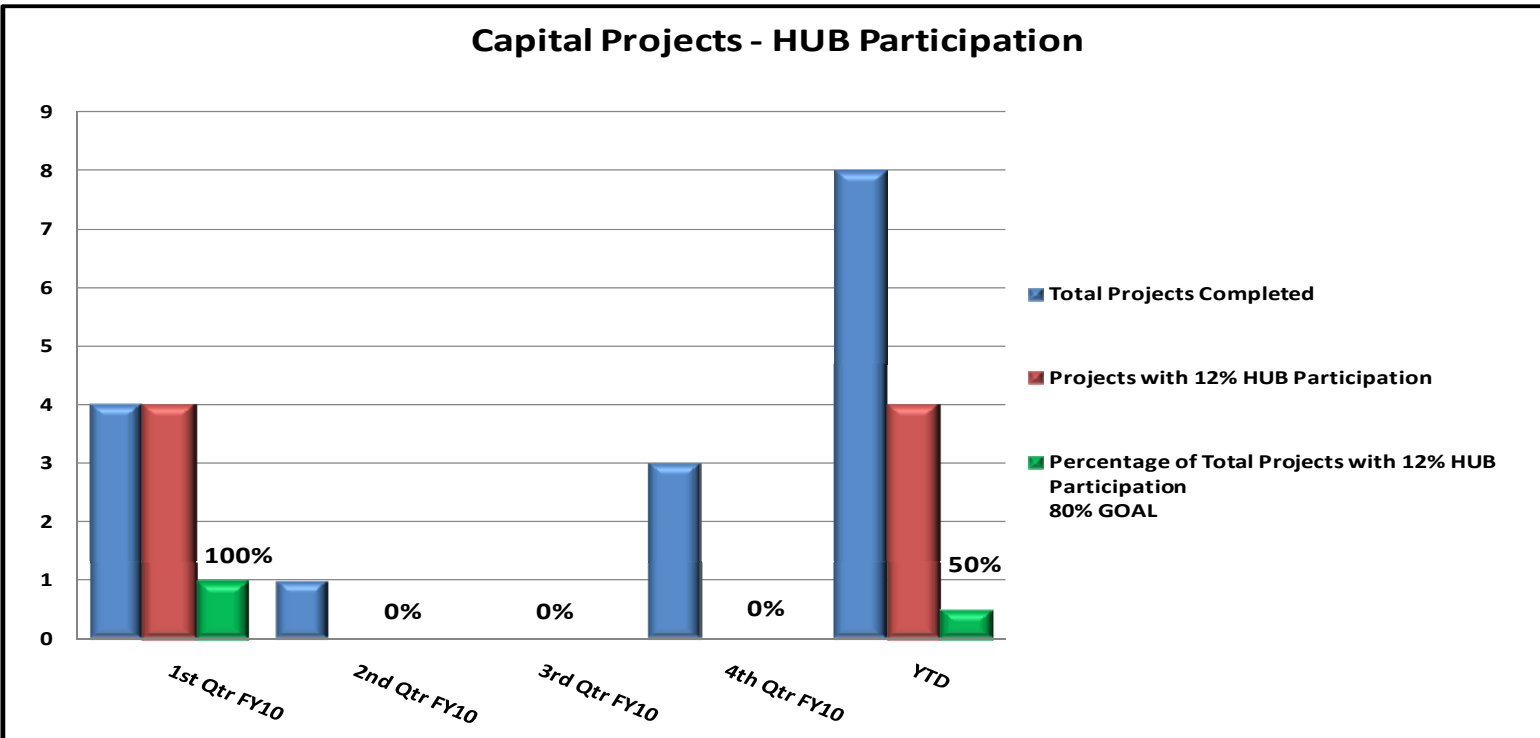
**Strategy** 6.5 Improve Historically Underutilized Business (HUB) Participation  
**Objective** 6.5.1 12% HUB participation on 80% of Capital Projects

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

**Balanced Scorecard Category:** Internal Business Process

Strategic Review	Total Projects Completed	Projects with 12% HUB Participation	Percentage of Total Projects with 12% HUB Participation 80% GOAL
1st Qtr FY10	4	4	100%
2nd Qtr FY10	1	0	0%
3rd Qtr FY10	0	0	0%
4th Qtr FY10	3	0	0%
<b>YTD</b>	<b>8</b>	<b>4</b>	<b>50%</b>

Steam Infrastructure – Cone/King  
 Cameron Blvd Resurfacing  
 Phillips Road Resurfacing



FY2010

STATUS

FY2009  
 14 Total/3 HUB – 21.4%

STATUS

## GOAL #6 – Promote Good Stewardship

Lead  
Capital

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

# ACTION PLAN

- Actions Complete
  1. Participated in “Access 2010” – community-wide government procurement conference
  2. Updated University “Vendor Information Guide”
- Actions Planned
  1. Work with CM contractors to identify potential HUB partners
  2. Work with CM contractors to encourage mentor-protégé/partnerships and/or joint venture relationships at 1<sup>st</sup> tier subcontractor level
  3. Work with CM contractors/agencies/organizations to identify/provide training to promote HUB growth and development
  4. Continue –
    - Encourage GCs to exceed 10% goal
    - Monitor Pay Applications/Good Faith Efforts
    - Provide project /event information to the community
    - Work with GCs/other agencies to identify qualified HUBs
    - Educate business community on the process
    - Community outreach efforts

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

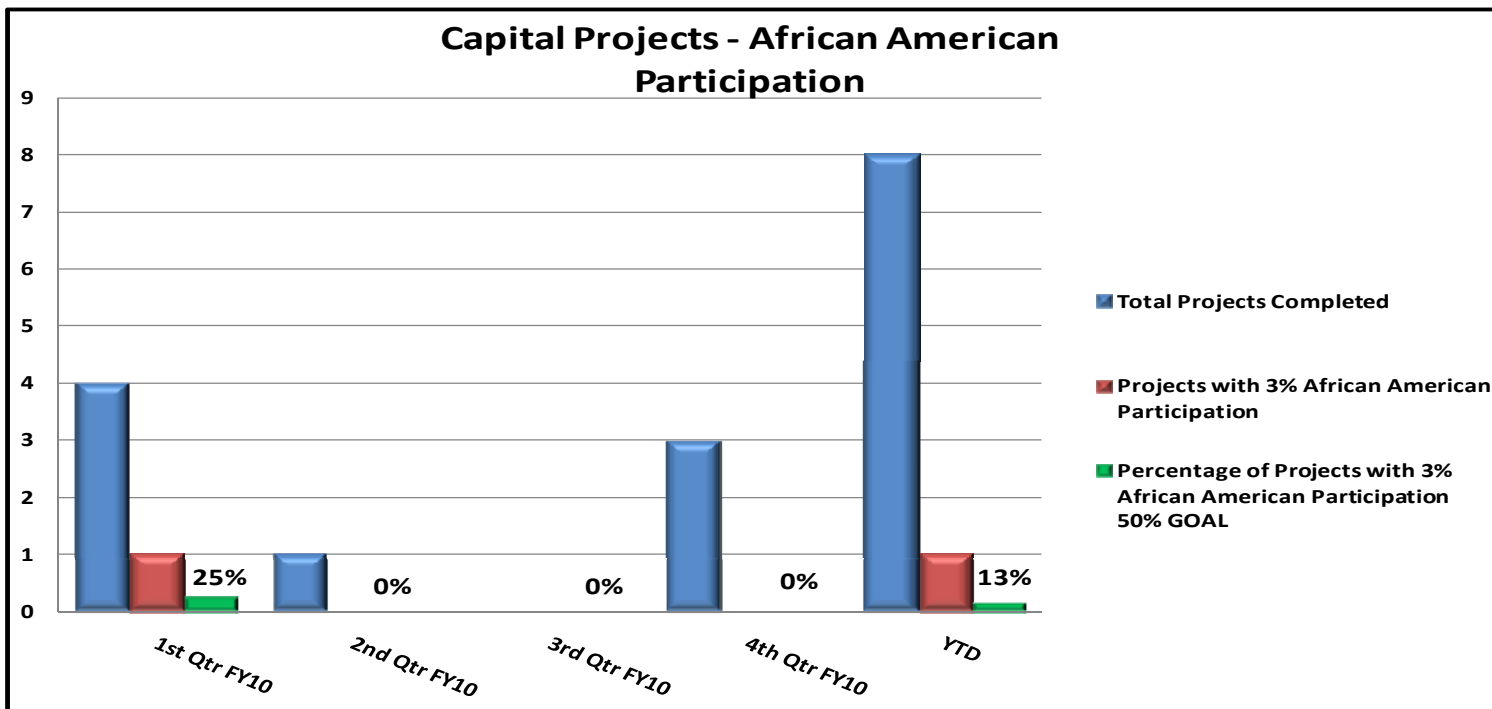
GOAL #6 – Promote Good Stewardship

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

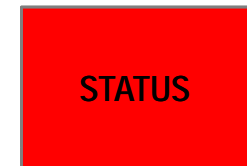
Measure: Percentage of Individual Capital Projects achieving 3% African American participation

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Projects Completed	Projects with 3% African American Participation	Percentage of Projects with 3% African American Participation 50% GOAL
1st Qtr FY10	4	1	25%
2nd Qtr FY10	1	0	0%
3rd Qtr FY10	0	0	0%
4th Qtr FY10	3	0	0%
<b>YTD</b>	<b>8</b>	<b>1</b>	<b>13%</b>



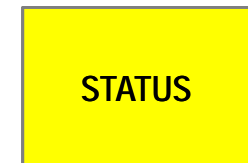
FY2010



STATUS

FY2009

14 Total – 4AA – 29%



STATUS



## GOAL #6 – Promote Good Stewardship

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

Lead  
Capital

# ACTION PLAN

- **Actions Complete**
  1. Met with Metrolina Minority Contractors Association (MMCA) to identify “business development” related training for membership
  2. Conducted overview of Informal Construction process to MMCA membership
- **Actions Planned**
  1. Work with CM Contractors to develop targeted training for subcontractors
  2. Encourage CM Contractors to identify reduced barrier packages to increase HUB participation
  3. Examine Goals & Objectives of the MBE Advisory Committee
  4. Continue –
    - Educate business community on the process
    - Identify qualified HUBs to bid projects
    - Provide project/event information to the community
    - Community outreach efforts

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
Capital

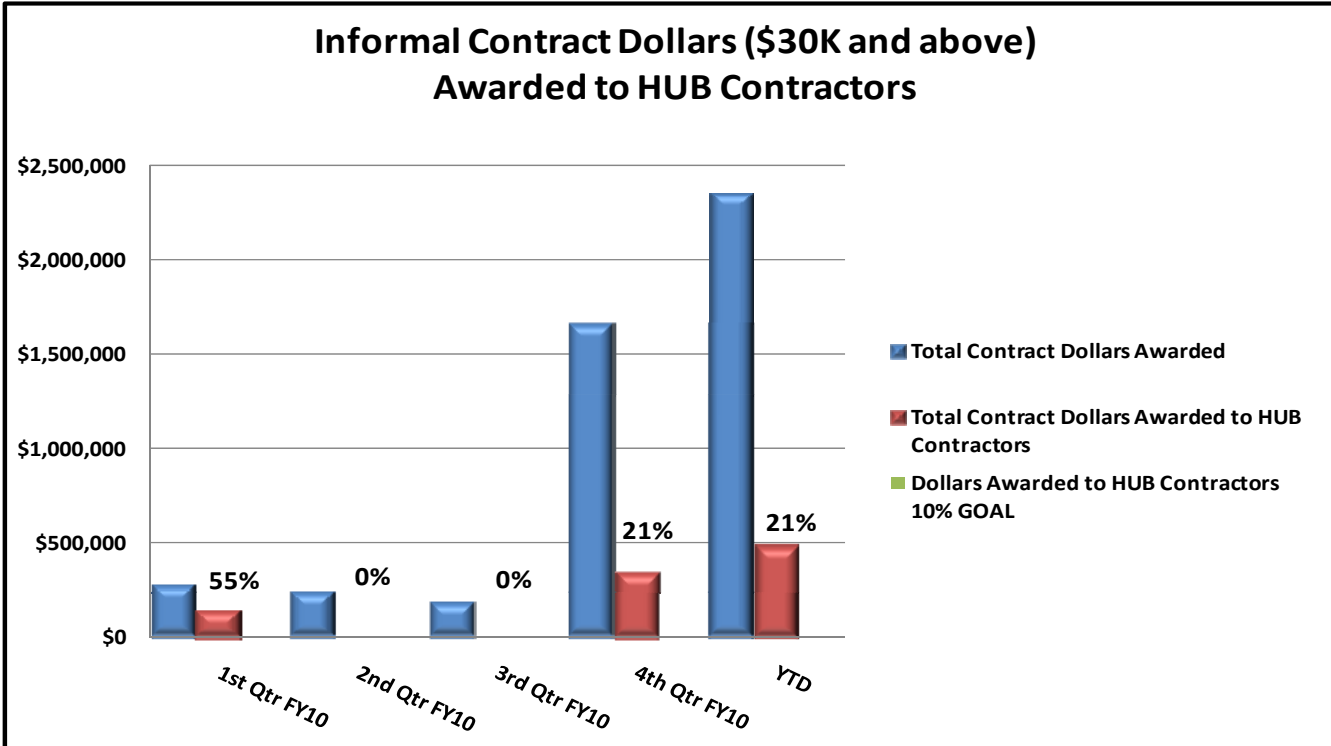
GOAL #6 – Promote Good Stewardship

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

**Measure:** Percentage of Informal Contract Dollars awarded to HUB Contractors

**Balanced Scorecard Category:** Internal Business Process

Strategic Review	Total Contract Dollars Awarded	Total Contract Dollars Awarded to HUB Contractors	Dollars Awarded to HUB Contractors 10% GOAL
1st Qtr FY10	\$273,968	\$150,312	55%
2nd Qtr FY10	\$239,600	\$0	0%
3rd Qtr FY10	\$185,200	\$0	0%
4th Qtr FY10	\$1,657,110	\$340,024	21%
<b>YTD</b>	<b>\$2,355,878</b>	<b>\$490,336</b>	<b>21%</b>



FY2010

STATUS

FY2009

\$679,237 – \$318,215 HUB – 47%

STATUS

## GOAL #6 – Promote Good Stewardship

Lead  
Capital

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

# ACTION PLAN

- **Actions Complete**
  1. Participated in GC and Subcontractor “Meet & Greet” session for Informal Construction process
  2. Worked with Materials Management to resolve specific HUB issues
- **Actions Planned**
  1. Participate in GC and Subcontractor “Meet & Greet” session for Informal Construction process
  2. Continue –
    - Encourage/Invite HUB firms to bid Informal Projects
    - Work with Materials Management/Design Services to identify qualified HUBs to bid projects
    - Educate business community on the process
    - Provide information about Informal projects
    - Community outreach efforts

**GOAL # 6 – Promote Good Stewardship**

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

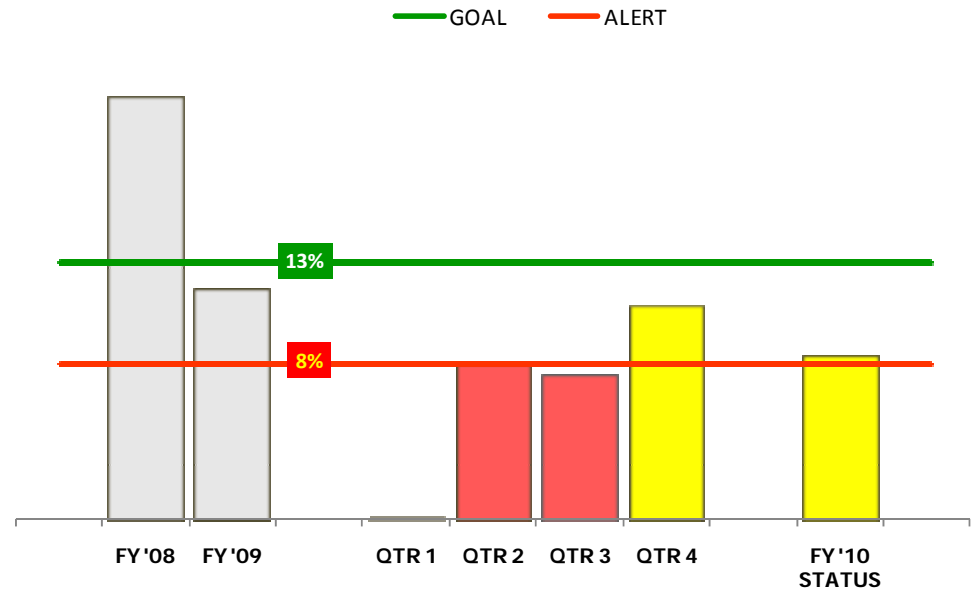
**Measure:** Total % of HUB participation on all Informal Projects below \$30,000 (**Construction only**) divided by Total Contracts

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY'08	\$ 2,861,776	\$ 608,415	21.3%
FY'09	\$ 1,404,456	\$ 163,049	11.6%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2	\$ 522,917	\$ 40,731	7.8%
QTR 3	\$ 659,240	\$ 47,972	7.3%
QTR 4	\$ 1,174,445	\$ 125,678	10.7%
<b>FY '10 STATUS</b>	<b>\$ 2,626,647</b>	<b>\$ 214,381</b>	<b>8.2%</b>

**HUB OVERALL GOAL: 13.0%**



<b>GOAL</b> 13.0%	<b>FY'10 STATUS</b> 8.2%
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## GOAL # 6 – Promote Good Stewardship

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

### ACTION PLAN

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

#### 6.5.4 - Actions Planned:

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

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

**GOAL # 6 – Promote Good Stewardship**

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

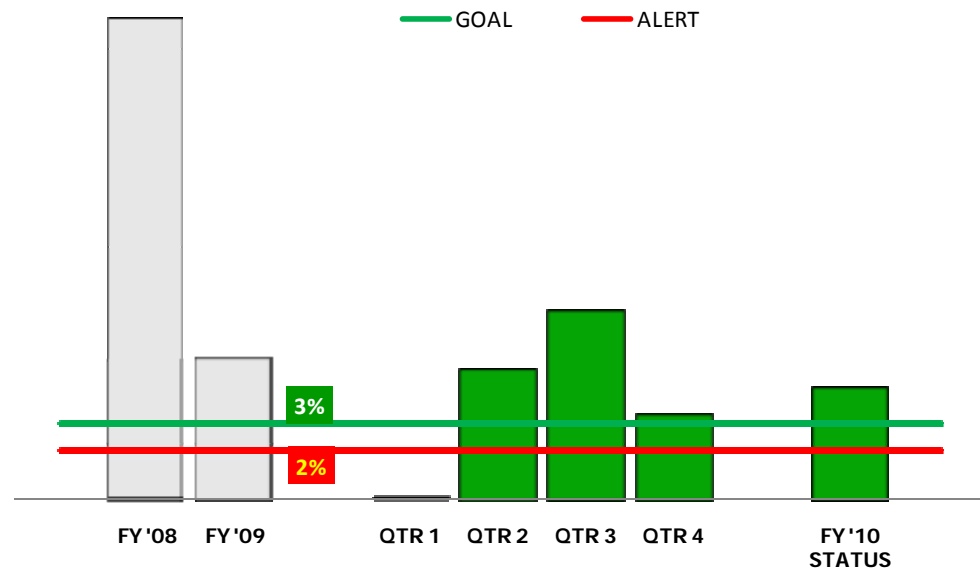
**Measure:** Total African American participation on all Informal Projects below \$30,000 (**Construction only**) divided by Total Contracts

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	Value of Contracts under 30K	African American Contribution	African American
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
QTR 1	\$ 270,045	\$ 0	0.0%
QTR 2	\$ 522,917	\$ 26,015	5.0%
QTR 3	\$ 659,240	\$ 47,972	7.3%
QTR 4	\$ 1,174,445	\$ 39,209	3.3%
<b>FY '10 STATUS</b>	<b>\$ 2,626,647</b>	<b>\$ 113,196</b>	<b>4.3%</b>

**AFRICAN AMERICAN GOAL: 3.0%**



<b>GOAL</b> 3.0%	<b>FY'10 STATUS</b> 4.3%
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UNC CHARLOTTE

# **Balance Score Card**

## **INTERNAL PROCESSES**

### **Perspective**

## **Strategic Objectives:**

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



UNC CHARLOTTE

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

-- Harold Geneen, industrialist

## **GOAL # 1**

Improve Maintenance and  
Operation on the Campus

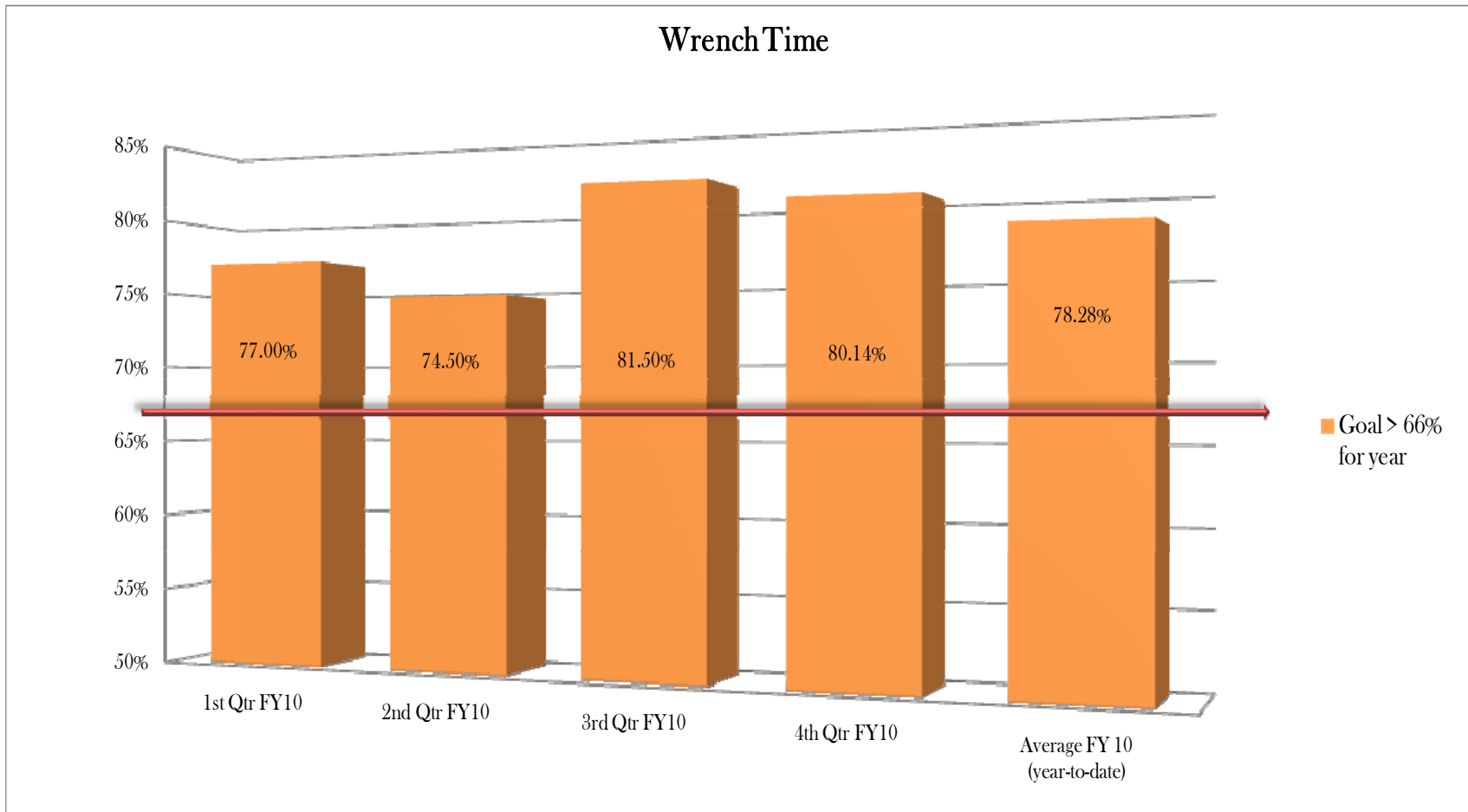
**GOAL #1 – Improve maintenance and operations of the Campus**

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

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

**Goal:** Greater than 66% for the year

**Balanced Scorecard Category:** Internal Business Process



**STATUS**

## GOAL #1 – Improve Facilities Operations

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

Lead  
F. O.

### ACTION PLAN

- Actions Complete
  - 1 – Continued improvement of accounting practices for time applied to WR’s. “Recorded hours” has improved from 81.2% of available hours last quarter to 81.66% of available hours this quarter.
  - 2 – Continued adding PMs to the PM program.
  
- Actions Planned
  - 1 – Continue development of a more extensive PM program.
  - 2 – Continue to stress reporting accuracy.
    - a) Meet with shop supervisors and PA’s to review.
    - b) Stress importance with all employees.

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

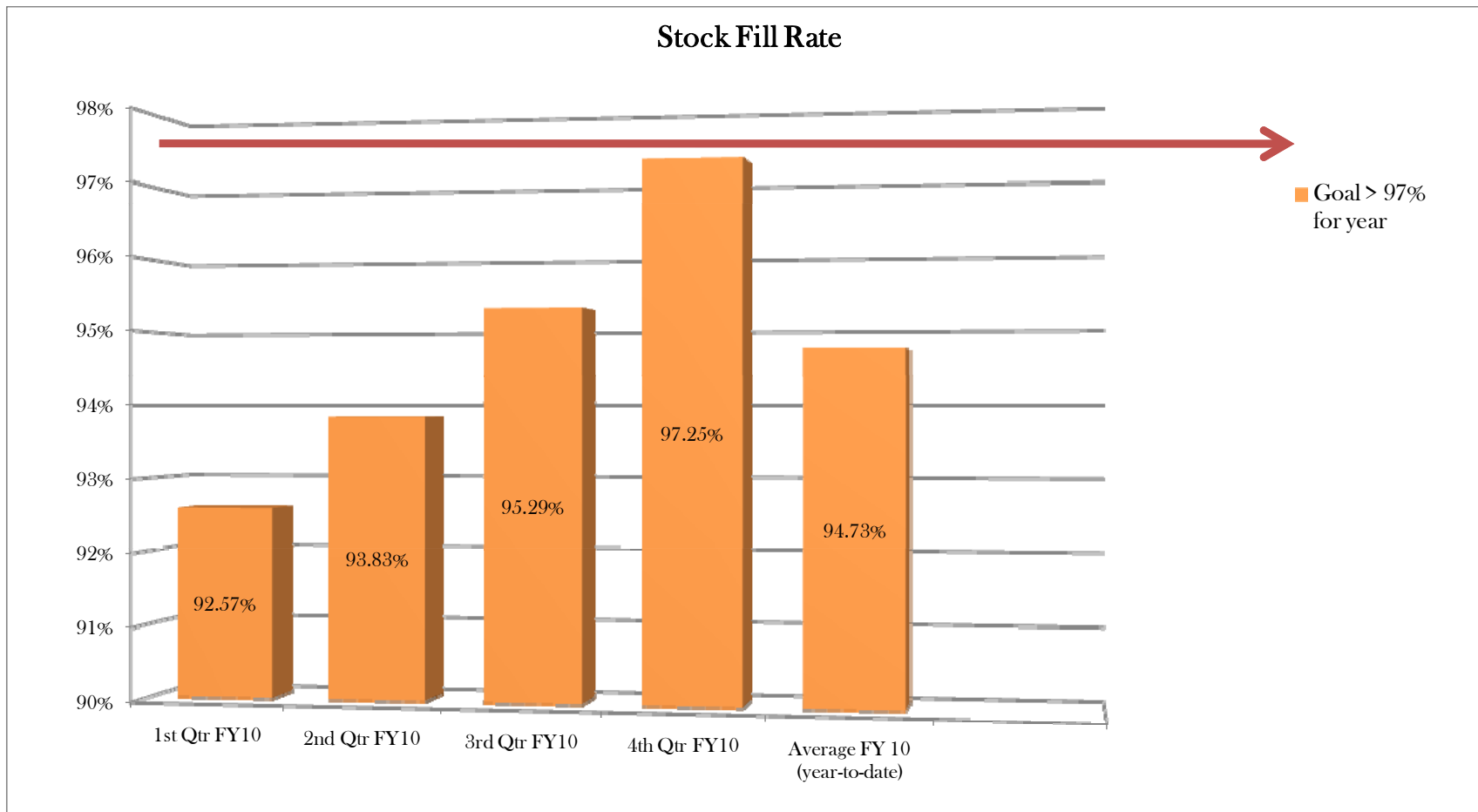
## GOAL #1 – Improve maintenance and operations of the Campus

**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)

**Goal:** Greater than 97%

**Balanced Scorecard Category:** Internal Business Process



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 – SDI's automated inventory management system which automatically computes stocking levels and reorder points based on usage and replenishment time was on the entire quarter. A fill rate of 98.48% was achieved in May but fell to 93.6% in June on average volume.
  - 2 – Ensured all items which had backorders placed against them were turned on for replenishment. This was a contributing factor to late deliveries and lower fill rates the first quarter of FY10. This quarter replenishment was on the entire period and fill rates have improved.
- Actions Planned
  - 1 – Continue to let automated system control and see how it works.

## Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

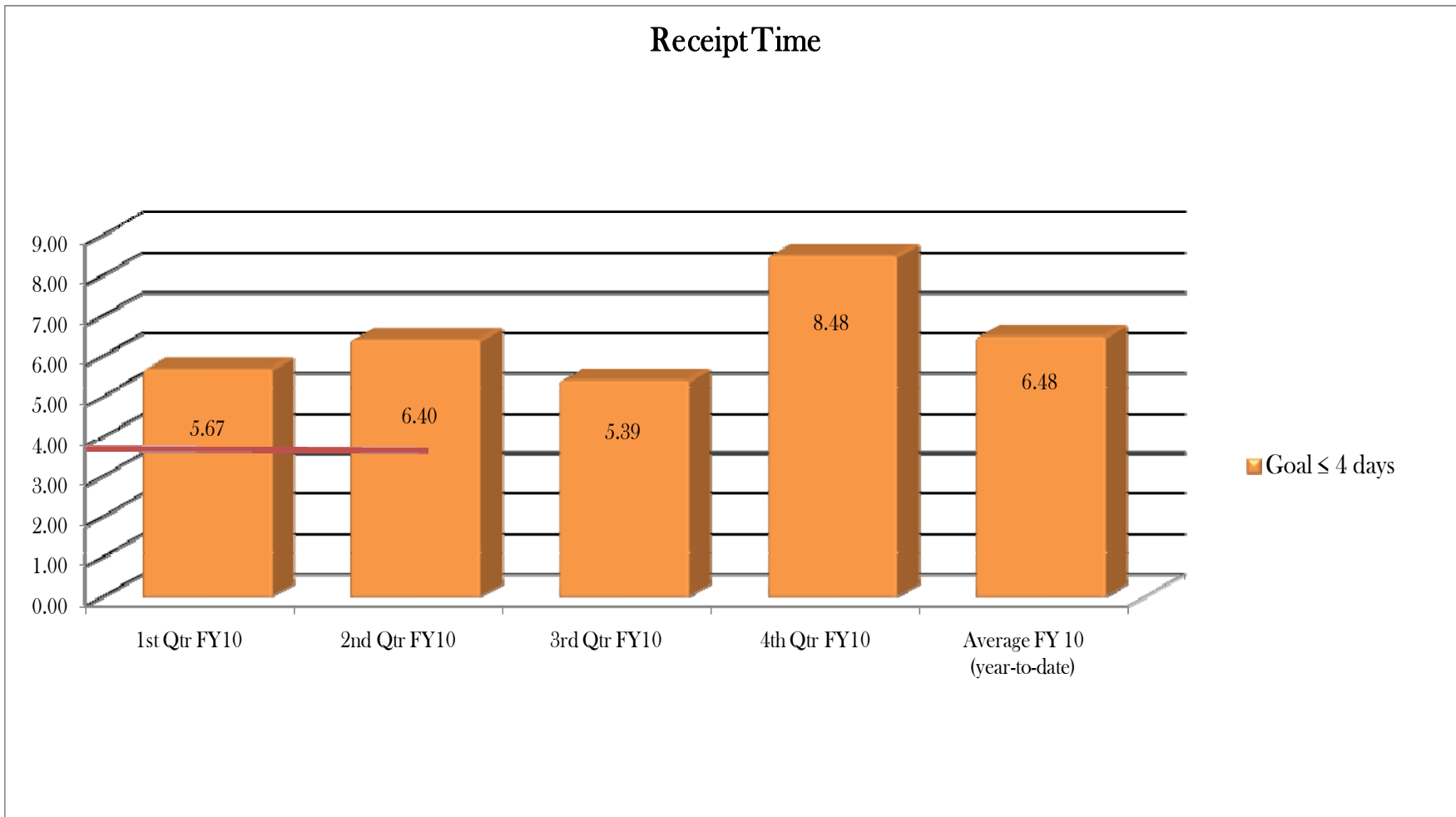
### GOAL #1 – Improve maintenance and operations of the Campus

**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)

**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 improved average approval time from 7.37 hrs. in Qtr 3 to 7.32 hrs. in Qtr 4.
  - 2 – Orders requiring more information rose to 2.2% of orders.
  - 3 – Reviewed non-stock orders to determine items that should be stocked. Monthly non-stock orders averaged 292 for all of FY09. Despite tight budget; the average monthly non-stock orders this fiscal year has averaged 366 per month. The 25% increase strained SDI's resources.
  - 4 - SDI has added additional resources to help with higher volumes.
- Actions Planned
  - 1 – Continue reviewing non-stock orders and add recurring items to stock inventory.

Lead  
F. O.

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

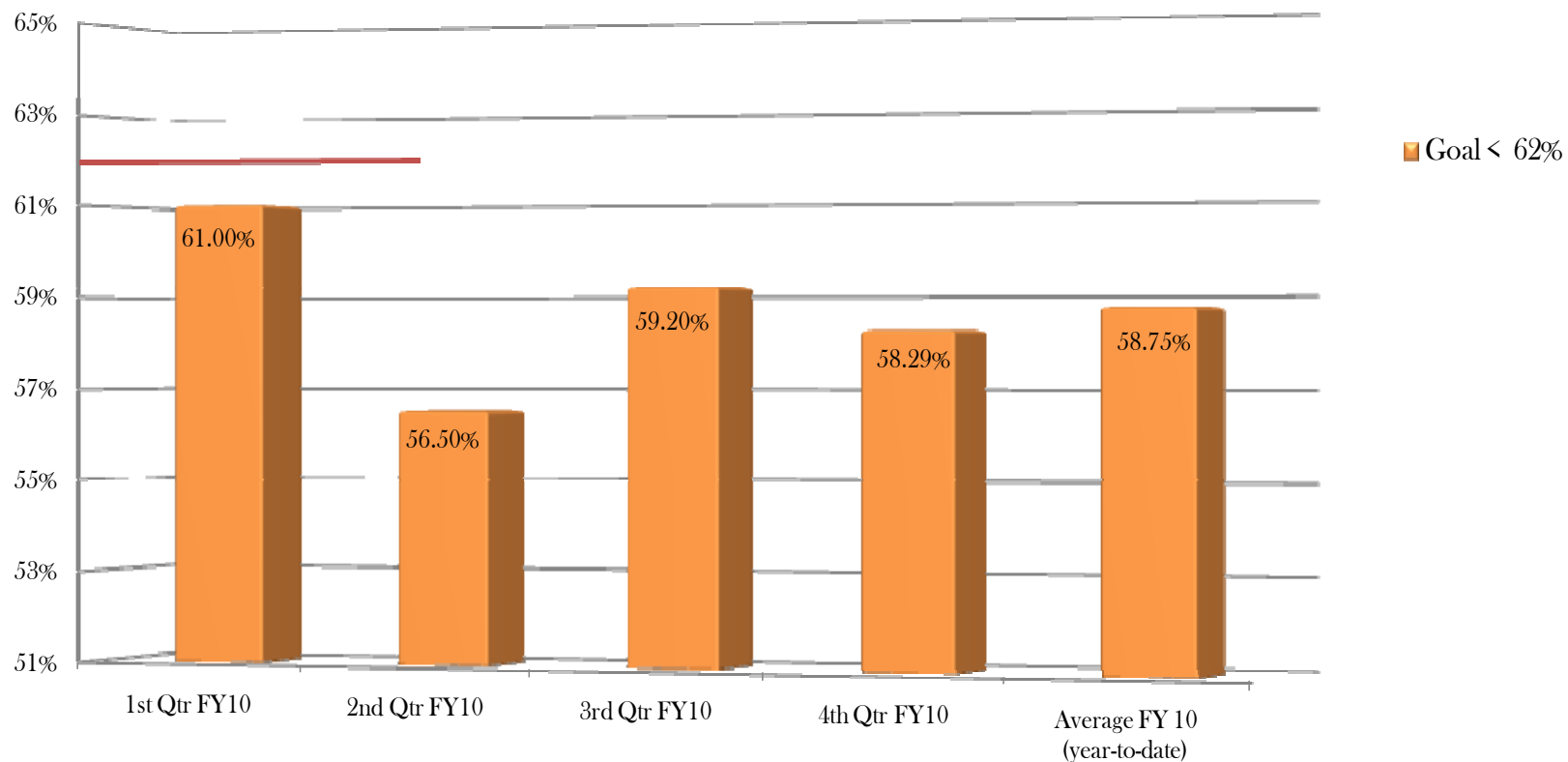
**Strategy:** 1.3 Improve Work Request Process  
**Objective:** 1.3.1 Decrease Percentage of Reactive Work Requests by 2%

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

**Goal:** Percentage to average < 62% for year.

**Balanced Scorecard Category:** Internal Business Process

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



STATUS

## GOAL #1 – Improve Facilities Operations

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

Lead  
F. O.

### ACTION PLAN

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

## Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

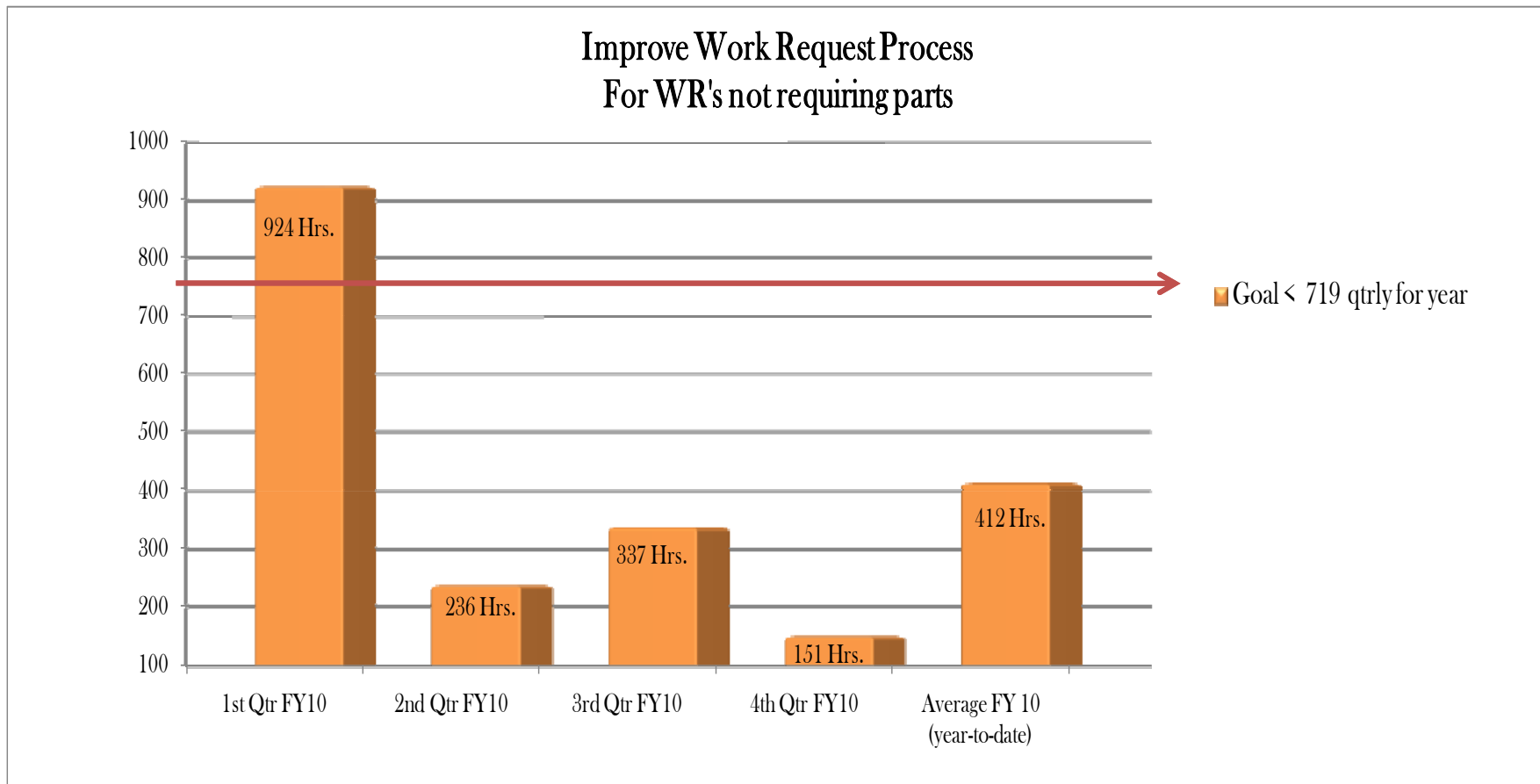
### GOAL #1 – Improve maintenance and operations of the Campus

**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 719 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 M&O Policy II-16 for Timely and Accurate Handling/Processing of WRs.

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
Housekeeping

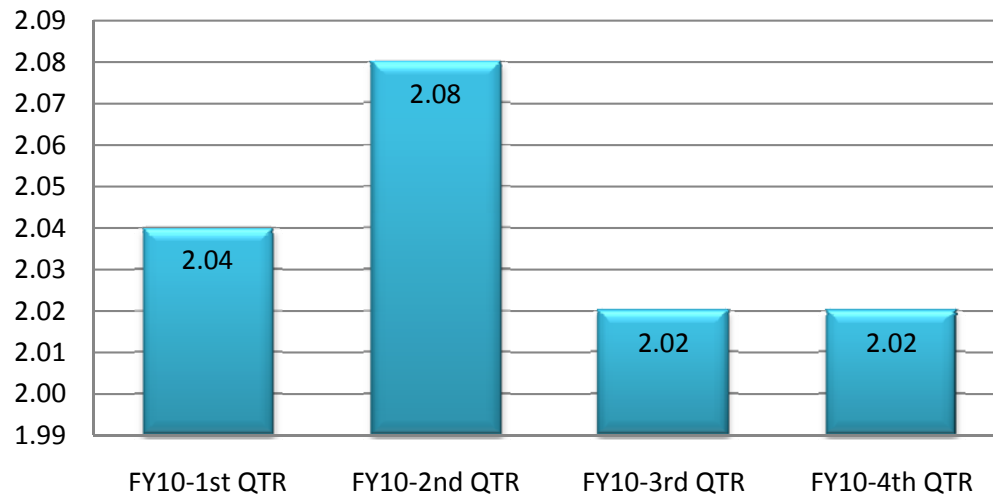
## GOAL #1 – Improve Maintenance and Operations of the Campus

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

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

**Balanced Scorecard Category:** Internal Business Process

### APPA LEVELS



2.04  
FY10

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 – Fourth Quarter FY 2010

Lead  
F. O.

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

**Strategy:** 1.5 Improve Reliability

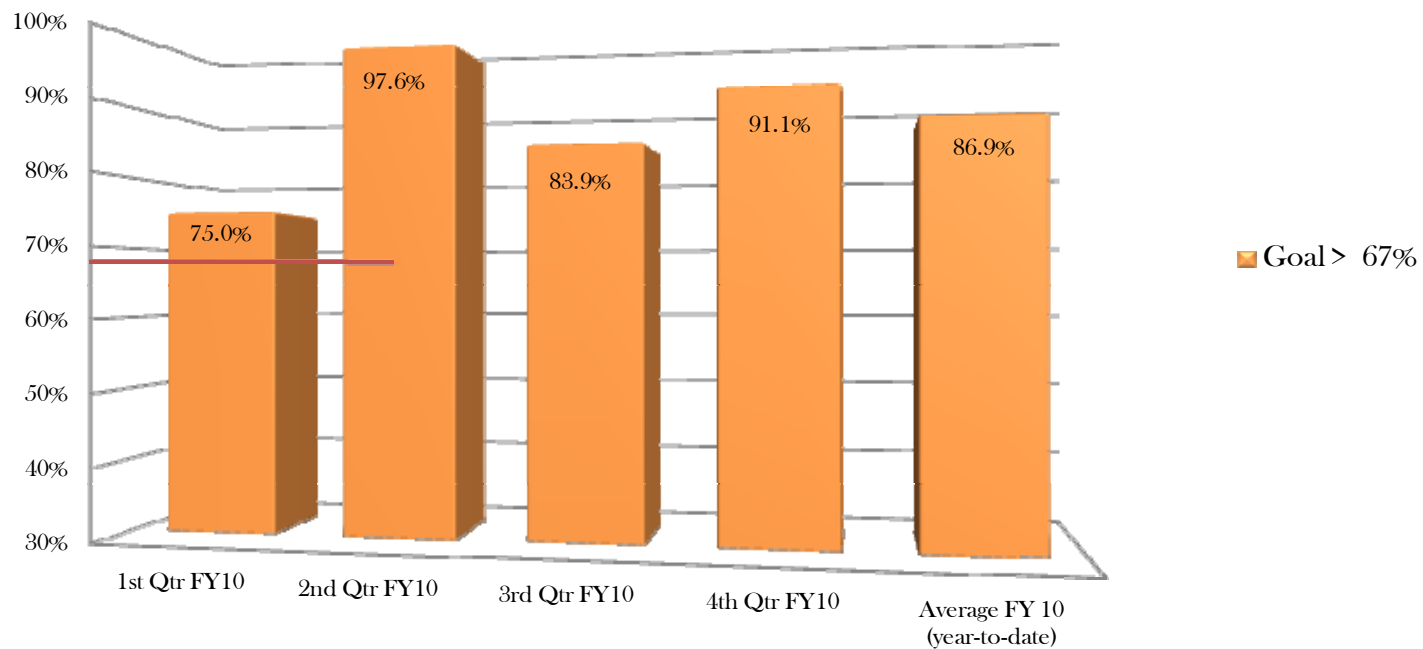
**Objective:** 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

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

**Goal:** Greater than 67%

**Balanced Scorecard Category:** Internal Business Process

### Preventive Maintenance



STATUS

## GOAL #1 – Improve Facilities Operations

**Strategy:** 1.5 Improve Reliability

**Objective:** 1.5.1 Improve Completion of Preventative Maintenance Work Requests by 10%

Lead  
F. O.

### ACTION PLAN

- Actions Complete
  - 1 – Hired PM Manager.
- Actions Planned
  - 1 – Continue development of PM Program.
  - 2 – Closer monitoring of PM completions.

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

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

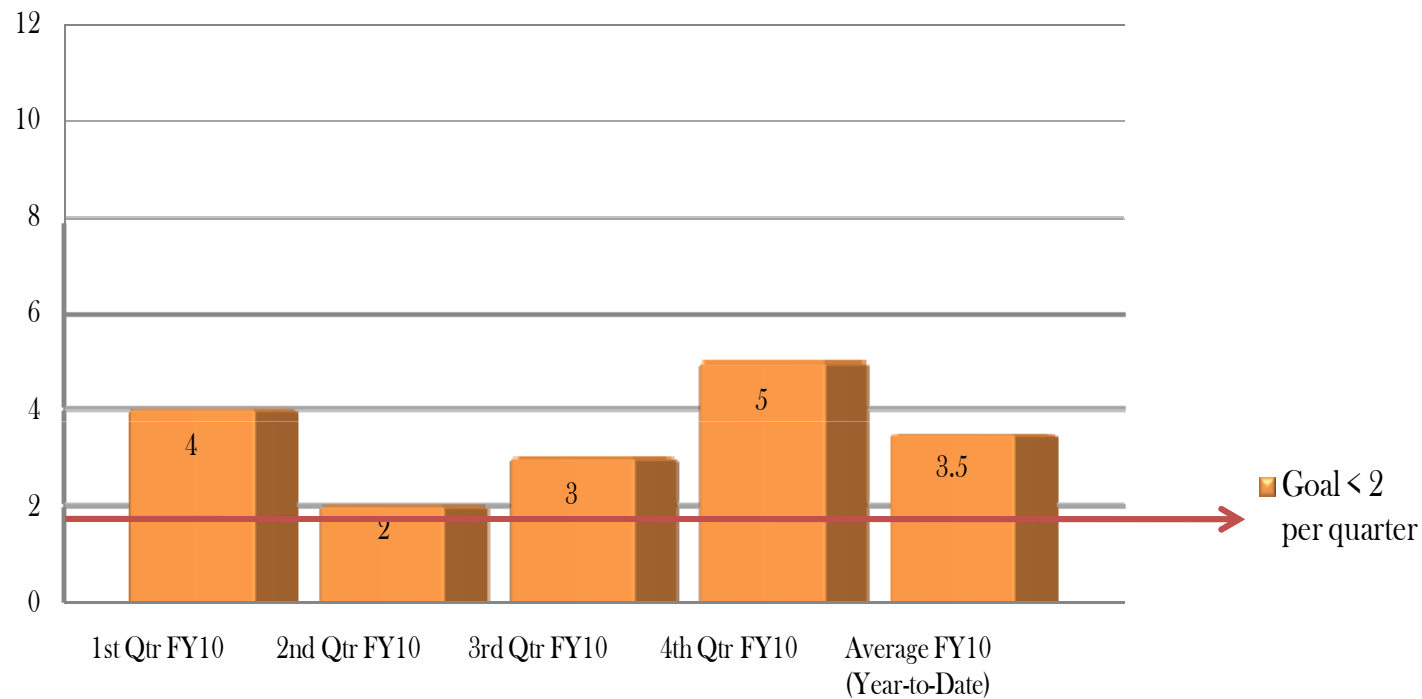
**Strategy:** 1.5 Improve Reliability  
**Objective:** 1.5.2 Decrease number of Unscheduled Equipment Replacement Projects by 15%

**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

### Unscheduled Equipment Replacement Projects



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

Note: Failures: CARC Clean Room Chiller, Transformers at Duke and West Deck, and two Air Compressors at Duke.

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

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

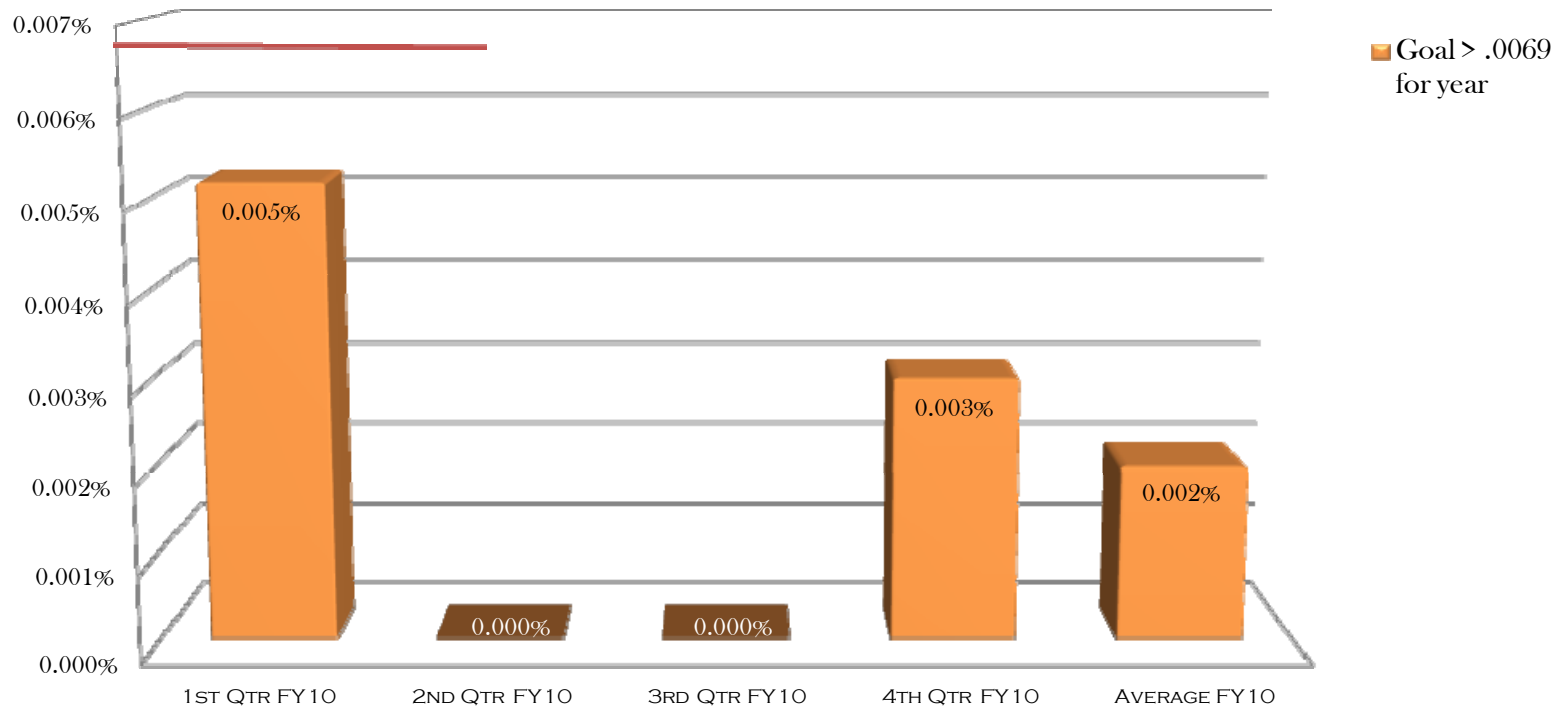
**Strategy:** 1.5 Improve Reliability  
**Objective:** 1.5.3 Reduce Unscheduled High Voltage Electrical System Outages by 10%

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

**Goal:** Less than .0069 for year.

**Balanced Scorecard Category:** Internal Business Process

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



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 – Continued working closely with Project Managers and contractors performing work on-site to preclude accidental interruptions by properly identifying location of underground utilities.
  - 3 - Identified several switches needing replacement and prepared estimates for planning.
  - 4 – Replaced Transformers at West Deck and repaired transformer at Duke.
- 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.
  - 4 – Preparing estimates for replacement of switches 42A-B and 42B-B.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

Lead  
F. O.

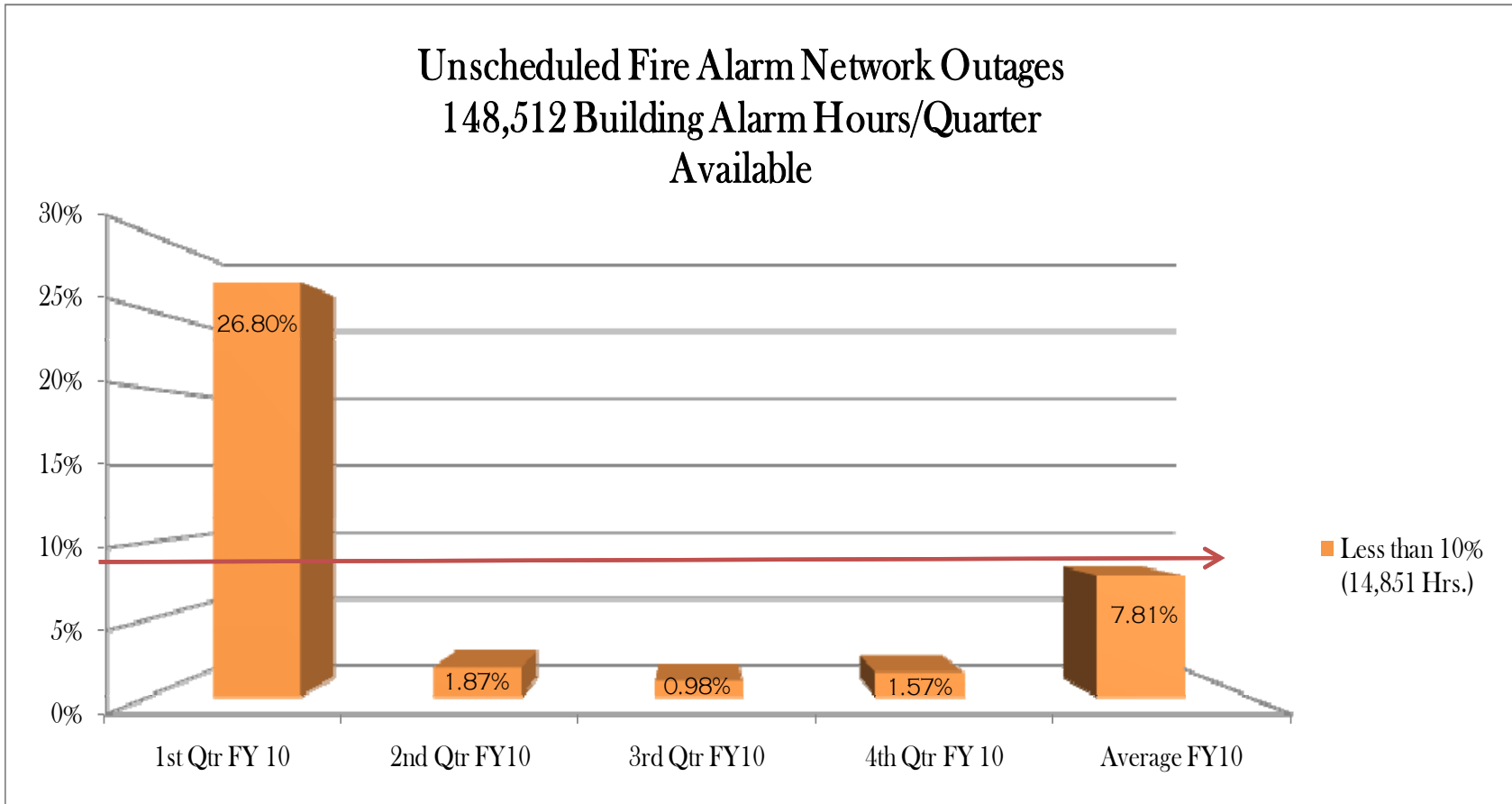
GOAL #1 – Improve maintenance and operations of the Campus

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

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

Goal: Less than 10%

Balanced Scorecard Category: 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.



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



# FM 5YP Prioritized Projects

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

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

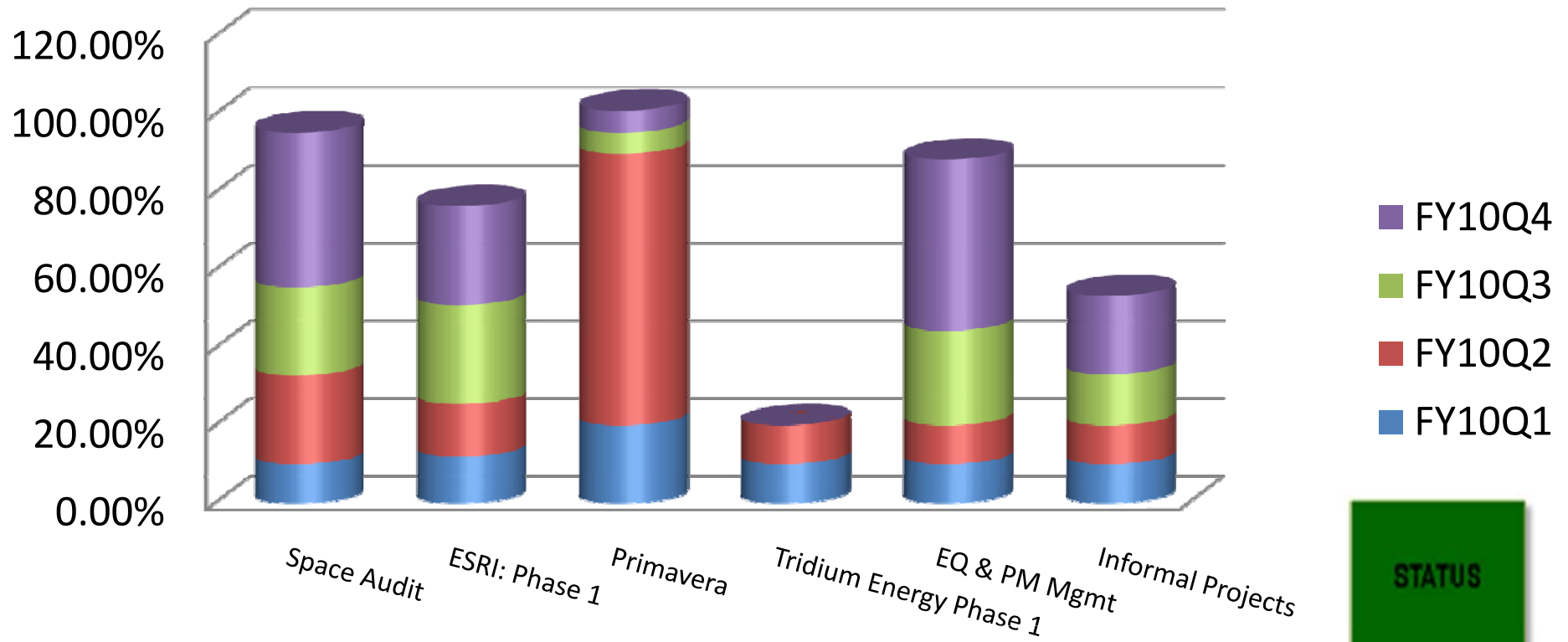
**Strategy:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

**Measure:** Completion of Five-Year Technology Milestones

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

### Project Percentage Completion Status



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

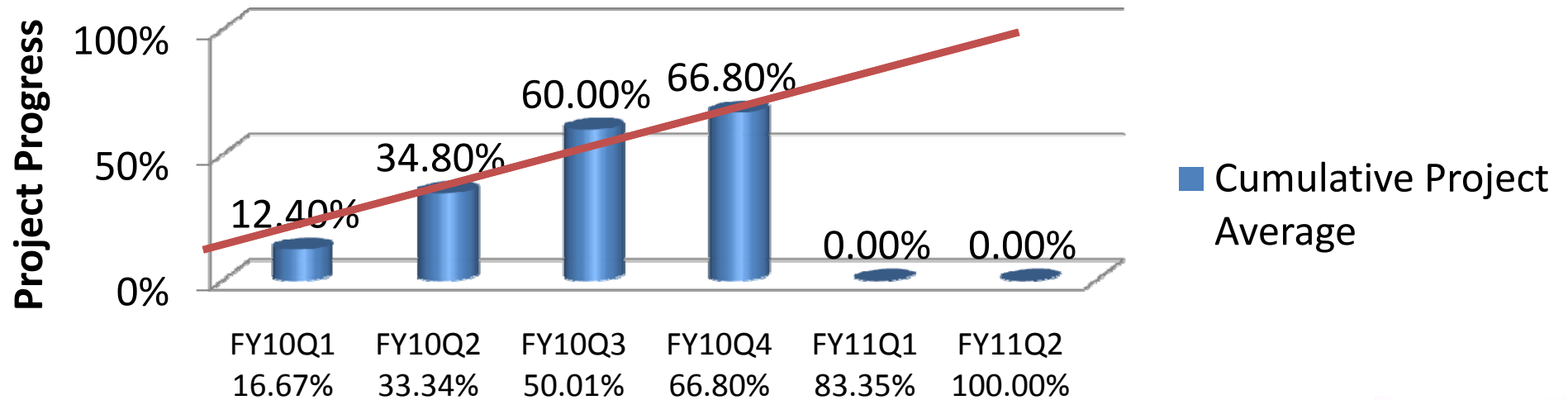
**Strategy:** 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology

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

**Measure:** Completion of Five-Year Technology Milestones

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

**Cumulative Project Average / Qtr within 18-Month Timeframe**



STATUS

## 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 Full AA training schedule and began AA Space Audit training.
2. Completed internal testing and began Informal Project User Testing.
3. Completed Equipment Management Requirement & Equipment Standards Identification/clean up. Update view to provide consistent EQ ID generation
4. BAS/Tridium – Place Project on hold until new BAS person (David Champion) starts.
5. New phase began in FY11 that includes additional training on Contract Management and development of a SOP and training for P6.
6. Archibus ESRI extension maps have been completed and we are waiting for data classification to release maps in Archibus to all roles.
7. EDA equipment has been purchased
8. Key Management Phase 1 is almost completed and most views are now available.

### Actions Planned:

1. Complete Space Audit training sessions for Development, Athletics and Student Services.
2. Complete SOP and go live with Informal Projects with Archibus Project Mgmt.
3. Complete Equipment Mgmt views and reports.
4. Begin Workgroups and development of EDA SOP's.

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

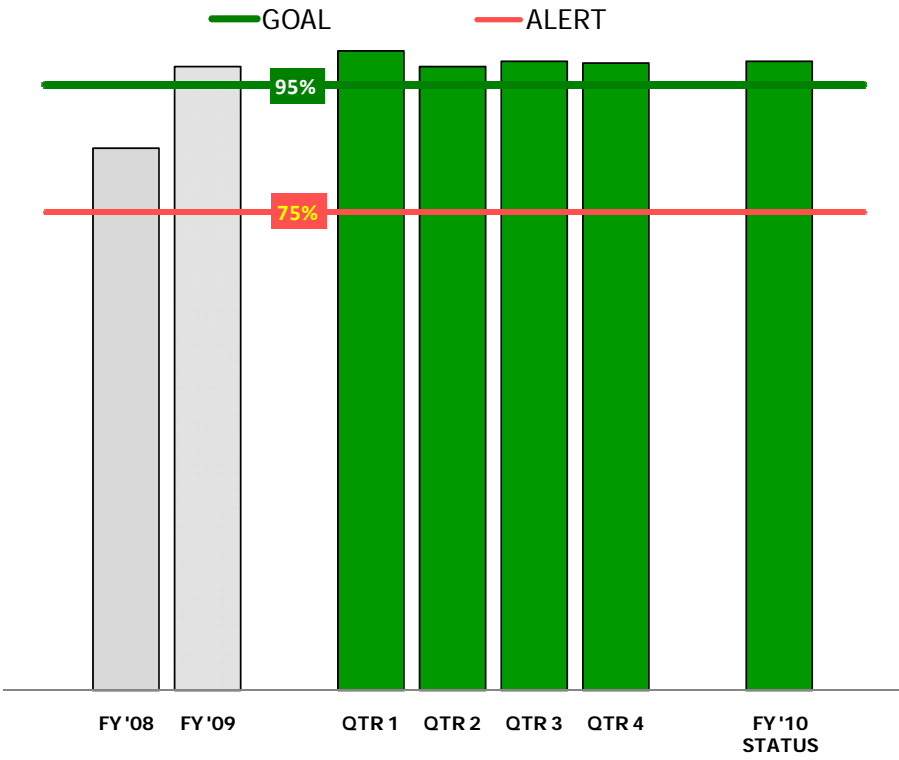
**Strategy Objective** 2.2 Improve Informal Project Design and Construction Process  
 2.2.1 **95% of Projects Designed on Time**

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

**Balanced Scorecard Category:** Internal Business Process

**95% of Projects Designed on Time**

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not completed on time	Designed On Time
FY'08	65	55	10	84.6%
FY'09	115	112	3	97.4%
QTR 1	23	23	0	<b>100.0%</b>
QTR 2	42	41	1	<b>97.6%</b>
QTR 3	56	55	1	<b>98.2%</b>
QTR 4	52	51	1	<b>98.1%</b>
<b>FY '10 STATUS</b>	<b>173</b>	<b>170</b>	<b>3</b>	<b>98.3%</b>
			<b>GOAL:</b>	<b>95.0%</b>



**GOAL**  
95.0%

**FY'10 STATUS**  
98.3%



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

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

Lead  
Design  
Services

# ACTION PLAN

### 2.2.1 - Actions Completed:

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

### 2.2.1 - Actions Planned:

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

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

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

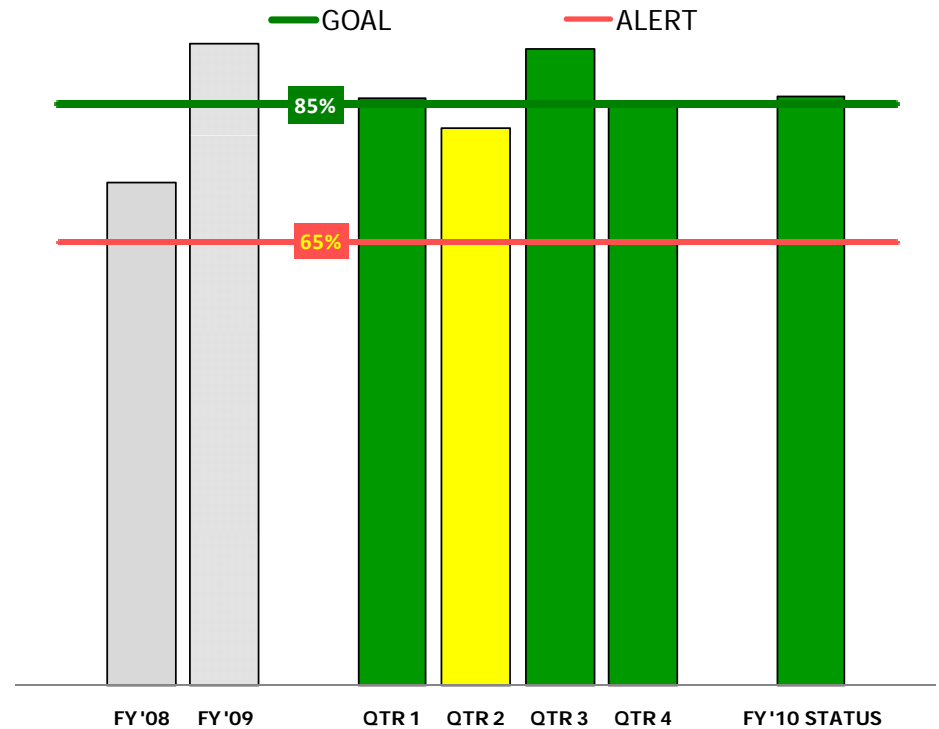
**Measure:** Percentage (Number of Projects designed with actual costs within +/- 10% of estimate, divided by total number of projects designed)

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	No. Of Projects Estimated	In-House Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY'08	30	22	8	73.3%
FY'09	31	29	2	93.5%
QTR 1	7	6	1	85.7%
QTR 2	16	13	3	81.3%
QTR 3	14	13	1	92.9%
QTR 4	27	23	4	85.2%
<b>FY '10 STATUS</b>	<b>64</b>	<b>55</b>	<b>9</b>	<b>85.9%</b>

**GOAL: 85.0%**



<b>GOAL</b> 85.0%	<b>FY'10 STATUS</b> 85.9%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.2 - Actions Completed:

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

### 2.2.2 - Actions Planned:

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

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

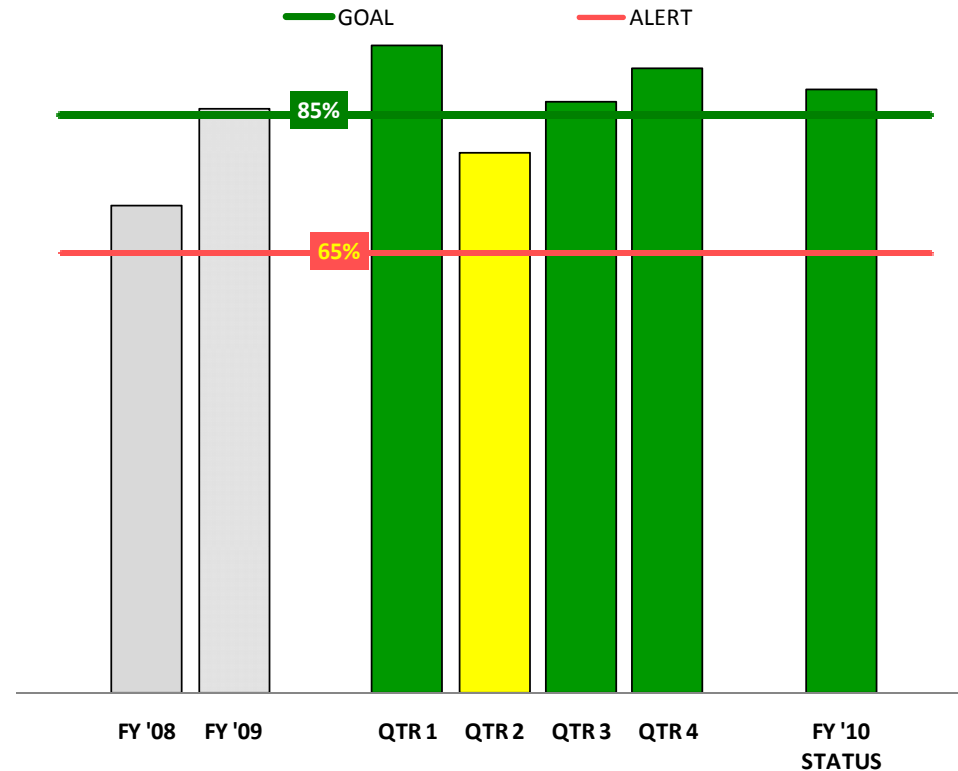
**Strategy** 2.2 Improve Informal Project Design and Construction Process  
**Objective** 2.2.3 **85% of Estimates for Contractor Construction within +/- 10%**

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

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	Number Of Projects Estimated	Number of Projects within 10% of Estimate	Number Projects not within 10% of Estimate	Estimates within +/- 10%
FY'08	35	25	10	71.4%
FY'09	84	72	12	85.7%
QTR 1	20	19	1	95.0%
QTR 2	34	27	7	79.4%
QTR 3	53	46	7	86.8%
QTR 4	84	77	7	91.7%
<b>FY '10 STATUS</b>	<b>191</b>	<b>169</b>	<b>22</b>	<b>88.5%</b>
			<b>GOAL:</b>	<b>85.0%</b>



<b>GOAL</b> 85.0%	<b>FY'10 STATUS</b> 88.5%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.3 - Actions Completed:

- Renewed two of the three JOC contractors contracts.

### 2.2.3 - Actions Planned:

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

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

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

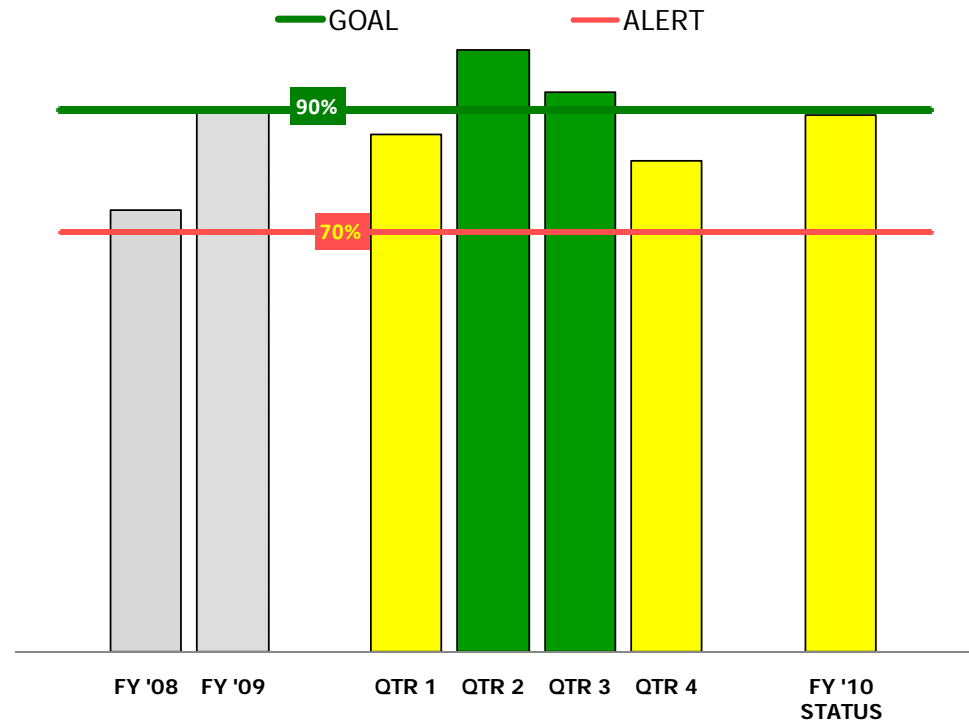
**Measure:** Percentage (Number of In-House projects completed on or before delivery date divided by total number of projects completed)

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	No. of In-house Projects	No. of In-house met Beneficial Occupancy	No. of In-house did not meet Delivery Date	Completed On Time
FY'08	30	22	8	73.3%
FY'09	31	28	3	90.3%
QTR 1	7	6	1	85.7%
QTR 2	16	16	0	100.0%
QTR 3	14	13	1	92.9%
QTR 4	27	22	5	81.5%
<b>FY '10 STATUS</b>	<b>64</b>	<b>57</b>	<b>7</b>	<b>89.1%</b>

**GOAL: 90.0%**



<b>GOAL</b> 90.0%	<b>FY'10 STATUS</b> 89.1%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.4 - Actions Completed:

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

### 2.2.4 - Actions Planned:

- Continue to establish proven steps to beneficial occupancy via departmental meetings.
- Expand Design Services' communications and support for projects.
- Post construction schedules on website to increase awareness of project timeliness.
- Review and suggest methods to spread out the project delivery process across the entire fiscal year.

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

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

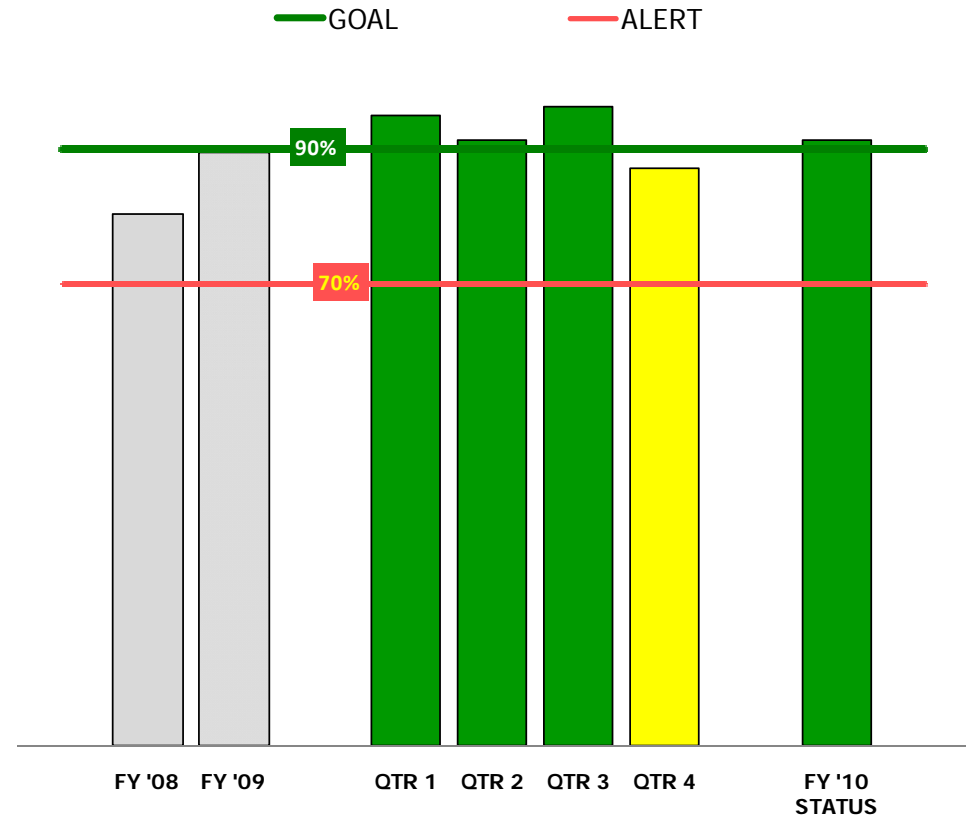
**Measure:** Percentage (Number of Contractor Construction Projects completed on or before delivery date divided by number of projects completed)

**Balanced Scorecard Category:** Internal Business Process

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

QUARTERLY REVIEW	No. of Contractor Projects	No. of Contractor met Beneficial Occupancy	No. of Contractor did not meet Delivery Date	Completed On Time
FY'08	35	28	7	80.0%
FY'09	85	76	9	89.4%
QTR 1	20	19	1	95.0%
QTR 2	34	31	3	91.2%
QTR 3	53	51	2	96.2%
QTR 4	84	73	11	86.9%
<b>FY '10 STATUS</b>	<b>191</b>	<b>174</b>	<b>17</b>	<b>91.1%</b>

**GOAL: 90.0%**



<b>GOAL</b> 90.0%	<b>FY'10 STATUS</b> 91.1%
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## GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

# ACTION PLAN

### 2.2.5 - Actions Completed:

### 2.2.5 - Actions Planned:

- Document all change order information at the earliest possible stage of the project.
- Develop better and more appropriate SCO submittal documents.
- Increase Project Coordinators attention to contractor's construction schedule throughout the delivery process.
- Review and suggest methods to spread out the project delivery process across the entire fiscal year.

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

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

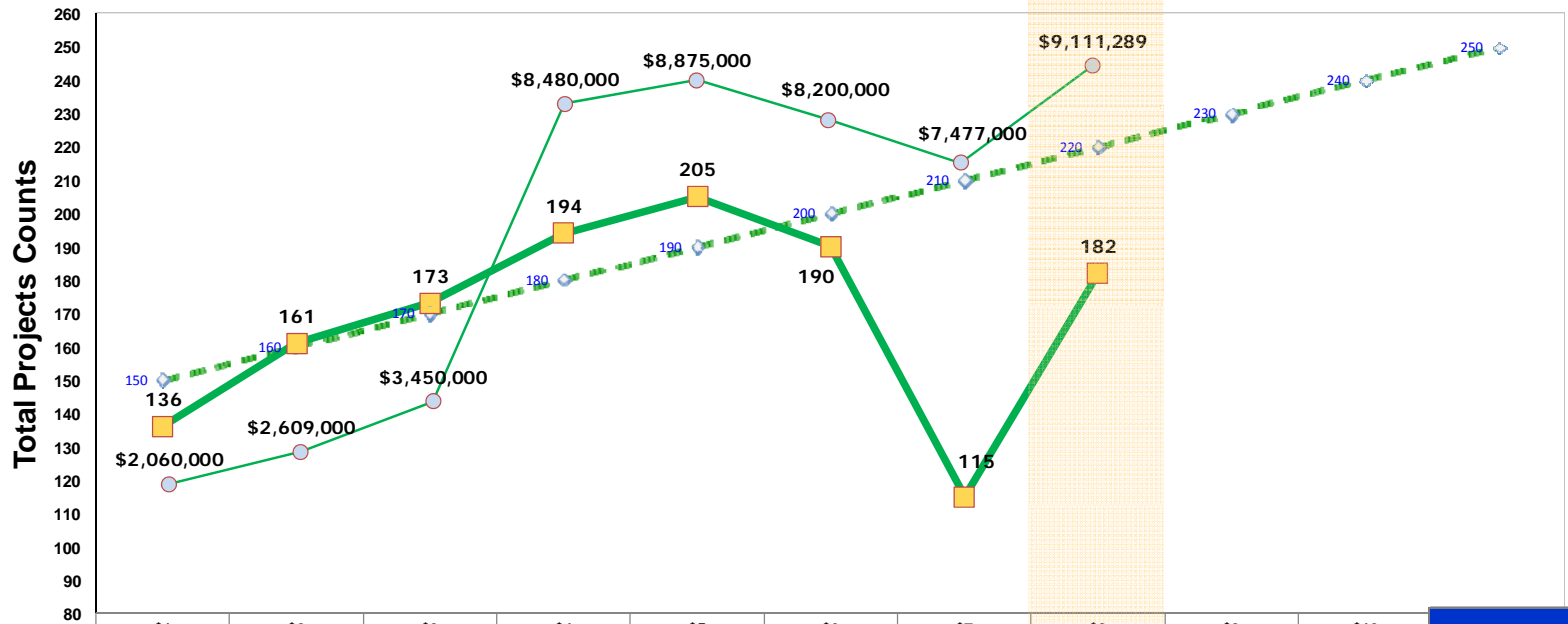
**Strategy** 2.2 Improve Informal Project Design and Construction Process  
**Objective** 2.2.6 **Increase Project Volume by 10 projects per year - Project Counts by Phase**

**Measure:** The 2010 Benchmark is 220 projects.

**Balanced Scorecard Category:** Internal Business Process

Increase Project Volume by 10 Projects per year - Project Counts by Phase											
GOAL	1	2	3	4	5	6	7	8	9	10	11
	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
<b>Projects Completed</b>	150	160	170	180	190	200	210	220	230	240	250
	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			
<b>Project Dollars</b>	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,289			
<b>AVG\$/Project</b>	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062			

**Increased Project Volume**



GOAL	150	160	170	180	190	200	210	220	230	240
Projects Completed	136	161	173	194	205	190	115	182		

**GOAL**  
100%

**FY'10 STATUS**  
82.7%

# FACILITIES MANAGEMENT - DESIGN SERVICES - PROJECTS REPORT

Lead  
Design  
Services

## 2010 PROJECT DATA

Date of Data Assembly:

Monday, July 26, 2010

Project Manager	Project Count 2009	Project Count 2010	Project Amount	AA	BA	C	DV	IA	SA	UR
1 Drew Averitt	7		\$ 375,816	\$ 11,763	\$ 108,919				\$ 255,134	
2 John Boal	13		\$ 567,924	\$ 900	\$ 311,264	\$ 18,000			\$ 237,760	
3 Fred Brillante	2		\$ 85,909		\$ 85,909					
4 Steve Burt	8		\$ 326,149	\$ 324,706	\$ 1,443					
5 Essa Dossary	28		\$ 740,846	\$ 251,846	\$ 182,816				\$ 306,184	
6 Marisa Elston	12		\$ 181,954	\$ 44,057	\$ 131,202				\$ 6,695	
7 Amanda Felock	26		\$ 1,536,138	\$ 756,357	\$ 9,806	\$ 702,463			\$ 67,511	
8 Sam Hanna	11		\$ 675,353	\$ 212,215	\$ 312,899				\$ 150,239	
9 Cheryl Lansford	17		\$ 2,643,068	\$ 932,926	\$ 139,537				\$ 1,570,605	
10 David Love	1		\$ 14,935		\$ 14,935					
11 Jeff Ross	43		\$ 1,670,097	\$ 384,828	\$ 1,239,409			\$ 18,620	\$ 78,021	
12 Steve Terry	14		\$ 293,100	\$ 14,932	\$ 262,812				\$ 7,067	\$ 8,290
				\$ 2,934,530	\$ 2,800,952	\$ 720,463	\$ -	\$ 18,620	\$ 2,679,215	\$ 8,290
A. Total Projects	115	182		32.2%	30.7%	7.9%	0.0%	0.2%	29.4%	0.1%
B. Project Dollar Volume - 2010			\$ 9,111,289							
D. Project Average			\$ 50,062							
E. Project Dollar Volume - 2009			\$ 7,477,000							
F. Project Dollar Increase - 2010			\$ 1,634,289							
G. Project Volume Increase			21.9%							

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

Lead  
Design  
Services

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

### ACTION PLAN

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

#### 2.2.6 - Actions Planned:

- Review FY'09 projects that went On-Hold for scheduled completion as projects are reactivated to increase our overall counts.
- Review and suggest methods to spread out the project delivery process across the entire fiscal year.

# Architectural Planning



9151



55

Facilities Management

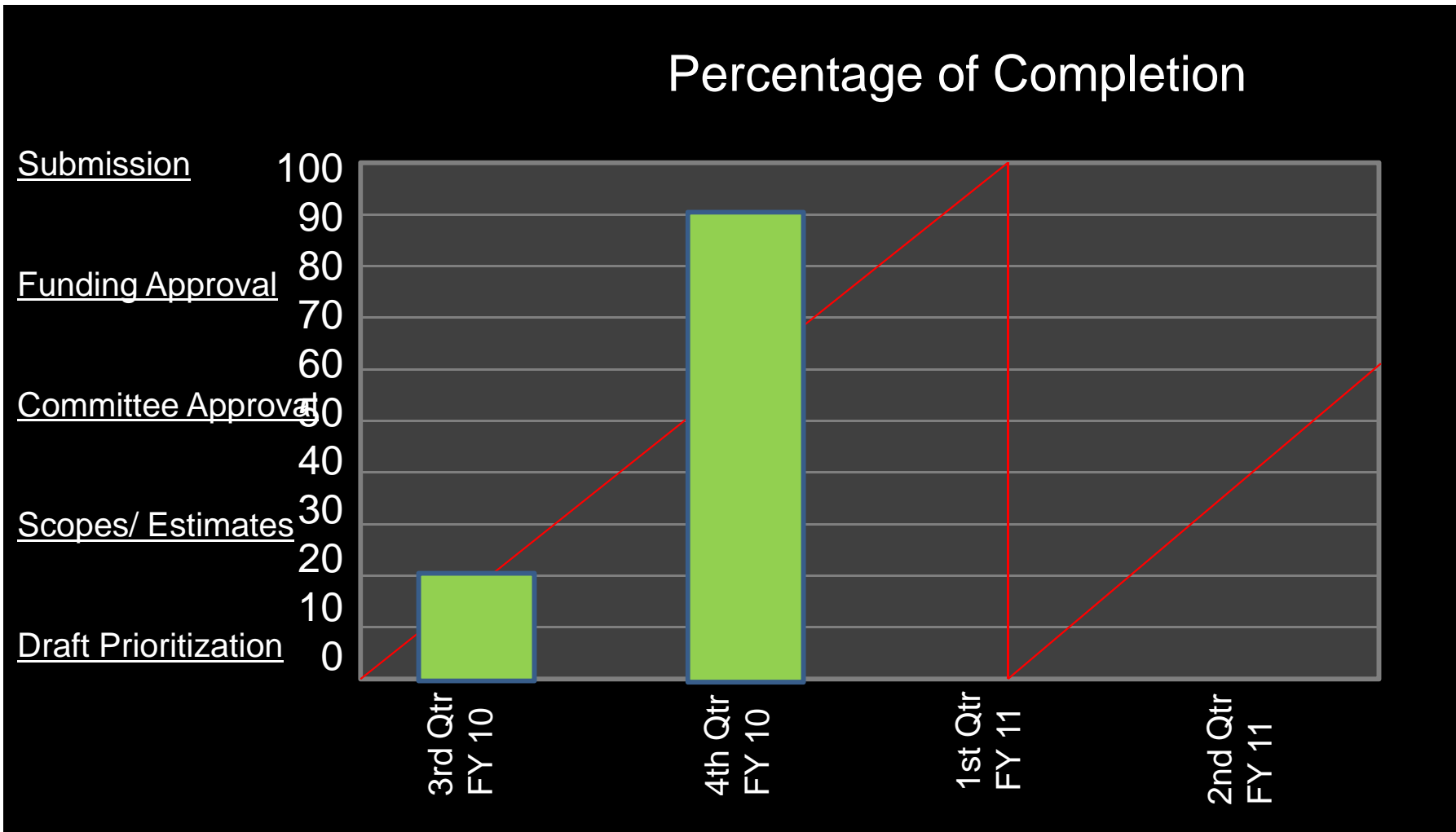
**GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements**

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

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

**Measure: % through the R & R process**

**Balanced Scorecard Category: Internal Business Process**



Status



UNC CHARLOTTE

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

-- Michelangelo, Artist

## **GOAL #3**

Deliver New Facilities that  
Support the University's Mission

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

Status

#### **Objective 3.2.1**

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

**Measure:** % of Projects with completed Pre-Programs

Lead: **Architectural Planning Dept**

Status

#### **Objective 3.2.2**

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

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

Lead: **Architectural Planning Dept**



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

Status

#### **Strategy 3.5: Improve Infrastructure improvement planning**

**Objective 3.5.1.** Integrate infrastructure projects into Capital Construction Project Scopes

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

Lead: **Architectural Planning Dept**

Status

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

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

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

Lead: **“Architectural Planning Dept”**

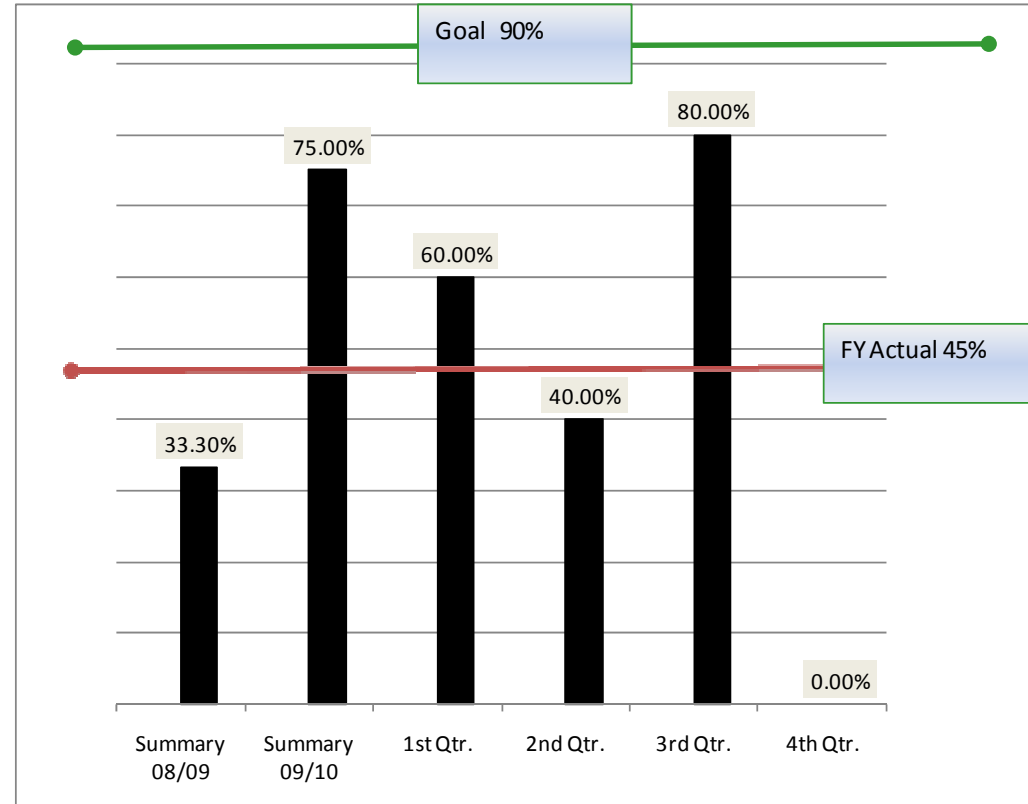
**GOAL #3 – Deliver New Facilities that Support the University's Mission**

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

**Measure:** Percentage of Designers under contract within 120 days.

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary 08/09	9	3	4	33.30%
Summary 09/10	10	9	3	75.0%
1st Qtr. 09/10	5	3	1	60.0%
2nd Qtr. 09/10	5	2	0	40.0%
3rd Qtr. 09/10	5	4	1	80.0%
4th Qtr. 09/10	1	0	1	0.0%



Results for 4<sup>th</sup> Quarter is 0%  
 Results for Fiscal Year is 45%

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

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

Lead  
Capital

# ACTION PLAN

- Actions Completed
  - 1. Fee negotiations for Student Activity Center offices completed.
- Actions Planned
  - 1. Negotiate fees for Hechenbleikner Lake Dam repair, Residence Halls Phase 10A & 10B, Residence Hall Fire Sprinklers Moore & Sanford.
  - 2. Monitor fees against fee curves (Georgia, Florida, etc.) and similar projects at other campuses.
  - 3. Have project managers participate.

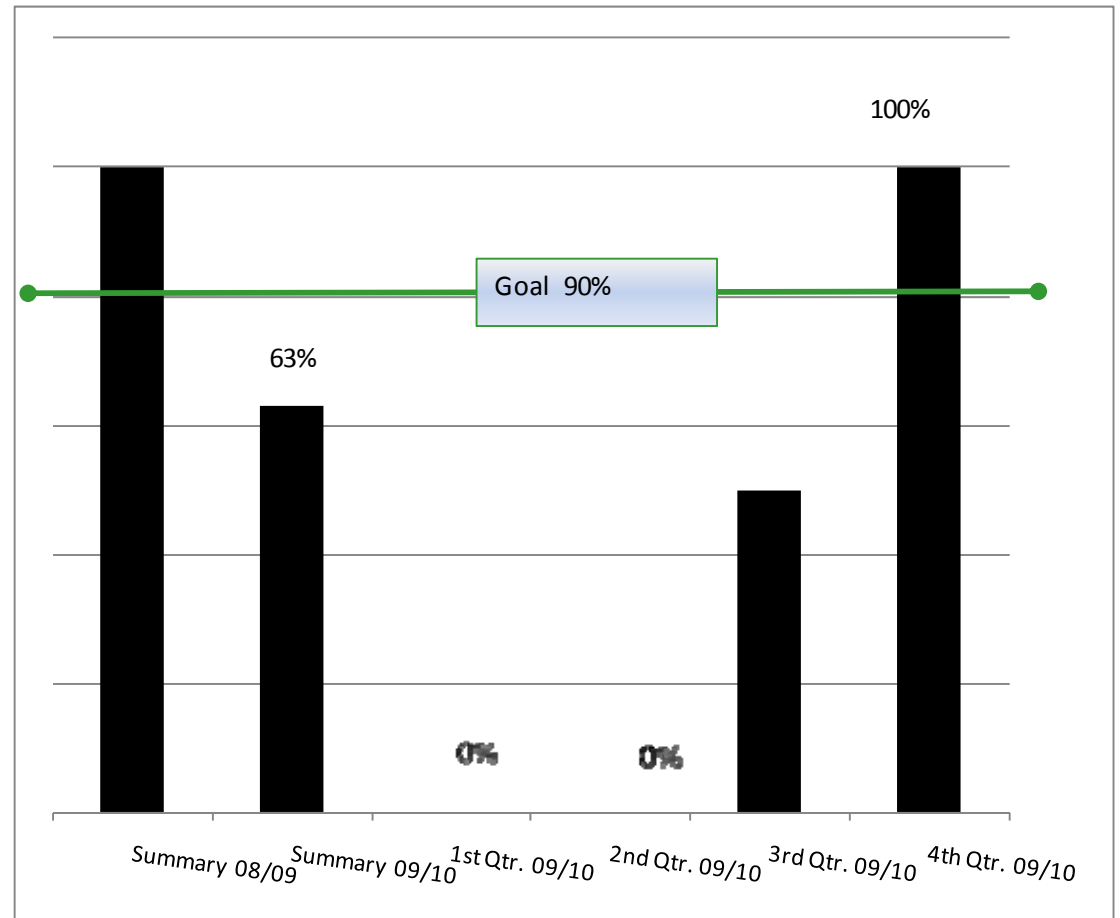
**GOAL #3 – Deliver New Facilities that Support the University's Mission**

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

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

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects completed by scheduled time	# not completed by scheduled time	% Designs complete by completion time
Summary 08/09	4	0	100.00%
Summary 09/10	9	5	63.00%
1st Qtr. 09/10	1	1	0.0%
2nd Qtr. 09/10	2	2	0.0%
3rd Qtr. 09/10	4	2	50.0%
4th Qtr. 09/10	2	0	100.00%
FY10	9	5	55.6%



Results for 4<sup>th</sup> Quarter is 100%  
 Results for Fiscal Year is 55.6%

Status

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

Lead  
Capital

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

### ACTION PLAN

- Actions Completed
  - 1. Obtained SCO approval for Prospector Phase II & bidding completed
  - 2. Residence Halls Fire Sprinklers (Holshouser, Cedar, Hickory, Sycamore) approved by SCO & bidding completed.
  - 3. Designs for Resurfacing Mary Alexander & Cameron Blvd. & bidding completed.
- Actions Planned
  - 1. Complete EPIC Trade packages (In review at SCO)
  - 2. Complete RUP & EPIC road plans (approvals)
  - 3. Complete Motorsports II
  - 4. Monitor PORTAL, Parking Deck I, Football Complex
  - 5. Monitor & review project schedule as provided from planning

Facilities Management Strategic Planning Session – Fourth FY 2010

Lead Capital

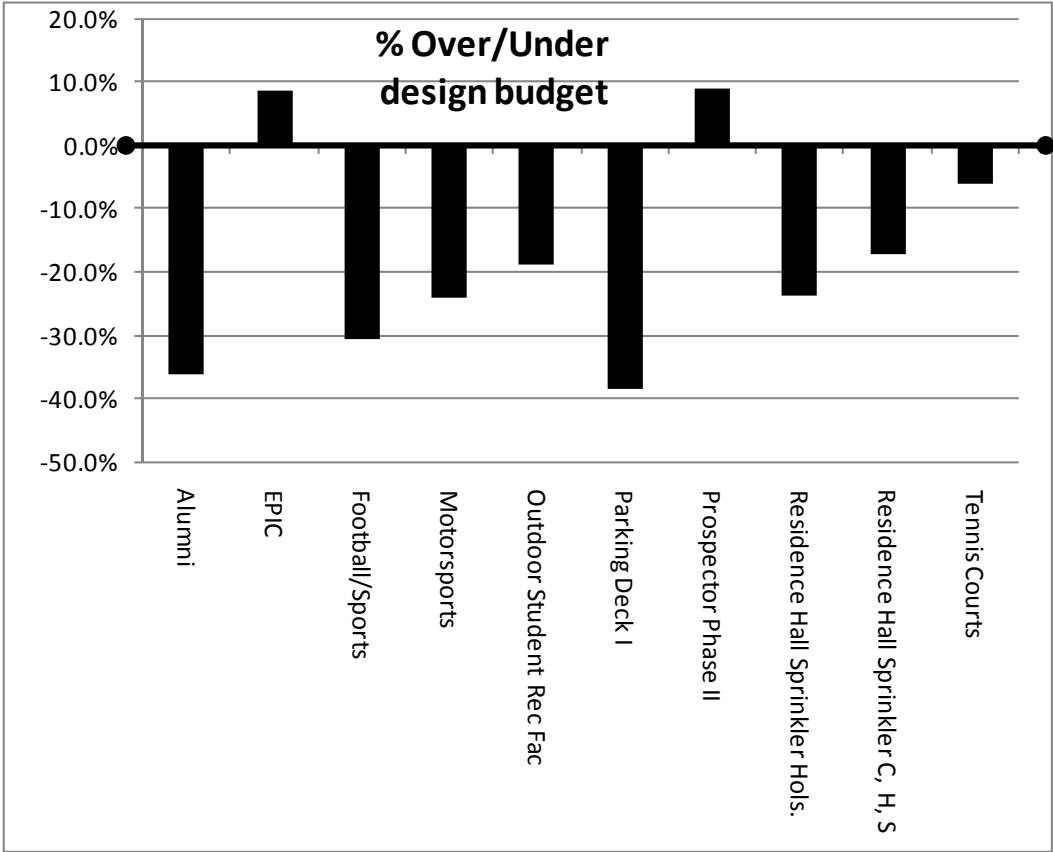
GOAL #3 – Deliver New Facilities that Support the University's Mission

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
Alumni	\$ 1,100,000.00	\$ 701,400.00	\$ 701,400.00
EPIC	\$ 6,021,000.00	\$ 4,476,635.00	\$ 6,530,370.00
Football/Sports	\$ 3,950,000.00	\$ 2,739,800.00	\$ 3,224,472.00
Motorsports II	\$ 399,000.00	\$ 303,000.00	\$ 303,700.00
Outdoor Student Rec Fac	\$ 336,575.00	\$ 258,733.00	\$ 273,552.00
Parking Deck I	\$ 1,701,000.00	\$ 1,044,000.00	\$ 802,869.00
Prospector Phase II	\$ 418,770.00	\$ 295,500.00	\$ 455,500.00
Residence Hall Sprinkler Hols.	\$ 265,818.00	\$ 202,500.00	\$ 202,500.00
Residence Hall Sprinkler C, H, S	\$ 132,720.00	\$ 109,836.00	\$ 109,836.00
Tennis Courts	\$ 292,972.00	\$ 275,000.00	\$ 275,000.00



**71% completed within design budgeted fee**

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

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. New Tennis Courts design completed, now in bidding
  - 2. Parking Deck H design completed, now in bidding
  - Alumni Parking design completed, now in construction
- Actions Planned
  - 1. Keep Parking Deck I in budget
  - 2. Keep Motorsports II in budget
  - 3. Keep PORTAL in budget
  - 4. Keep Prospector Renovation II in budget
  - 5. Negotiate fair fees for New Residence Halls Phase 10A & 10B
  - 6. Negotiate fair fees for Heckenbleikner Lake Dam repair

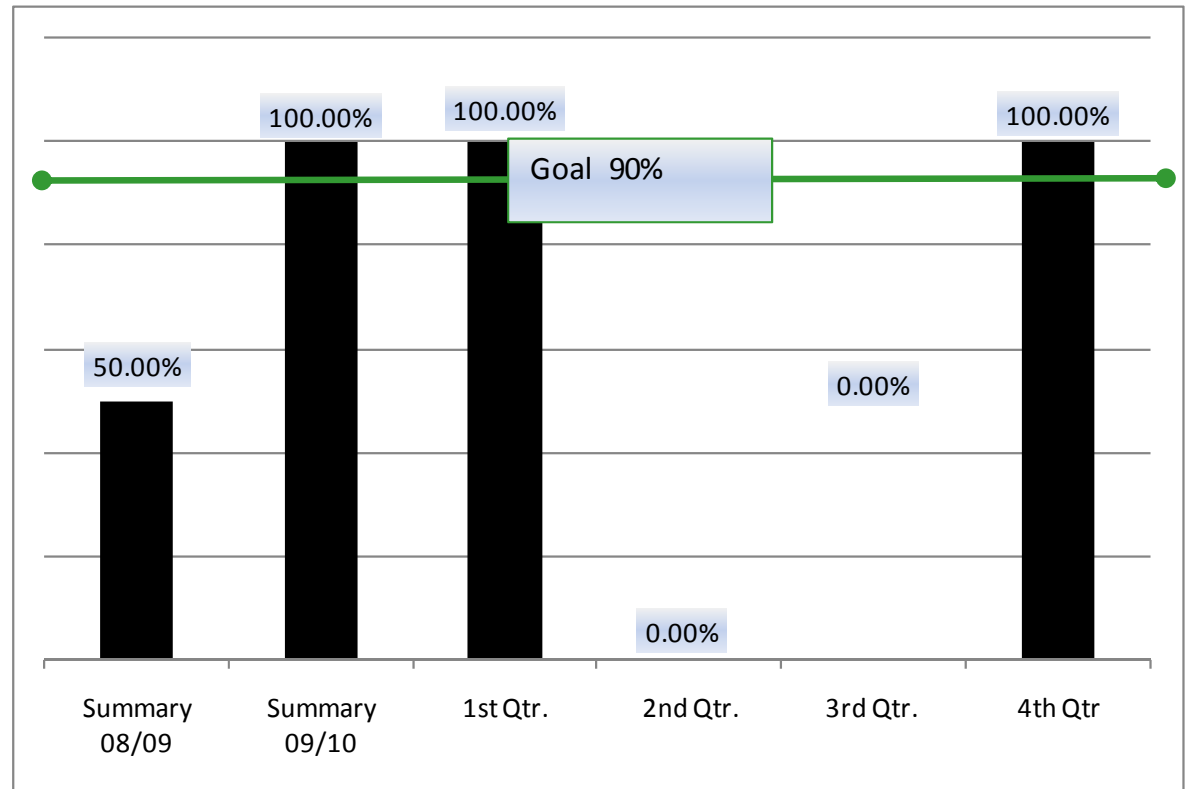
**GOAL #3 – Deliver New Facilities that Support the University's Mission**

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

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

**Balanced Scorecard Category:** Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	# completed on schedule	not completed on schedule	% completed on time
Summary 08/09	4	2	50.0%
Summary 09/10	6	0	100.0%
1st Qtr. 09/10	4	0	100.0%
2nd Qtr. 09/10	0	0	0.0%
3rd Qtr. 09/10	0	0	0.0%
4th Qtr. 09/10	2	0	100.0%



Objective for 4<sup>th</sup> Quarter is 100%



## 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

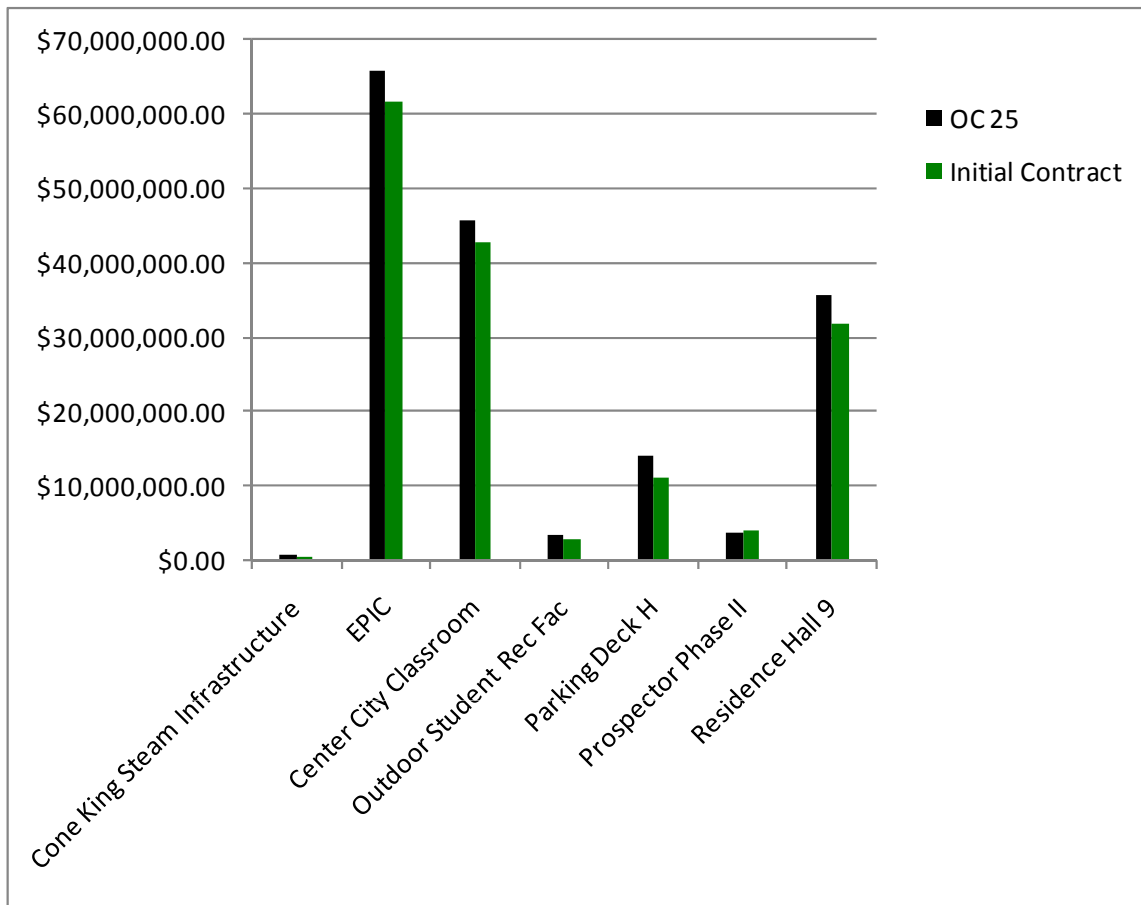
- Actions Complete
  - 1.
- Actions Planned
  - 1. Control change orders
  - 2. Limit customer requested change orders
  - 3. Limit additional scope request at 50% level from customer
  - 4. Use CM@Risk where appropriate
  - 5. Focus on summer projects – Residence Hall Sprinklers, Pedestrian Bridge, Cameron Blvd. Resurfacing, Mary Alexander Resurfacing, Boiler Replacement

**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



Projects listed are not complete

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. Closed out Student Union
  
- Actions Planned
  - 1. Insure we engage CM on constructive criticism early in the process
  - 2. Insure we get delivery of items in the RFP
  - 3. Engage CM's closer to SD's
  - 4. Gauge CM's performance on final contingency and change order rates



UNC CHARLOTTE

# **Balance Score Card**

## **Learning & Growth**

### **Perspective**

## **Strategic Objectives:**

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



UNC CHARLOTTE

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

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

## GOAL #5

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



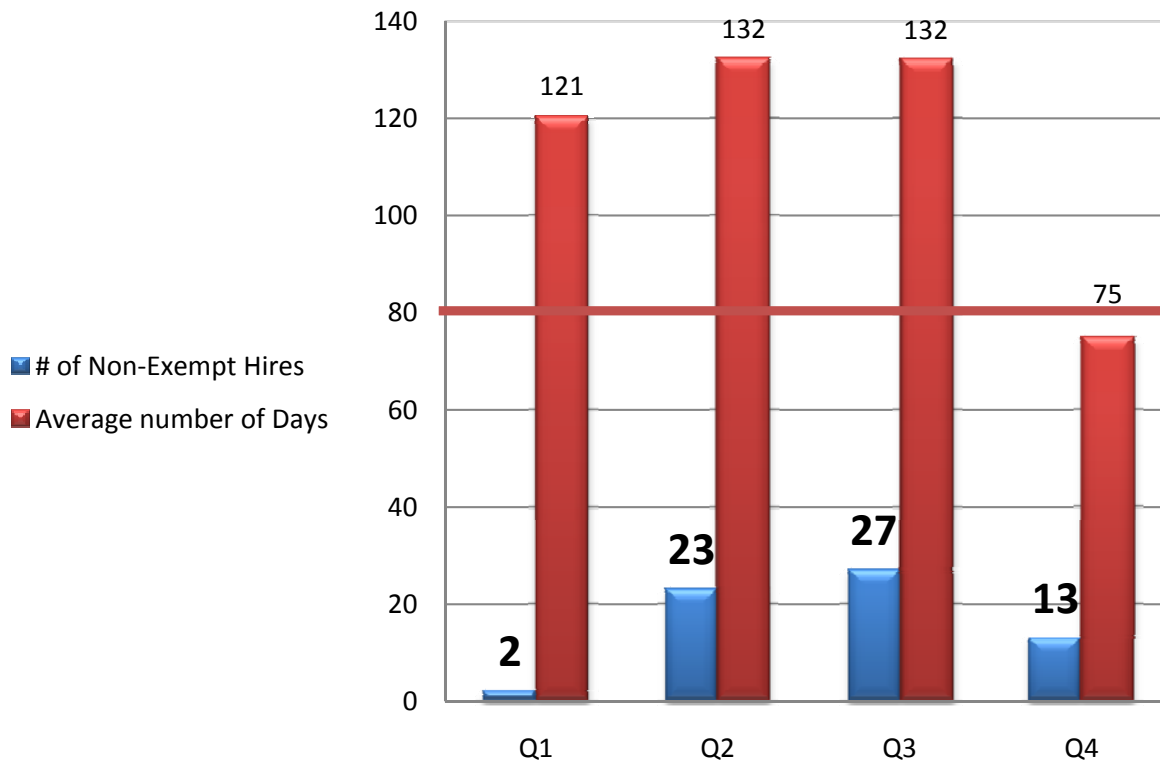
**GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce**

**Strategy 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



**Fiscal 2010 Results:**  
  
65 Nonexempt Hires:  
  
Average # /days: 115

Goal:  
80 days

**STATUS**

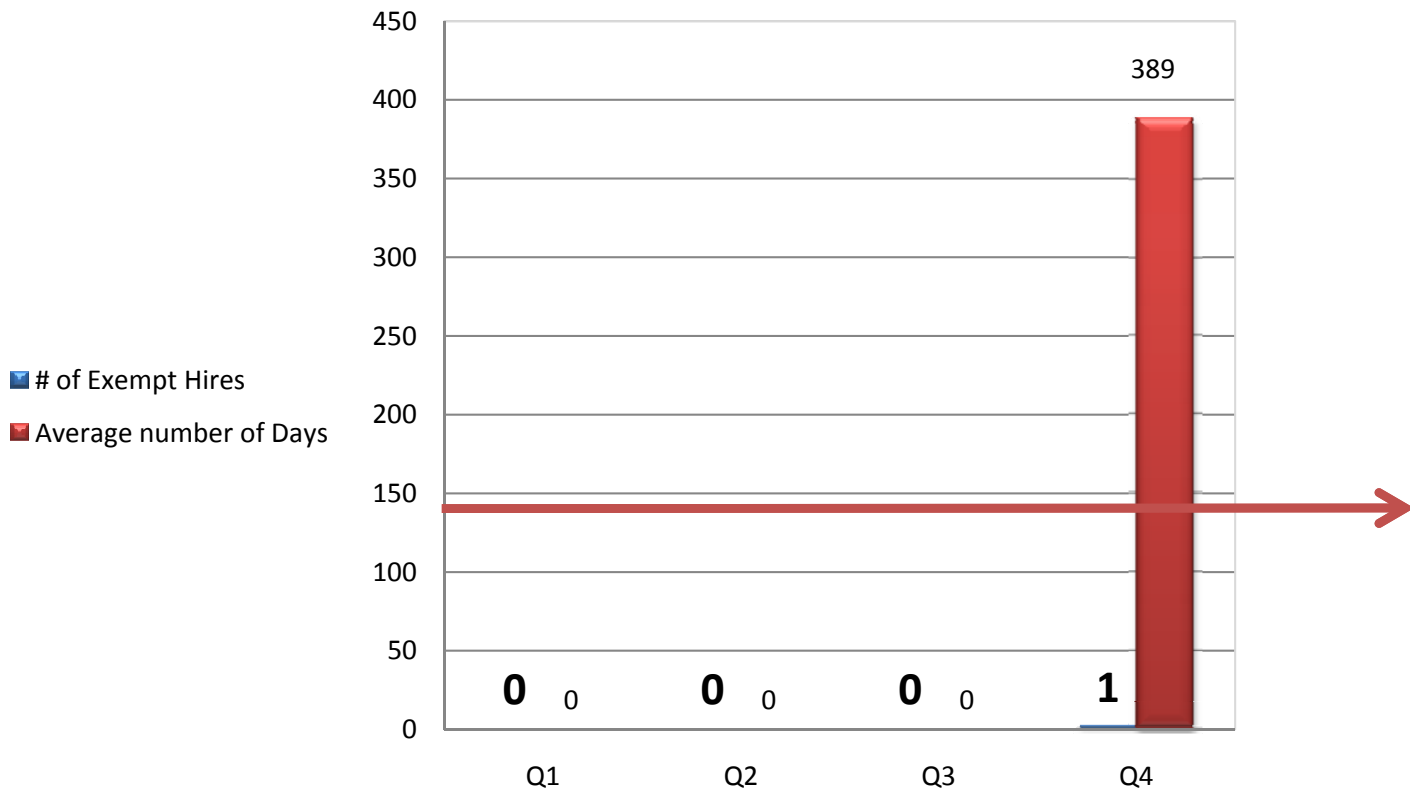
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 Benchmark vacancy time of no longer than 120 calendar days - Exempt

**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**



**Fiscal 2010 Results:**  
 1 Exempt Hires:  
 Average # /days: 389

Goal:  
120 days

**STATUS**

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

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

**Measure:** Days needed to fill vacant position

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

**ACTION PLAN**

- **Actions Complete**
  - ✓ New hiring process developed
  - ✓ Developed new process documentation
  - ✓ Met with University HR to review changes to People Admin system as it applies to new process
  - ✓ New Hiring Process review by FM Leadership team
  - ✓ Purchased new HRIS for FM HR
  - ✓ Redefine process measured (active recruitment)
  - ✓ Implement revamped Hiring Process in FY 2010
  
- **Actions Planned**
  1. Continue aggressive implementation of new hire process
  2. Develop process reinforcement communication for managers and supervisors
  3. Implementation of new HRIS for FM HR
    - a. Meet with FIS to develop plan
    - b. Input data
    - c. Report development



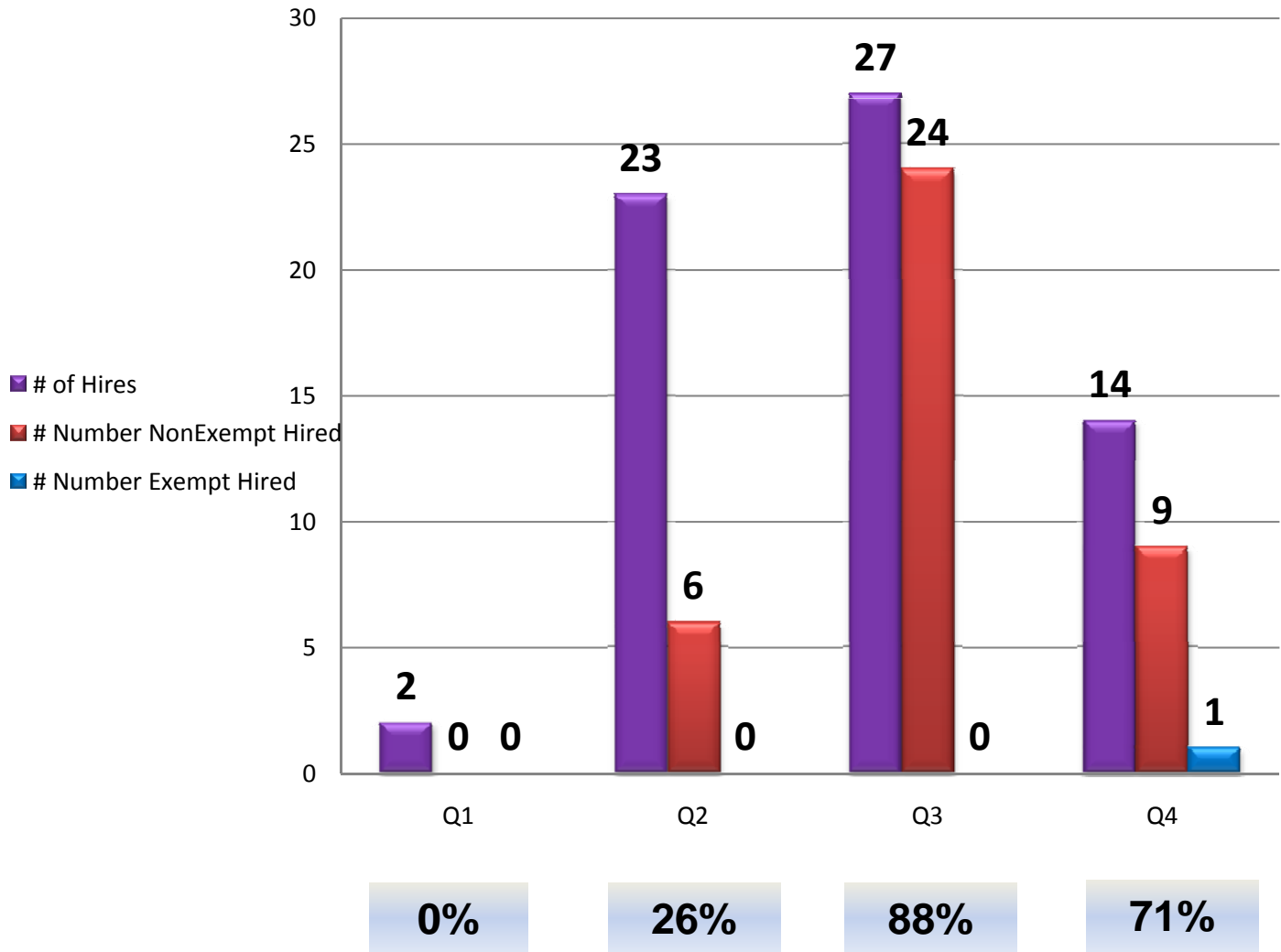
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

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

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

Positions filled using Targeted Selection



**Fiscal 2010 Results:**

Goal  
100%

Actual  
32%

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

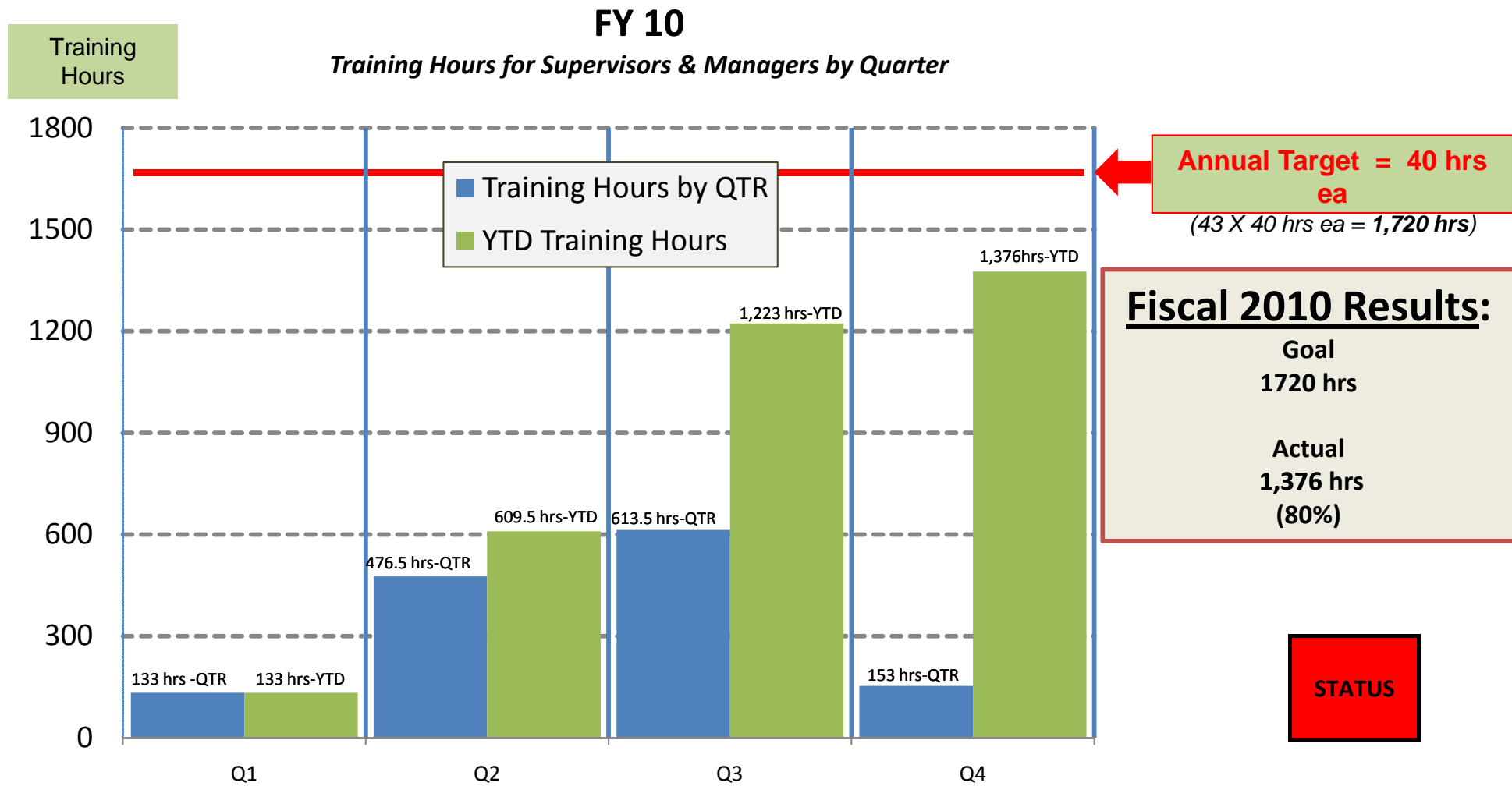
Lead  
FBO

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

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

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

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



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

Lead  
FBO

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

**ACTION PLAN**

- **Actions Completed**
  - ✓ Leadership Development Matrix developed
  - ✓ Roll-out of Leadership Development Program
  - ✓ Phase 1: Relationships and 7 Habits
  - ✓ Develop Individualized Leadership Development matrices w/ work plans by 6/1/2009
  - ✓ MECC II training and coaching
  
- **Actions Planned**
  1. Continue matrix updates
  2. Reassess target
  3. Develop compliance training and mission specific training metrics

Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

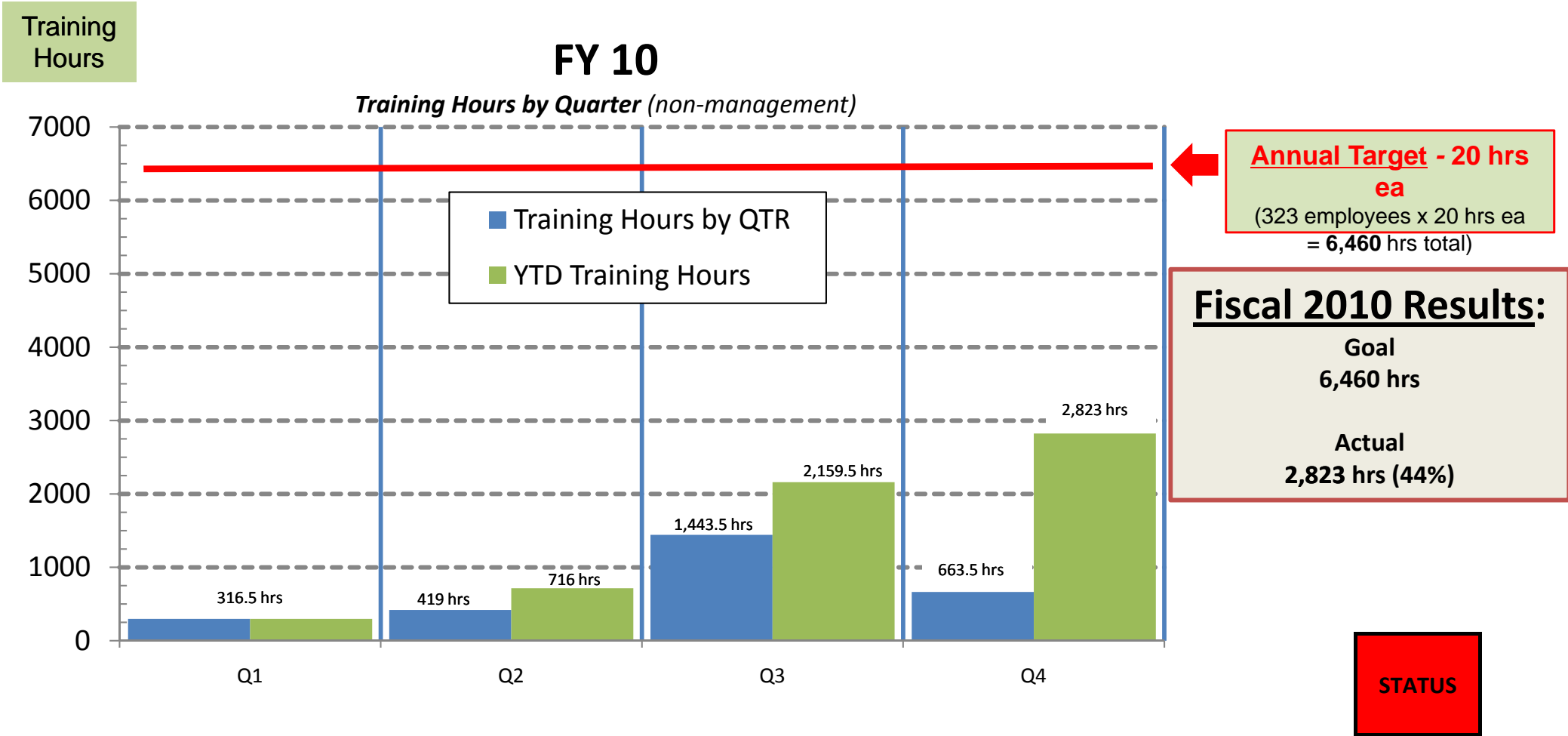
Lead  
FBO

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

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

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

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



## *09~10 YTD Training Hours - Percentage of Target*

Unit/Zone	YTD
Design Services	20%
Grounds	22%
FIS	24%
Steam Plant	26%
Zone 7	31%
Capital Projects	33%
Housekeeping *	41%
Lock Shop	41%
Zone 5	43%
High Voltage & Fire Alarms	47%
Zone 1	47%
Zone 6	51%
Zone 2	65%

Unit/Zone	YTD
Facilities Operations Admin	66%
Zone 4	92%
Central Operations	95%
Auto	99%
Recycling *	114%
AVC	125%
Planning	129%
Business Office	136%

\* HSKP & Recycling combined = 48%

**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. Continue development of training matrix for trades positions
  2. PC skills training for infrequent users in preparation for Web Time entry
  3. Implementation of new HRIS for FM HR

Lead  
FBO

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

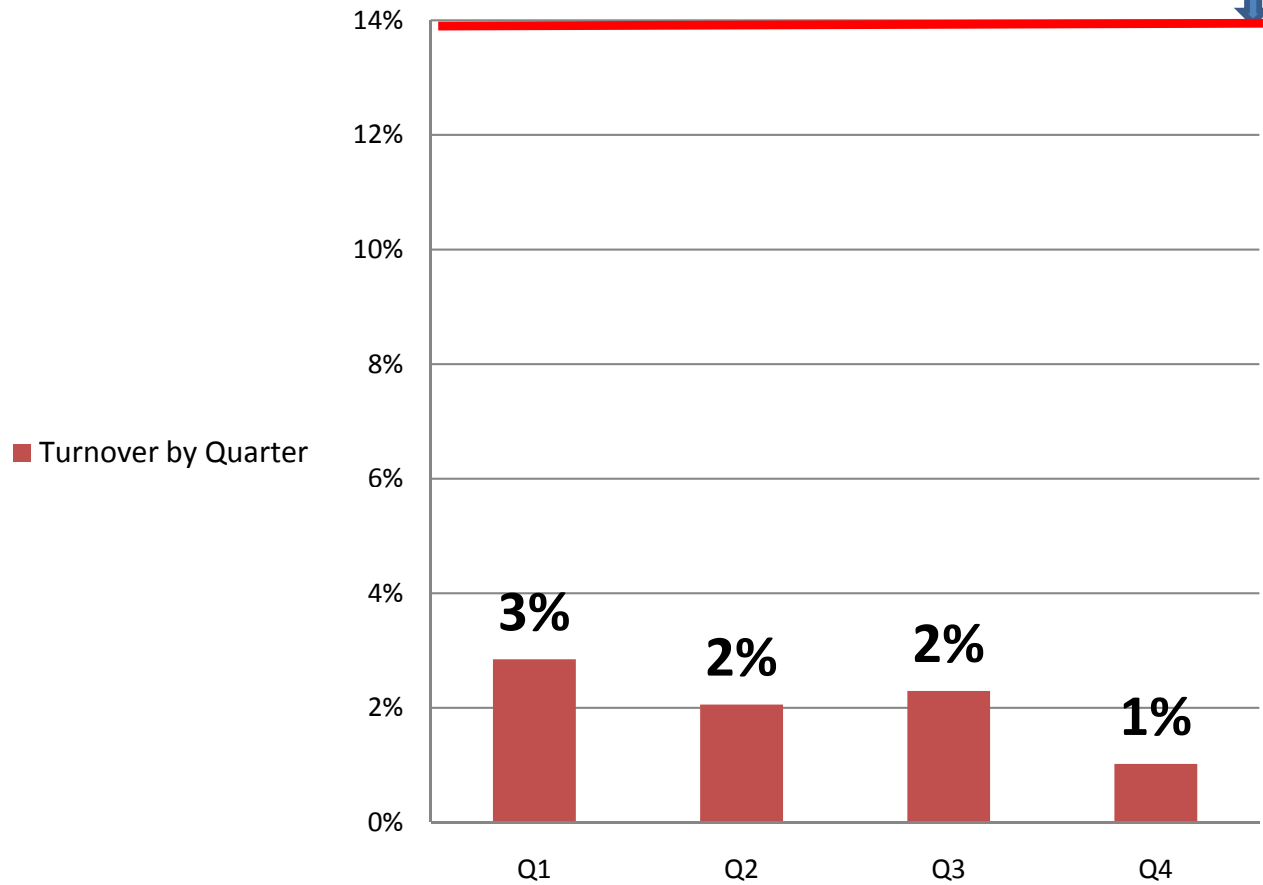
**Strategy** 5.3 Retain a Quality Workforce  
**Objective** 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

**Measure:** Annual Employee Turn-over Rate

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

### Turnover by Quarter

*Annual Target – 14%*



**Fiscal 2010 Results:**

Goal  
< 14%

Actual  
2%

**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 succession management program

# Facilities Management Strategic Planning Session – Fourth Quarter FY 2010

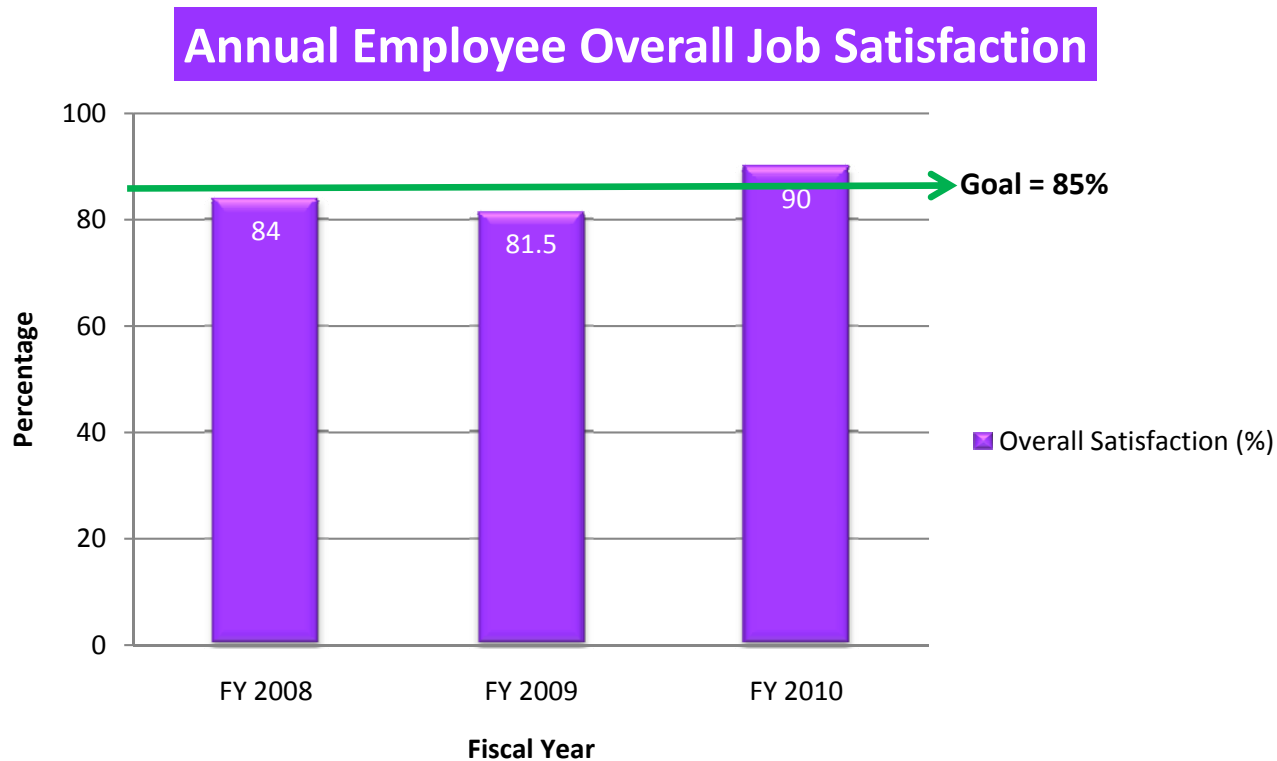
Lead  
FBO

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

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

**Measure:** Annual Employee Satisfaction Survey Overall Job Satisfaction Survey Question

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



STATUS

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

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

Lead  
FBO

**ACTION PLAN**

- **Actions Complete**
  - ✓ Survey administration done electronically.
  - ✓ Survey administered November through December 2009.
  - ✓ Survey results tabulated by UI and presented to Directors on January 26<sup>th</sup>.
  
- **Actions Planned**
  1. Look for common themes within both customer and employee satisfaction surveys.
  2. Develop action plan to address survey issues