



UNC CHARLOTTE

*Facilities Management*

## **Strategic Planning Session**

**Fourth Quarter – Fiscal Year 2011**

**July 27, 2011**



*...Creating a Campus of Distinction*



UNC CHARLOTTE

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

-- Harold Geneen, industrialist

## **GOAL #1**

Improve Maintenance and  
Operation on the Campus



UNC CHARLOTTE

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

-- Stephen Covey, Author and Speaker

## **GOAL #2**

Successfully Adapt Existing  
Facilities to Meet New  
Requirements



UNC CHARLOTTE

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

-- Michelangelo, Artist

## **GOAL #3**

Deliver New Facilities that  
Support the University's Mission



UNC CHARLOTTE

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

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

- Theo Michelson, State Farm Insurance

## GOAL #4

Perfect a Customer Focused Organization

**THINK**  
OUR GOAL IS  
CUSTOMER  
SATISFACTION



UNC CHARLOTTE

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

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

## GOAL #5

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





UNC CHARLOTTE

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

-- Brian Tracy, Speaker, Author, Consultant

## **GOAL #6**

Promote Good Stewardship



UNC CHARLOTTE

# **Balance Score Card**

## **CUSTOMER**

### **Perspective**

## **Strategic Objectives:**

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



Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
F. O.

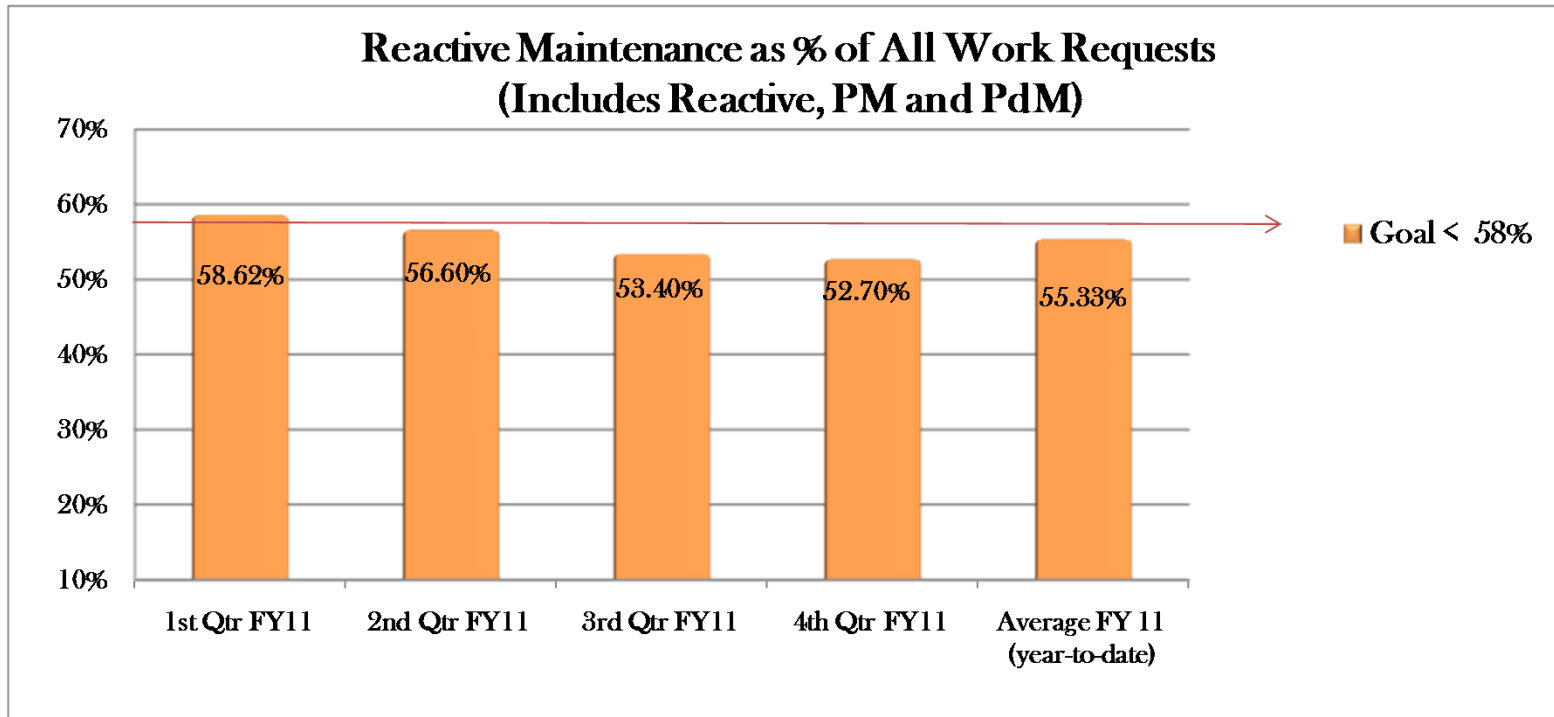
**GOAL #1 – Improve maintenance and operations of the Campus**

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

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

**Goal:** Percentage to average < 58% for year.

**Balanced Scorecard Category:** Customer Service



STATUS

## GOAL #1 – Improve Facilities Operations

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

Lead  
F. O.

### ACTION PLAN

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

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2011**

Lead  
F. O.

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

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

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

**Goal:** Less than 719 quarterly average for the year

**Balanced Scorecard Category:** Internal Business Process

Archibus  
Report  
In error  
FIS Contacted

STATUS

**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

**Actions Complete**

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

**Actions Planned**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

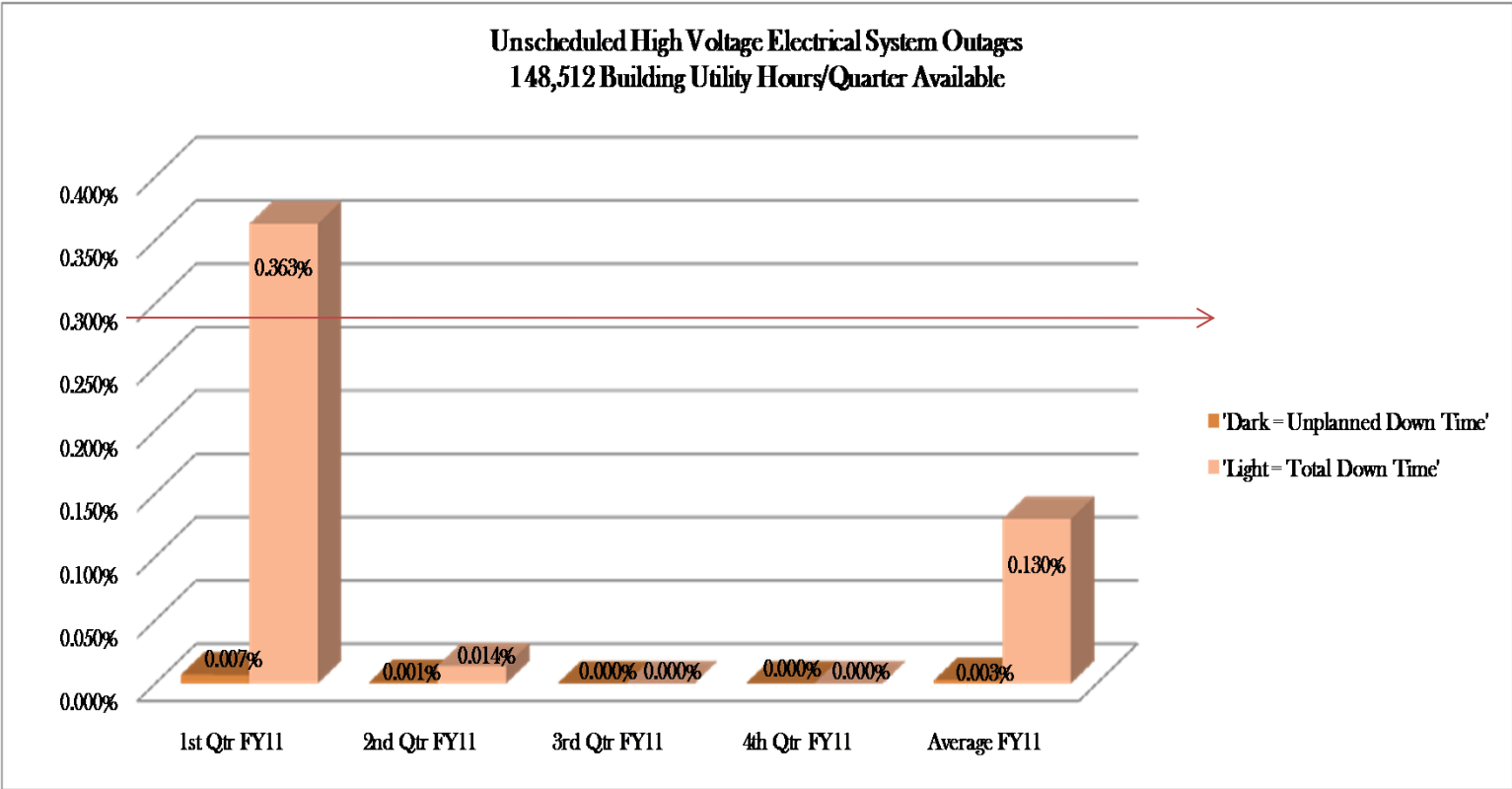
GOAL #1 – Improve maintenance and operations of the Campus

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



**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

- **Actions Complete**
  - 1 – Completed PM’s as scheduled.
  - 2 – Completed first half of thermal scanning.
- **Actions Planned**
  - 1 – Continue PM’s.
  - 2 – Prepare program for major equipment repairs and replacement.
  - 3 – Review system projects identified on the R&R list and prioritize. Indicate urgency and recommend future funding dates.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
F. O.

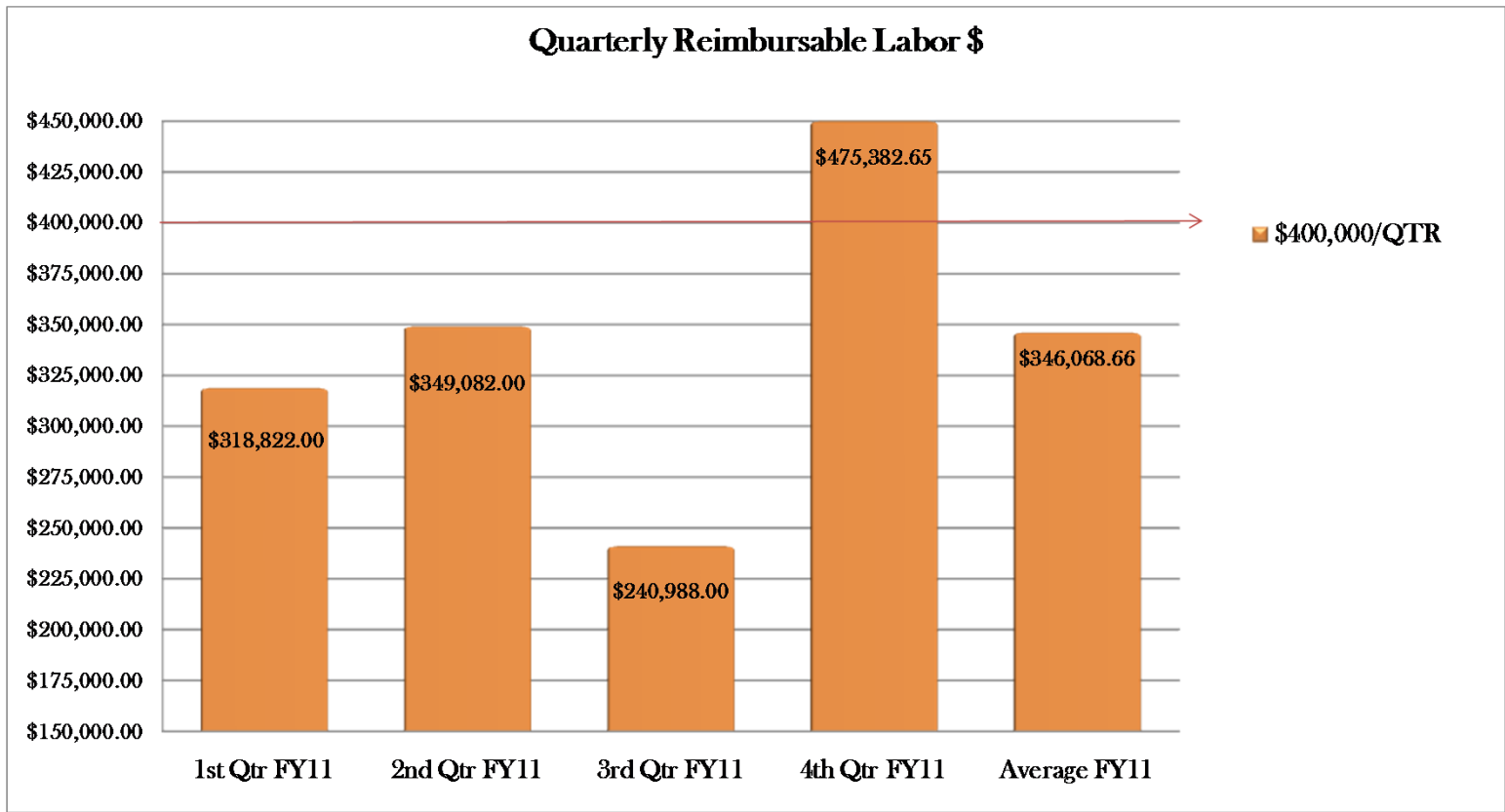
GOAL #1 – Improve maintenance and operations of the Campus

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.



Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

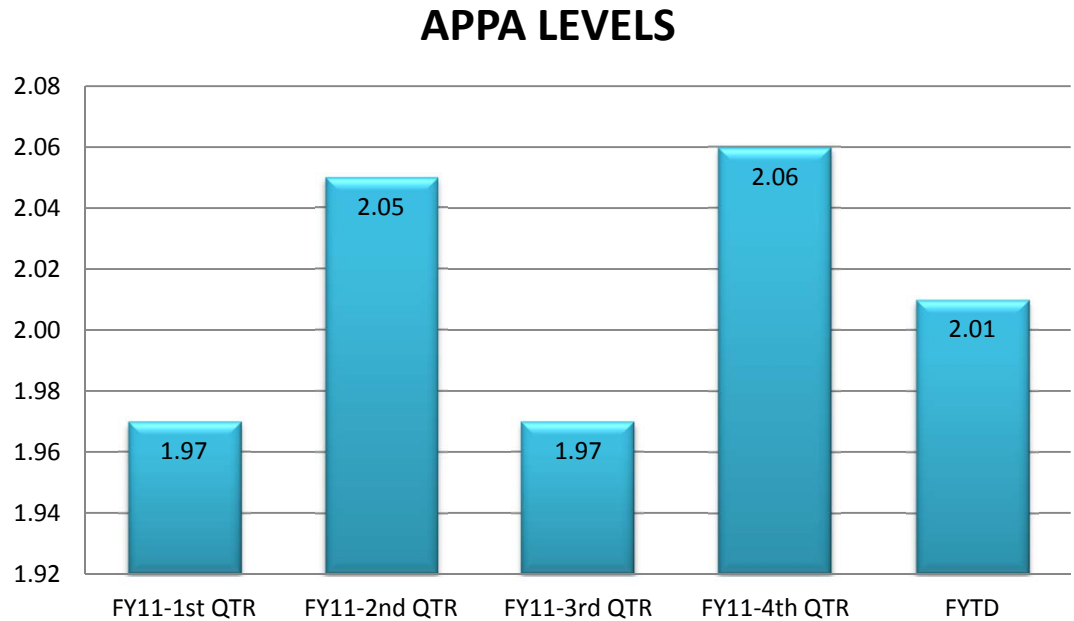
Lead  
Housekeeping

**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



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 2011

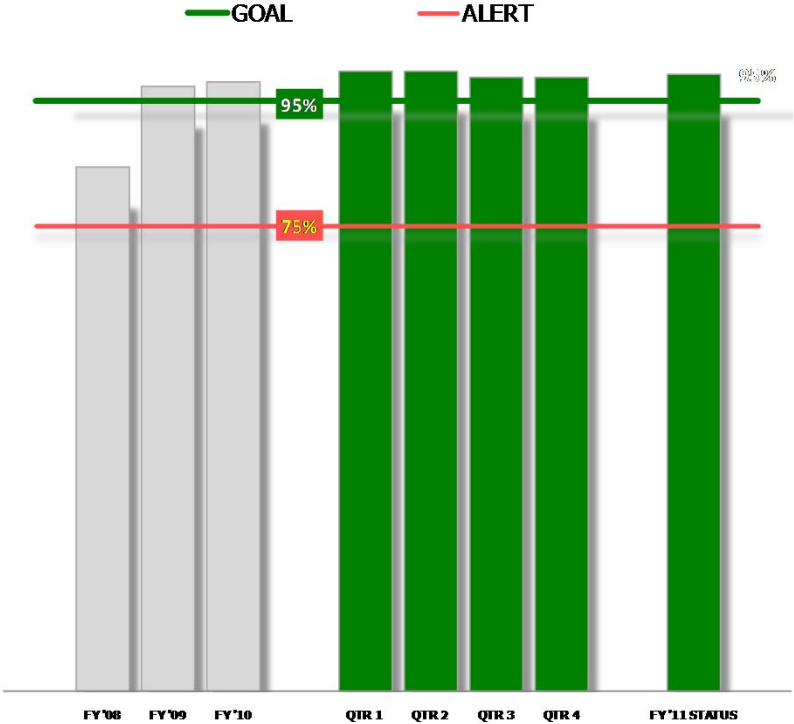
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

Measure: Percentage (Number of Project Designs completed on or before scheduled delivery date divided by total number of projects designed)  
 Balanced Scorecard Category: Internal Business Process

95% of Projects Designed on Time

QUARTERLY REVIEW	No. Of Projects Designed	Project Design Completed by Delivery Date	Project Design Not Completed On Time	Designed On Time
FY'08	65	55	10	84.6%
FY'09	115	112	3	97.4%
FY'10	173	170	3	98.3%
QTR 1	49	49	0	100.0%
QTR 2	64	64	0	100.0%
QTR 3	89	88	1	98.9%
QTR 4	98	97	1	99.0%
<b>FY '11 STATUS</b>	<b>300</b>	<b>298</b>	<b>2</b>	<b>99.3%</b>



GOAL  
95.0%

STATUS  
99.3%

**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

**ACTION PLAN**

**2.2.1 - Actions Completed:**

**2.2.1 - Actions Planned:**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

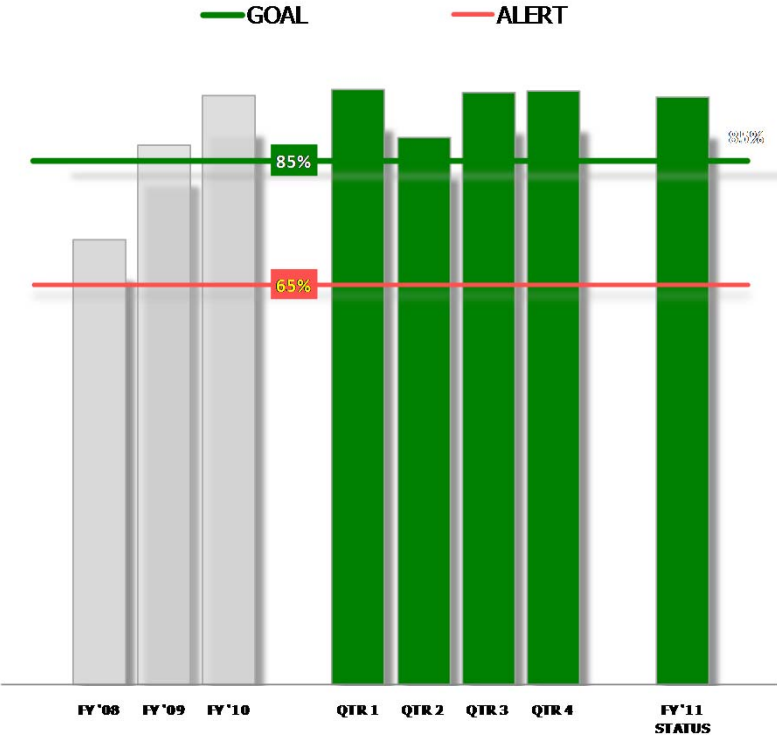
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

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

QUARTERLY REVIEW	No. Of Projects Estimated	Projects Estimated within +/- 10%	Projects Not Estimated within +/- 10%	Estimates within +/- 10%
FY'08	65	47	18	72.3%
FY'09	115	101	14	87.8%
FY'10	255	244	11	95.7%
QTR 1	31	30	1	96.8%
QTR 2	36	32	4	88.9%
QTR 3	55	53	2	96.4%
QTR 4	175	169	6	96.6%
FY '11 STATUS	297	284	13	95.6%



GOAL  
85.0%

STATUS  
95.6%

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

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

**ACTION PLAN**

**2.2.2 - Actions Completed:**

**2.2.2 - Actions Planned:**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

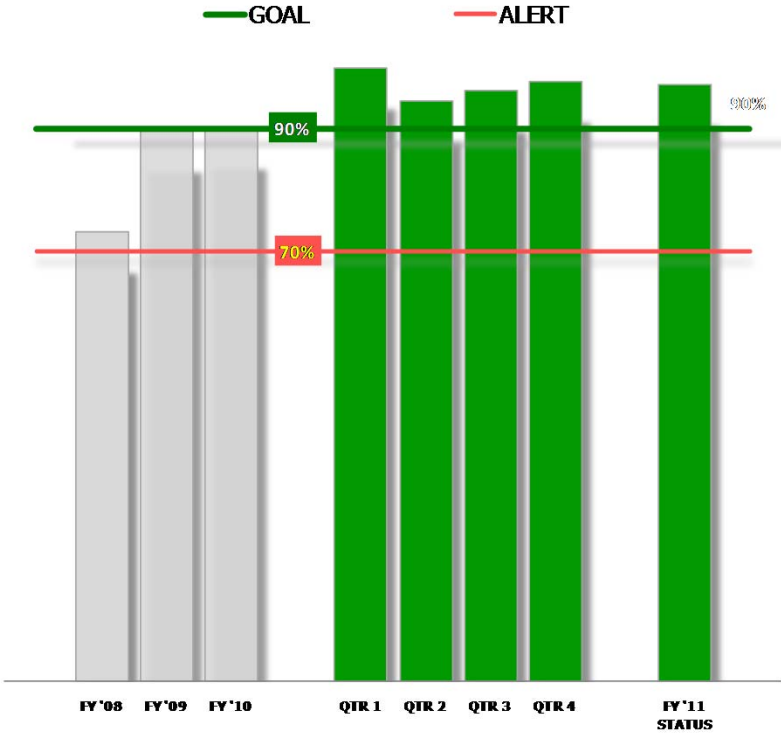
GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements

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

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

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

QUARTERLY REVIEW	No. of Projects	No. of met Beneficial Occupancy	No. that did not meet Delivery Date	Completed On Time
FY '08	190	139	51	73.2%
FY '09	116	104	12	89.7%
FY '10	182	164	18	90.1%
QTR 1	31	31	0	100.0%
QTR 2	36	34	2	94.4%
QTR 3	55	53	2	96.4%
QTR 4	175	171	4	97.7%
FY '11 STATUS	297	289	8	97.3%



GOAL  
90.0%

STATUS  
97.3%

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

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

Lead  
Design  
Services

**ACTION PLAN**

**2.2.4 - Actions Completed:**

**2.2.4 - Actions Planned:**

- Project schedules from Scope & Budget, Design and Construction through**
- Continue to establish proven steps to beneficial occupancy via departmental meetings - **on going.**
- New "Wildly Important Goal" - Customer involvement with project Punch List process - **on going.**
- Post construction schedules on website to increase awareness of project**



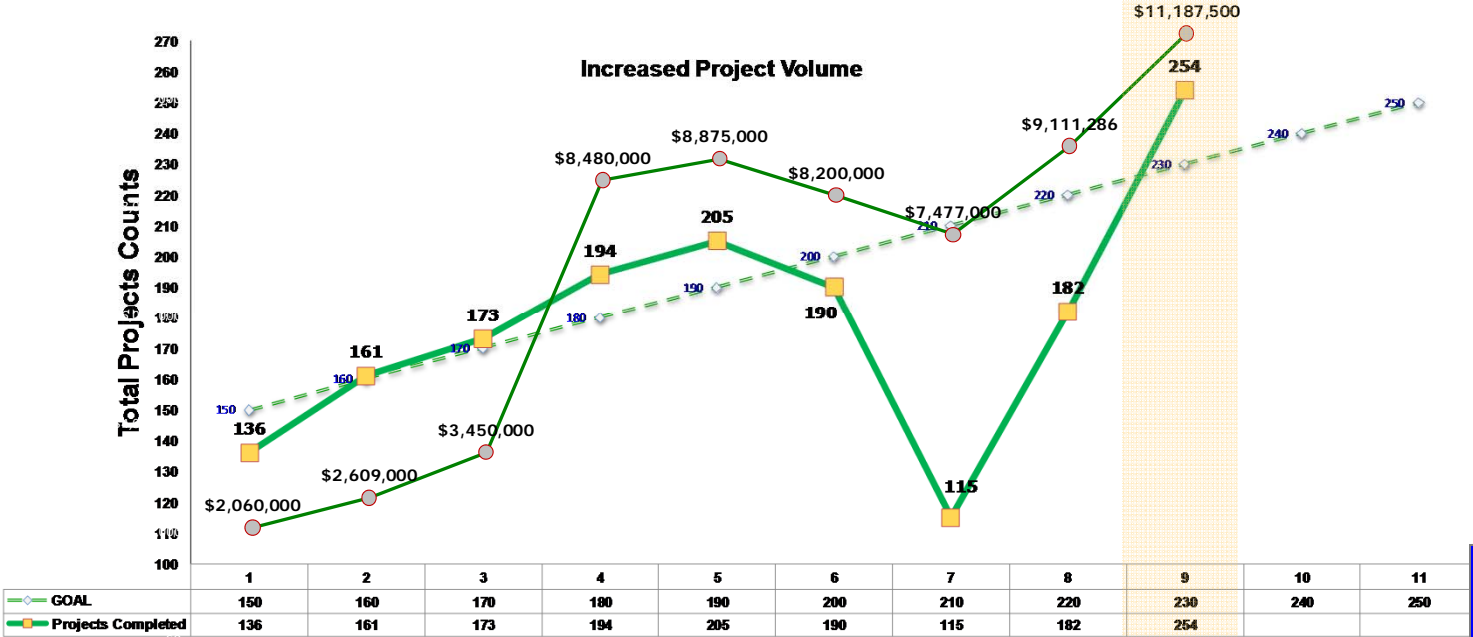
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

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

Measure: The 2008 Benchmark is 200 projects.  
 Balanced Scorecard Category: Internal Business Process

Increase Project Volume by 10 Projects per year - Project Counts by Phase											
GOAL	1	2	3	4	5	6	7	8	9	10	11
	Goal FY 2003	Goal FY 2004	Goal FY 2005	Goal FY 2006	Goal FY 2007	Goal FY 2008	Goal FY 2009	Goal FY 2010	Goal FY 2011	Goal FY 2012	Goal FY 2013
	150	160	170	180	190	200	210	220	230	240	250
Projects Completed	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
	136	161	173	194	205	190	115	182	254		
Project Dollars	\$2,060,000	\$2,609,000	\$3,450,000	\$8,480,000	\$8,875,000	\$8,200,000	\$7,477,000	\$9,111,286	\$11,187,500		
AVG\$/Project	\$15,147	\$16,205	\$19,942	\$43,711	\$43,293	\$43,158	\$65,017	\$50,062	\$44,045		



GOAL 100%

STATUS 107.0%

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

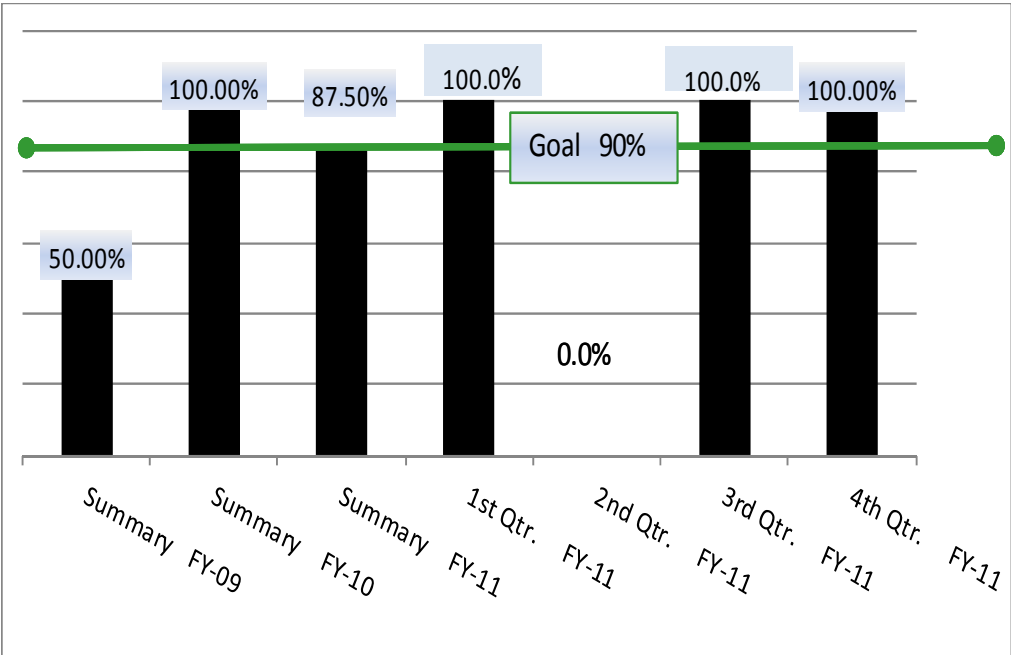
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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 FY-09	4	2	50.0%
Summary FY-10	6	0	100.0%
Summary FY-11	7	1	87.5%
1st Qtr. FY-11	4	0	100.0%
2nd Qtr. FY-11	0	1	0.0%
3rd Qtr. FY-11	1	0	100.0%
4th Qtr. FY-11	2	0	100.0%



Objective for 4th Quarter is 100%  
 Year to date is 87.5%

Facilities Management Strategic Planning Session – 4th Quarter FY 2011



Annual objective

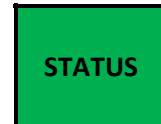
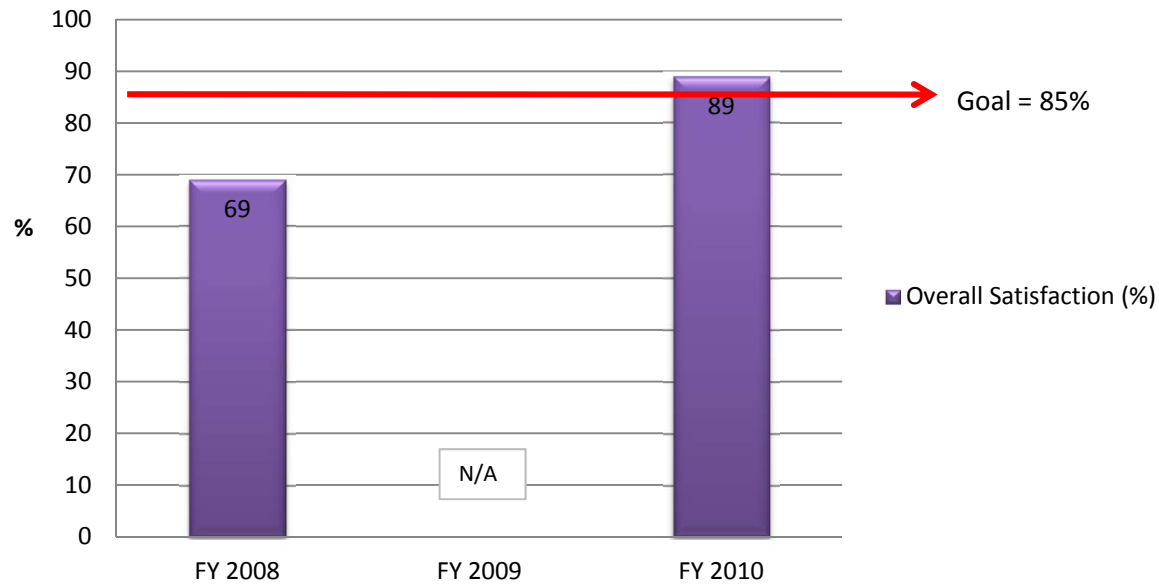
GOAL #4 – Perfect a Customer Focused Organization

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

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

Balanced Scorecard Category: Customer Perspective

Overall Satisfaction with Facilities Management Services



**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
  
  
  
  
  
  
  
  
  
  
- Actions Planned

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

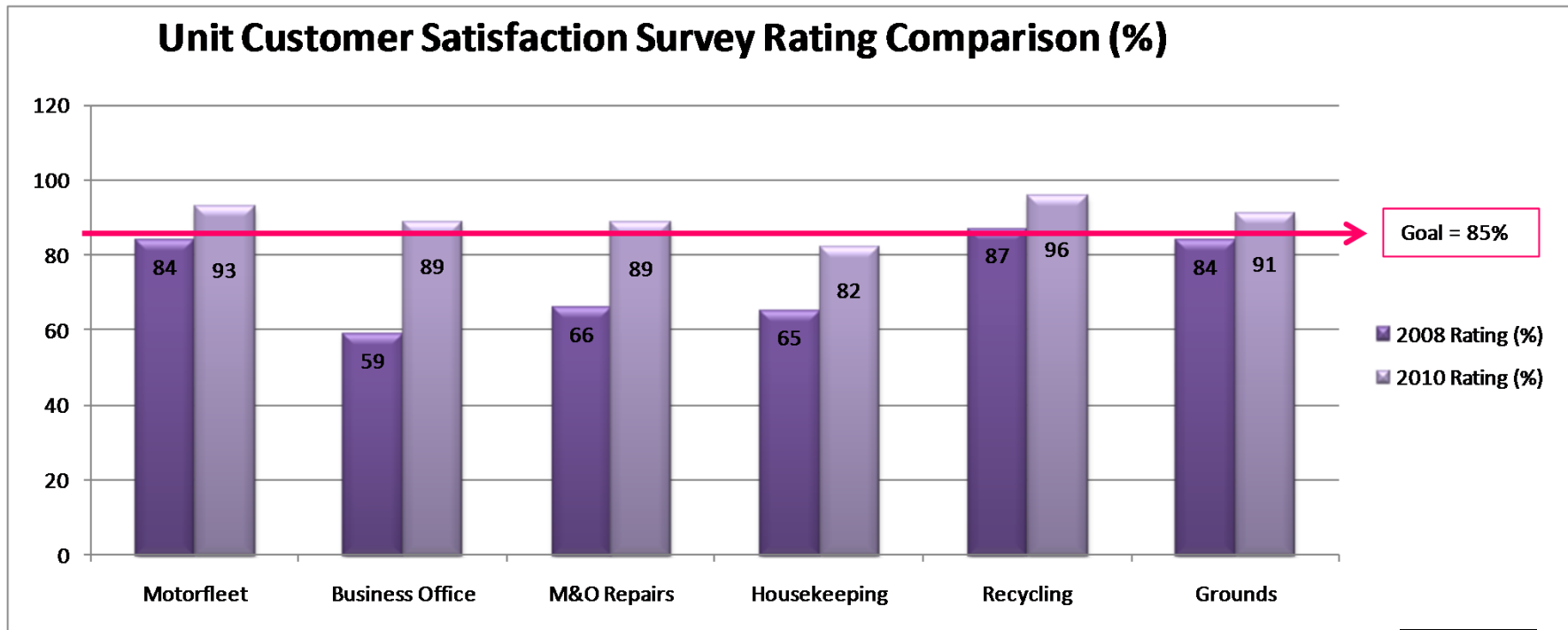
GOAL #4 – Perfect a Customer Focused Organization

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

Annual objective

**Measure:** Annual Customer Survey Results

**Balanced Scorecard Category:** Customer Perspective



STATUS

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

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

Lead  
FBO

**ACTION PLAN**

- **Actions Planned**
  - ✓ **Facilities Business Office:**
    - ✓ Development of new Customer Information page on FBO website; Work pre-empted by 49er Mart go-live;
    - ✓ Requested communication officer position. This position is becoming more common amongst Facilities organizations across the country. Request on hold due to current budget climate, funding constraints and hiring freeze.

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Lead  
F. O.

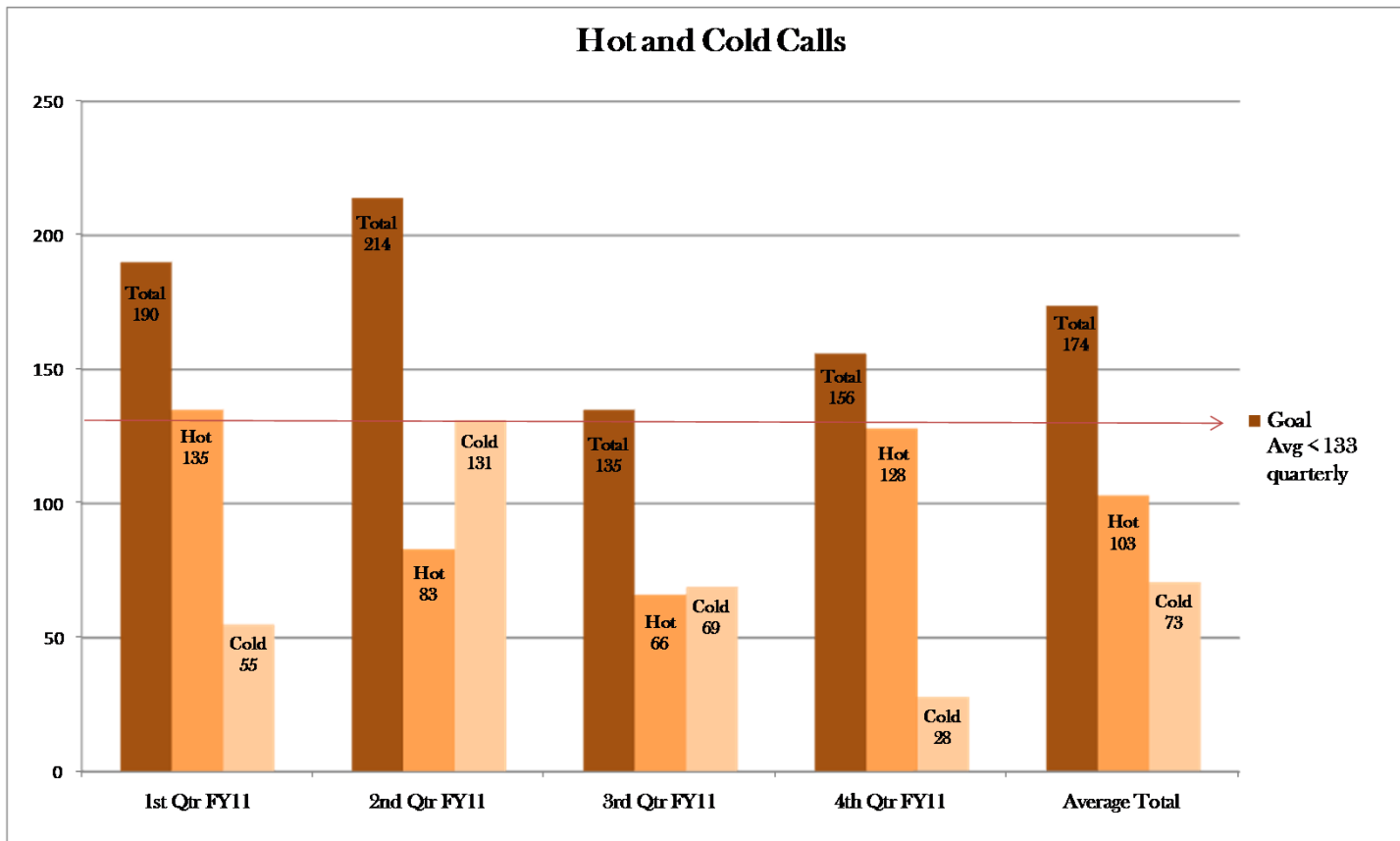
**GOAL #4 – Perfect a Customer Focused Organization**

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

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

**Goal:** Less than 133 per quarter annual average

**Balanced Scorecard Category:** Customer Perspective



STATUS

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

Lead  
F. O.

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

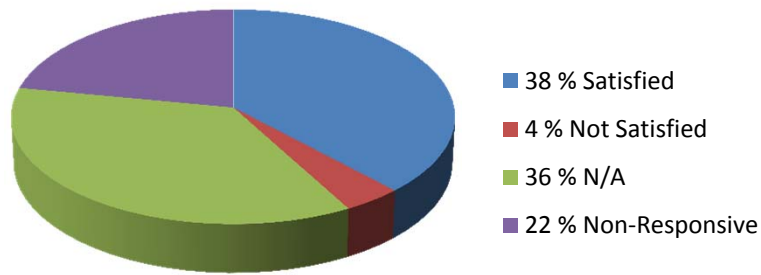
**ACTION PLAN**

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

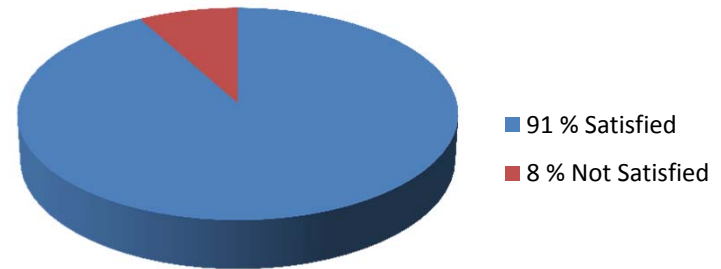


# Housekeeping Work Request Customer Satisfaction

Percentages



Percentages



Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

GOAL #4 – Perfect a Customer Focused Organization

Strategy 4.1 Continually Improve Customer Service/Satisfaction

BONUS SLIDE

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GOAL #4 – Perfect a Customer Focused Organization

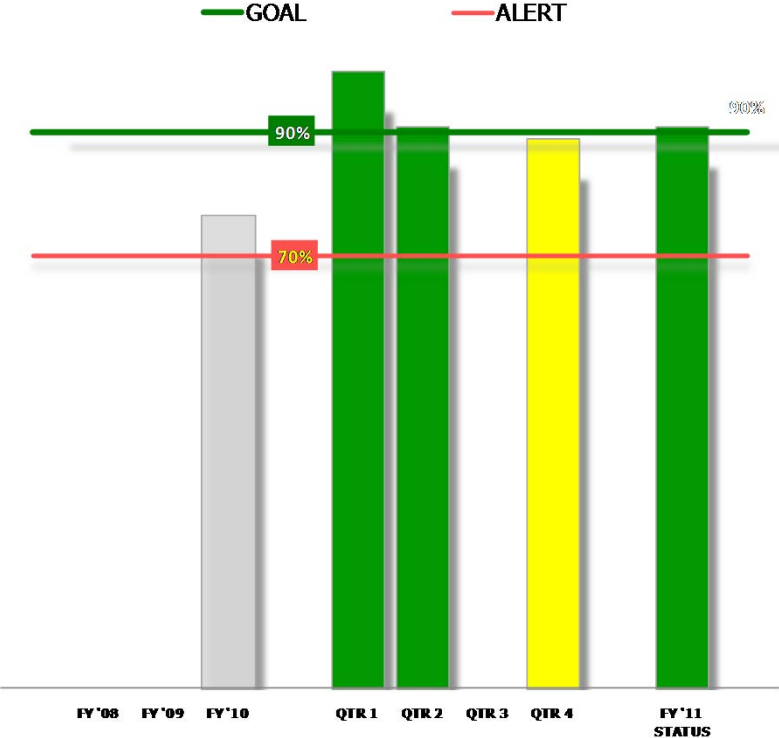
Strategy 4.1 Continually improve customer service/satisfaction  
 Objective 4.1.4 90% of Informal Project Customers Satisfied or Very Satisfied

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

Balanced Scorecard Category: Customer Perspective

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

QUARTERLY SURVEY	Number of Projects Surveyed	Very Satisfied 5	Satisfied 4+	Somewhat Satisfied 3+	Neutral 2+	Somewhat Dissatisfied 1+	Unsatisfied 0+	Percent Satisfied
FY'08	0	0	0	0	0	0	0	0.0%
FY'09	0	0	0	0	0	0	0	0.0%
FY'10	30	18	5	0	6	1	0	76.7%
QTR 1	4	3	1	0	0	0	0	100.0%
QTR 2	11	8	2	0	0	1	0	90.9%
QTR 3	Surveys not recorded in Archibus during 3rd Quarter							#VALUE!
QTR 4	18	13	3	2	0	0	0	88.9%
FY '11 STATUS	33	24	6	2	0	1	0	90.9%



GOAL  
90.0%

STATUS  
90.9%

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

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

**ACTION PLAN**

**4.1.1 - Actions Completed:**

**4.1.1 - Actions Planned:**

- Review Customer Satisfaction Survey responses and implement appropriate**

Facilities Management Strategic Planning Session – Third Quarter FY 2011

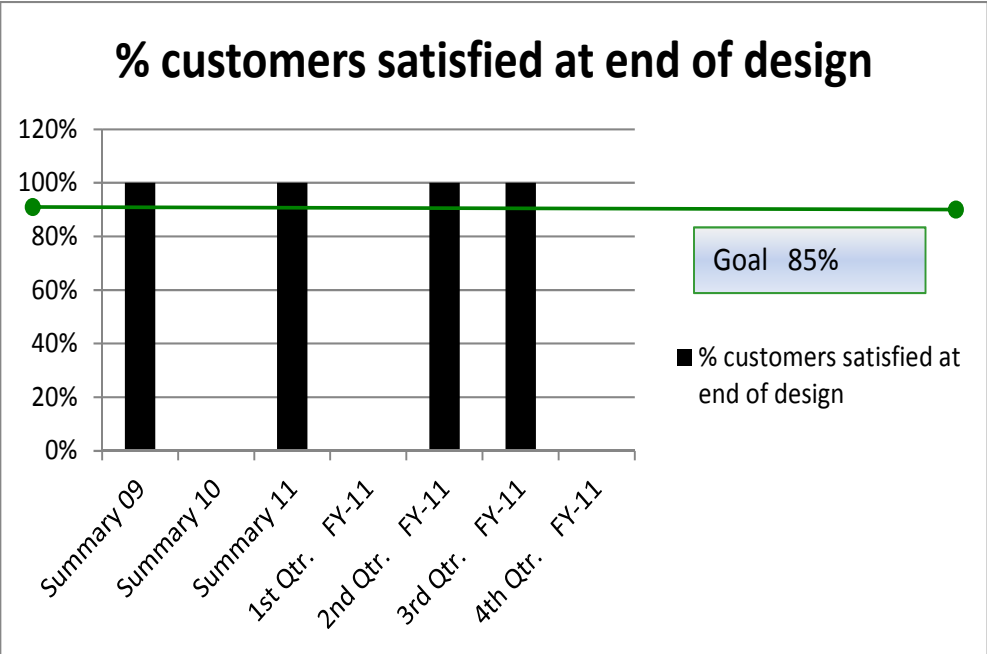
GOAL #4 – Perfect a Customer Focused Organization

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

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

**Balanced Scorecard Category:** Customer Perspective

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



No data is a result of customer not answering questionnaire

Objective for 4th Quarter is not measured  
 Year to date is 100%

**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

**ACTION PLAN**

- Actions Complete
  - 1.
  
- Actions Planned
  - 1. Need to submit satisfaction survey to customers on:  
Parking Deck I and Football Complex

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

GOAL #4 – Perfect a Customer Focused Organization

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

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

**Balanced Scorecard Category:** Customer Perspective

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



Objective for 4th Quarter is not measured  
 Year to date is 100%

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

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

**ACTION PLAN**

- Actions Complete
  - 1.
  
- Actions Planned
  - 1. Need to submit satisfaction survey to customers on:  
    SAC Office Renovations



# Balance Score Card

# DISCUSSION

## CUSTOMER PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<b>Customer</b> <i>To achieve our vision, how must we view &amp; treat our customers?</i>	Work Request Process	1.3.1	Reactive Maintenance work requests	<58%					
		1.3.2	Decrease Work Request Cycle Time by 5%	<300 hrs					
	Housekeeping Processes	1.4.1	Achieve APPA Level 2 in 98% of Buildings	98%	98%				
		1.5.3	Reduce Unscheduled HV outages by 10%	<=0.3%					
	Improve Process Reliability	1.5.4	Reduce Unscheduled FA Network Outages by 10%	<=3%					
		2.2.1	Increase on-time delivery	95% of Projects Designed on Time	95%	99.3%			
	Informal Project Administration	2.2.2	85% of Estimates for All Construction within +/- 10%	85% w/in 10% actuals	95.6%				
		2.2.3	<i>Combined with 2.2.2</i>						
		2.2.4	All IP construction meets BOD	90%	97.3%				
		2.2.5	<i>Combined with 2.2.4</i>						
		2.2.6	Increase Project Volume by 10 proj/year	200 = bchmk; goal 210	107.0%	Annual	Annual	Annual	Annual
	Enhance customer satisfaction	3.4.1	90% Cap Construction Projects on Schedule	90%	87.5%				
		4.1.1	Improve: Overall satisfaction rating	85%	No data	Annual			
		4.1.2	All FM Units Achieve Customer Satisfaction of 85%	85%	No data	Annual			
		4.1.3	Reduce: Maintenance & Ops # hot/cold calls	-15% or <133					
		4.1.4	Improve: Informal Projects rating (sat./very sat.)	90%	90.9%				
		4.1.5	Improve: Capital Projects rating (sat./very sat.) - design	85%	100%				
4.1.6		Improve: Capital Projects rating (sat./very sat.) - constr	85%	100%					
<b>NEW</b>		All measures positive on customer sat survey	<2% S Dis; <5% Dis or Neu						





UNC CHARLOTTE

# **Balance Score Card**

## **FINANCIAL**

### **Perspective**

## **Strategic Objectives:**

**Manage Budget, Maximize Revenue Stream**

**Promote Fiscal Responsibility**

**Sustainable Practices**

**Conserve Natural Resources**

**Improve Employee Safety**

**Improve HUB Participation**

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

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, 2011 FINAL**

ACCOUNT DESCRIPTION	2010-11 Budget	% of TOTAL BUDGET	YTD ACTIVITY	ENCUMBRANCES	TOTAL EXPENDITURES	REMAINING BALANCE	VARIANCE (budgeted:actual) U/F
STUDENT AND TEMPORARY WAGES	\$ 36,205	1%	\$ 36,205	\$ -	\$ 36,205	\$ -	\$ - F
PERSONAL SERVICE CONTRACTS	\$ 159,716	5%	\$ 156,406	\$ 3,310	\$ 159,716	\$ 0	\$ - F
CORPORATE SERVICES CONTRACTS (Srv Agr)	\$ 687,173	22%	\$ 686,876	\$ 298	\$ 687,173	\$ 0	\$ 0 F
OTHER ADMINISTRATIVE EXPENSES	\$ 47,699	1%	\$ 47,249	\$ 450	\$ 47,699	\$ -	\$ - F
DOMESTIC TRAVEL/TRAINING	\$ 84,873	3%	\$ 84,873	\$ -	\$ 84,873	\$ -	\$ - F
FIXED PURCHASED SERVICES (Maint Agr)	\$ 258,828	8%	\$ 258,597	\$ 231	\$ 258,828	\$ -	\$ - F
OTHER PURCHASED SERVICES	\$ 446,308	14%	\$ 433,077	\$ 13,231	\$ 446,308	\$ -	\$ - F
SUPPLIES	\$ 1,253,600	39%	\$ 1,217,317	\$ 36,284	\$ 1,253,600	\$ 0	\$ - F
EQUIPMENT	\$ 141,543	4%	\$ 139,982	\$ 1,561	\$ 141,543	\$ 0	\$ 0 F
CAPITAL OUTLAY	\$ 3,677	0%	\$ 3,677	\$ -	\$ 3,677	\$ -	\$ - F
FIXED CHARGES	\$ 24,264	1%	\$ 24,264	\$ -	\$ 24,264	\$ -	\$ - F
RECYCLING	\$ 40,412	1%	\$ 37,329	\$ 2,898	\$ 40,227	\$ 185	\$ 185 F
<b>FACILITIES MANAGEMENT Main Operating Funds</b>	<b>3,184,300</b>		<b>3,125,852.61</b>	<b>58,262.57</b>	<b>3,184,115.18</b>	<b>184.80</b>	<b>\$ 185</b>

STATUS

**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.

Lead  
FBO

**ACTION PLAN**

- **Actions Complete**
  - ✓ Periodically review expenditure reports as part of continuous improvement effort;
  - ✓ Met with key stakeholders within Facilities Operations to discuss process improvements and new operational methods (i.e., use of standardized account codes, the financial report, etc.)
  
- **Actions Planned**
  - As part of FM’s Training and Development Academy, create training course - FM Budgeting 101 - which will focus on budget management skills. Program development placed on hold;

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

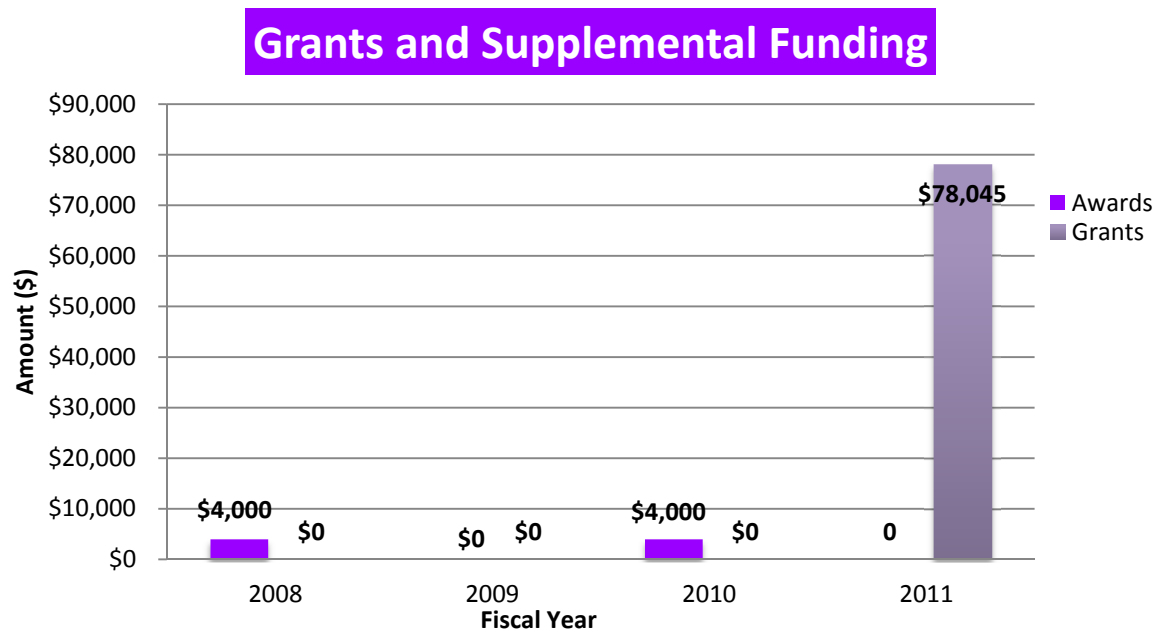
Lead  
FBO

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

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

GOAL #6 – Promote Good Stewardship

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STATUS

**GOAL #6 – Promote Good Stewardship**

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

Lead  
FBO

**ACTION PLAN**

- **Actions Complete**
  - ✓ Periodically review expenditure reports as part of continuous improvement effort;
  - ✓ Met with key stakeholders within Facilities Operations to discuss process improvements and new operational methods (i.e., use of standardized account codes, the financial report, etc.)
  
- **Actions Planned**
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Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

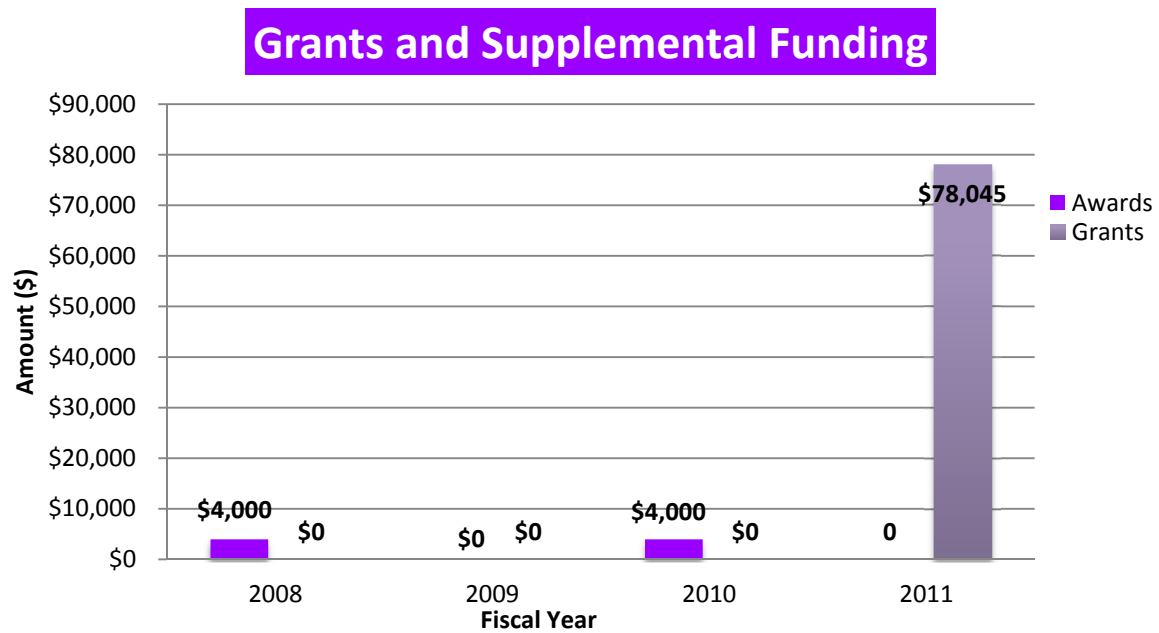
Lead  
FBO

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**

Lead  
FBO

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

**ACTION PLAN**

- **Actions Complete**
  - ✓ Grant awarded for Energy Analyst position. Position reports to Energy Manager.
  - ✓ Determined best deposit venue for monies received. Dilemma: how to minimize GF restrictions on award monies received; Worked with Sponsored Programs, Budget Office and Development to determine viable, legal solution
  
- **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.



Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

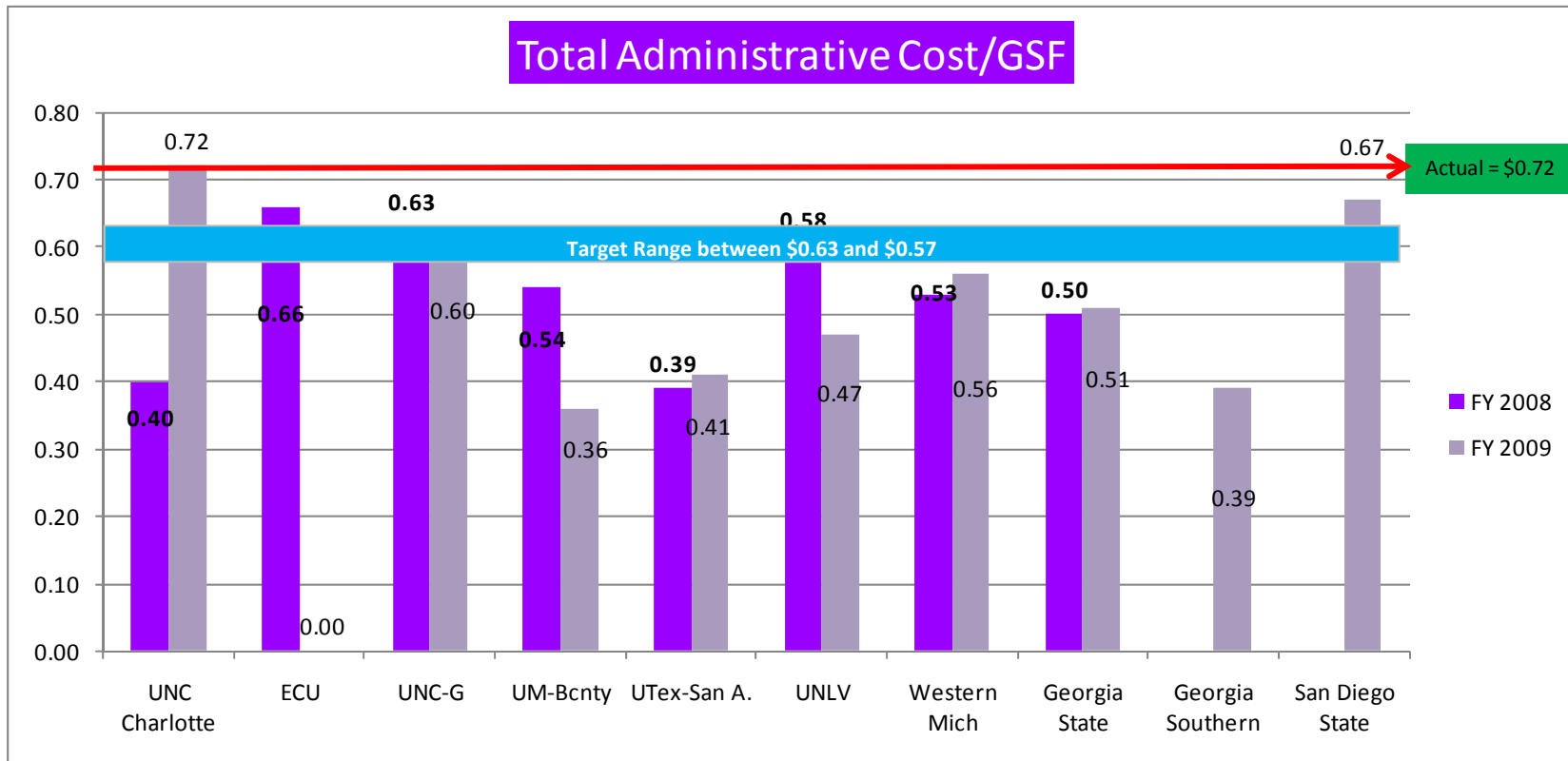
Lead  
FBO

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



STATUS

**GOAL #6 – Promote Good Stewardship**

Lead  
FBO

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

**ACTION PLAN**

- Actions Complete
  
- Actions Planned
  1. Submit survey data requirements to all participants in July 2011
  2. Survey open through December 2011; Goal to submit for review to AVC-FM is end of October 2011.
  3. Review 2010 data

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
Housekeeping

**GOAL #6 – Promote Good Stewardship**

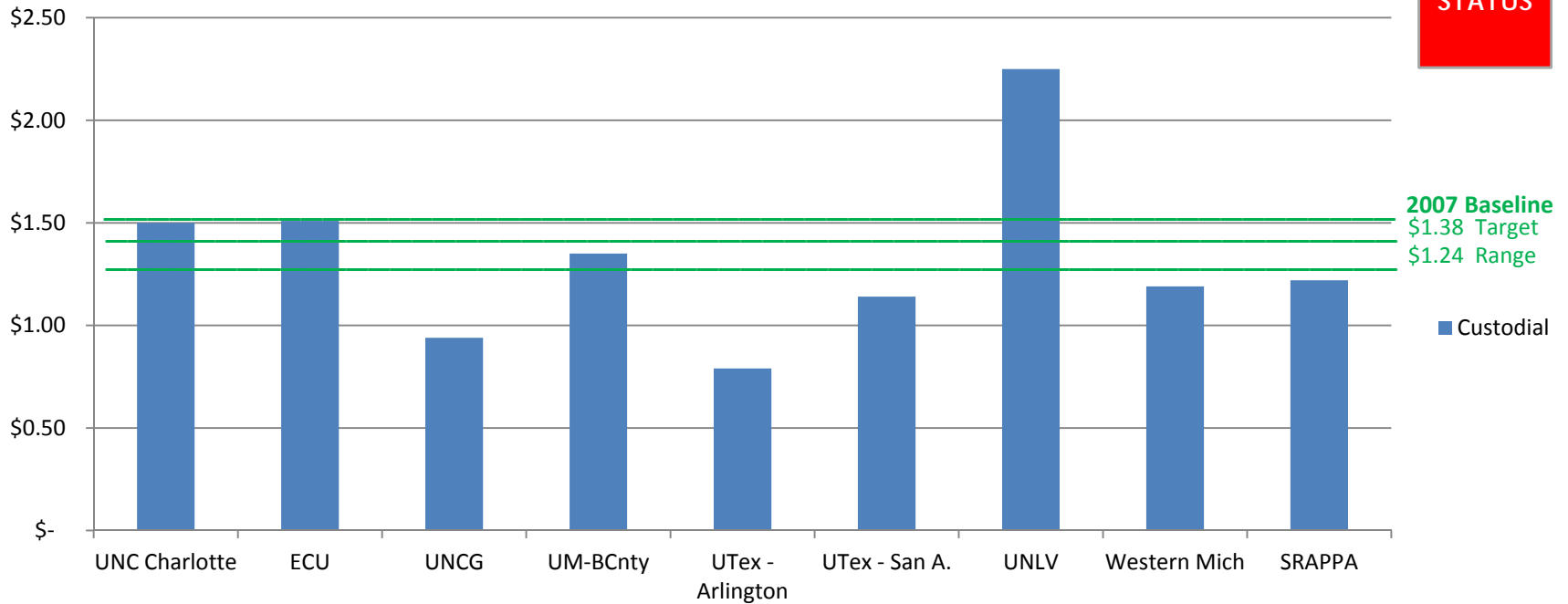
**Strategy 6.1** Promote Fiscal Responsibility  
**Objective 6.1.4** Achieve Custodial Costs/GSF Plus or Minus 5% of the APPA Average for Peer Institutions  
 (Internal UNC Peers = East Carolina, Greensboro)  
 (National Peers – University of Maryland-Baltimore County, UNLV, University of Texas at Arlington,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

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

**Balanced Scorecard Category:** Financial Perspective

**Custodial-Total Cost/GSF Comparison**

**STATUS**



**GOAL #6 – Promote Good Stewardship**

<b>Strategy</b>	<b>6.1</b>	Promote Fiscal Responsibility
<b>Objective</b>	<b>6.1.4</b>	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.

Lead  
Housekeeping

**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 2011

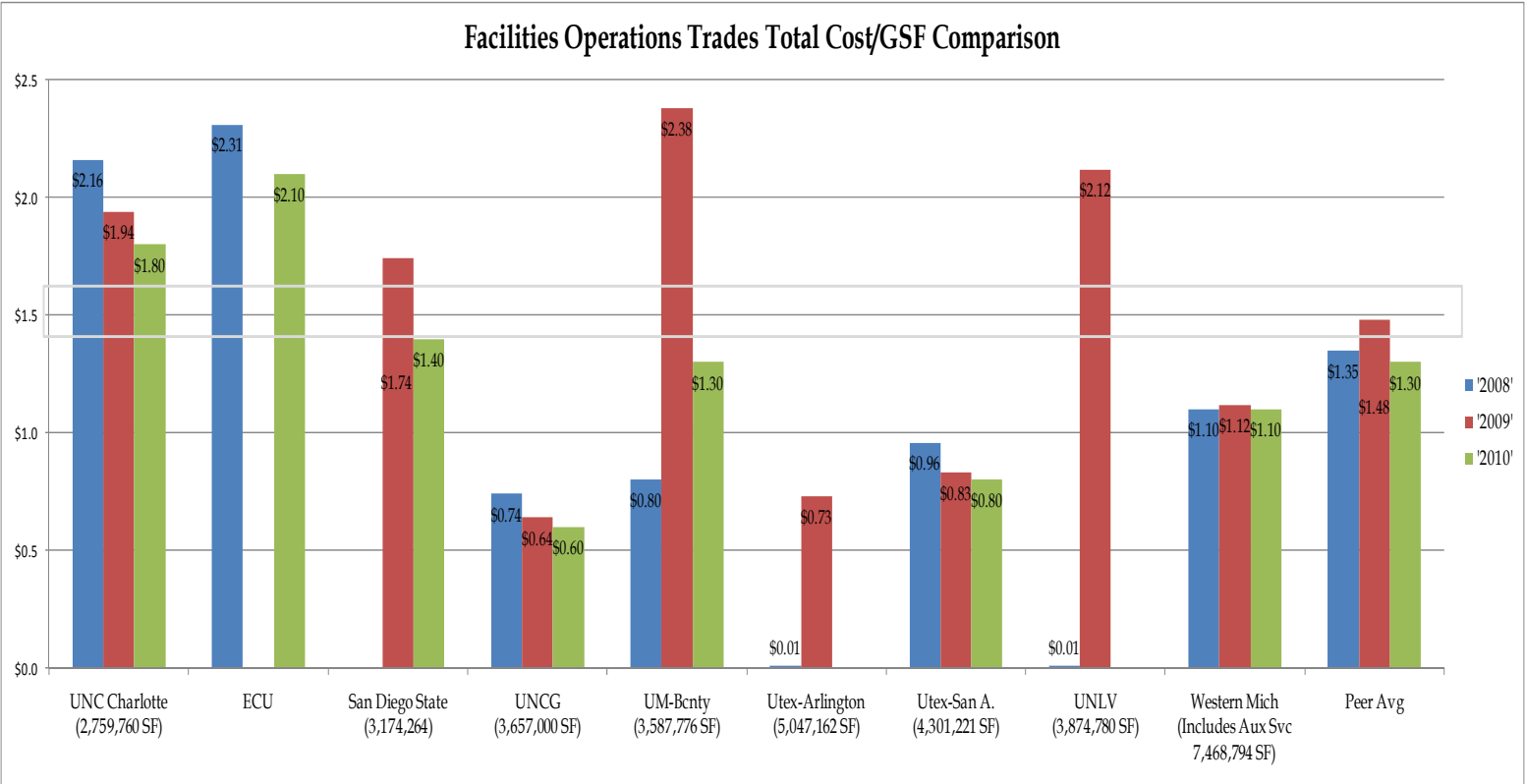
GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective

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



**GOAL #6 – Promote Good Stewardship**

Lead  
F. O.

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

**ACTION PLAN**

- **Actions Complete**
  - 1 – Pulled data from 2010 APPA RPI Report.
  
- **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 2011

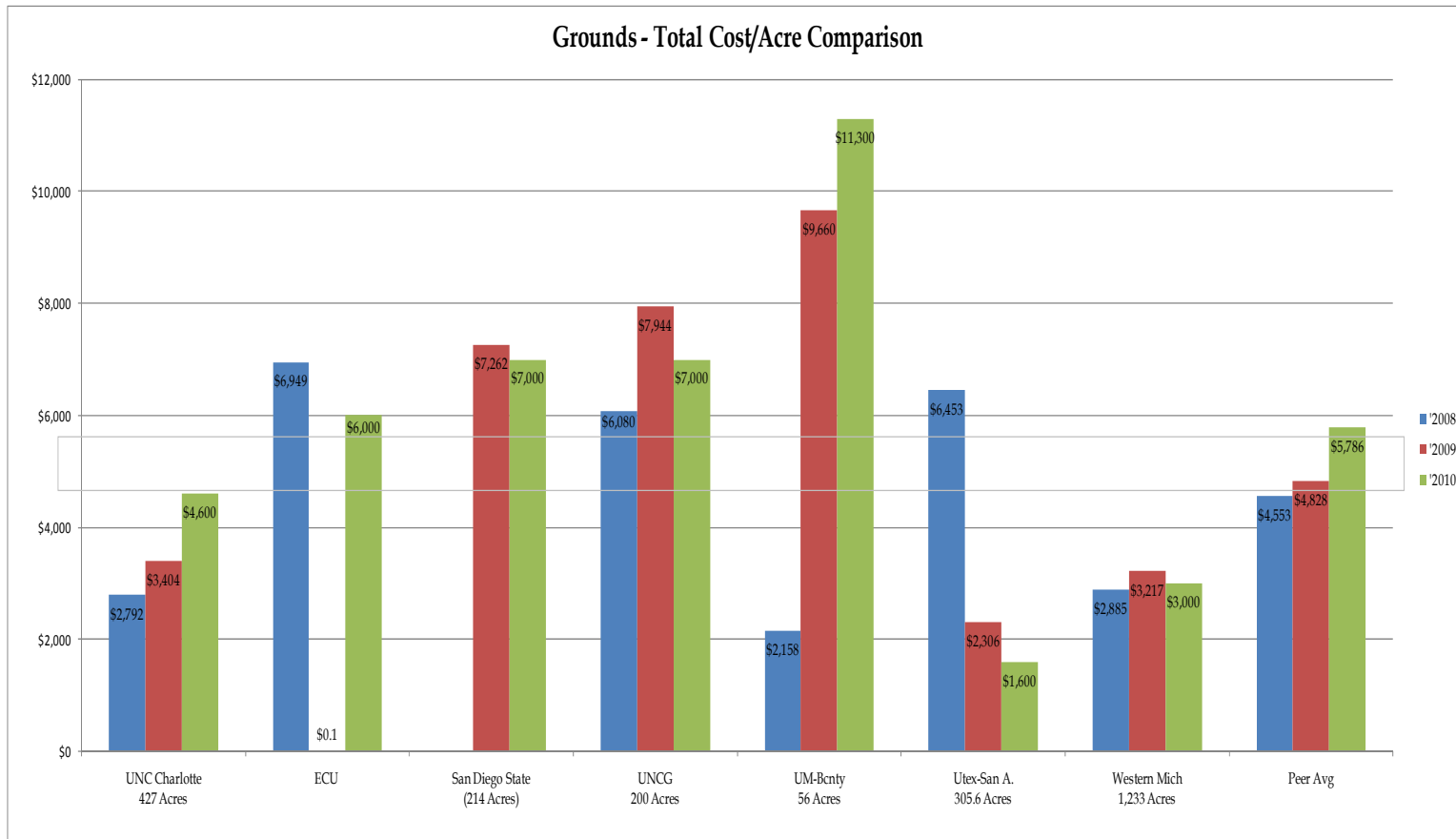
Lead  
F. O.

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**

Lead  
F. O.

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

**ACTION PLAN**

- **Actions Complete**
  - 1 – Pull data from 2010 APPA RDI Report.
  - 2 – Added additional labor services staffing to raise level of maintenance for reimbursable customers.
  - 3 – Calculated a cost per acre based on weighted average using acreage and found better fit.
- **Actions Planned**
  - 1 – Review the manner in which data was collected and provided for the FPI Report.



Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
F. O.

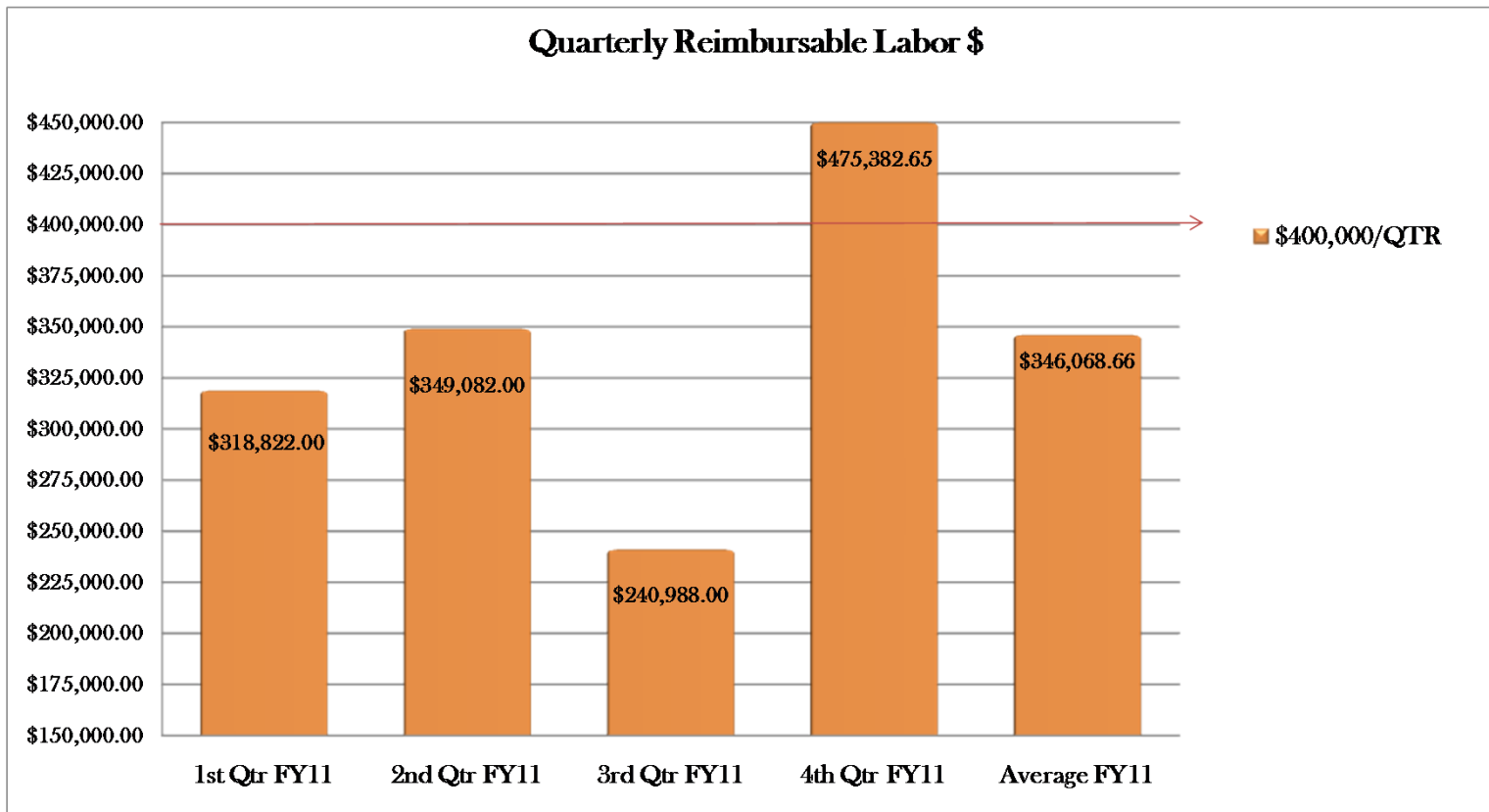
**GOAL #6 – Promote Good Stewardship**

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

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

**Goal:**            \$400,000.00/Qtr

**Balanced Scorecard Category:** Financial Perspective



STATUS

**GOAL #6 – Promote Good Stewardship**

Lead  
F. O.

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

**ACTION PLAN**

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

**Actions Planned**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011



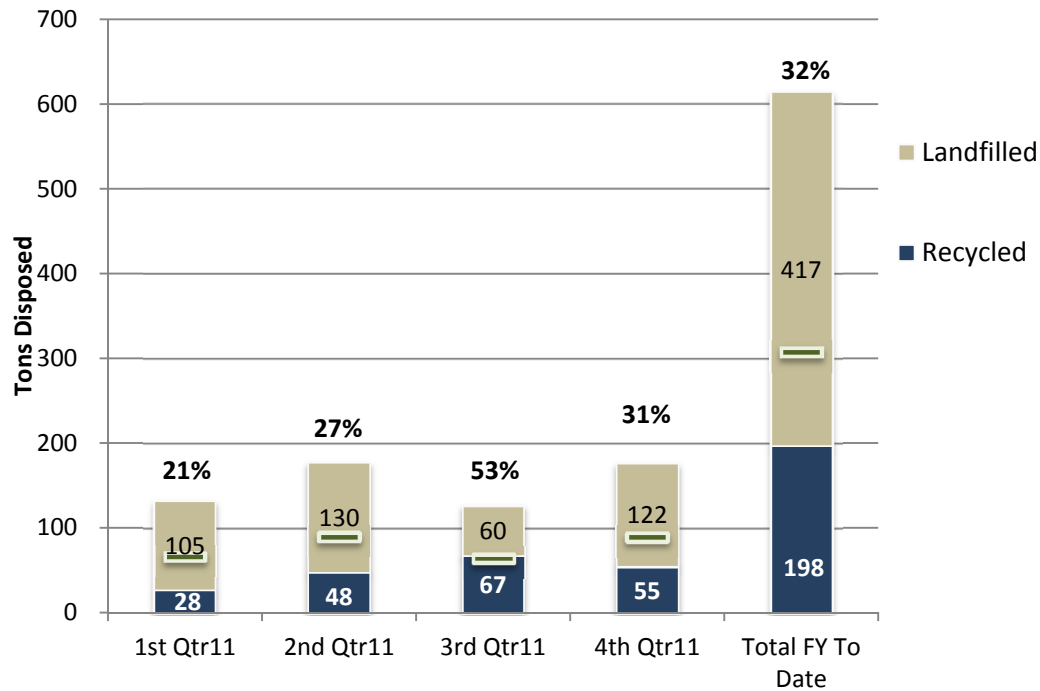
GOAL #6 – Promote Good Stewardship

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 FY11



**GOAL #6 – Promote Good Stewardship**

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



**ACTION PLAN**

- Actions Complete
  
- Actions Planned
  - Need to determine method to separate Surplus materials and items from Residence Life out; right now they count against our recycling rates.
  - Closer monitoring on design projects to ensure weight tickets received from contractors.
  - Pursue partnerships that allow for alternative disposal methods.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011



**GOAL #6 – Promote Good Stewardship**

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

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

**Balanced Scorecard Category:** Financial Perspective

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



**GOAL #6 – Promote Good Stewardship**

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



**ACTION PLAN**

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



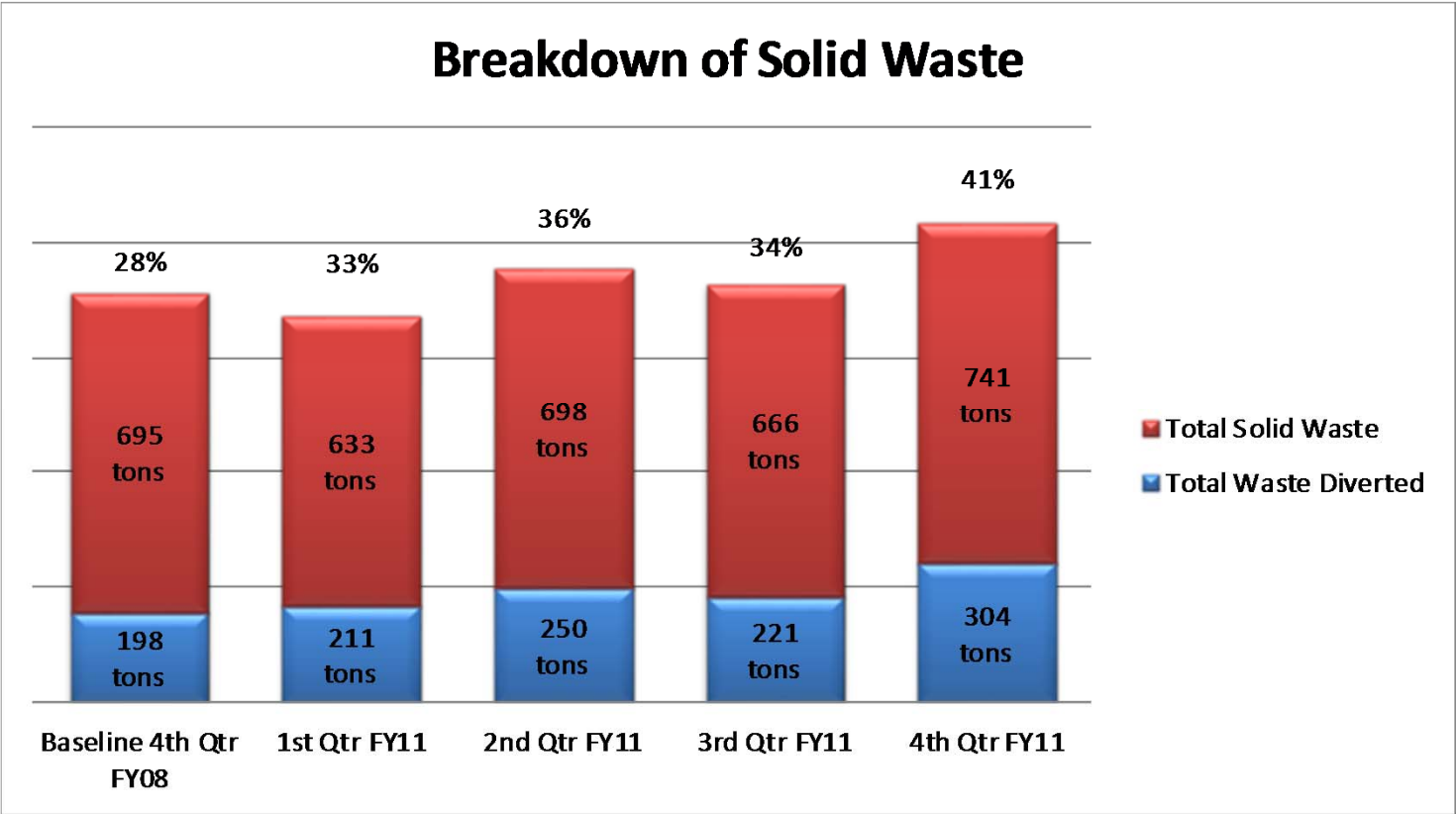
Facilities Management Strategic Planning Session – 2nd Quarter FY 2011

GOAL #6 – Promote Good Stewardship

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

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

Balanced Scorecard Category: Financial Perspective



**GOAL #6 – Promote Good Stewardship**

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



**ACTION PLAN**

- **Actions Complete - TOTAL recycling for quarter 41% , 36% for the year**
  - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
    - Attended all SOAR and summer orientation session
  - Continue to Partnered with Housekeeping on the new mini office trash can reduction program – have provided programs in every building
  - 2 Master Students from Civil Engineering will assist Recycling/Grounds/ Sustainability Departments to design comprehensive food composting program Summer 2011 semester
  - finalize SOP for trash and recycling bin placement and design
  - Continue educational outreach and promotion
    - Continue to chair Carolina Recycling Coalition’s Collegiate Recycling Council.
    - continue to be advisors to EARTH Club and CGI
    - working with 2012 NCAPPA conference committee
  - Assist Sustainability Coordinator with Zero Waste Goal and **American College & University Climate Commitment**
- **1st Quarter Actions Planned**
  - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus
  - Continue educational outreach and promotion
    - will attend all new staff and faculty orientation sessions, meet with RA/RM’s, Week of Welcome Programs, etc
  - Designing Zero Waste Options for FOOTBALL
    - Student Government wrote a resolution for a ZERO WASTE FOOTBALL Stadium
  - Will develop RFP for outdoor recycling/trash bins
  - Will develop RFP for waste hauler



Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
RELU

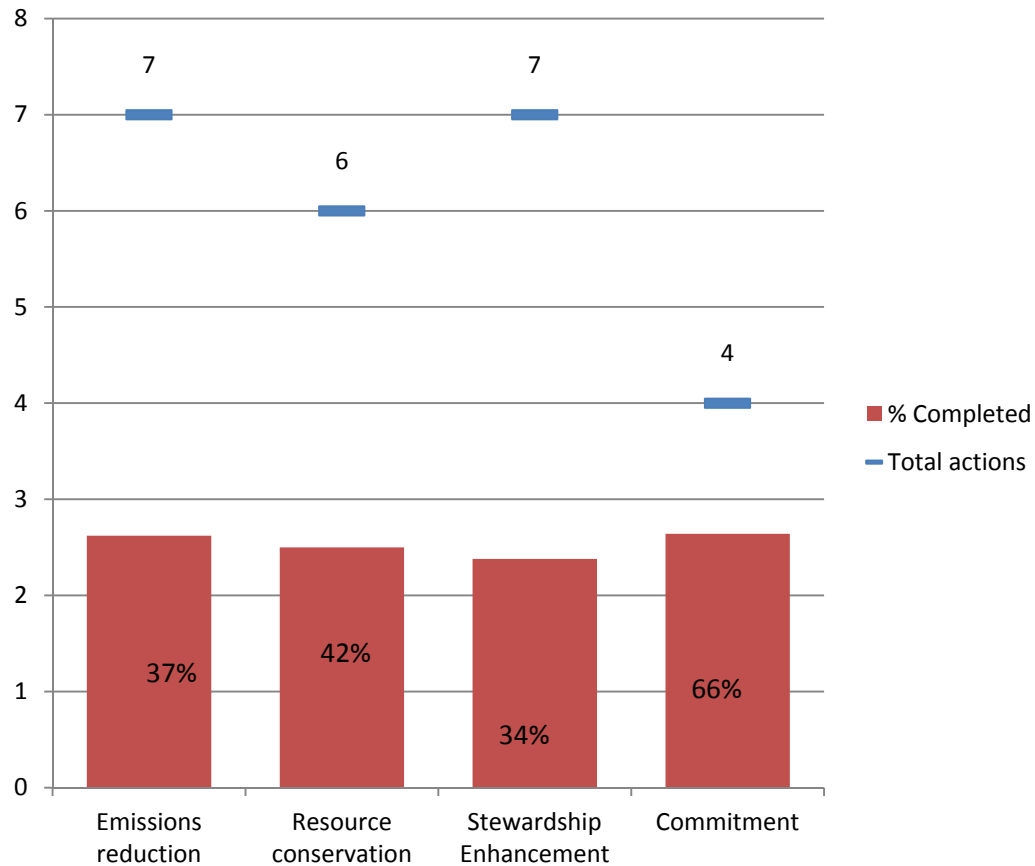
GOAL #6 – Promote Good Stewardship

Strategy 6.2 Develop a Sustainable Campus

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

Measure: Number of actions completed in each category

Balanced Scorecard Category: Innovation and Learning



Status

**GOAL #6 – Promote Good Stewardship**

<b>Strategy</b>	<b>6.2</b>	<b>Develop a Sustainable Campus</b>
<b>Objective</b>	<b>6.2.4</b>	Implementation of sustainability plan actions

Lead  
Planning

**ACTION PLAN**

**Actions Completed**

- Freshman Seminar
- Climate Action Planning
  - Set up working Task Force
  - Mitigation strategies brainstorming
  - Mitigation strategies Prioritization
- Sustainability Communications strategy
- Revolving Fund Proposal

**GOAL #6 – Promote Good Stewardship**

**Strategy**      **6.2**              **Develop a Sustainable Campus**

**Objective**      **6.2.4**              Implementation of sustainability plan actions

Lead  
RELU

**ACTION PLAN**

- **Actions Planned**
  - Complete Climate Action Plan Mitigation Strategy Analysis
  - Start CAP Report
  - Update Sustainability Plan
  - Implementation/tracking of Best Practices

Facilities Management Strategic Planning Session – 4th Quarter FY 2011

Lead  
Capital

GOAL #6 – Promote Good Stewardship

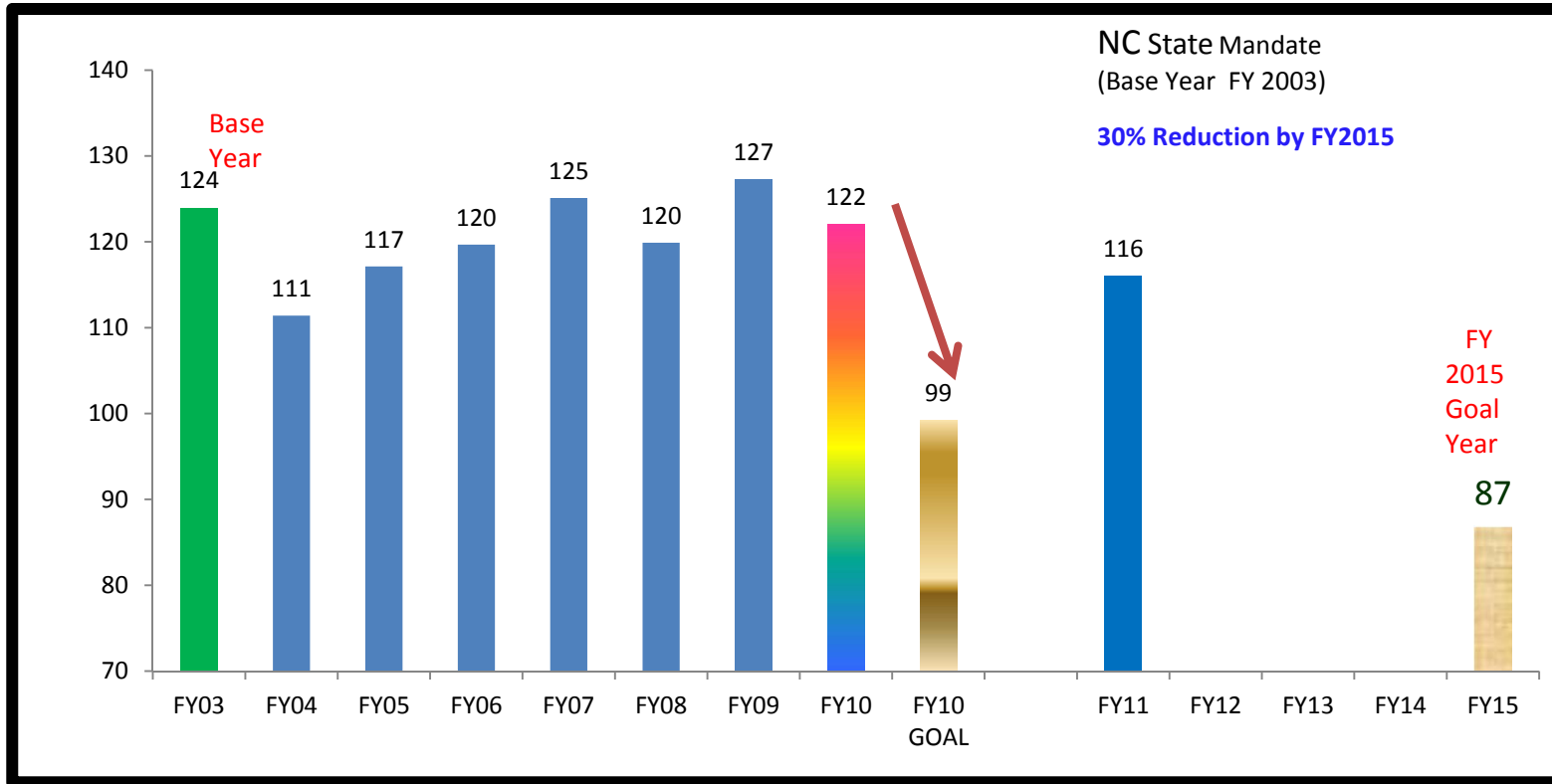
Strategy 6.3 Conserve Natural Resources  
Objective 6.3.1 Decrease Energy Usage by 30% by FY2015 (State Guideline)

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

STATUS

**CAMPUS ENERGY USAGE**  
**BTU/GSF/YEAR**



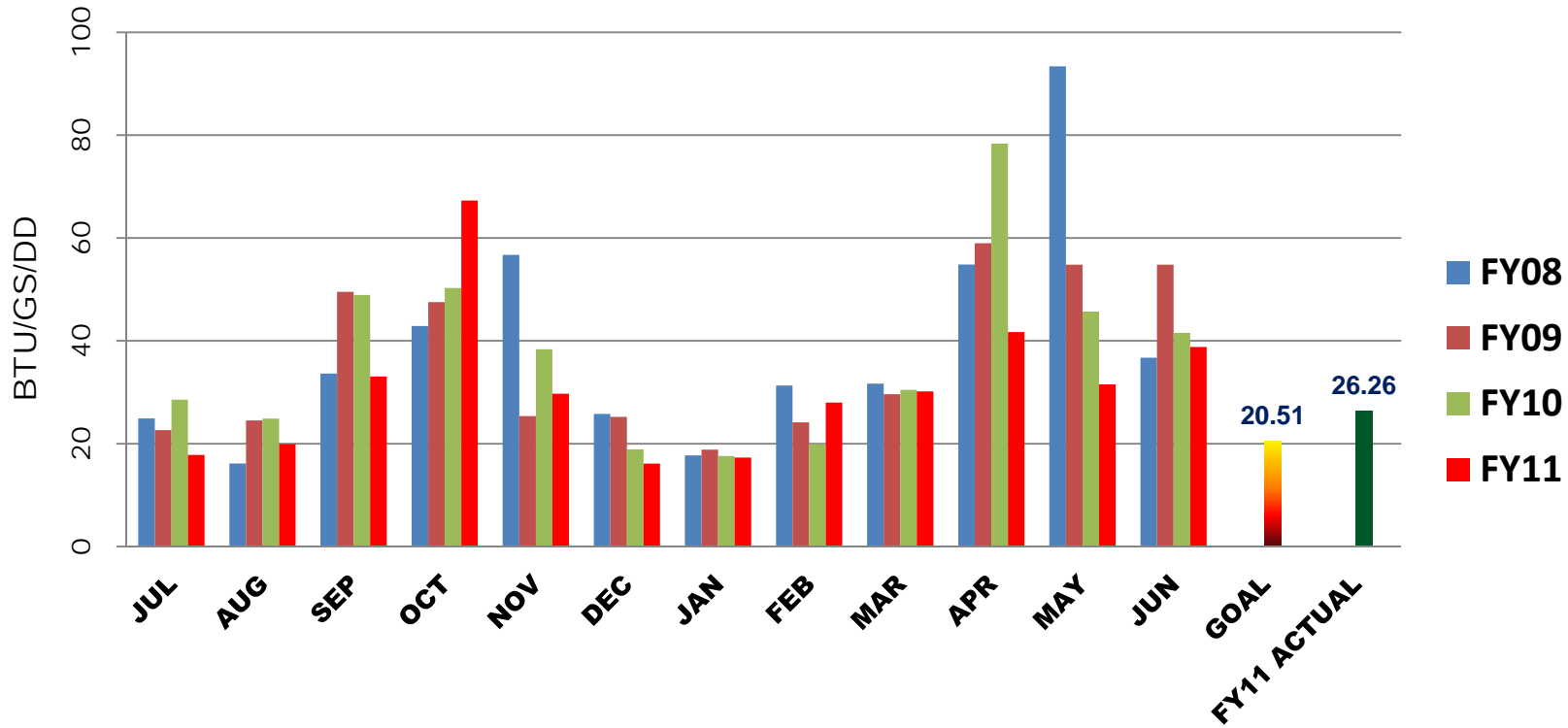
**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

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

STATUS



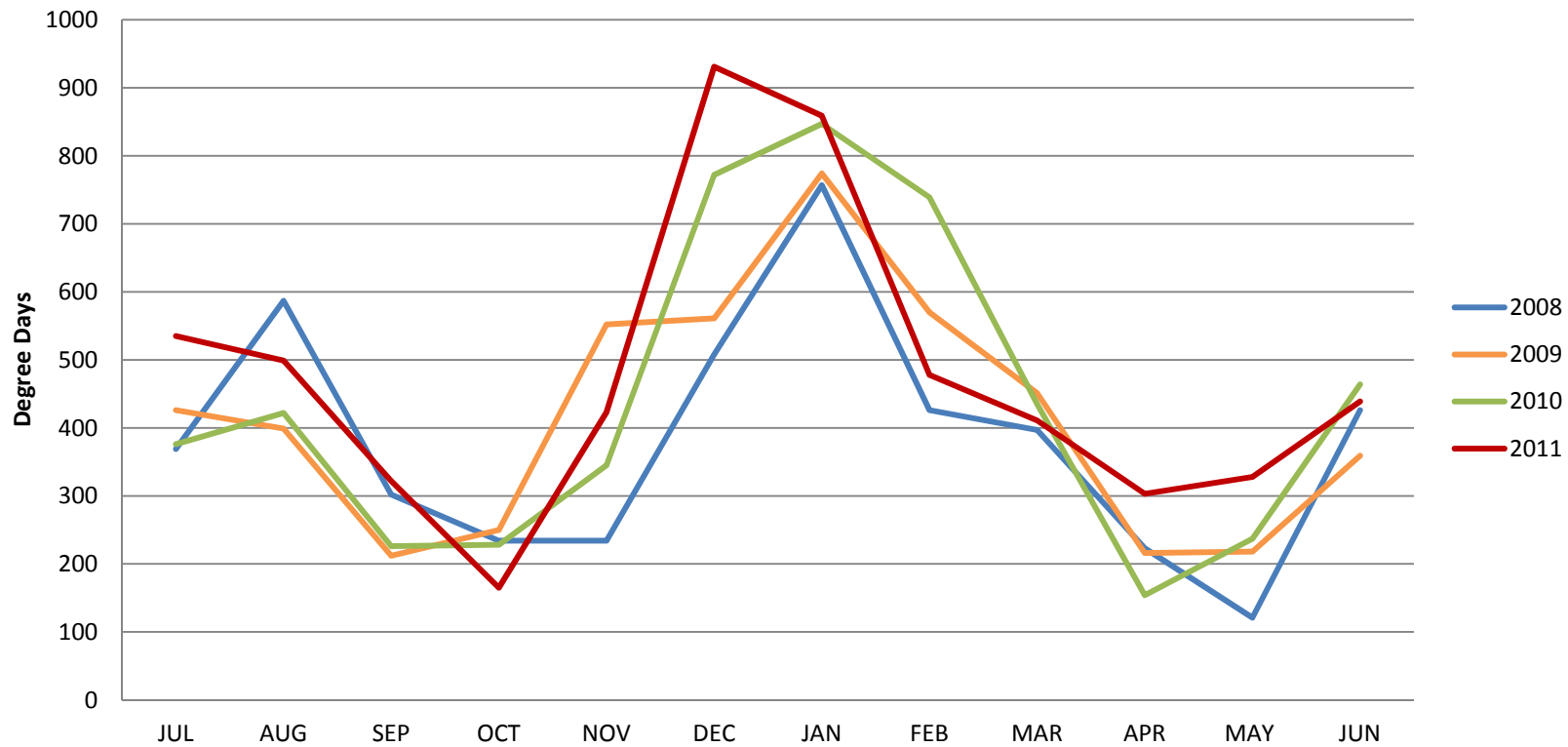
**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

STATUS

**DEGREE DAY COMPARISON**



**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

**ACTION PLAN -ENERGY**

**STATUS**

- **Actions Complete**
  - Performance contract progressing.
  - Hired Energy Analyst with ARRA funding, permanent time-limited. (End 2-29-12)
  - Space Temperature Guidelines accepted by BOT & Chancellor – to be reviewed after 6 months
  - RFQ prepared for Atkins retro-commissioning (ARRA funded)
  
- **Actions Planned**
  - Complete Engineering and Zone coordination for energy operation.
  - Update our Strategic Energy Plan for the State Energy Office.
  - Complete campus master plan for energy conservation.
  - Continue with PM/CM roles for energy projects.
  - Focus on identifying problem buildings and root causes for energy inefficiencies.

**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

**ACTION PLAN - ESPC**

**STATUS**

## Energy Savings Performance Contract

- **Actions Complete**
  - ESCO (Ameresco) close to completing 90% IGA.
  - 3<sup>rd</sup> Party consultant, Celtic Energy, continues to provide support and evaluation of IGA.
  
- **Actions Planned**
  - Investment Grade Audit (IGA) 90% submission
    - Finalize acceptable ECMs.
      - Energy Services Agreement (ESA) signed (September 2011)



Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
Capital

GOAL #6 – Promote Good Stewardship

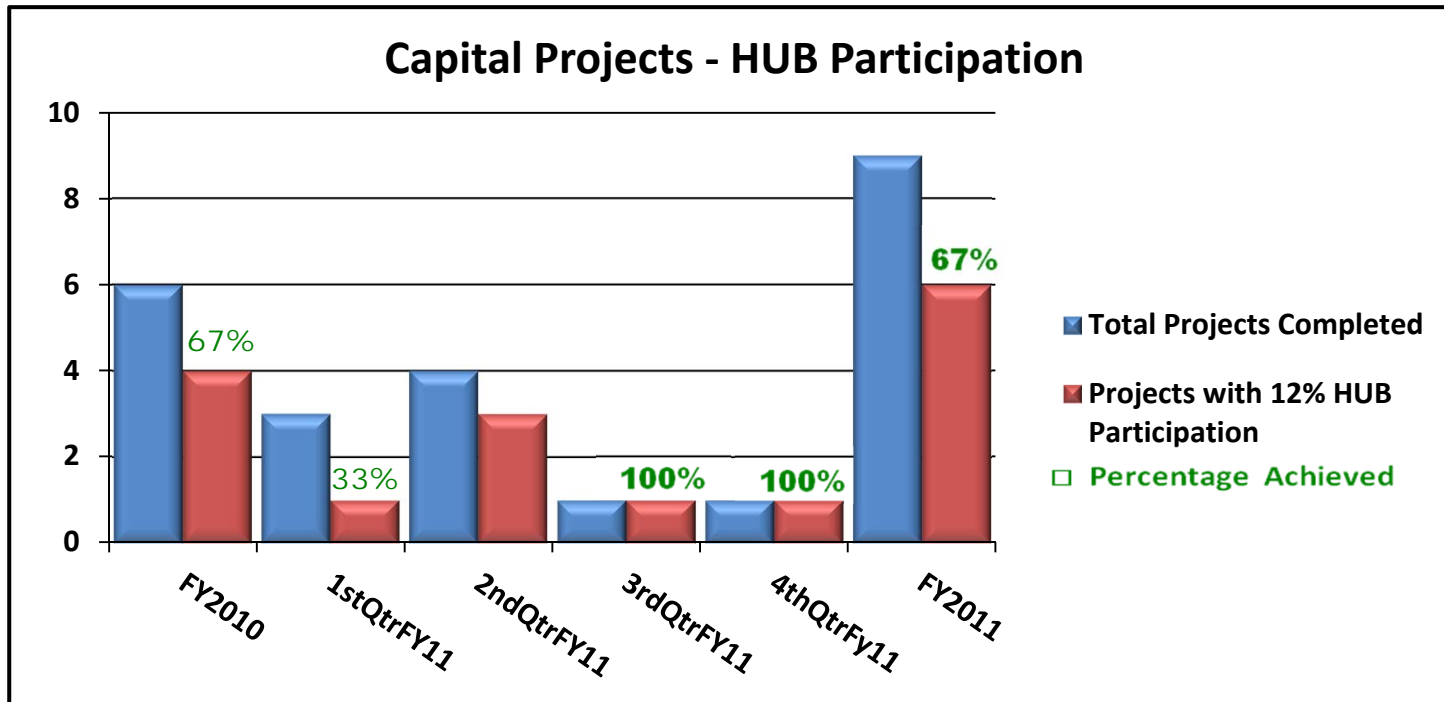
Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation  
Objective 6.5.1 12% HUB participation on 80% of Capital Projects

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

Balanced Scorecard Category: Internal Business Process

SAC Renovation

Strategic Review	Total Projects Completed	Projects with 12% HUB Participation	Percentage of Projects Meeting 80% GOAL
FY2010	6	4	67%
1stQtrFY11	3	1	33%
2ndQtrFY11	4	3	75%
3rdQtrFY11	1	1	100%
4thQtrFY11	1	1	100%
FY2011	9	6	67%



4thQtrFY11

FY STATUS

**GOAL #6 – Promote Good Stewardship**

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

**ACTION PLAN**

- **Actions Completed**
  - ✓ Bonding Workshop
  - ✓ MBE Advisory Board Meeting
  - ✓ Turner School of Construction Management
  - ✓ Triad Coalition Minority Construction & Supplier Outreach Event
  - ✓ UNC-CH Bell Tower Year End Review
  
- **Actions Planned**

Continue –

  - Encourage GCs to exceed 10% HUB participation goal
  - Work with GC/CMs to identify HUB subcontractors/partners
  - Promote mentor-protégé/partnerships/joint venture relationships at 1<sup>st</sup> tier subcontractor level
  - Work with GCs/agencies/organizations to identify/provide training to promote HUB growth and development
  - Monitor Program/Educate Business Community/Outreach Efforts

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

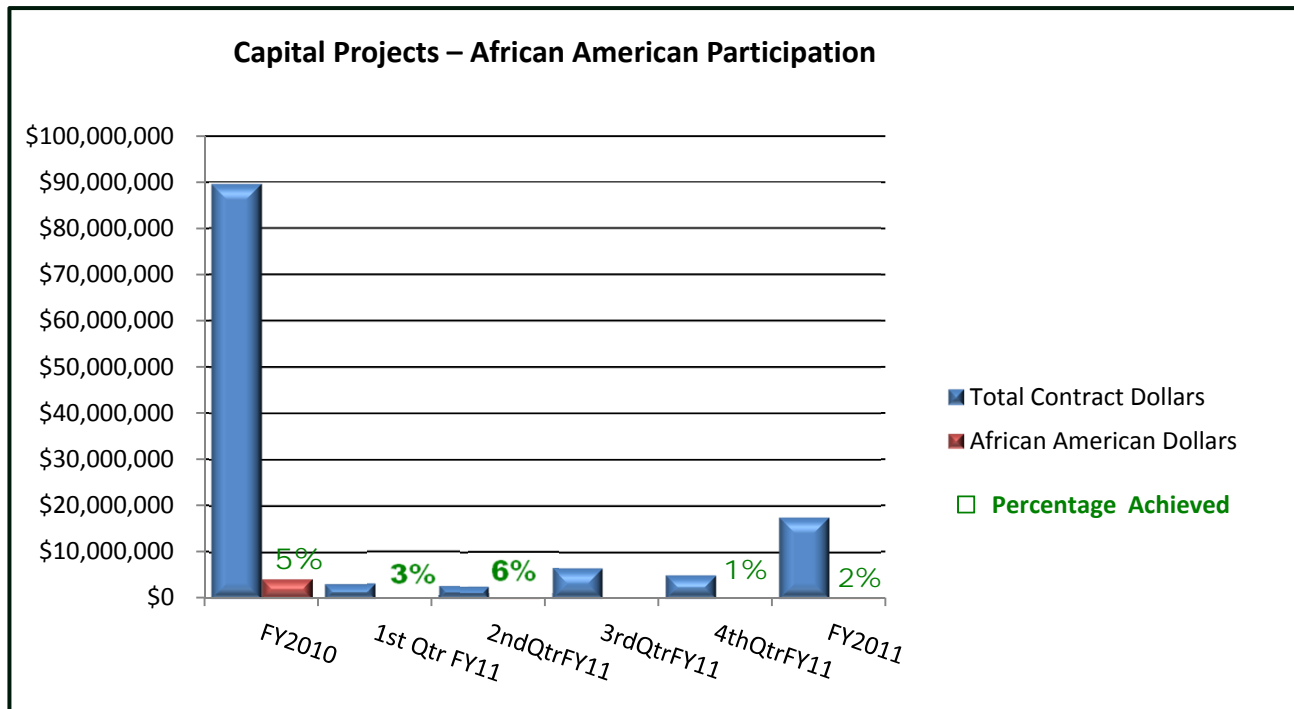
GOAL #6 – Promote Good Stewardship

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

Measure: Total African American Dollars divided by Total Contract Dollars

Balanced Scorecard Category: Internal Business Process

Strategic Review	Total Contract Dollars	African American Dollars	AA Percentage 3% GOAL
FY2010	\$89,561,668	\$4,230,479	5%
1st Qtr FY11	\$3,190,214	\$80,864	3%
2ndQtrFY11	\$2,677,018	\$165,262	6%
3rdQtrFY11	\$6,653,139	\$6,125	0%
4thQtrFY11	\$5,131,000	\$46,455	1%
FY2011	\$17,651,371	\$298,706	2%



4thQtrFY11

FY  
STATUS

**GOAL #6 – Promote Good Stewardship**

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

Lead  
Capital

**ACTION PLAN**

- **Actions Completed**

- ✓ MBE Advisory Board Meeting
- ✓ Turner School of Construction Management
- ✓ Triad Coalition Minority Construction & Supplier Outreach Event
- ✓ UNC-CH Bell Tower Year End Review

- **Actions Planned**

Continue –

- Educate African American firms on the process
- Encourage African American firms to bid university projects
- Promote mentor-protégé/partnerships/joint venture relationships between African American/other minority/non-minority firms
- Work with GCs/agencies/organizations to identify firms and “best practices” for increasing African American participation on public/private sector projects

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

GOAL #6 – Promote Good Stewardship

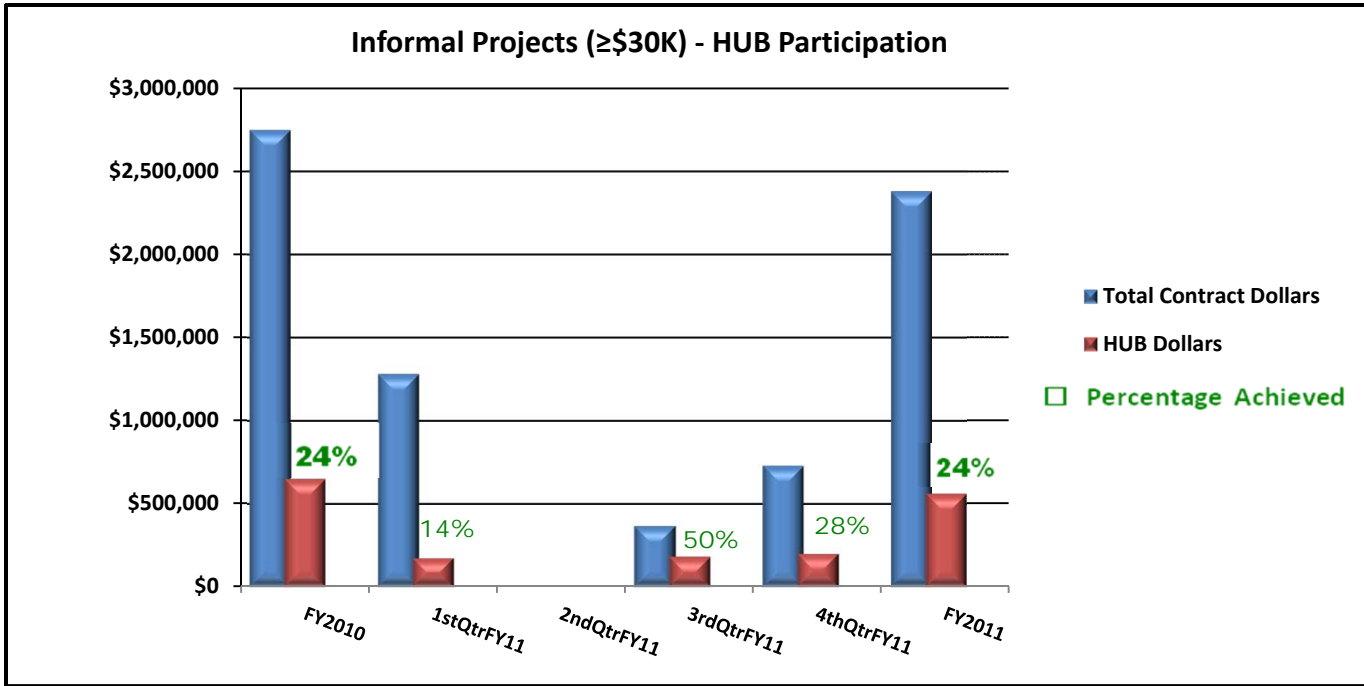
Strategy 6.5 Improve Historically Underutilized Business (HUB) Participation  
 Objective 6.5.3 13% overall HUB participation on Informal contracts \$30,000 and above

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

Balanced Scorecard Category: Internal Business Process

Lead  
Capital

Strategic Review	Total Contract Dollars	HUB Dollars	HUB Dollars Percentage 13% GOAL
FY2010	\$2,751,672	\$652,717	24%
1stQtrFY11	\$1,282,661	\$176,569	14%
2ndQtrFY11	No Data Reported		
3rdQtrFY11	\$367,733	\$184,118	50%
4thQtrFY11	\$731,566	\$202,619	28%
FY2011	\$2,381,960	\$563,306	24%



4thQtrFY11

FY  
STATUS

**GOAL #6 – Promote Good Stewardship**

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

**ACTION PLAN**

- **Actions to Continue**
  - Encourage/Invite HUB firms to bid Informal Projects
  - Work with Design Services, Materials Management, and other campus organizations to
    - Identify HUB firms pursuing work on UNC Charlotte campus
    - Assist HUB firms working on UNC Charlotte
  - Educate business community on the process
  - Provide project/event information to the public
  - Community outreach efforts

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GOAL # 6 – Promote Good Stewardship

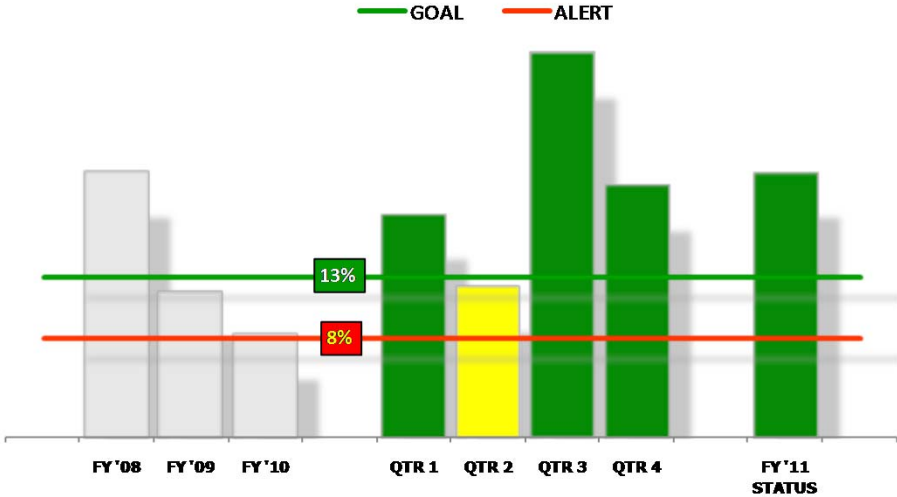
Strategy 6.5 Improve Historically Underutilized Business Participation  
 Objective 6.5.4 **13% overall HUB participation on informal projects below \$30,000 including 3% African American**

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

Balanced Scorecard Category: Internal Business Process

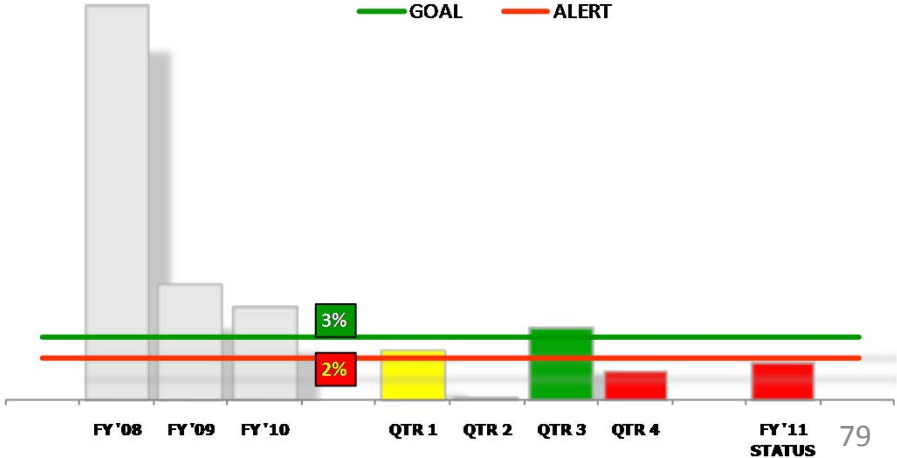
13% overall HUB participation on informal projects below \$30,000 - 6.5.4

QUARTERLY REVIEW	Value of Contracts under 30K	H.U.B. Contribution	HUB Total
FY '08	\$ 2,861,776	\$ 608,415	21.3%
FY '09	\$ 1,404,456	\$ 163,049	11.6%
FY '10	\$ 2,626,647	\$ 214,381	8.2%
QTR 1	\$ 684,520	\$ 122,224	17.9%
QTR 2	\$ 1,400,523	\$ 167,415	12.0%
QTR 3	\$ 1,839,059	\$ 567,486	30.9%
QTR 4	\$ 2,320,854	\$ 467,483	20.1%
FY '11 STATUS	\$ 6,244,956	\$ 1,324,607	21.2%



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

QUARTERLY REVIEW	Value of Contracts under 30K	African Am. Contribution	African Am. Total
FY '08	\$ 2,861,776	\$ 530,550	18.5%
FY '09	\$ 1,404,456	\$ 75,961	5.4%
FY '10	\$ 2,626,647	\$ 113,196	4.3%
QTR 1	\$ 684,520	\$ 15,750	2.3%
QTR 2	\$ 1,400,523	\$ 625	0.0%
QTR 3	\$ 1,839,059	\$ 61,002	3.3%
QTR 4	\$ 2,320,854	\$ 29,699	1.3%
FY '11 STATUS	\$ 6,244,956	\$ 107,076	1.7%



**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**

**6.5.3 - Actions Completed:**

**6.5.4 - Actions Planned:**

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





# Balance Score Card

## DISCUSSION

### FINANCIAL PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
	Manage Budget	6.1.1	Balanced Budget @ End of Year	100%	100%	Annual FY 10			Annual FY 11
	Maximize Revenue Streams	6.1.2	Increase Grants/Supplemental Funding	25%	\$78K	Annual FY 11			Annual FY 11
	Promote fiscal responsibility	6.1.3	Admin Cost/GSF +/-5% of APPA Avg for Peer Inst.	" +/-5%"	Awaiting APPA 2010 Survey Results				?
		6.1.4	Custodial Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"	Awaiting APPA 2010 Survey Results				
		6.1.5	Maint Cost/GSF +/- 5% of APPA Avg for Peer Inst	" +/-5%"	Awaiting APPA 2010 Survey Results				
		6.1.6	Landscape Cost/GSF +/-5% of APPA Avg for Peer Inst	" +/-5%"	Awaiting APPA 2010 Survey Results				
<b>Financial</b> <i>To financially sustain our mission, what must we focus on?</i>		6.1.7	Exceed Labor Services Payroll requirements by 10%	\$400,000/qtr	No data				
		Sustainable Practices	6.2.1	C&D Recycling - Informal Projects	50%	32%			
			6.2.2	C&D Recycling Capital Projects	50%	85%			
			6.2.3	Increase % Solid Waste Recycled (Baseline 2007)	5% (25.27%)	41%			
			6.2.4	Implement 50% of each 2008 Sustainability goals	50%	66%			
		Conserve Natural Resources	6.3.1	Energy Usage by 2015	-30%				
			6.3.2	Water Usage by 2010	-20% or 43 Gal/GSF				
		Improve HUB Participation	6.5.1	12% HUB participation on 80% of Capital Projects	80%	67%			
			6.5.2	3% African American Participation on Capital Projects	3%	2%			
			6.5.3	13% HUB participation on Informal Proj \$30K and above	13%	24%			
	6.5.4		13% HUB for Informal Proj below \$30,000 inc. 3% AA	13%/3%	21.2%/1.7%				
	6.5.5		Combined with 6.5.4						



UNC CHARLOTTE

# **Balance Score Card**

## **INTERNAL PROCESSES**

### **Perspective**

## **Strategic Objectives:**

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

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Lead  
F. O.

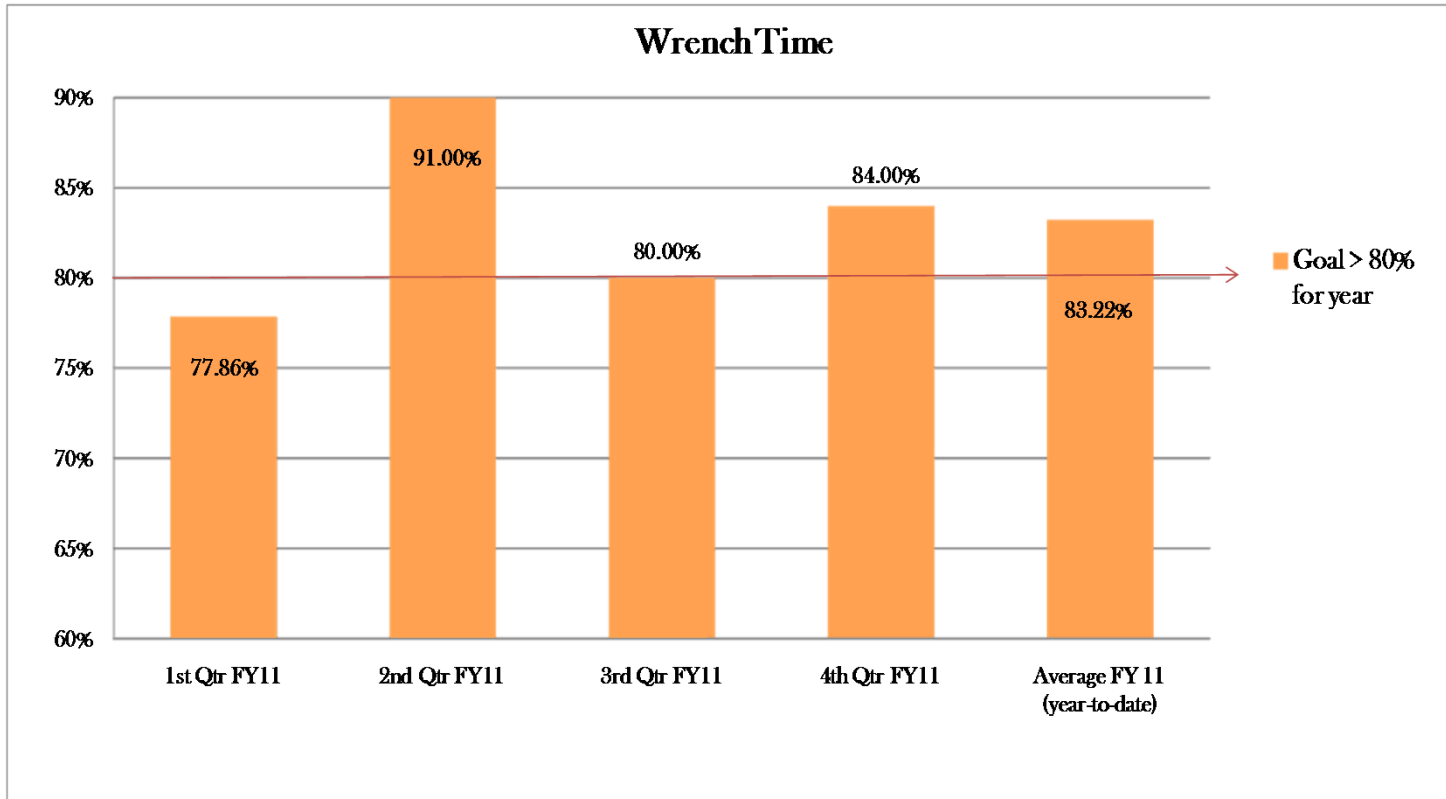
**GOAL #1 – Improve maintenance and operations of the Campus**

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

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

**Goal:** Greater than 80% for the year

**Balanced Scorecard Category:** Internal Business Process



STATUS

**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

- Actions Complete
  - 1 – Continued improvement of accounting practices for time applied to WR’s.
  - 2 – Continued development of the PM program.
  
- Actions Planned
  - 1 – Continue to stress reporting and recording of employee’s time.
    - a) Meet with shop supervisor and PA’s to review
    - b) Stress importance with all employees.

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
F. O.

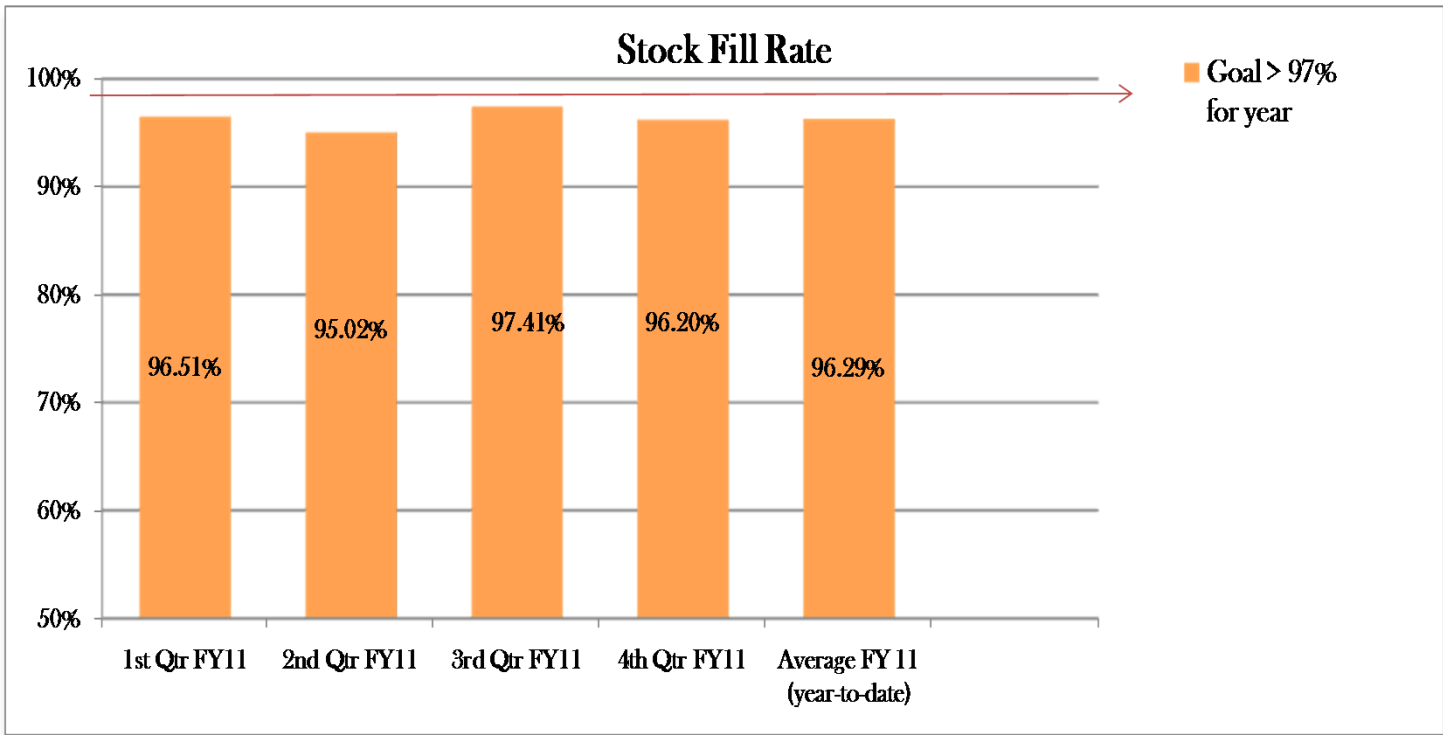
**GOAL #1 – Improve maintenance and operations of the Campus**

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

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

**Goal:** Greater than 97%

**Balanced Scorecard Category:** Internal Business Process



STATUS

**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

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

**Facilities Management Strategic Planning Session – Fourth Quarter FY 2011**

Lead  
F. O.

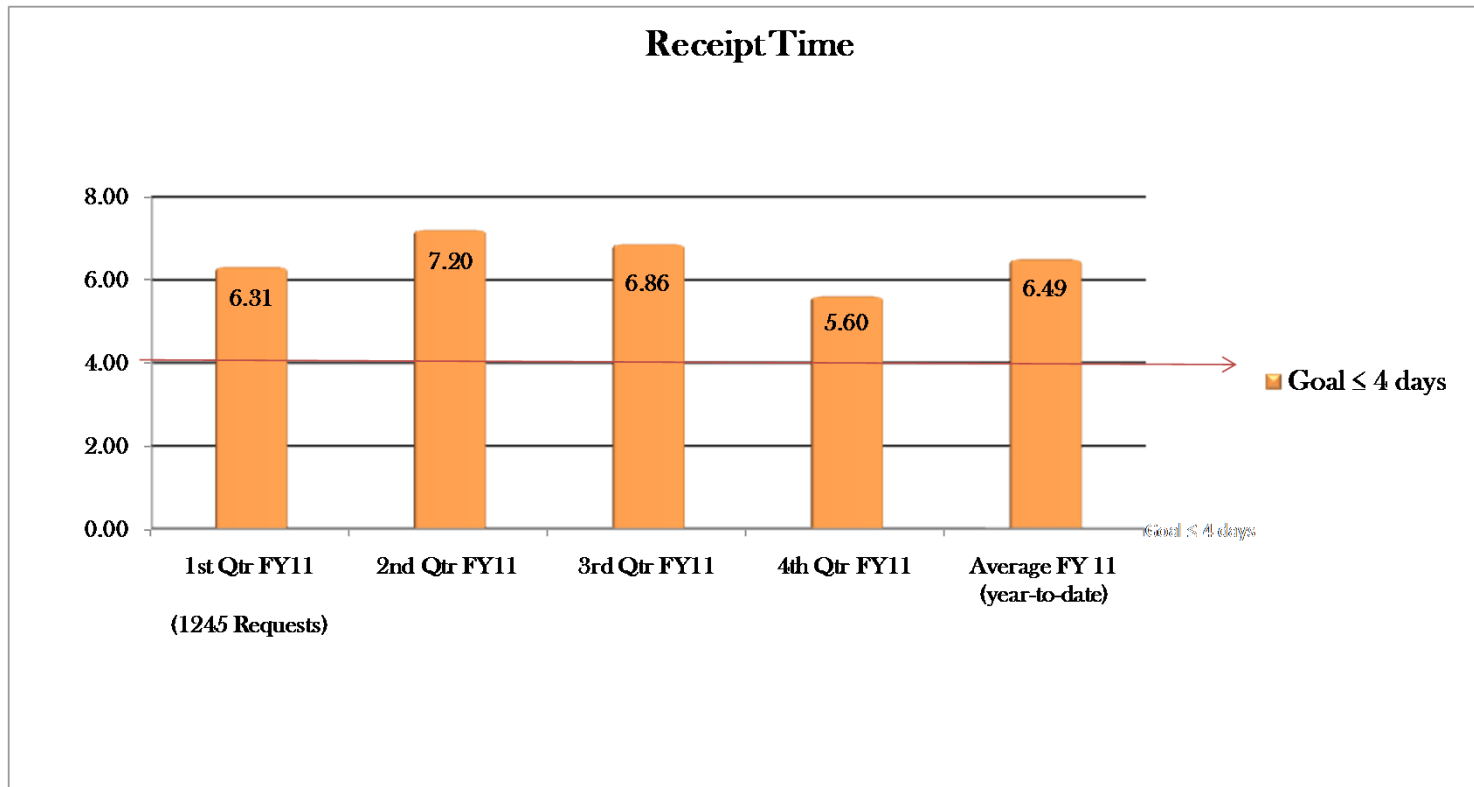
**GOAL #1 – Improve maintenance and operations of the Campus**

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

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

**Goal:** Less than 4 days

**Balanced Scorecard Category:** Internal Business Process



STATUS

**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

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



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Lead  
F. O.

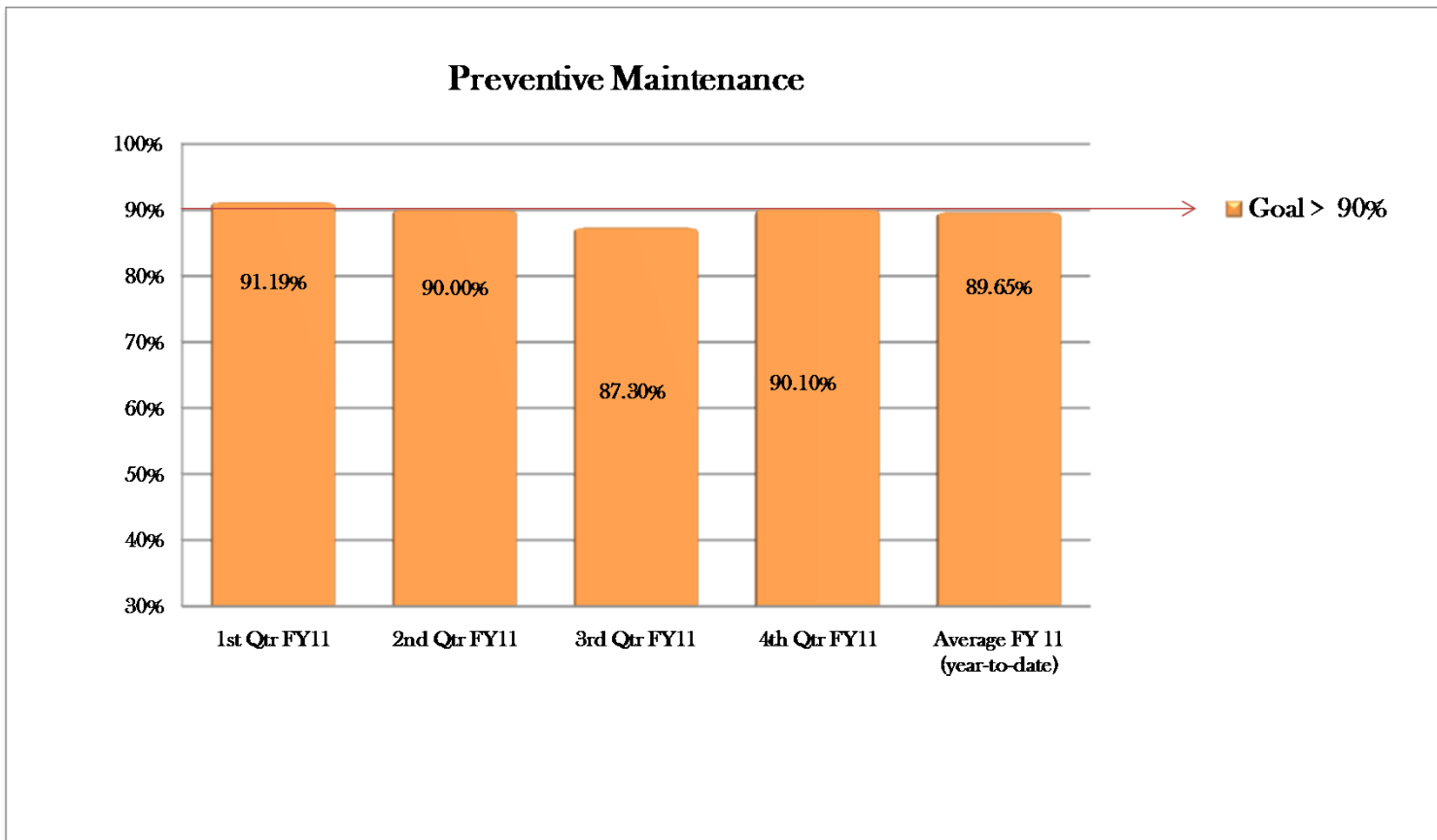
GOAL #1 – Improve maintenance and operations of the Campus

Strategy: 1.5 Improve Reliability  
Objective: 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90% from 87% last year.

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

Goal: Greater than 90%

Balanced Scorecard Category: Internal Business Process



STATUS

**GOAL #1 – Improve Facilities Operations**

**Strategy:** 1.5 Improve Reliability  
**Objective:** 1.5.1 Improve Completion of Preventative Maintenance Work Requests to over 90%

Lead  
F. O.

**ACTION PLAN**

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
F. O.

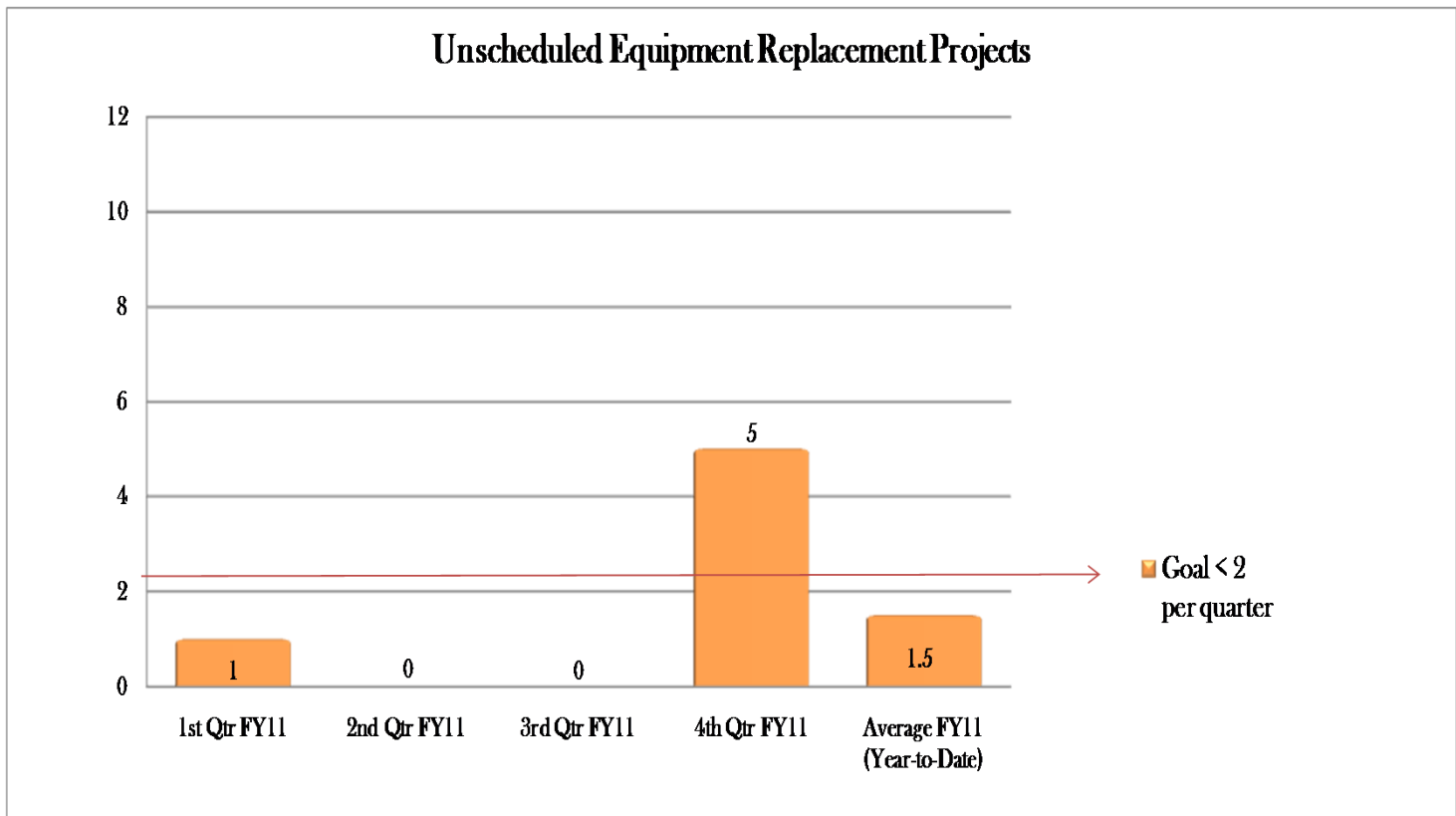
**GOAL #1 – Improve maintenance and operations of the Campus**

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

**Measure:** Number of Unscheduled Equipment Replacement Projects in Quarter

**Goal:** Less than 8 per year or 2 per quarter

**Balanced Scorecard Category:** Internal Business Process



STATUS

**GOAL #1 – Improve Facilities Operations**

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

Lead  
F. O.

**ACTION PLAN**

- Actions Complete
  - 1 – Continued adding equipment to PM program.
  
- Actions Planned
  - 1 – Continue expansion of PM Program.
  - 2 – Continue expansion of predictive maintenance program.

# Facilities Information Systems



# FM 5YP Prioritized Projects – FY11

1. Capital Renewal/Deferred Maintenance (CRDM) Process Reengineering
2. Enterprise Data Assistant (EDA) Project for Recycling
3. Enterprise Data Assistant (EDA) Project for FO-WR
4. ARCHIBUS Web Central Space Audit
5. Tridium Energy Management –Inventory and Energy Reporting
6. ARCHIBUS Key Management – Phase One & Two
7. ARCHIBUS Capital Financial Management



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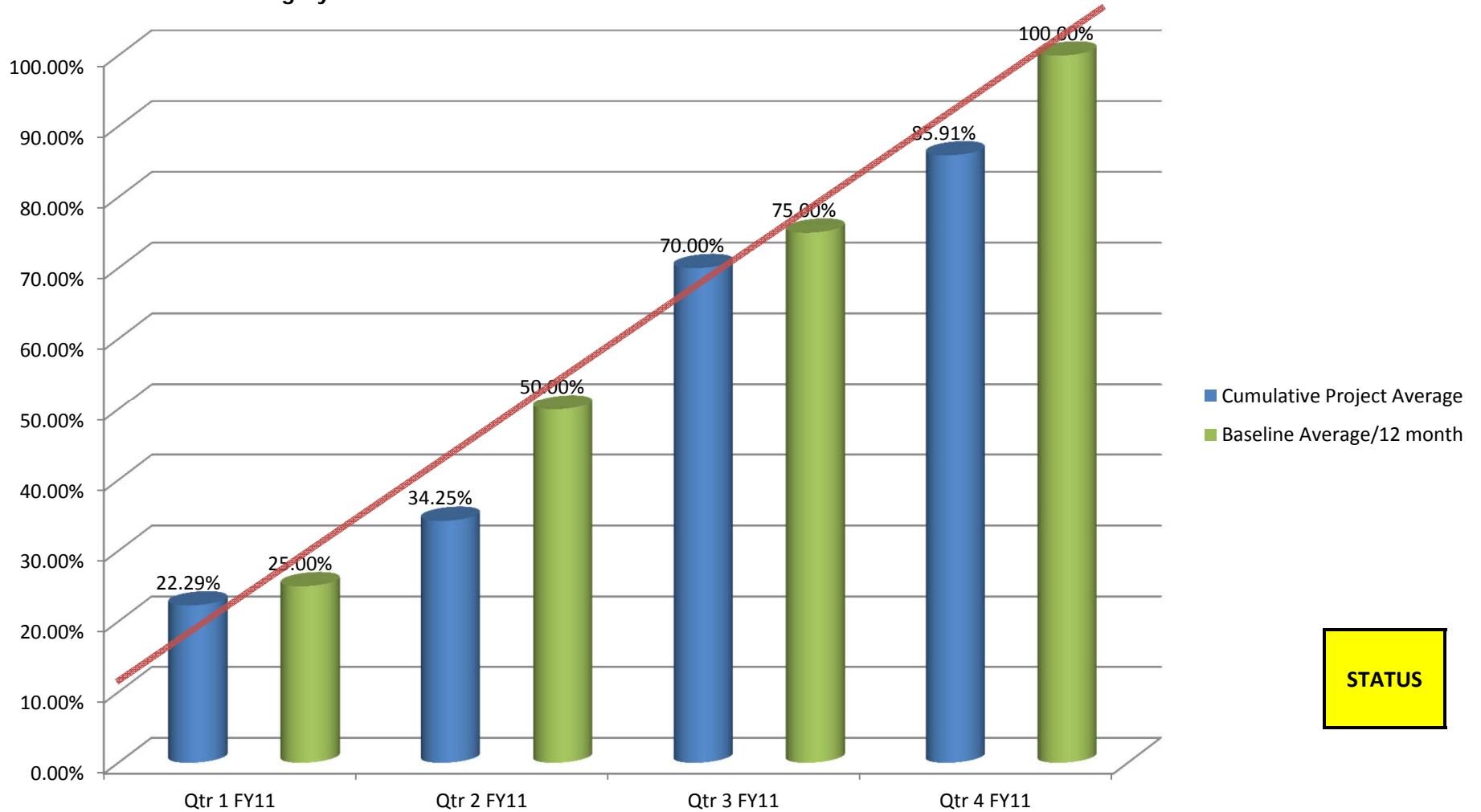
Lead  
FIS

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

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

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

Balanced Scorecard Category: Internal Processes

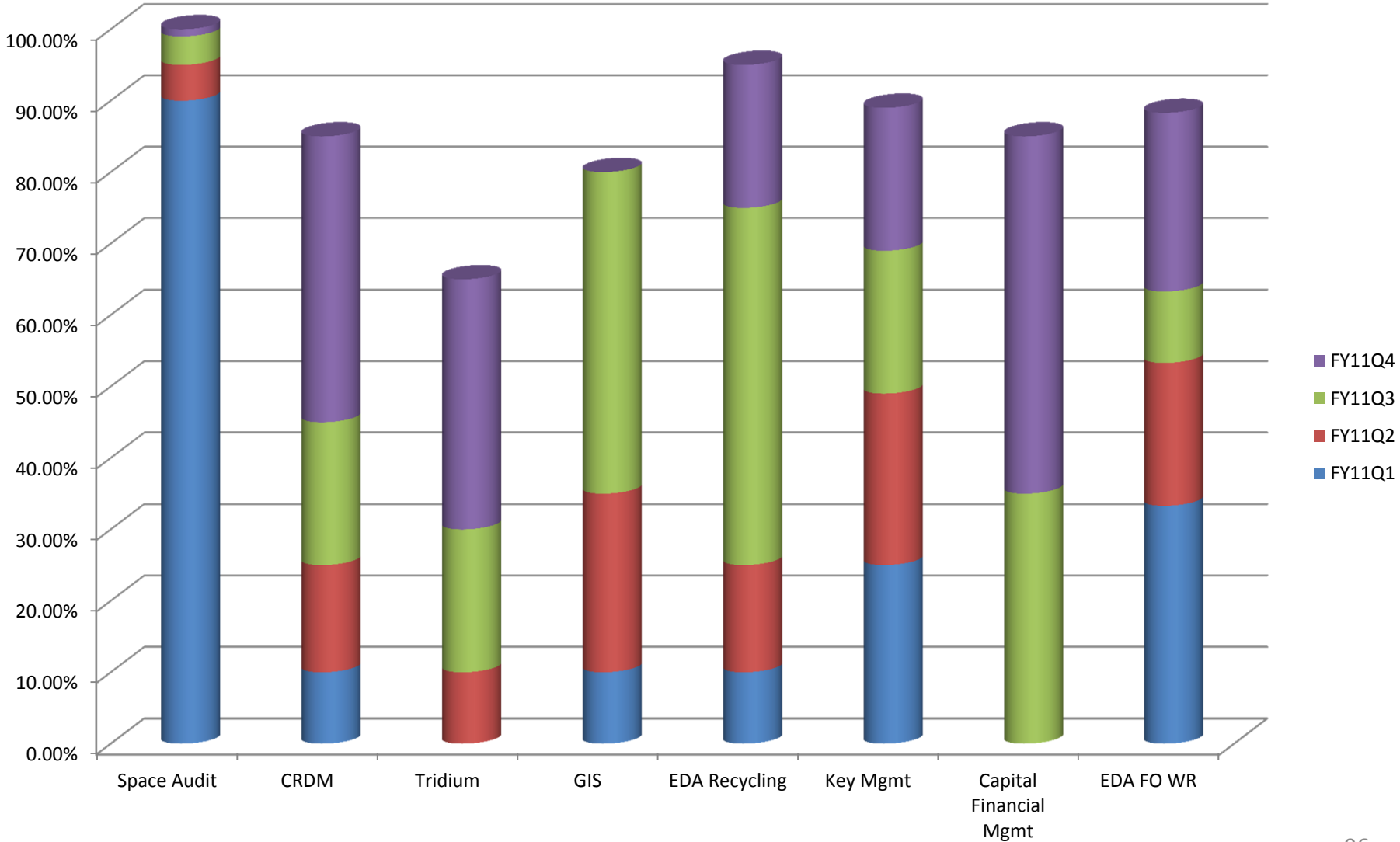


STATUS

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

Lead  
FIS





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

Lead  
FIS

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

**ACTION PLAN**

**Actions Completed:**

1. Enterprise Data Assistant (EDA) pilot began for Recycling. FO WR development completed.
2. CRDM Development Phase completed; first phase of User Testing completed and requested changes are completed. Phase one pilot scheduled for Sept/Oct.
3. BAS/Tridium – Dashboard training completed. BAS Inventory, issues list completed and is now in ARCHIBUS EQ inventory
4. Finalizing development issues and bugs identified in phase one for ARCHIBUS Capital Financial Management. Go Live is Aug 8th. Final Training session scheduled for Aug 15th
5. Key Management Phase 2 Requirements completed - Development Underway.

**Actions Planned:**

1. Finalize close out for CRDM and Capital Financial Mgmt
2. Finalize close out for Capital Funds Mgmt
3. Finalize Pilot for Key Mgmt Phase (Customer Key Form)
4. EDA Pilot with Zone 2
5. Collect results of Recycling EDA pilot
6. Begin FY12-13 Projects

# Facilities Technology Steering Committee – Priorities for FY12-13

Number	Title	Start	End
1	Archibus FO Updates (Includes EDA Pilot)	Sept 2011	Dec 2011
2	Banner/Archibus Reports	Jul 2011	Jul 2012
3	BAS Alarming	Jun 2011	Dec 2011
4	Archibus Cleanup	Oct 2011	Dec 2011
5	Archibus Training Program Improvements	Oct 2011	May 2012
6	FO Work Request Process Improvement	TBD - FY12 - FY13	TBD - FY12 - FY13
7	FO Equipment Management Process Improvement	TBD - FY12 - FY13	TBD - FY12 - FY13
8	FO Preventive Maintenance Process Improvement	TBD - FY12 - FY13	TBD - FY12 - FY13
9	FCAP - Archibus Condition Assessment	TBD - FY12 - FY13	TBD - FY12 - FY13
10	Warehouse/SDI Process Improvement	TBD - FY12 - FY13	TBD - FY12 - FY13

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

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

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



Status

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

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

Lead: **Architectural Planning Dept**



Status

**Objective 3.2.1**

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

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

Lead: **Architectural Planning Dept**

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

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

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

Status

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

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

Lead: **Architectural Planning Dept**

Status

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

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

Measure: % of sections updated and posted.

Lead: “**Architectural Planning Dept**”

Status

#### **Strategy 3.7: Improve space utilization throughout the university.**

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

Measure: % Initial audits and updates completed.

Lead: “**Architectural Planning Dept**”

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
Architectural  
Planning

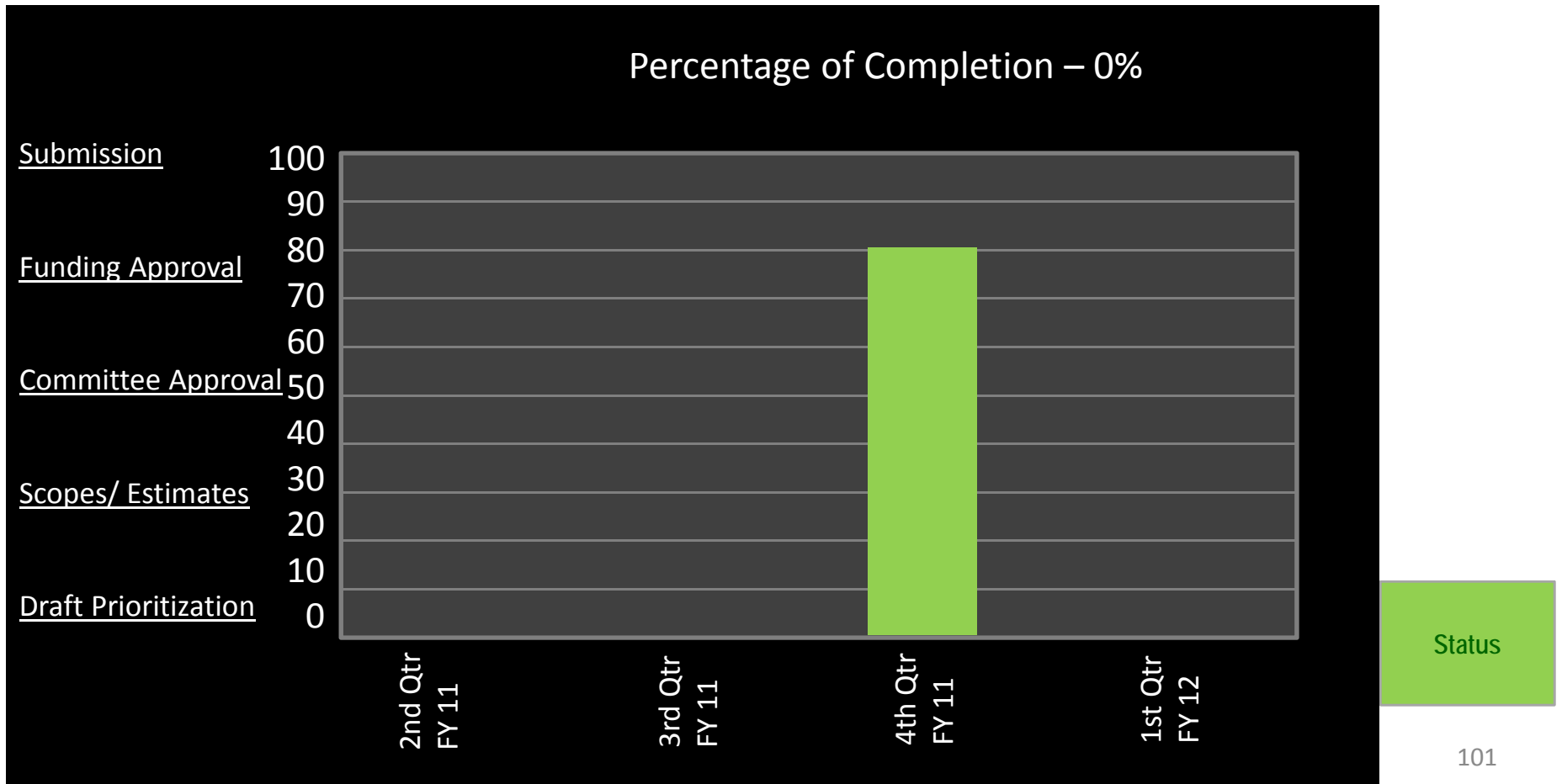
**GOAL #2 – Successfully Adapt Existing Facilities to Meet New Requirements**

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

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

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

**Balanced Scorecard Category:** Internal Business Process



## Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

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

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

**Balanced Scorecard Category:** Internal Business Process

### ACTION PLAN

- Actions Complete
  - Consolidated R & R List
  - List under review by M & O
  - Worked with FIS to develop CRDM in Archibus
  - Receive review by M & O
  
- Actions Planned:
  - Implementation of CRDM
  - Data entry of existing list
  - Prioritization
  - Prep for committee meetings/ funding meetings/ submission

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
Architectural  
Planning

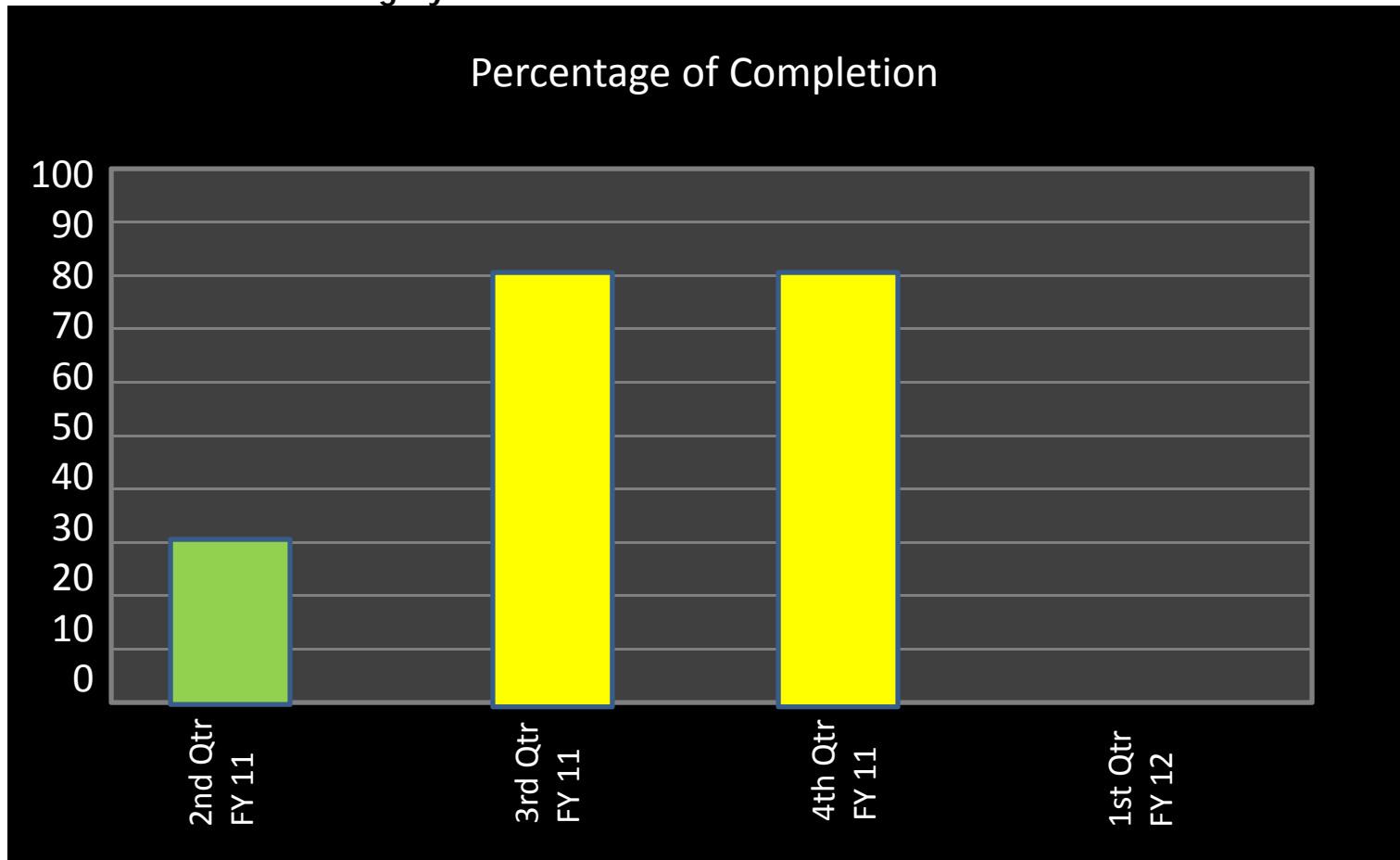
**GOAL #3 – Deliver New Facilities that Support the University’s Mission**

**Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements**

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

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

**Balanced Scorecard Category:** Internal Business Process



Status

## Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

#### Strategy 3.2 Improve the Six Year Plan for Appropriated Capital Improvements

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

### ACTION PLAN

#### Appropriated Projects

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

\* Pending AA review , changes, and approval

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



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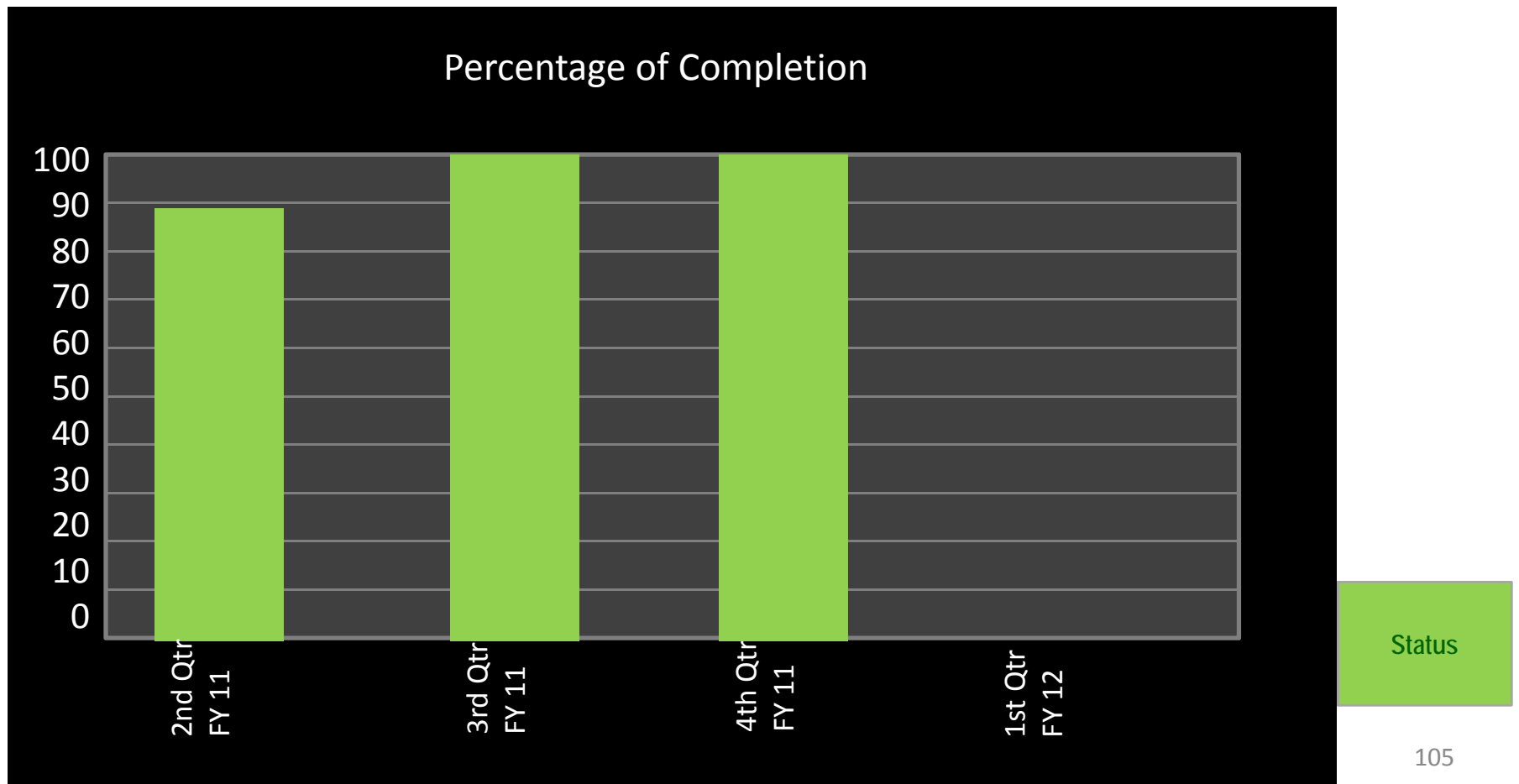
Lead  
Architectural  
Planning

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

Strategy 3.5: Improve Infrastructure improvement planning

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

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



## Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

#### Strategy 3.5: Improve Infrastructure improvement planning

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

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

**Balanced Scorecard Category:** Internal Business Process

### ACTION PLAN

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

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
Architectural  
Planning

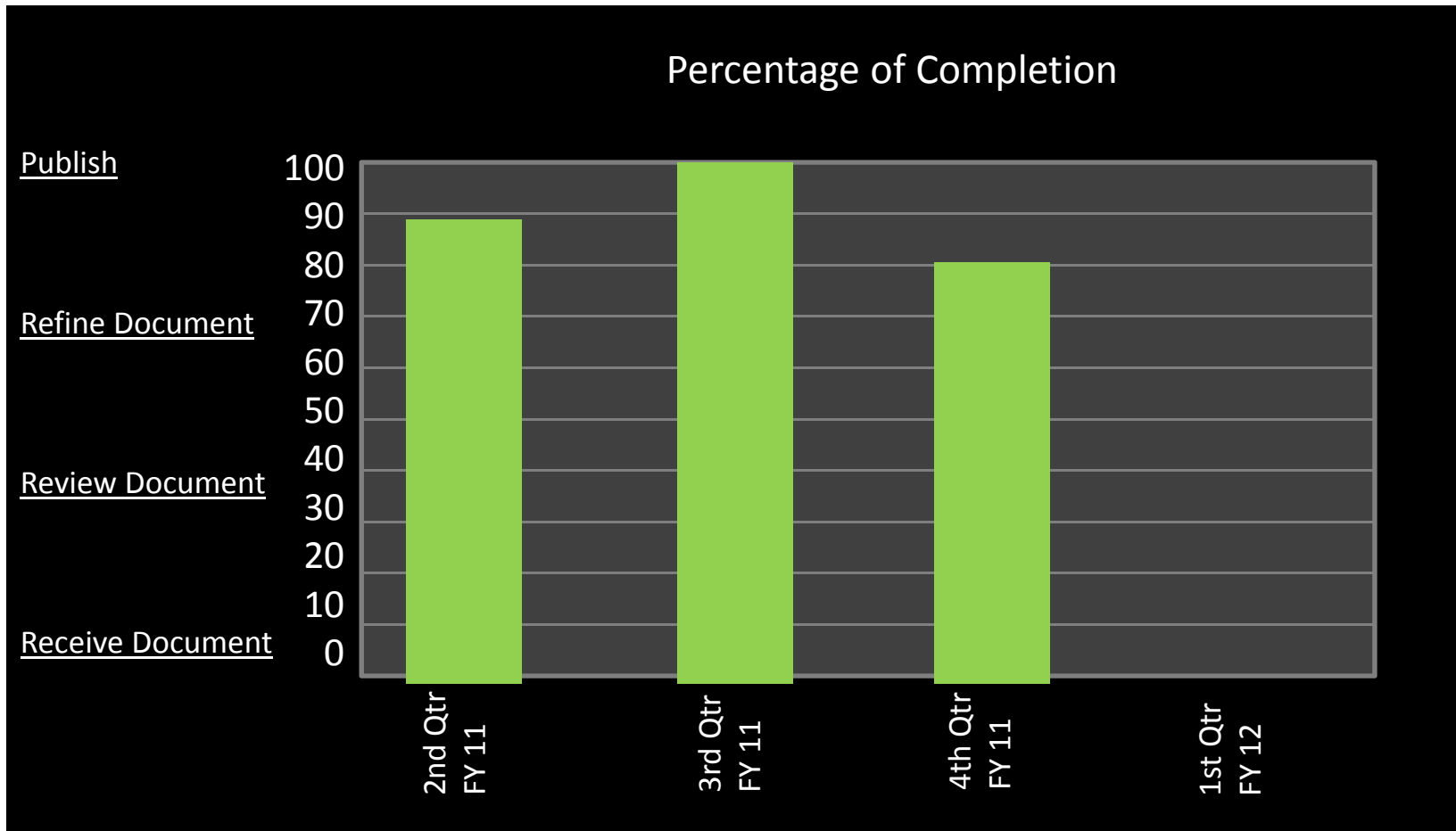
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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

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

Measure: % of sections updated and posted.

Balanced Scorecard Category: Internal Business Process



Status

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

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

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

**Measure:** % of sections updated and posted.

**Balanced Scorecard Category:** Internal Business Process

**ACTION PLAN**

- Actions Complete:
  - ASG has provided their “final” product
  - Architectural Planning Team has gone through entire document for corrections
  - Design manual has been posted
  - A meeting was held with the departments and sections for review distributed.
  
- Actions Planned:
  - Receive input from the Departments
  - Compile changes
  - Conduct quarterly updates

## Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

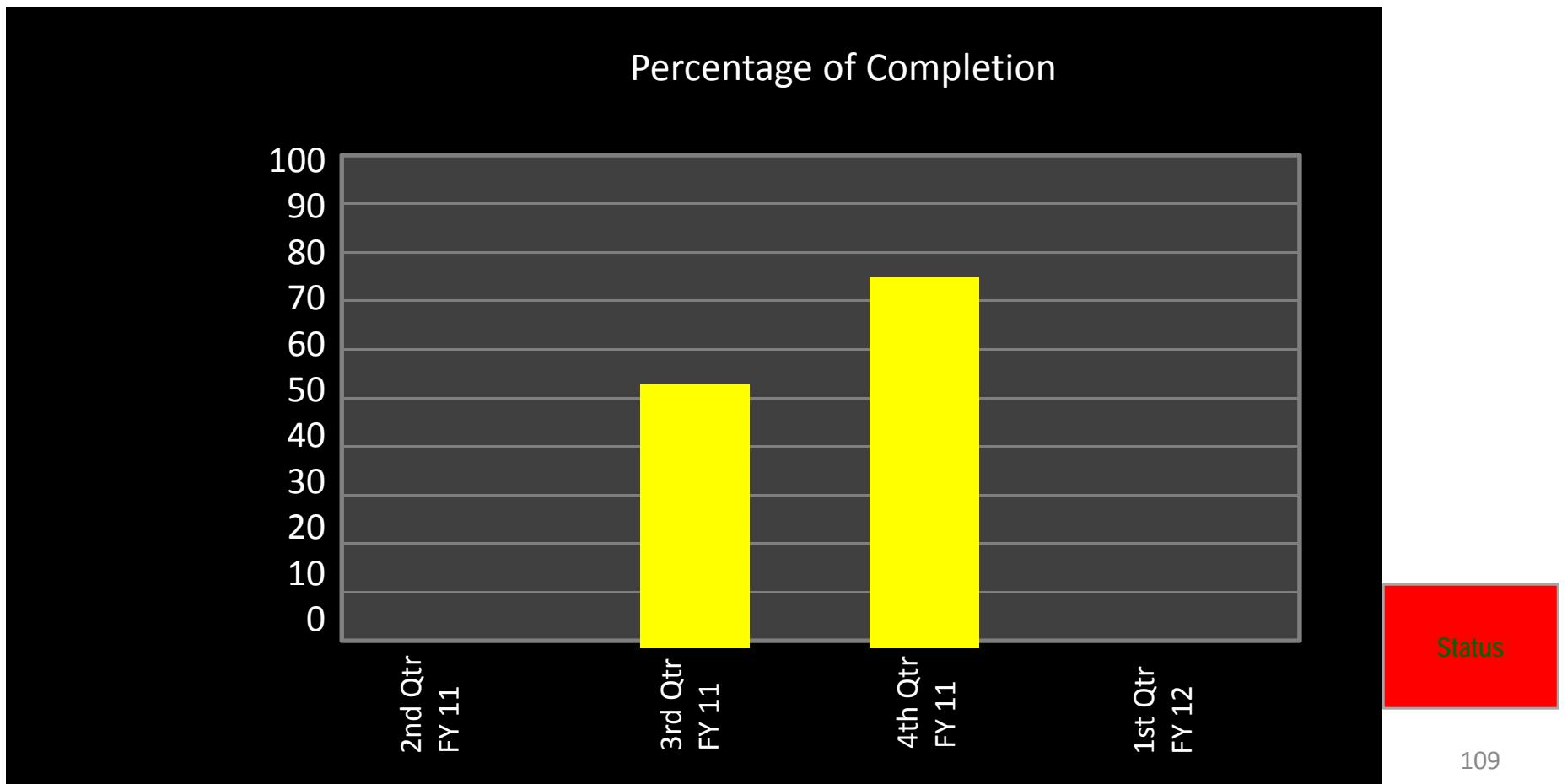
Lead  
Architectural  
Planning

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

#### Strategy 3.7: Improve space utilization throughout the university.

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

**Measure:** % Initial audits and updates completed.



## Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead  
Architectural  
Planning

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

#### Strategy 3.7: Improve space utilization throughout the university.

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

**Measure:** % Initial audits and updates completed.

**Balanced Scorecard Category:** Internal Business Process

### ACTION PLAN

- Actions Complete:
  - BA Audit 75% complete to date
  - AA Audit 75% complete to date
  
- Actions Planned:
  - AA complete NLT end of June, 2011 (Depends on AA)
  - BA completed NLT end of July, 2011
  - Remainder completed NLT Oct, 2011
  - Spot inspections/ checks completed NLT Dec 2011

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

Lead Capital

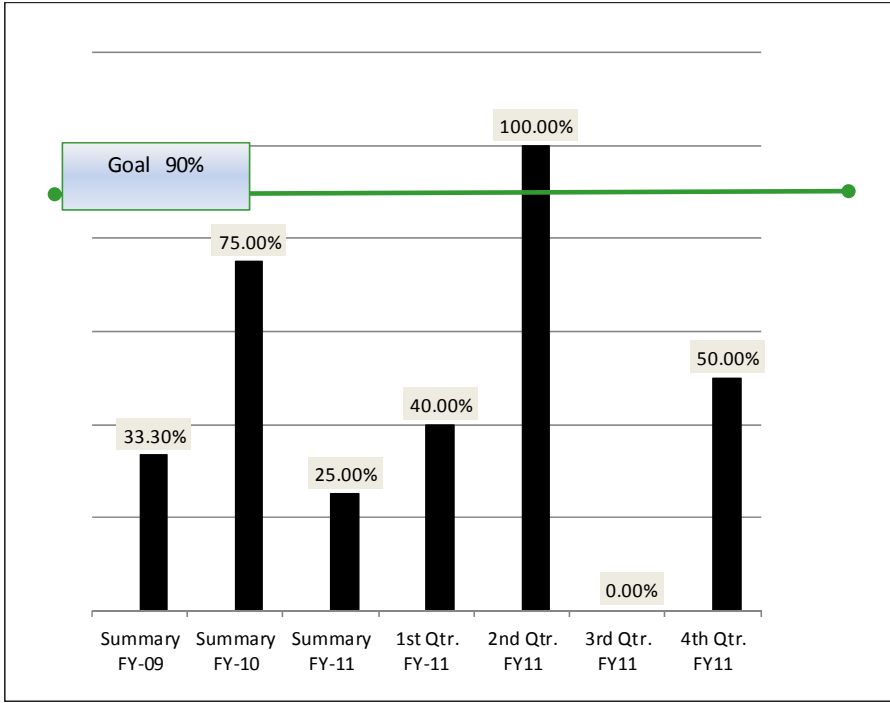
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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

Measure: Percentage of designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

STRATEGIC REVIEW by Fiscal Year (July-June)	No. of projects authorized in Capstat	Designer under contract within 120 days	Designer not under contract within 120 days	% Designers under contract w/in
Summary FY-09	9	3	4	33.30%
Summary FY-10	10	9	3	75.0%
Summary FY-11	11	2	6	25.0%
1st Qtr. FY-11	5	0	2	40.0%
2nd Qtr. FY-11	4	1	0	100.0%
3rd Qtr. FY-11	2	0	3	0.0%
4th Qtr. FY-11	0	1	1	50.00%



Objective for 4th Quarter is 50%  
 Year to date is 25%

Status

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

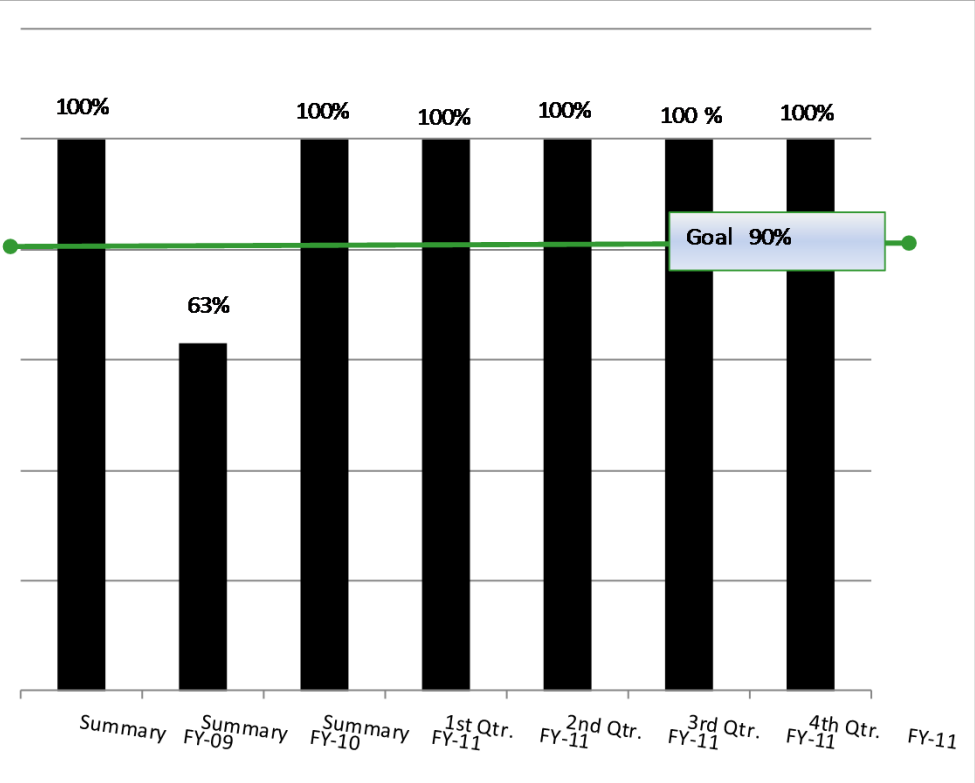
GOAL #3 – Deliver New Facilities that Support the University’s Mission

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 FY-09	4	0	100.00%
Summary FY-10	9	5	63.00%
Summary FY-11	6	0	100.00%
1st Qtr. FY-11	2	0	100.00%
2nd Qtr. FY-11	1	0	100.00%
3rd Qtr. FY-11	2	0	100.00%
4th Qtr. FY-11	1	0	100.00%



Objective for 4th Quarter is 100%  
 Year to date is 100%



Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

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

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

Balanced Scorecard Category: Financial Perspective

Projects	OC25	Initial Contract	Final/Current Contract	Percent Difference Between OC25 & Initial	Percent Difference Between Initial & Final Contract	Completed Within Design Budget (1=yes, 0=no)
Football/Sports	\$3,950,000	\$2,739,800	\$3,224,472	-30.6%	17.7%	0
Motorsports II	\$399,000	\$303,000	\$303,700	-24.1%	0.2%	0
Parking Deck I	\$1,701,000	\$1,044,000	\$802,869	-38.6%	-23.1%	1
Parking Deck J	\$2,211,057	\$946,200	\$0	-57.2%	0.0%	0
RDH Renovation	\$1,742,048	\$0	\$0	0.0%	0.0%	0
Res. Hall Ph. X	\$2,809,632	\$2,167,790	\$0	-22.8%	0.0%	0
Res. Hall Ph. XI	\$3,695,657	\$2,078,598	\$0	-43.8%	0.0%	0
Res. Hall Moore & Sanford	\$503,000	\$435,000	\$435,000	-13.5%	0.0%	1
Tennis Courts	\$292,972	\$275,000	\$275,000	-6.1%	0.0%	1
Heck Dam	\$190,000	\$185,650	\$0	-2.3%	0.0%	0
Demo Phase III	\$45,455	\$32,500	\$0	-28.5%	0.0%	0

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

Objective is 30%

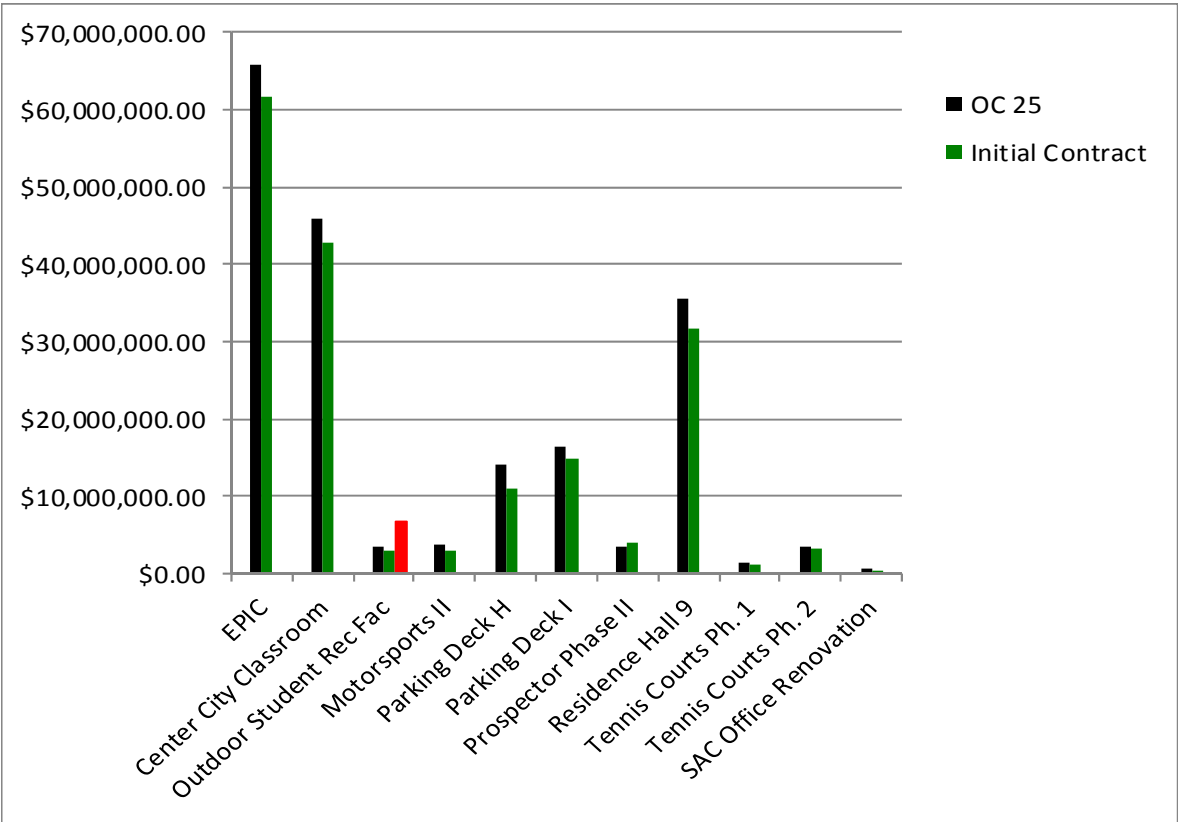
Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

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

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

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

**Balanced Scorecard Category:** Internal Business Process



Projects listed are not complete

Status

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



# Balance Score Card

## DISCUSSION

### INTERNAL PROCESSES PERSPECTIVE

Perspective	Strategic Objective	Goal	Lag Measures/Lead Measures	Target	Actual	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<b>Internal Processes</b> <i>To satisfy and delight our customers, which operational processes must we excel in?</i>	Labor Availability	1.1.1	Increase Wrench Time	>80%	No data				
	Logistics Efficiency	1.2.1	Stock Fill Rate	>97%	No data				
	Optimize Supply Chain	1.2.2	Non-stock cycle time (request to receipt time)	<4 days	No data				
	Improve Process Reliability	1.5.1	On-time Prev. Maintenance completion	> 90%	No data				
		1.5.2	Reduce Unscheduled equipment repl projects by 15%	<2	No data				
	Manage Technical Resources	2.1.1	Completion of FM 5-YR Tech. Plan by 2015	100%	85.9%				
	Master/Project Planning Process	2.3.1	80% of Existing Projects Documented and Input into the CRDM by July 2011. (updated Third Qtr FY11)	80%	80%				
		3.2.1	100% of Capital Projects on the Appropriated and Non-Appropriated Six Year Capital Improvements Plan approved and ready for submission to GA by Fall 2011	100%	80%				
		3.2.2	Projects on the Non-appropriated Six Year Plan have completed pre-programs	80%	removed				
		3.2.3	% Projects with completed OC-25s - Appropriated	75%					
		3.2.4	% Projects with completed OC-25s - Non-Approp.	75%					
		3.5.1	80% of Infrastructure Projects Integrated into Capital Construction Project Scopes	80%	100%				
		3.6.1	80% of Revisions Integrated into the Design and Construction Manual.	80%	80%				
		3.7.1	100% of Space Audits by Division; Documented and Updated into Archibus NLT December 2012.	100%	75%				
		Capital Project Administration	3.3.1	Designers Under Contract w/in 120 days of Posting in CAPSTAT	90% w/in 120	25%			
			3.3.2	90% of Designs Complete by Scheduled Comp. Date	90%	100%			
		3.3.3	90% of Designs w/in Design Budgeted Fee	90%	?				
		3.4.2	95% of Cap Prof completed w/in orig contract or GMP	95%	?				



UNC CHARLOTTE

# **Balance Score Card**

## **Learning & Growth**

### **Perspective**

## **Strategic Objectives:**

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

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

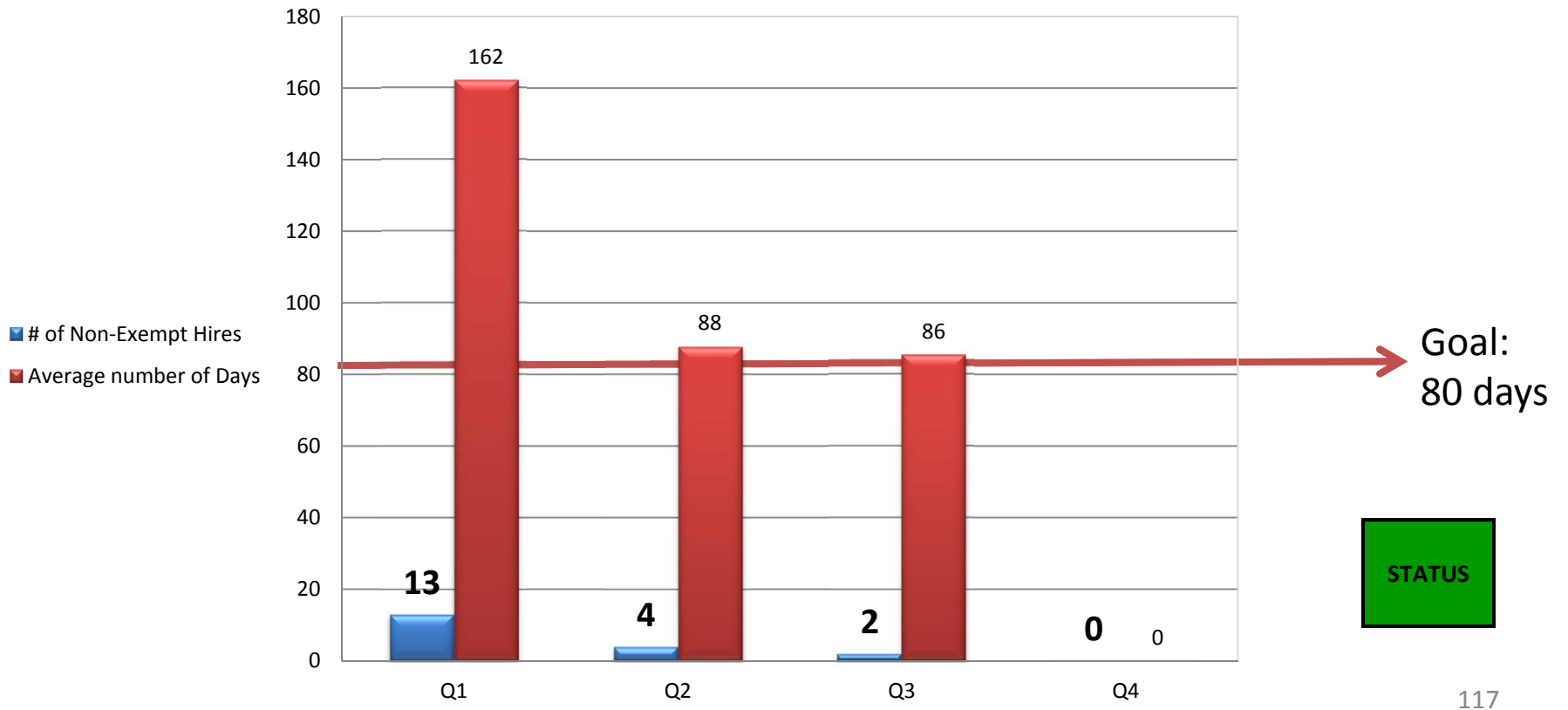
GOAL #5 – Develop a valued, well-trained, motivated and diverse workforce

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

Measure: Days needed to fill vacant position

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

### Average Number of Days to Fill Nonexempt (Hourly) Vacancies



Facilities Management Strategic Planning Session – 4th Quarter FY 2011

Lead  
FBO

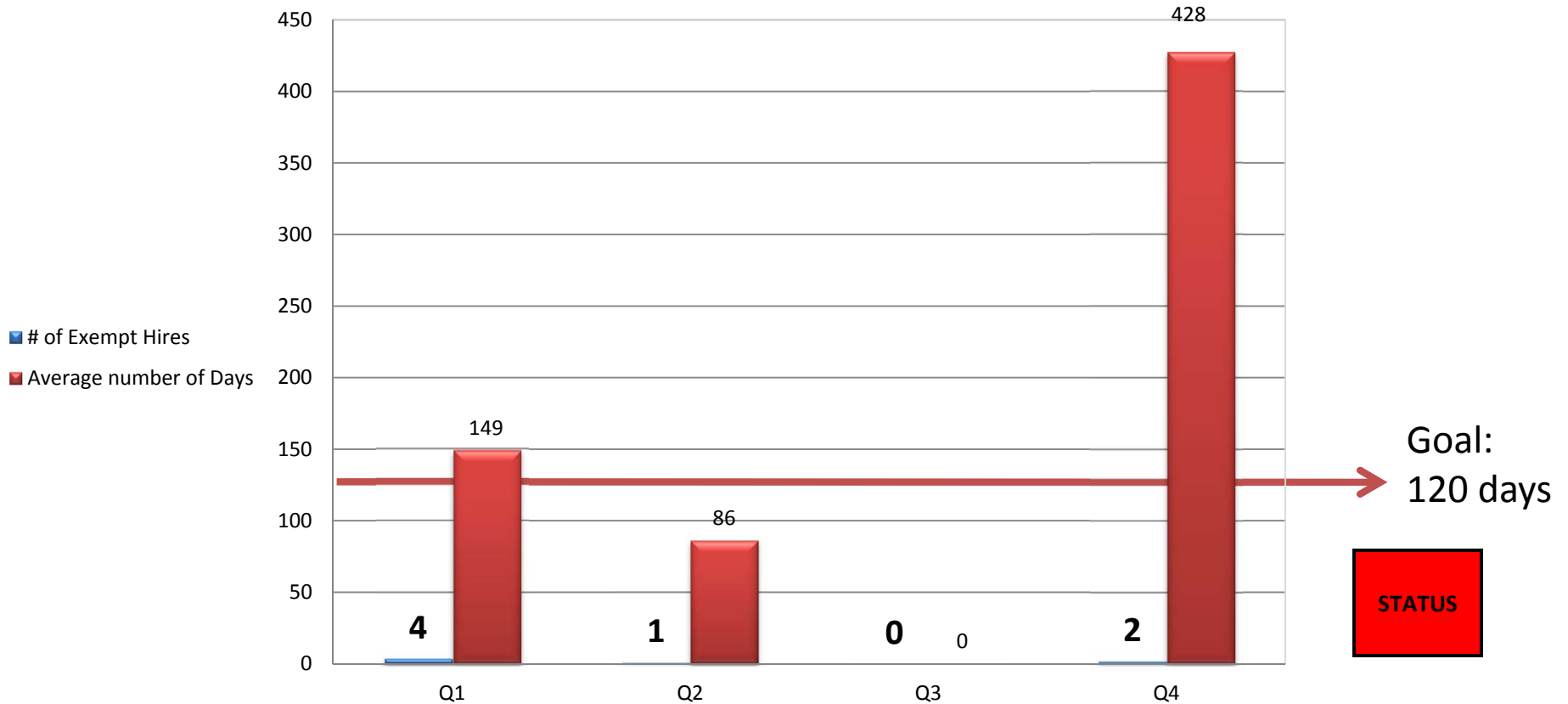
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Benchmark vacancy time of no longer than 120 calendar days - Exempt

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



## Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

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

<b>Strategy</b>	<b>5.1</b>	Recruit a talented and diverse workforce in a timely fashion
<b>Objective</b>	<b>5.1.1</b>	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
  - ✓ Revamped Hiring Process
  - ✓ Implemented new HRIS for FM HR
  - ✓ Reviewed new PeopleAdmin program.
- Actions Planned
  1. Work with Campus HR to ensure successful implementation on August 1<sup>st</sup>.

Facilities Management Strategic Planning Session - 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

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

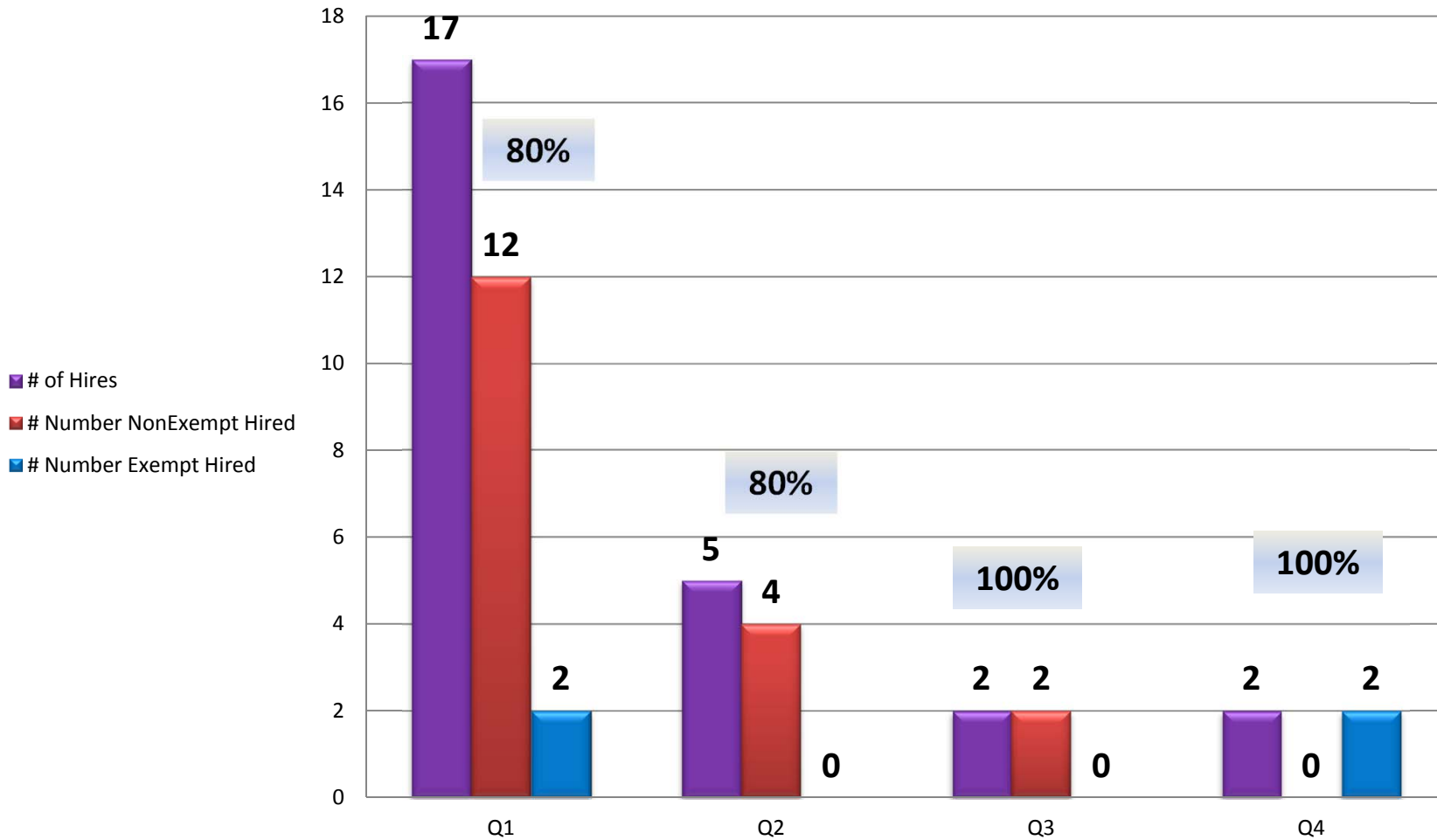
(22%)

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

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

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

Positions filled using Targeted Selection



STATUS



Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

**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
  
- 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 – 4<sup>th</sup> Quarter FY 2011

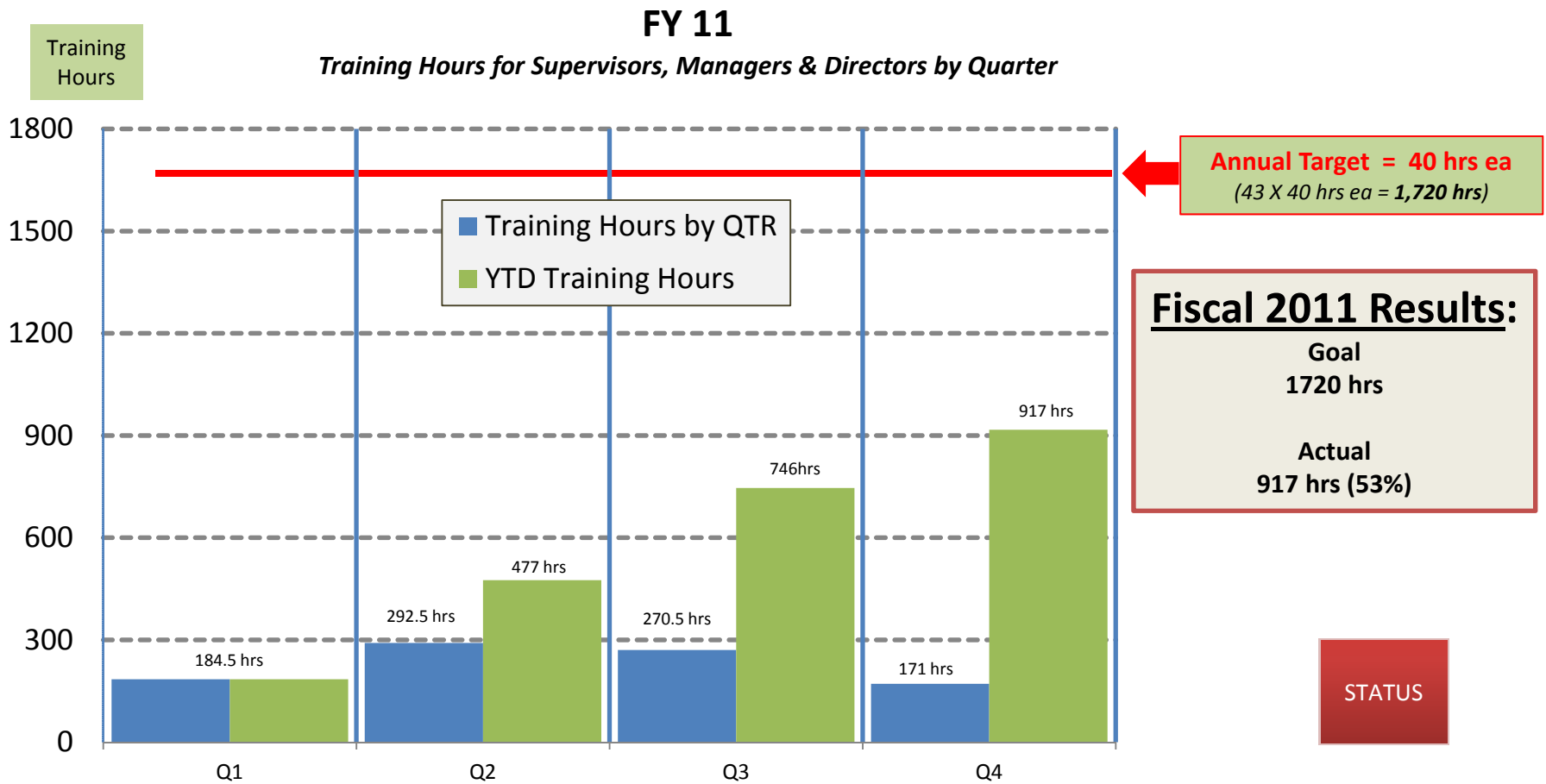
Lead  
FBO

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

**Strategy 5.2** Implement training system to enhance employee performance and provide career growth  
**Objective 5.2.1** 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**
  - ✓ Completed Electrician Matrix development
  
- **Actions Planned**
  1. Unveil Electrical Lab
  2. Continue matrix updates – HVAC underway
  3. Continued review of Leadership Development Matrix
  4. Develop compliance training and mission specific training metrics

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

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

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

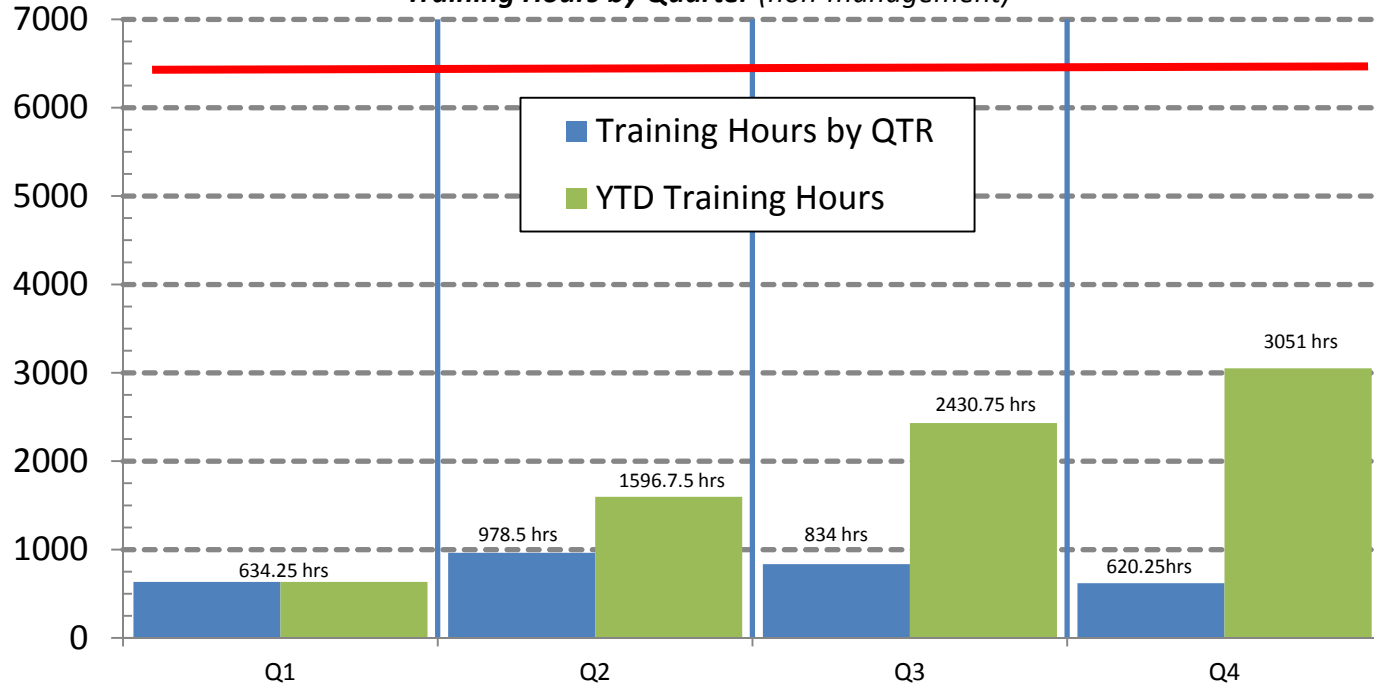
**Measure:** Average hours of training provided to or obtained by front line employees

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

Training  
Hours

**FY 11**

*Training Hours by Quarter (non-management)*



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

**Fiscal 2011 Results:**  
 Goal  
 6,460 hrs  
 Actual  
 3,051hrs (47%)

STATUS

## 2010~11 YTD Training Hours - Percentage of Yearly Target

(4th Quarter/YTD Standings)

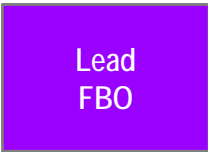
Unit/Zone	4 <sup>th</sup> Qtr	YTD	Unit/Zone	4 <sup>th</sup> Qtr	YTD
Design Services	5.3%	56%	Facilities Operations	45%	88%
Grounds	0%	4%	Zone 4	48%	51%
FIS	40%	88%	Central Operations	20%	61%
Steam Plant	80%	56%	Auto	91%	64%
Zone 7	103%	28%	Recycling	62%	77%
Capital Projects	21%	75%	Planning/Architectural	256%	392%
Housekeeping	29%	50%	Real Estate/Land Use	20%	155%
Lock Shop	14%	11%	Business Office	152%	92%
Zone 5	35%	20%	AVC Office	253%	178%
High Voltage & Fire Alarms	0%	32%			
Zone 1	45%	40%			
Zone 6	15%	28%			
Zone 2	0%	31%			

**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



**ACTION PLAN**

- Actions Complete
  
- Actions Planned
  1. Develop plan for new Lunch and Learn Series
  2. Develop case for an FM Computer Training Lab
  3. Continue development of training matrix for trades positions
  4. PC skills training for infrequent users in preparation for Web Time entry

Facilities Management Strategic Planning Session – 4<sup>th</sup> Quarter FY 2011

Lead  
FBO

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

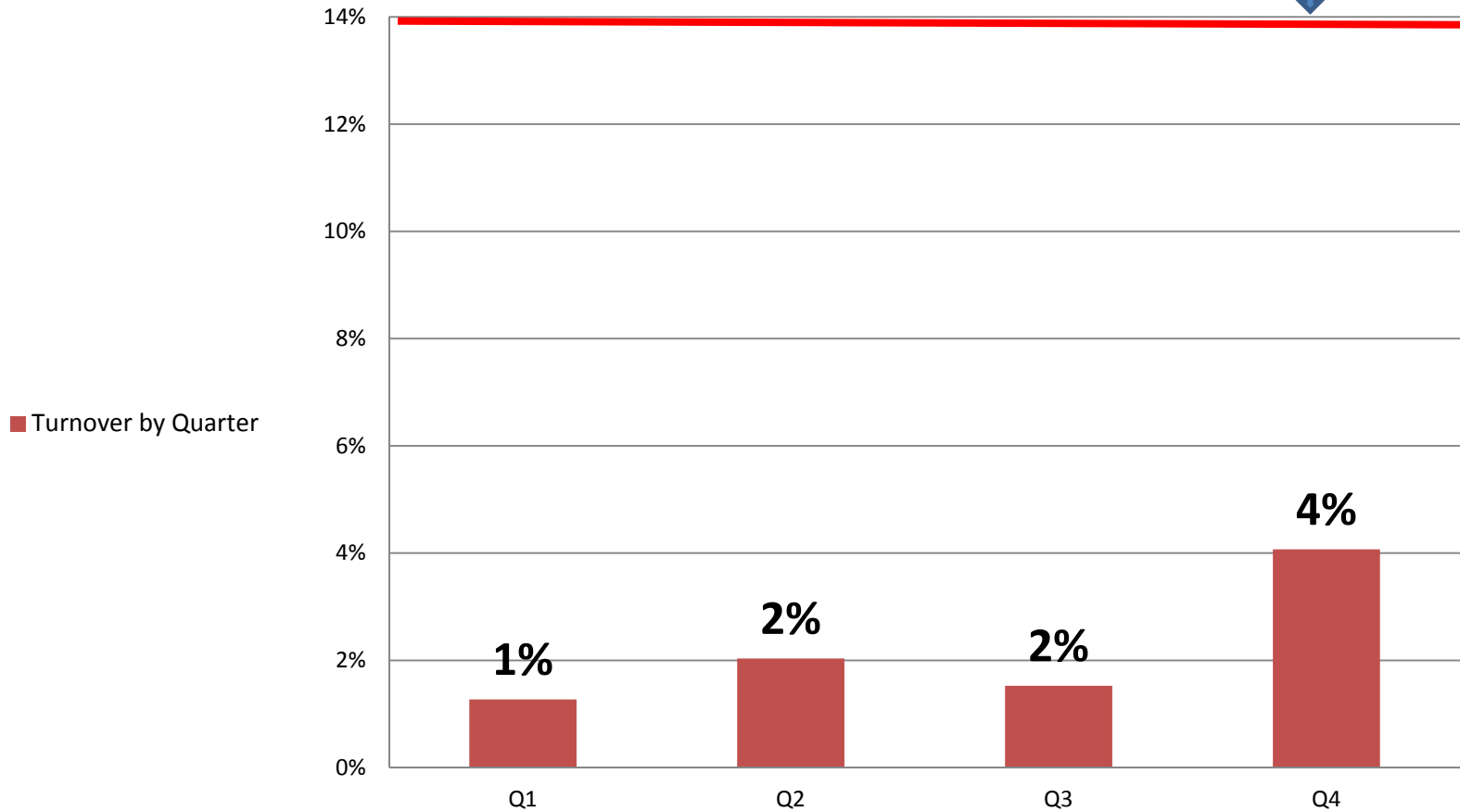
Strategy 5.3 Retain a Quality Workforce  
Objective 5.3.1 Maintain the Annual Employee Turn-over Rate to <14%

Measure: Annual Employee Turn-over Rate

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

Turnover by Quarter

Annual Target – 14%



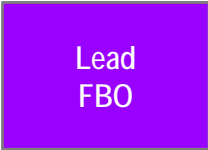
STATUS

**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



**ACTION PLAN**

- **Actions Complete**
  - ✓ Revamped employee exit interview process – web-based
  
- **Actions Planned**
  1. Develop succession plan for management



Facilities Management Strategic Planning Session – First Quarter FY 2011

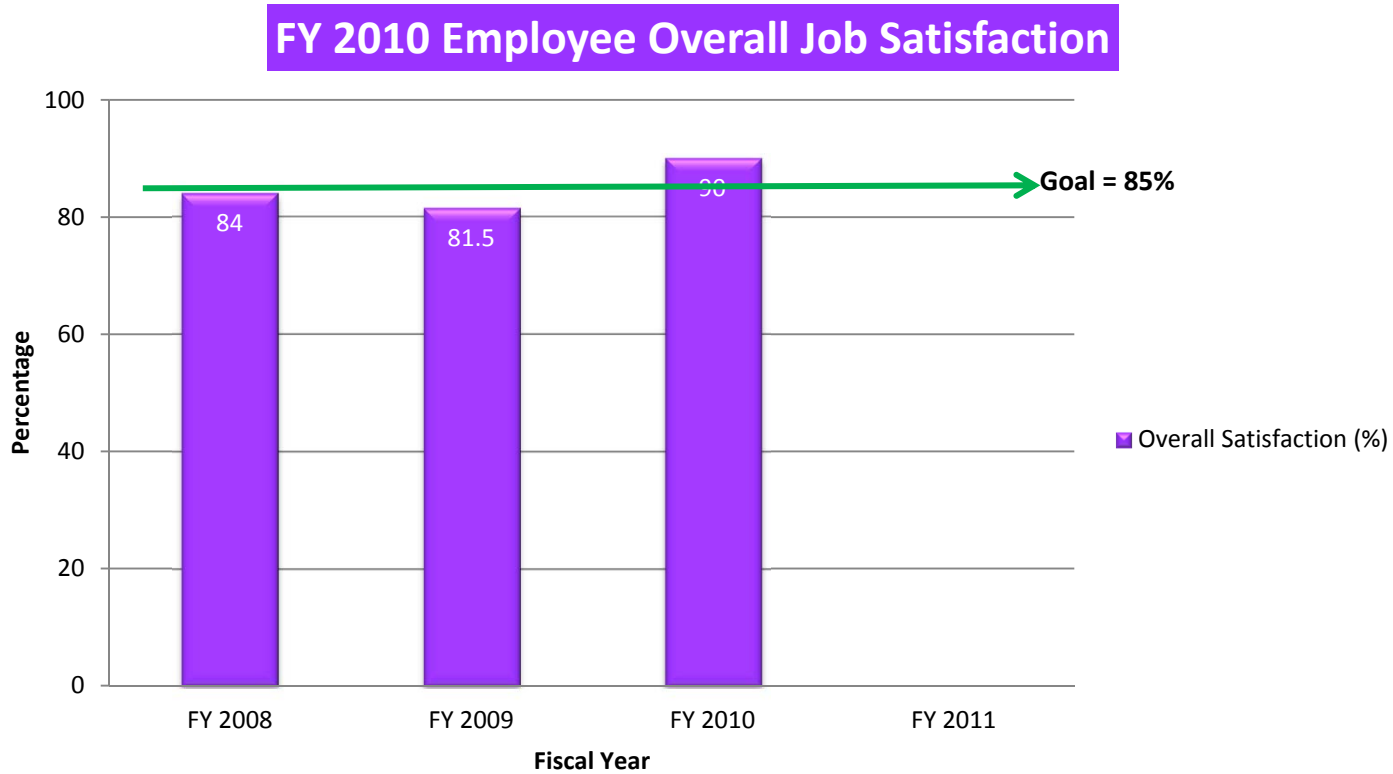
Lead  
FBO

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**
  - ✓ Reviewed initial survey requirements with Urban Institute – May 2011.
  
- **Actions Planned**
  1. Determine date for next survey
  2. Schedule next meeting with UI

Facilities Management Strategic Planning Session – Fourth Quarter FY 2011

GOAL #6 – Promote Good Stewardship

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

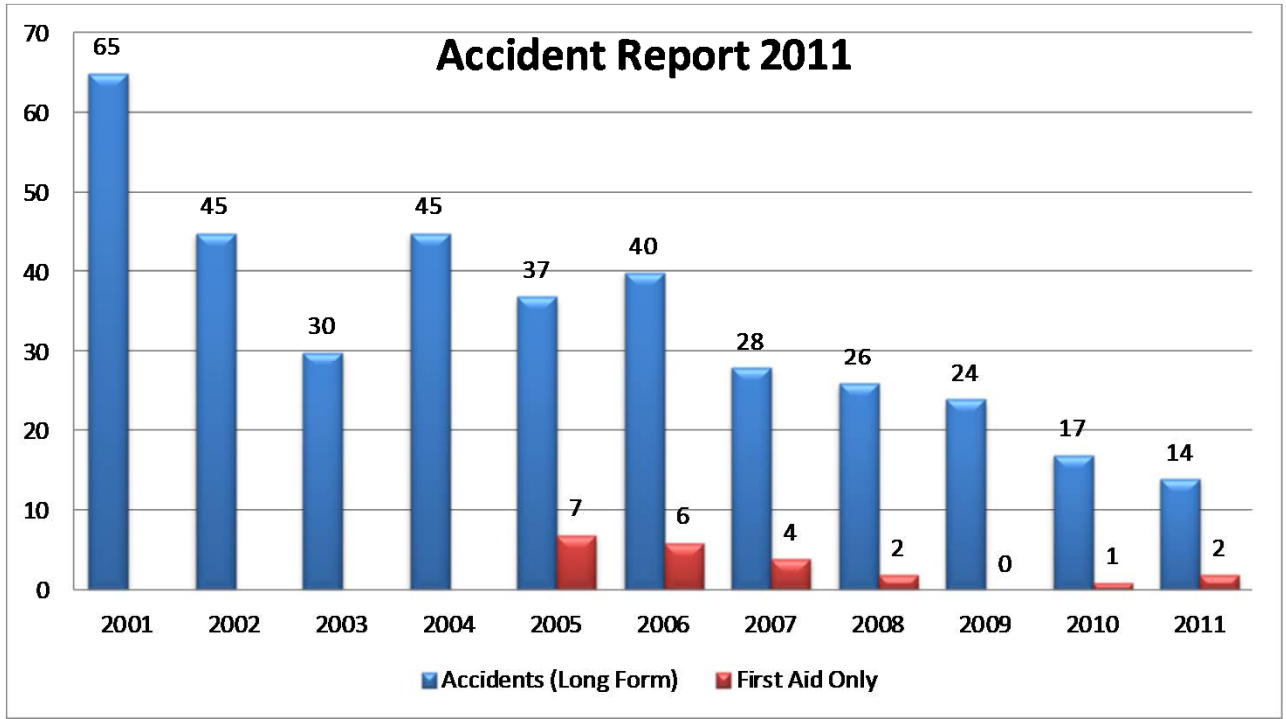
Measure: Number of reportable accidents (Measured by Calendar Year)

Goal: <=15

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

Lead  
FBO

Target <=15



STATUS

**GOAL #6 – Promote Good Stewardship**

Lead  
FBO

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

**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.



# Group Discussion



# Directors Discussion

