Facilities Management
Quarterly Strategic Planning Session

First Quarter – Fiscal Year 2015
July - September 2014

AGENDA

Strategic Planning Metrics and Actions Plans
Special Presentation: Energy Consumption
Employee Satisfaction Survey Action Plans
Look Ahead

...Creating a Campus of Distinction
Strategic Planning Session

First Quarter – Fiscal Year 2015
July - September 2014

AGENDA

Goal 1 - Continuously Improve Operation of Campus Facilities
Goal 2 - Create a Reliable and Sustainable Physical Infrastructure
Goal 3 - Foster a Customer Focused Organization
Goal 4 - Recruit, Develop, and Retain Quality Employees
Goal 5 - Promote Good Stewardship
GOAL #1

Continuously Improve Operations of Campus

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

-- Harold Geneen, industrialist
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.1: Improve Labor Availability
Tactic: 1.1.1: Maintain “Wrench” Time at 70%

ACTION PLAN

• Actions Planned

1 – December 2014; Daily assignment, coordinating and monitoring of work effort
2 – December 2014; assignment of lead technician in absence of supervisor
3 – All levels of leadership “Manage by Walking around”
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.1: Improve Labor Availability
Tactic: 1.1.1: Maintain “Wrench” Time at 70%
Measure: Hours (total hours charged to work requests divided by total hours recorded)

Lead: Facilities Operations
Balanced Scorecard Category: Internal Business Process
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.2: Improve Logistics Efficiency
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days

ACTION PLAN

• Actions Planned

1 – Weekly review of 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).

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

3 – Send out daily email reminders for approvers (Supervisors, Admins and Managers)

4 – Monitor the req to PO processing time and discuss weekly.

Actions Completed:

- Promote the use of SDI Punch-out; conduct lunch and learn July 2014.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.2: Improve Logistics Efficiency
Tactic: 1.2.1: Improve Non-stock on-time delivery to 95%
Measure: Percent of non-stock orders received on or before delivery due date (SDI Key Performance Indicator (KPI))

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

![Bar chart showing improvement in non-stock on-time delivery]

**Improve Non-stock on-time Delivery**

- **FY13-14 AVERAGE**: 91.84%
- **1ST QTR FY15**: 91.84%
- **2ND QTR FY15**: 91.84%
- **3RD QTR FY15**: 91.84%
- **4TH QTR FY15**: 91.84%

**Goal to 95%**

**STATUS**
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.2: Improve Logistics Efficiency
Tactic: 1.2.2: Reduce Average Non-stock Requisition to Receipt Time to 3.5 Days
Measure: Average Days from requisition to receipt (SDI KPI – Non-stock Requisition to Receipt Time)

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

REDUCE AVERAGE NON-STOCK REQUISITION TO RECEIPT TIME

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATUS</td>
<td>4.58</td>
<td>4.47</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Goal=3.5 Days
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.3: Improve Work Request Process
Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%
Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

ACTION PLAN

• Actions Planned

  1 – Review of recurring services and scheduled services currently being completed using PM work request – Aug 2014
  2 – Emphasize Facilities Operations OP-16 Timely and Accurate Handling/Processing of WRs.
  3 – Weekly meeting with UPA and Managers to monitor 14 day report.
  4 - Communicate work order priorities (Quarterly Customer, Building Liaison and specific College Meetings); implemented July 2014
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.3: Improve Work Request Process

Tactic: 1.3.1: Decrease Number of Work Orders Over 14 Days Old by 15%

Measure: Number of open reactive work orders over 14 Days from request (excluding scheduled work orders)

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Number of Work Orders Over 14 Days

<table>
<thead>
<tr>
<th>Qtr</th>
<th>Number of Work Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY13-14 Average</td>
<td>1449</td>
</tr>
<tr>
<td>1st Qtr FY15</td>
<td>862</td>
</tr>
</tbody>
</table>

Goal: <15% (1232)
GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.3: Improve Work Request Process
Tactic: 1.3.2: Decrease Work Request Cycle Time by 10%
Measure: Hours from Work Request Submitted to Work Complete (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease Work Request Cycle Time

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>498.5</td>
<td>520.4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Goal = <10% (448.65)
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operation of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

ACTION PLAN

• Actions Planned

1 – Complete conversion from old PM Module to new PM Module. (Goal for completion August 2015) UPA and Managers to monitor status.

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

4 – Identify and prioritize equipment conditions and needs for replacement.

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

6 – Re-emphasize the Customer Handbook, get out and see the customer; swiftly and accurately report outages.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

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

Measure: Percentage of Preventive Maintenance Work Requests Completed

Lead: Facilities Operations

Balance Scorecard Category: Internal Business Process

**Improve Completion of PM Work Orders**

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal to 90%</strong></td>
<td>88.50%</td>
<td>84%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities
Objective: 1.5: Improve Facility Systems Reliability
Tactic: 1.5.2: Decrease number of Unscheduled Equipment Replacement Projects to less than 2 incidents per quarter
Measure: Number of Unscheduled Equipment Replacement Projects

Lead: Facilities Operations
Balance Scorecard Category: Internal Business Process

Unscheduled Equipment Replacement Projects

Goal= Less than 2 incidents per quarter

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unscheduled Equipment Replacement Projects</td>
<td>2.25</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

STATUS
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

Tactic: 1.5.3: Fewer than 5 unscheduled outages per quarter

Measure: Number of Occurrences; Electric, Water, Sewer, HVAC, (Roofs, Lots, Decks, Roads measured separately).

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

Unscheduled Outages

<table>
<thead>
<tr>
<th>Status</th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead F.O.</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Goal: Less than 5 incidents per quarter
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #1 – Continuously Improve Operations of Campus Facilities

Objective: 1.5: Improve Facility Systems Reliability

Tactic: 1.5.4: Improve Ratio of Preventive/Predictive work requests to reactive request to 50%

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

Lead: Facilities Operations

Balance Scorecard Category: Customer Perspective

---

**Improve Ratio of Preventive/Predictive Work Requests**

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 Average</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal =</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ratio Improve</td>
<td>48.65%</td>
<td>51.10%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Ratio to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Goal = Improve Ratio to 50%**
GOAL #1 – Continuously Improve Maintenance and Operations

Objective: 1.4: Improve BES Processes
Tactic 1.4.1: Achieve APPA Level 2 in 98% of Buildings

ACTION PLAN

• Actions Completed
  – Attended Janitor University *(10/6/14 – 10/10/14)*
    • attended by: Althea Cook, Vanessa Dodd, Katherine Humphries, and Joe Scolo
  – Monthly PM Tracking Process Created *(10/16/14)*
    • Utilized for supervisors to track cleanliness levels, share with managers, and go over with entire team

• Actions Planned
  – Conduct (OS1) Pilot in Friday building *(end of FY14-FY15)*
  – Training
    • Work Loading Class *(TBD)*
  – Continue Re-engineering implementation planning meetings thru *(3/1/15)*
  – Review and continue quarterly self audits *(11/30/14)*
Facilities Management Strategic Planning Session – First Quarter FY 2015

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

Objective: 1.4: Improve BES Processes
Tactic 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)

Lead: Building Environmental Services
Balanced Scorecard Category: Customer Perspective

APPRA LEVELS

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY14-2nd QTR</td>
<td>91%</td>
</tr>
<tr>
<td>FY14-3rd QTR</td>
<td>79%</td>
</tr>
<tr>
<td>FY14-4th QTR</td>
<td>74%</td>
</tr>
<tr>
<td>FY15-1st QTR</td>
<td>93%</td>
</tr>
</tbody>
</table>

Percentage = 93%

STATUS
(OS1) Baseline Audit Scores - Job Category

- Cleaning Wrkr.
- Training
- Safety
- Workloading/Logistics
- Supervision/Management
- Benchmarking

Percentage:
- Cleaning Wrkr.: 8%
- Training: 8%
- Safety: 9%
- Workloading/Logistics: 6%
- Supervision/Management: 9%
- Benchmarking: 8%
(OS1) Baseline Audit Scores - Organization Comparison

- UNC Chapel Hill: 13
- U Mich: 8
- WFU: 12
- MSU: 12
- MT SAC: 11
- Provo School District: 6
- UNC Charlotte: 8
- STANDARD: 80

Percentage

Legend:
- UNC Chapel Hill
- U Mich
- WFU
- MSU
- MT SAC
- Provo School District
- UNC Charlotte
- STANDARD
GOAL #2

Create a Reliable and Sustainable Physical Infrastructure

"People with goals succeed because they know where they're going"

-- Earl Nightingale, Motivational Speaker
FM Prioritized Projects – FY15

1. Campus Map – Roll over from FY14; Estimated Completion Jun 2015
2. Access and Key Management – Roll over from FY14; Estimated Completion Feb 2014
4. BES ReOrg – Estimated Completion Nov 2014
5. ARCHIBUS 21.2 Upgrade – Estimated Completion Jan 2015
6. Capital Projects Requests and BANNER Integration - Estimated Completion Apr 2014
7. CRDM Parent Child – Estimated Completion Jun 2015
8. BAS Niagara 3.8 Upgrade – Estimated Completion Jun 2015
9. ImageNOW (Archive drawings) – Roll over from FY14; Estimated Completion Feb 2015
10. FO Craftsperson Timesheet/Whiteboard/Split Fund PM – Estimated Completion Jan 2015
12. Design Services Phase 2 Requests – Estimated Completion Date Jun 2015
13. BES EDA Asset Mgmt - Roll over from FY14; Estimated Completion Dec 2014
14. WO Hot /Utility Form – Roll over from FY14; Estimated Completion Dec 2014
15. ARCHIBUS Mobile Proof of Concept – Estimated Completion Feb 2015
17. Mobile Space Inventory - Estimated Completion Apr 2015
18. Mobile Map Utilities Field Units - Estimated Completion Jun 2015
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

ACTION PLAN

Actions Planned:

1. Complete testing and roll out of new FO Utility Form by Dec 1, 2014.
2. Complete walkthrough testing/training with all BES Supervisors on Mobile Asset Module; roll out for first Equipment Audit by Dec 2014.
4. Transition over the new BES Re-Org System Changes by Dec 2014 including WO routing and new BES Zone updates.
5. Conduct user testing and feedback for Beginner WR Customer online training for Go Live by Dec 2014.
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

**Actions Completed:**

3. Completed Phase 1 and 2 Development of ARCHIBUS Moodle Training.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.1 Maximize Facilities Management Effectiveness and Efficiency through Information Technology
Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan
Measure: Percent Completion of Five-Year Technology Projects
Based upon Cumulative Average of Project Completion

Balanced Scorecard Category: Internal Business Processes

FIS Project Task Cumulative Completion Avg.

Qtrly Metric Goal: Cumulative Avg.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

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

Tactic: 2.1.1 Complete 40% of the Facilities Management Five-Year Technology Plan

Measure: Percent Completion of Five-Year Technology Projects
Project Status Completion Percentage

Balanced Scorecard Category: Internal Business Processes
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>Tactic 2.2.1:</th>
<th>95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tactic 2.2.2:</th>
<th>Review Project Capacity - Goal 250 projects per year.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure:</td>
<td>Number of Projects Completed (Annual Goal)</td>
</tr>
</tbody>
</table>

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS

Reduce and Eliminate Paper Processes – Requires interface assistance with FIS:

- Convert Scope & Budget to format in Archibus similar to Estimating Workbook.
  - **Timeline:** FY15 QTR 3 - FY15 QTR 4
- Convert Excel Purchase Requisition (PR) to Archibus PR.
  - **Timeline:** FY15 QTR 3 - FY15 QTR 4
- Updates to Estimating Workbook to improve Contingency and Fee calculations.
  - **Timeline:** FY15 QTR 3 - FY15 QTR 4

Customer Orientation for Design Services Processes and Archibus Design Services Project Management:

- Customer meetings to help our Customers understand our processes – Project entry, approvals, timelines, SCO, etc.
  - **Timeline:** FY15 QTR 2 - FY15 QTR 4
- Project Priority List to include new column designating “true” Project Customer.
  - **Timeline:** Success – It works.

Archibus - Design Services Customer Survey:

- Customer responses via Lime-Survey – Success to date. FIS performing ARCHIBUS testing.
  - **Timeline:** Success – It works.

ONGOING IMPROVEMENTS

- Continue ongoing efforts to assign Classroom Capacity and provide ADA egress information per building.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.1: 95% of All Construction Projects Meet Scheduled Beneficial Occupancy Date (BOD)
Measure: Percentage (Number of Construction Projects completed on or before delivery date divided by total number of project completed.)

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>No. Of Projects</th>
<th>Projects Occupied by scheduled date</th>
<th>Projects not Occupied by scheduled date</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>115</td>
<td>100</td>
<td>15</td>
<td>87.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>182</td>
<td>168</td>
<td>14</td>
<td>92.3%</td>
</tr>
<tr>
<td>FY '11</td>
<td>224</td>
<td>200</td>
<td>24</td>
<td>89.3%</td>
</tr>
<tr>
<td>FY '12</td>
<td>240</td>
<td>231</td>
<td>9</td>
<td>96.3%</td>
</tr>
<tr>
<td>FY '13</td>
<td>139</td>
<td>134</td>
<td>5</td>
<td>96.4%</td>
</tr>
<tr>
<td>FY '14</td>
<td>221</td>
<td>211</td>
<td>10</td>
<td>95.5%</td>
</tr>
</tbody>
</table>

| QTR 1            | 18             | 17                                  | 1                                      | 94.4%   |
| QTR 2            | 0              | 0                                   | 0                                      | 0.0%    |
| QTR 3            | 0              | 0                                   | 0                                      | 0.0%    |
| QTR 4            | 0              | 0                                   | 0                                      | 0.0%    |

| FY '15 STATUS    | 18             | 17                                  | 1                                      | 94.4%   |
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective: 2.2: Improve Informal Project Design and Construction Process

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 2.2.2: Increase Project Capacity by 10 projects per year
Measure: Number of Projects Completed

Increase Project Volume by 5-10 Projects Per Year

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>150</td>
<td>160</td>
<td>170</td>
<td>180</td>
<td>190</td>
<td>200</td>
<td>210</td>
<td>220</td>
<td>230</td>
<td>240</td>
<td>250</td>
<td>250</td>
<td>250</td>
</tr>
<tr>
<td>136</td>
<td>161</td>
<td>173</td>
<td>194</td>
<td>205</td>
<td>190</td>
<td>193</td>
<td>278</td>
<td>177</td>
<td>286</td>
<td>218</td>
<td>221</td>
<td>48</td>
</tr>
<tr>
<td>$2,060,000</td>
<td>$2,609,000</td>
<td>$3,450,000</td>
<td>$8,480,000</td>
<td>$8,875,000</td>
<td>$8,200,000</td>
<td>$7,745,678</td>
<td>$9,935,384</td>
<td>$17,944,564</td>
<td>$19,393,759</td>
<td>$13,589,752</td>
<td>$13,648,336</td>
<td>$3,886,720</td>
</tr>
</tbody>
</table>

In-Construction
GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program
Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - Recommendation NLT July 2015

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o Complete CRDM update including revision of Second Section of SOP by December 2014
  o Complete Phase 2, CRDM, for FCI capability (FIS) by December 2014
  o Determine O/A FCI of buildings (Live data available with FCAP updates ongoing) by January 2015
  o Conduct campus customer meeting in January 2015
  o Conduct Committee review meetings in January & May 2015
  o Recommend a plan/ prioritize projects to improve FCI by 5% by July 2015.
GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.3: Develop a Comprehensive Capital Renewal/Deferred Maintenance (CRDM) Program

Tactic 2.3.1: Improve the Facilities Condition Index (FCI) for buildings on campus by 5% - Recommendation NLT July 2015.

Measure: Average Building FCI for campus

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

---

### Percentage of Completion

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q2 FY14</td>
<td>20%</td>
</tr>
<tr>
<td>Q3 FY14</td>
<td>25%</td>
</tr>
<tr>
<td>Q4 FY14</td>
<td>30%</td>
</tr>
<tr>
<td>Q1 FY15</td>
<td>40%</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization
Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards NLT end of July 15.
Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o Compose comparative analysis of actual spaces vs UNC Charlotte Approved Standard by January 2015
  o Complete space allocations/inventory by room category in Archibus (Ongoing)
  o Compare inventory to standard and report % difference by January 2015
  o Work with FIS to generate report by room use (NLT December 2014)
  o Recommend a plan/prioritize projects to improve allocations to within 5% of the standard by end of July 2015.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.4: Improve Campus Space Planning and Utilization

Tactic 2.4.1: 80% of Departments/Colleges within +/- 5% of System-wide space standards NLT end of July 15.

Measure: Percentage of Departments/Colleges meeting System-wide space standards as measured in gross square feet (GSF occupied divided by GSF required based on UNC System standards for each applicable room category)

Lead: Facilities Planning

Balanced Scorecard Category: Internal Business Process

Lead
Facilities Planning

Status
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 - Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5: Improve the Capital Planning and Design Process
Tactic 2.5.1: Develop Lifecycle cost analysis and funding process for capital projects (Action Plan only)

Lead: Facilities Planning
Balanced Scorecard Category: Internal Business Process

ACTION PLAN

• Actions Planned:
  o Sustain current process of completing Operating Budget sheets for new projects (Ongoing)
  o Support Capital, when required, with further study related to funding (e.g. HRL, Cone, RDH, Health and Wellness Center, etc. work) (Ongoing)
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

**Objective 2.5**
Improve the Capital Planning and Design Process

**Tactic 2.5.2**
90% of designers under contract within 120 days of the Project posting in CAPSTAT

**2.5.3**
90% of Designs complete by the scheduled completion date

**2.5.4**
90% of designs complete within design budgeted fee

---

**ACTION PLAN**

**Actions Completed**
- CID 2—Colvard Renovations Assessment started
- CID 2—East Village Infrastructure Assessment started
- CID 2—Elevator Upgrades designer advertisement
- CID 2—Academic Complex designer advertisement

**Actions Planned**
- PMs, prior to executing the design agreement, arrange a meeting between capital projects, design team, and user group to plan / agree on a design production schedule to be reflected in the designer’s agreement.
- Baseline (BL) schedules —
  - PMs to update the BL schedules when design agreements are received reflecting the contractual dates for each project phase (design, bidding, construction).
  - PMs to communicate at project design meetings these design phase critical dates.
  - PMs must carry project datasheets with the accurate baselines dates to every project meeting.
- PMs print project budget / financial sheets. Have them on hand for all design meetings. PMs must know their project authorization, current source of funding, available balances.
- Develop a standardized design meeting agenda and make budget, contingency, scope creep, and design production schedule required topics for updating the project team.
- Report monthly to AVC FM status of changes relating to designer fees, scope creep, schedule misses, etc..
- Protect contingency limit uses for unforeseen conditions, inflation
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process
Tactic 2.5.2 90% of designers under contract within 120 days of the Project posting in CAPSTAT
Measure: Percentage of designers under contract within 120 days.

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects authorized in Capstat</th>
<th>Designer under contract w/in 120 days</th>
<th>Designer not under contract w/in 120 days</th>
<th>% Designers under contract w/in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>14</td>
<td>3</td>
<td>6</td>
<td>33%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>7</td>
<td>4</td>
<td>1</td>
<td>80%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 50%
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.5 Improve the Capital Planning and Design Process

Tactic 2.5.3 90% of designs complete by the scheduled completion date

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

Balanced Scorecard Category: Internal Business Process

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th>No. of projects completed by scheduled</th>
<th>#not completed by scheduled time</th>
<th>% Designs complete by completion time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>8</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

**Objective** 2.5  
Improve the Capital Planning and Design Process

**Tactic** 2.5.4  
90% of designs complete within design budgeted fee

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

**Balanced Scorecard Category:** Internal Processes

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># of designs with original budgeted fee</th>
<th># designs complete not within budget</th>
<th>% Designs not complete w/in budgeted fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>3</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>1</td>
<td>85%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Tactic Measurement for 1st Quarter is 100%
GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6  
Improve the Capital Construction Process

Tactic 2.6.1  
90% of capital construction Projects completed on time

2.6.2  
95% of Capital Projects completed within the original construction contract amount or Guaranteed Maximum Price (GMP) plus 3% new construction 5% renovation (contingency)

ACTION PLAN

Actions Complete

• RH Phase 14 SLUR
• RH Phase 14

Actions Planned

• CMs keep baseline schedules current & refer to them regularly, focus on design and construction end dates.
• PMs & CMs discuss schedule (baseline & current) with end users, designers & contractors
  – Use 3rd party construction scheduling consultant to evaluate contractor’s schedules
  – CMs dedicate a portion of each weekly construction meeting to compare 5-day look ahead with current construction schedule to make sure the two are in sync
• Inform designers and contractors of each other’s contractual schedule dates
• PMs & CMs maintain & print project budgets & account reports monthly (have at all project meetings)
• PMs share budgets with AVC and end users.
• Hold contingency for unforeseen conditions, project requirements, inflation, etc.
  – CMs schedule & facilitate systematic construction site visits with end users and FM staff
  – CMs communicate status of project contingency, change orders, etc.
• Manage construction scope creep
  – PMs use alternatives during bidding process to identify basis project needs.
  – PMs & CMs refer to advance planning document/SD/DD deliverables when assessing a change item request.
• Select qualified/experienced construction management teams
  – Field staff resumes need to identify similar projects (size, scale, complexity) experience and roles member played.
  – CMR Staffing proposals must clearly identify personnel with specific role and percentage of time to be assigned to our project (TBD is not acceptable).
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

Objective 2.6 Improve the Capital Construction Process
Tactic 2.6.1 90% of capital construction Projects completed on time

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

Balanced Scorecard Category: Customer Perspective

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>1</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>3</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Goal: 90%

Tactic Measurement for 1st Quarter is 100%
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #2 – Create a Reliable and Sustainable Physical Infrastructure

**Objective** 2.6 Improve the Capital Construction Process

**Tactic** 2.6.2 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

<table>
<thead>
<tr>
<th>STRATEGIC REVIEW by Fiscal Year (July-June)</th>
<th># completed on schedule</th>
<th>not completed on schedule</th>
<th>% completed on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary FY-13</td>
<td>1</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>Summary FY-14</td>
<td>6</td>
<td>3</td>
<td>67%</td>
</tr>
<tr>
<td>Summary FY-15</td>
<td>2</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>1st Qtr. FY-15</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>2nd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>3rd Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>4th Qtr. FY-15</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Tactic Measurement for 1st Quarter is 100%**
GOAL #3

Foster a Customer Focused Organization

“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
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective 3.1:  Continuously improve customer service/satisfaction
Tactic 3.1.1:  Achieve overall customer satisfaction of 90% for FM services.
Measure:  Annual Customer Survey results: Percentage of customers selecting “fair, good or very good” with the statement: “Overall I am satisfied with <the service> I received from Facilities Management”

Lead: Facilities Management Wide
Balanced Scorecard Category: Customer Perspective

2014 Survey Overall Satisfaction: 93%

ACTION PLAN

Customer Survey
•  Reports delivered to Directors - Oct. 2014
•  Directors develop actionable items to report at Strategic Planning Meeting. – Winter 2014
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization
Objective: 3.1: Continuously improve customer service/satisfaction
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied

ACTION PLAN

• Actions Planned

1 – Stay engaged with performance of ESCO contract; keep customers informed; walk the buildings and work with the Energy Manager to keep customers informed; communicate daily.

2 – Support Capital to get buildings commissioned and retro commissioned.

3 – Work with customers; educate them on the UNCC Temperature Control Policy and monitor requests for accuracy.

Actions Completed:

- Implemented daily monitoring of temperatures using BAS and field verification. Continue to develop controls section and cross train with Zones.
- Work with other FM team members to establish a communication plan for temperature related building issues; communicate this plan no later than 1 August 2014 and update as needed.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization
Objective: 3.1: Continuously improve customer service/satisfaction
Tactic: 3.1.2: Decrease the Number of Hot/Cold Calls by 20%
Measure: Number of Hot/Cold Calls submitted on work requests

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective

Decrease the Number of Hot/Cold Calls

<table>
<thead>
<tr>
<th></th>
<th>FY13-14 (Avg 138.4)</th>
<th>1st Qtr FY15</th>
<th>2nd Qtr FY15</th>
<th>3rd Qtr FY15</th>
<th>4th Qtr FY15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>168.25</td>
<td>226</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Too Hot</td>
<td>96</td>
<td>65</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Too Cold</td>
<td>72.25</td>
<td>161</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Goal=Decrease Number by 20% (138.4)
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization

Objective: 3.1: Continuously Improve Customer Service and Satisfaction

Tactic 3.1.3: 90% of Informal Project Customers are more than satisfied or satisfied

Measure: Results from Project Related Customer Surveys

Lead: Design Services

**Balanced Scorecard Category:** Internal Business Process

---

**90% of Informal Project Customers More than Satisfied or Satisfied with services received**

<table>
<thead>
<tr>
<th>Survey Totals by Fiscal Year</th>
<th>Number of Surveys issued</th>
<th>Number of Survey Responses</th>
<th>More than Satisfied</th>
<th>Satisfied</th>
<th>Less than Satisfied</th>
<th>Percent Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY ’09</td>
<td>22</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
</tr>
<tr>
<td>FY ’10</td>
<td>30</td>
<td>30</td>
<td>18</td>
<td>5</td>
<td>0</td>
<td>76.7%</td>
</tr>
<tr>
<td>FY ’11</td>
<td>33</td>
<td>33</td>
<td>24</td>
<td>6</td>
<td>2</td>
<td>90.9%</td>
</tr>
<tr>
<td>FY ’12</td>
<td>31</td>
<td>31</td>
<td>27</td>
<td>2</td>
<td>0</td>
<td>93.5%</td>
</tr>
<tr>
<td>FY ’13</td>
<td>22</td>
<td>22</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>95.5%</td>
</tr>
<tr>
<td>FY ’14</td>
<td>24</td>
<td>24</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>87.5%</td>
</tr>
<tr>
<td><strong>FY ’15</strong></td>
<td><strong>29</strong></td>
<td><strong>5</strong></td>
<td><strong>5</strong></td>
<td><strong>0</strong></td>
<td><strong>0</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

**GOAL:** 90.0%

**STATUS:** 100.0%

---

**Customers Comments:**

*The project manager was extremely helpful in getting our questions answered and keeping us informed.*

*The project went well and I was happy with the communication during the projects. There were a few minor punch list items at the conclusion of the project that we corrected very quickly.*

*The project coordinator followed up with the contractors on several small issues and the changes were made very quickly and accurately.*

*Very pleased with the communication with Design and Renovations. Coordination between everyone was satisfactory, and start to completion timeline was fast and addressed our needs. I wish all projects could go so smoothly. Thanks.*
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3 – Foster a Customer Focused Organization
Objective: 3.1: Continuously improve customer service/satisfaction
Tactic: 3.1.4: 90% of Reactive Work Request Customers are satisfied or very satisfied
Measure: Percent satisfied or very satisfied on Archibus email Work Order Survey Results (to be updated)

Lead: Facilities Operations
Balance Scorecard Category: Customer Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3 Foster a Customer Focused Organization

Objective xxx: Continuously improve customer service/satisfaction
Tactic xxx: (Proposed Change) Build brand awareness
Measure: (Proposed Change) Action Plan Only

Lead: Facilities Business Office - Communications
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Publicity/Public Relations:

• FY 2014: 82 documented mass-view FM news items in varying media channels.

• 1st Q, FY 2015: 12 documented mass-view FM news items in varying media channels.
  ➢ Analytics examples
    o APPA Award 1,100 + views on University YouTube site within 1st week; 369 “likes,” 210 “shares” on University FB page
    o Zero Waste Returns To Gridiron 400+ unique page views on University Homepage Spotlight
    o LYNX Light Rail 1,000+ views on Inside UNC Charlotte (multiple channel drivers) 1st week
    o Phillips Rd. Realignment 25 “likes,” 3 “shares” on University FB page
  ➢ Campus Construction Reports – 2
  ➢ Campus-Wide Notifications – Daily, usually

Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective xxx:  Continuously improve customer service/satisfaction
Tactic xxx:  Proposed: Build brand awareness
Measure:  (Proposed Change) Action Plan Only

Lead: Communications
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Customer Communication Initiatives (interrelated):

• Launch 2nd Customer Environmental Scan  Fall 2014
  ➢ Share results with Directors  Winter 2014/2015
• External Marketing Campaign: “Creating A Campus of Distinction”
  ➢ Signage launch – Fall 2014
  ➢ Solicit feedback/input from Directors and Employees – Winter 2014/2015
  ➢ Execute campaign tactics (testimonials, LCD signage, website, etc.) – Late Winter/Early Spring 2014/2015
• SOP review, development  Winter 2014/2015
• Update and remarket Customer Handbook, digital and print – Late Fall/Early Winter 2014
• Website Update (2nd iteration) and QA - Winter 2014/2015
  – Requested temporary or permanent position to assist with communications efforts;
  – QA other customer-facing technology — As needed thru June 30, 2015
  – ARCHIBUS automated customer surveys (may use Survey Share for Ops)
  – CRDM page
• Forming FM Communication Group. Selecting members now. – Winter 2014/2015
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #3  Foster a Customer Focused Organization

Objective xxx: Continuously improve customer service/satisfaction
Tactic xxx: Proposed: Build Brand Awareness
Measure: (Proposed Change) Action Plan Only

Lead: Communications
Balanced Scorecard Category: Customer Perspective

ACTION PLAN

Internal Communication: Through June 30, 2015, unless otherwise noted
• Communications workshop added to FM Leadership Academy. Operations Writing Workshops completed
• Expand FM audience and subject materials – Fall/Winter 2014
• Intranet – Spring 2015

Special Projects: Through June 30, 2015, unless otherwise noted
• Sustainability Magazine Launch Fall 2014
  ➢ Final editing & proof phase
  ➢ Will be reviewed by Phil Jones, Phil Dubois and Beth Hardin, prior to launch
• Editing/Writing FM award submissions: COAA, Campus Tree USA, APPA Innovative Practices
• Presentation assistance: SCUP Conference video
• Traffic communications initiatives with U. Communications: Quarterly e-newsletter, articles, announcements, etc.
• Communication Plans: BES key announcements, FIS new campus map
• Surveys: Design Services, Operations, FIS new campus map user test
• Personnel: New position request submitted through FY 15 budget process
GOAL #4

Recruit, Develop, and Retain Quality Employees

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

-- Calvin Coolidge, 30th U.S. president
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Tactic 4.1.2: Vacancy time of no longer than 120 calendar days - Exempt
Tactic 4.1.2: Reduce Number of Employees Terminated During Probationary Period to less than 5%

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

• Increase the pool of qualified applicants by ensuring minimum/preferred qualifications on all job postings contain reference to computer skills, excellent/effective skills in written, verbal and interpersonal communications; English language comprehension skills and skills that demonstrate the applicant’s ability effectively to work/interact with others - As appropriate through June 30, 2015

• Ensure a qualified diverse applicant pool by continuous research and development of resources and mediums in which to advertise position vacancies – As appropriate through June 30, 2015

• Ensure efficient turnaround time in filling position vacancies by maintaining consistent communications with hiring supervisors regarding hiring actions in HRMS - As appropriate through June 30, 2015

• Ensure FM maintains all currently-budgeted positions by providing consistent communications and reporting of position vacancies to not reach the 6-month abolishment threshold - As appropriate through June 30, 2015

• Ongoing monitoring of separation data ensures accurate reporting on employee turnover during the 24-month probationary period implemented August, 2013 - August 22, 2015

• Ensure less turnaround time with Main HR in processing recruitment actions by assisting hiring supervisors with establishing appropriate selection criteria and ensuring non-selection rationale meets Main HR guidelines - As appropriate through June 30, 2015
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant positions

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Non-Exempt Vacancies FY 2015

Target = 80 days or less
Actual = 121 days

# of Non-Exempt Hires
Average Number of Days

Q1: 14
Q1: 121
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1: Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.1: Vacancy time of no longer than 80 calendar days – Nonexempt
Vacancy time of no longer than 120 calendar days - Exempt

Measure: Days needed to fill vacant positions

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

Average Number of Days to Fill Exempt (Salaried) Positions 1st Quarter FY 2015

Target = 120 Days
Exempt Hires = 0
Facilities Management Strategic Planning Session – First Quarter FY 2015
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.2:  Reduce Number of Employees Terminated During Probationary Period to less than 5%
Measure:
Lead:  Facilities Business Office
Balanced Scorecard Category: Innovation & Learning

ACTION PLAN

Recruitment AND Retention thru 06/30/15

- Retention is just as important
  - We take many steps in recruitment. It’s important as careful interviewing and reference checking practices help eliminate many problem performers from being hired in the first place.
  - Need to take steps in retention to keep the qualified employees that we took so many steps to hire.

- Culture of engagement
  - Increase employee awareness regarding (their) access to our HRMS (PeopleAdmin) – Started July, 2014 and ongoing
  - Position Description
  - Work Plan
  - Performance Evaluation

- Professional Development
  - It is the supervisor’s responsibility to provide the training and development opportunities employees need to be successful in their jobs.

- Current position description
  - An accurate position description, classification and salary are crucial to effective management.
  - All new hires, transferred employees, promotions receive an updated position description.

- Mentioning
  - Good relations with employees prevent many disciplinary situations from beginning or worsening.

Employee Relations thru 06/30/15

- Discipline
  - Closely tied to performance management process.
  - Not an independent event - part of a larger process.
  - Difficult to argue that an employee should be dismissed for performance when he/she has three years of “outstanding performance management ratings on file

- Documentation
  - Roadmap that shows how us how we got to a certain stage in the discipline process.
  - Why document...
  - Selective and unreliable memory
  - Grievance or lawsuit
  - If you didn’t document it, then it didn’t happen!

- Meet with FM Departments and identify training needs in the area of Employee Relations – December, 2014
  - SPA Employee Grievance Policy - effective 5/1/2014
  - The 3 causes for disciplinary action
    - Unsatisfactory job performance
    - Unacceptable personal conduct
    - Grossly inefficient performance
  - Steps in the progressive discipline process
  - Required/Appropriate documentation in the disciplinary process

- Complete individual training sessions specific to departmental needs – June 30, 2015
GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.1:  Recruit a Qualified Workforce in a Timely Fashion
Tactic 4.1.2:  Reduce Number of Employees Terminated During Probationary Period to less than 5%

Measure:  Percent Employees Terminated before end of probationary period

Lead:  Facilities Business Office
Balanced Scorecard Category:  Innovation & Learning

Employee’s Separated During 1st Quarter
FY 2015

Total Separations = 13
5 Employees Separated During Probationary Period

Target = <5%
Actual = 1.3% Employees Separated during Probationary Period

STATUS
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

**Objective 4.2:** Improve Workforce Development
**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year
**Tactic 4.2.2:** Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office
**Balanced Scorecard Category:** Internal Business Process, Learning and Growth

**FM ACADEMY ACTION PLAN**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Planned/Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Technical</strong></td>
<td></td>
</tr>
<tr>
<td>– EPA 608 Refrigerant Certifications (F/O)</td>
<td>Sep 2014</td>
</tr>
<tr>
<td>– HVAC Matrix Development</td>
<td>Oct 2014</td>
</tr>
<tr>
<td>– Computer Training for BES <em>(ITS Partnership)</em></td>
<td>(TBD)</td>
</tr>
<tr>
<td>– Boiler Operation, Maintenance &amp; Safety (F/O - onsite)</td>
<td>Jan 2015</td>
</tr>
<tr>
<td>– Hands On Electrical Troubleshooting (F/O - onsite)</td>
<td>Feb 2015</td>
</tr>
<tr>
<td>– Trouble Shooting Mechanical Drives Systems &amp; Rotating Equipment</td>
<td>Mar 2015</td>
</tr>
<tr>
<td>– Work Order Process Improvement &amp; Mapping</td>
<td>(TBD)</td>
</tr>
<tr>
<td><strong>Safety Awareness</strong></td>
<td></td>
</tr>
<tr>
<td>– Supervisor Safety Talks</td>
<td>Monthly</td>
</tr>
<tr>
<td>– CPR/1st Aid Training <em>(Innovative Solutions)</em></td>
<td>Dec 2014</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
</tr>
<tr>
<td>– Documentation &amp; Disciplinary Process</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>– Leadership Communication Workshop</td>
<td>Oct/Nov 2014</td>
</tr>
<tr>
<td>– Targeted Selection Training <em>(External consultant)</em></td>
<td>Dec 2014</td>
</tr>
<tr>
<td>– Cultural Awareness/Inclusion Program</td>
<td>TBD</td>
</tr>
<tr>
<td>– NEO redesign</td>
<td>June 2015</td>
</tr>
<tr>
<td><strong>Externally Driven Initiatives</strong></td>
<td></td>
</tr>
<tr>
<td>– Kronos implementation/training <em>(Financial services)</em></td>
<td>Dec 2014</td>
</tr>
<tr>
<td>– People Admin version 7.35 upgrade/training <em>(Campus HR)</em></td>
<td>Jan 2015</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

**Objective 4.2:** Improve Workforce Development
**Tactic 4.2.1:** Increase Supervisor/Manager Training to 40 hours/year
**Tactic 4.2.2:** Increase Employee Training to 20 hours/year

**Lead:** Facilities Business Office

**Balanced Scorecard Category:** Internal Business Process, Learning and Growth

---

**ACTION PLAN**

- Met with directors (Fake, Gilbert, Brillante, Fessler) to discuss staff learning & development needs for FY 15. – Sept 2014
- Continue regular attendance at F/O staff meetings for timely information exchange on training, licensure, etc. - Biweekly
- Meet with BES/R Education Coordinator to discuss upcoming plans, new strategies, etc. - Monthly
- Developing relationship with consultant Joanna Roop on future training opportunities. Requesting list of potential course deliverables. - Fall 2014
- FM-HR continuing to develop FM Academy “**Lending Library**” to provide learning resources for FM employees.
  - Developing check-out procedures – Dec. 2014

---

<table>
<thead>
<tr>
<th>Learning &amp; Development (1st Qtr - 2015)</th>
<th>Hours Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>43</td>
</tr>
<tr>
<td>Leadership</td>
<td>0</td>
</tr>
<tr>
<td>Professional Development</td>
<td>271</td>
</tr>
<tr>
<td>Safety Awareness</td>
<td>299</td>
</tr>
<tr>
<td>Administrative</td>
<td>59</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.2:  Improve Workforce Development
Tactic 4.2.1:  Increase Supervisor/Manager Training to 40 hours/year
Measure:  Average Hours of Training completed by Supervisors and Managers

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process, Learning and Growth

FY 15
Training Hours for Supervisors & Managers by Quarter

Annual Target = 40 hrs ea
(49 X 40 hrs ea = 1,960 hrs)

FY 2015 Results:
Target - 1,960 hrs
Actual YTD
193.25hrs (10%)
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.2: Improve Workforce Development
Tactic 4.2.2: Increase Employee Training to 20 hours/year
Measure: Average Hours of Training completed by front line employees

Lead: Facilities Business Office
Balanced Scorecard Category: Internal Business Process. Learning and Growth

FY 15
Training Hours for front line employees by Quarter

Annual Target - 20 hrs ea
(388 x 20 hrs ea = 7,760 hrs)

Fiscal 2015 Results:
Annual Target- 7,760 hrs
Actual YTD
478.5 hrs (6.2 %)
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

**Objective 4.3:** Create and Maintain a Quality Work Environment
**Tactic 4.3.1:** 90% of Employees satisfied or very satisfied working in FM
**Tactic 4.3.2:** 87% of Employees satisfied or very satisfied in each unit of FM

*Lead:* Facilities Business Office

**Balanced Scorecard Category:** Customer Perspective

---

**Survey Results and Data Review:**

- Directors developing actionable items based on survey feedback for report out - **Fall 2014**;
- Demographic data provided by HR – every two weeks;
- Requested SPSS software for use in data analysis; - Software installed **Sept 2014**.
- Frequencies and crosstabulations of the data have been performed and shared with AVC-FM; will be shared with leadership - **Fall 2014**

**Survey Logistics:**

- Update survey instrument based on feedback from employees (add progress bar, investigate adding a comment box after each section or field for employees to provide feedback, etc.) – **Winter 2014**
  - Discuss potential of creating a survey focus group consisting of one employee from each of the major depts. to provide feedback on the questions as currently presented – i.e., are the questions clearly phrased for understanding, are we asking the right questions, etc. – **October 2014**
  - If feasible and if approved by AVC, identify members for the focus group and start process – **January 2015**

- Next survey to be administered in October/November 2015.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment
Tactic 4.3.1: 90% of Employees satisfied or very satisfied working in FM
Measure: Annual Employee Work Climate Survey

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

FY 2014 Annual Satisfaction: 89%

Overall how satisfied are you working in the Facilities Management Department? (2013)

Overall how satisfied are you working in the Facilities Management Department? (2011)
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4 Recruit, Develop and Retain Quality Employees

Objective 4.3: Create and Maintain a Quality Work Environment
Tactic 4.3.2: 87% of Employees satisfied or very satisfied in each unit of FM
Measure: Annual Employee Work Climate Survey

Lead: Facilities Business Office
Balanced Scorecard Category: Customer Perspective

Unit Customer Satisfaction Survey FY Rating Comparison (%)

<table>
<thead>
<tr>
<th>Unit</th>
<th>2014 Rating</th>
<th>Extremely Satisfied</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Services</td>
<td>88</td>
<td>0</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>Other</td>
<td>87</td>
<td>0</td>
<td>56</td>
<td>31</td>
</tr>
<tr>
<td>Facilities Ops</td>
<td>90</td>
<td>16</td>
<td>35</td>
<td>39</td>
</tr>
<tr>
<td>BES</td>
<td>86</td>
<td>16</td>
<td>33</td>
<td>40</td>
</tr>
<tr>
<td>Recycling</td>
<td>67</td>
<td>17</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Capital</td>
<td>100</td>
<td>25</td>
<td>63</td>
<td>12</td>
</tr>
</tbody>
</table>

All units are not at 87% satisfied

Goal = 87%
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.4:  Improve Employee Safety
Tactic 4.4.1:  Reduce the number of reportable accidents by 20%
Tactic 4.4.2:  98% of Mandatory Compliance Training completed annually

Lead: FM Wide
Balanced Scorecard Category: Innovation and Learning Perspective

FM ACADEMY

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ongoing safety related activities to foster continuous awareness</td>
<td></td>
</tr>
<tr>
<td>• Supervisor Safety Talks</td>
<td>Ongoing monthly</td>
</tr>
<tr>
<td>• FM Safety Fair</td>
<td>May 2015</td>
</tr>
<tr>
<td>• CPR/1st Aid training</td>
<td>Jan 2015</td>
</tr>
<tr>
<td>• Accident/Incident YTD (calendar year)</td>
<td></td>
</tr>
<tr>
<td>• Accidents - 9</td>
<td>2014 year end</td>
</tr>
<tr>
<td>• Minor incidents - 1</td>
<td>2014 year end</td>
</tr>
<tr>
<td>• Compliance training (OSHA)</td>
<td></td>
</tr>
<tr>
<td>• FM-HR, Risk Mgmt. and EHS to meet to discuss requirements</td>
<td>Oct 2015</td>
</tr>
<tr>
<td>• Process Review Project</td>
<td>Ongoing</td>
</tr>
<tr>
<td>1. Working with FO Leadership to determine OSHA compliance training needs, current status of employee training, etc.</td>
<td></td>
</tr>
<tr>
<td>2. Identified need to perform process mapping on current state of OSHA training with FO leaders; Date to begin current state mapping TBD</td>
<td></td>
</tr>
<tr>
<td>• All training records sent to FM-HR Staff Dev. Specialist</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety
Tactic 4.4.1: Reduce the number of reportable accidents by 20%
Measure: Number of Reportable Accidents (Measured by Calendar Year)

Lead: FM Wide
Balanced Scorecard Category: Innovation and Learning Perspective

Last year = 11 accidents
Target 20% Reduction =  9
Current = 9 accidents
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.4: Improve Employee Safety
Tactic 4.4.2: 98% of Mandatory Compliance Training completed annually
Measure: Percent of employees completing mandatory compliance training

Lead: Facilities Business Office
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

Reduce the number of reportable accidents by 20% - Improve Safety Awareness

- Supervisor Safety Talks (SST) - monthly
- Annual FM Safety Fair - Annually, Spring 2015

Compliance Training

- Periodic meetings with EH&S to review needs, processes, etc. – next meeting scheduled Oct. 22, 2014;
- Identified need to perform process mapping on current OSHA training with FO Leaders; Tentatively planned for Winter 2014
- Research training providers/vendors to help fill training gaps, as needed
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #4  Recruit, Develop and Retain Quality Employees

Objective 4.5: Improve Workforce Performance (Action Plan Only)

Lead: Facilities Business Office

Balanced Scorecard Category: Innovation and Learning Perspective

### ACTION PLAN

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Continued development of FM Academy</td>
<td></td>
</tr>
<tr>
<td>– Marketing Strategy &amp; Website Development</td>
<td>Dec 2014</td>
</tr>
<tr>
<td>– Content Development</td>
<td>Ongoing</td>
</tr>
<tr>
<td>– Vendor Selection and Delivery</td>
<td>As Needed/As Funded</td>
</tr>
<tr>
<td>• HVAC Matrix Development – meetings ongoing</td>
<td>Oct 2014</td>
</tr>
</tbody>
</table>
GOAL #5

Promote Good Stewardship

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

-- Brian Tracy, Speaker, Author, Consultant
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility

Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Finance/Budget:

• Labor Services analysis began July 2014 to determine and address areas of concern:
  – Reviewed IDI process for possible improvement; New financial report to be developed for improved tracking of payments associated with contracts – October 2014
  – Gaps in contract process identified – to be discussed with FO Director – October/November 2014;
  – Continue periodic review of ARCHIBUS work orders (NR vs R) – July 1, 2014 - June 30, 2015;
• Ensure that all finance responsibilities (FM appropriated and non-appropriated budgets, operating reserve templates, student fee submittals, APPA Survey, etc.) are completed on time – various deadlines

Supplemental Grant/Award Funding:

• NC State Energy Office Grant for Electric Stations; Awaiting expenditure plan – October 2014.
• Campus Tree USA Designation/Award Submittal; Due Dec. 31, 2014
• FBO developing award submittal for innovative/effective practices – Due Nov. 30, 2014
• Search for grant and award possibilities for Facilities Management organizations. For those grants requiring “matching funds”, ensure buy-in from AVC prior to submitting proposals – thru June 2015;
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.1: 100% of financial accounts within budget
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ACTION PLAN

Cost Accounting:
- Devise strategy to improve cost accounting measures within all areas of Facilities Management – Fall 2014
  - Improve org code usage – July 2014 and July 2015, on-going when possible
  - Improve account code usage - July 1, 2014 – June 1, 2015
  - Understanding the impact of personnel decisions on budget – on-going through-out FY.
  - Create a budget revision process – completed July 1, 2014
- Review monthly position control reports to ensure that positions/budgets are appropriately aligned. - 1st of each month;
- Develop a process with paper trail to ensure that employees are appropriately aligned within their unit org codes - Fall 2014
- Requested an entry-level accountant position for FY 15 to assist in this area – July 2014;
- Improve use of account codes across FM; Currently addressing on the front end with 49er Mart, but other issues are occurring where there is no upfront oversight by FBO (i.e., ARCHIBUS NR work orders); increase monitoring efforts July 1, 2014 thru June 30, 2015 close out.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.3: Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions
Measure: Administrative cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

FY 14 APPA Survey:
• Data collection currently underway; Data received from FO, Capital, Budget Office; Data entry progress at 40%;
• Survey draft submitted to AVC for review – November 30th;
• Survey submitted to APPA – December 15, 2014.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.1: 100% of financial accounts within budget
Measure: Main Operating Fund Variance Report

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

ON HOLD – AWAITING FINAL BUDGET
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5  Promote Good Stewardship

Objective 5.1: Promote Fiscal Responsibility
Tactic 5.1.2: Increase Supplemental Funding to the Department by 10% annually
Measure: Percent increase in supplemental funding

Lead: Facilities Business Office
Balanced Scorecard Category: Financial Perspective

Awards

<table>
<thead>
<tr>
<th>Year</th>
<th>Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$4,500</td>
</tr>
<tr>
<td>2009</td>
<td>$4,000</td>
</tr>
<tr>
<td>2010</td>
<td>$3,500</td>
</tr>
<tr>
<td>2011</td>
<td>$4,000</td>
</tr>
<tr>
<td>2012</td>
<td>$4,500</td>
</tr>
<tr>
<td>2013</td>
<td>$4,000</td>
</tr>
<tr>
<td>2014</td>
<td>$3,500</td>
</tr>
</tbody>
</table>

Grants

<table>
<thead>
<tr>
<th>Year</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$500,000</td>
</tr>
<tr>
<td>2009</td>
<td>$500,000</td>
</tr>
<tr>
<td>2010</td>
<td>$500,000</td>
</tr>
<tr>
<td>2011</td>
<td>$50,000</td>
</tr>
<tr>
<td>2012</td>
<td>$500,000</td>
</tr>
<tr>
<td>2013</td>
<td>$500,000</td>
</tr>
<tr>
<td>2014</td>
<td>$500,000</td>
</tr>
</tbody>
</table>
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5  Promote Good Stewardship

Objective 5.1:  Promote Fiscal Responsibility

Tactic 5.1.3:  Achieve Administrative cost/GSF ± 5% of APPA Average for Peer Institutions

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

Lead:  Facilities Business Office

Balanced Scorecard Category:  Financial Perspective

FY 13 Administrative Total Cost per GSF

- East Carolina University: $0.50
- Portland State University: $0.50
- University of New Mexico: $0.60
- UNC Charlotte: $0.40
- University of Texas San Antonio: $0.40
- SRAPPA Region: $0.50

Overall APPA Avg. = $0.48
Target = $0.456
UNC Charlotte = $0.40

ANNUAL
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.3: Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.
Measure: STARS points to achieve bronze rating

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

• Actions Planned:
  o Assess additional actions list for achieving STARS Silver; by 12/14.
  o Quarterly update of implementation plan for earning further credits based on feasibility: 10/14, 1/15, 4/15.
  o Achieve bronze rating by end of FY 15.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus

**Tactic 5.2.3:** Achieve Bronze rating on the Sustainability Tracking and Reporting System (STARS) NLT end of FY 15.

**Measure:** STARS points to achieve bronze rating

**Lead:** Facilities Planning

**Balanced Scorecard Category:** Innovation and Learning Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.
Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective

ACTION PLAN

• Actions Planned:
  o Assess use of identified best practices (from Sustainability and Climate Action Plans, completed in May), including timeline and probable costs for additional implementation, by October 2014.
  o Draft annual plan and budget by January 2015 to achieve implementation of 60% of identified best practices.
  o Demonstrate 60% of best practices implemented by October 2015.
GOAL #5 – Promote Good Stewardship

Objective: 5.2: Develop a Sustainable Campus
Tactic 5.2.4: Implement 60% of the Campus Sustainability Plan best practices NLT end of FY 15.
Measure: Percent of Campus Sustainability Plan best practices implemented

Lead: Facilities Planning
Balanced Scorecard Category: Innovation and Learning Perspective
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year

ACTION PLAN

• Actions Planned

1 – Establish guidelines for qualifying reimbursable vs non-reimbursable work requests (To Charge or Not To Charge) by 28 November 2014.
2 – Identify opportunities to expand reimbursable work in an effort to support labor services funds 25 November 2014
3 – Realign the labor services positions to ensure maximum utilization of resources by 28 November 2014.
4 – Weekly review of Facilities Operations Labor pool before going outside for additional staff support.
5 – Monthly review of Labor Services accounts with FBO to identify gaps and improve processes.

Actions Completed:

• Identify opportunities to expand reimbursable work in an effort to support labor services funds 25 November 2014
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.5: Achieve total Maintenance cost/GSF ± 5% of APPA Average for Peer Institutions
Measure: Maintenance cost/GSF from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Maintenance Total per GSF

Avg. cost/student = $1.64
Goal = $1.56
UNC Charlotte = 28.05% above
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.6: Achieve total Landscape cost/acre ± 5% of APPA Average for Peer Institutions
Measure: Landscape cost/acre from annual APPA Facilities Performance Indicators Report (APPA Benchmark)

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

**Grounds - Total Cost per Acre**

- **Average Cost**: $4.00
- **Goal**: $3.80
- **UNC Charlotte**: 17.5% below average

**Institutions**:
- ECU
- Portland State University
- University of New Mexico
- UNC Charlotte
- University of Texas San Antonio

**Cost per Acre**:
- ECU: $5.10
- Portland State University: $6.70
- University of New Mexico: $3.20
- UNC Charlotte: $3.30
- University of Texas San Antonio: $1.70
- SRAPPA Region: $4.40
GOAL #5 – Promote Good Stewardship
Objective: 5.1: Promote Fiscal Responsibility
Tactic: 5.1.7: All Receipt Supported Funds Accounts have a positive balance at the end of the fiscal year
Measure: Dollars in account at end of fiscal year

Lead: Facilities Operations
Balance Scorecard: Financial Perspective

Dollars in Account at end of Fiscal Year

- Goal to be positive at end of fiscal year

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Dollars in Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Qtr FY15</td>
<td>$679,859</td>
</tr>
<tr>
<td>2nd Qtr FY15</td>
<td>$0</td>
</tr>
<tr>
<td>3rd Qtr FY15</td>
<td>$0</td>
</tr>
<tr>
<td>4th Qtr FY15</td>
<td>$0</td>
</tr>
</tbody>
</table>
GOAL #5 – Promote Good Stewardship

Objective 5.2 Develop a Sustainable Campus
Objective 5.2.2 Increase Percent of Solid Waste diversion on Campus to 45% by 2018

ACTION PLAN

- Waste Reduction and Recycling

  Actions Complete

  TOTAL recycling for quarter 38% (all totals are not in), 40% for last year
  - Continue to provide timely and efficient collection service of recyclable and reusable items to the entire campus and outreach efforts to University community
  - Coordinated MOVE IN – 13,672 pounds of cardboard and Styrofoam
  - Started composting program at Center City Building
  - Coordinated Campus Clean UP and Tree Banding – October 22
  - Coordinating 2nd season Piloting Zero Waste Football program
  - computer training October 8-9 with Jennifer Toth covering Outlook, Microsoft Office, Campus website, etc.
  - INTERIM Reviews complete
  - Interviews completed and recommendation sent to HR position #9944
  - Achieved 98% customer satisfaction

2nd Quarter Actions Planned

- Replace Recycling Coordinator
- Second Zero Waste Football season August - November
- Start composting program at South Dining when it opens
- 2014-2015 waste reduction campaign – exploring greening events and going zero waste at basketball
- Continue to conduct Waste audits for campus to determine amount of recyclables in waste stream
Facilities Management Strategic Planning Session – First Quarter FY 2015

Objective 5.2: Develop a Sustainable Campus

Tactic 5.2.1
Increase Recycling of Construction and Demolition Materials on Capital Projects to 80% of Total C&D Waste
Measure: Pounds of C & D Waste Recycled divided by Total Pounds of C & D Waste

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

**Construction & Demolition Debris Diversion**
1st Quarter FY15

- FY 13: 60.4%
- FY 14: 60.4%
- FY 15 (YTD): 36.9%
- Total Qtr: 36.9%

**Legend:**
- Tons Landfilled
- Tons Recycled
Facilities Management Strategic Planning Session – Fourth Quarter FY 2014

Tactic 5.2.2
Increase Percent of Solid Waste Diversion on Campus to 45%
Measure: Pounds of Solid Waste Recycled, composted and reused
Annually divided by Total Solid Waste

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

---

**Breakdown of Solid Waste**

<table>
<thead>
<tr>
<th>Period</th>
<th>Total Waste</th>
<th>Diverted Waste</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline 4th Qtr FY08</td>
<td>695 tons</td>
<td>198 tons</td>
</tr>
<tr>
<td>2nd Qtr FY14</td>
<td>777 tons</td>
<td>264 tons</td>
</tr>
<tr>
<td>3rd Qtr FY14</td>
<td>865 tons</td>
<td>345 tons</td>
</tr>
<tr>
<td>4th Qtr FY14</td>
<td>764 tons</td>
<td>287 tons</td>
</tr>
<tr>
<td>1st Qtr FY15</td>
<td>730 tons</td>
<td>279 tons</td>
</tr>
</tbody>
</table>

- **Baseline 4th Qtr FY08**: 28% diversion
- **2nd Qtr FY14**: 34% diversion
- **3rd Qtr FY14**: 40% diversion
- **4th Qtr FY14**: 38% diversion
- **1st Qtr FY15**: 38% diversion
GOAL #5 – Promote Good Stewardship

Objective  5.3  Conserve Natural Resources
Tactics   5.3.1  Decrease Energy Usage 30% by FY2015

**ACTIONS TO REDUCE CAMPUS ENERGY USAGE**

- Performance Contract wrapping up
  - Will reduce campus consumption by another 4%
- System Wide Lighting Performance Contract - scheduled to go into construction Nov 2014
- Continue retro-commissioning program
- Exterior Lighting upgrades to LED
  - Street light replacements fixtures have been finalized project to be complete by April.
  - Pedestrian Lights to be replaced as funds become available – start with campus core.
Facilities Management Strategic Planning Session – 1st QTR FY 2015

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.1 Decrease Energy Usage by 30% by FY2015

Measure: BTUs/GSF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

**CAMPUS ENERGY USAGE**

Kbtu/GSF

Base Year FY 2003
Current Reduction 28%
Mandated Reduction 30% BY FY 15
Facilities Management Strategic Planning Session – 1st QTR FY 2015

GOAL #5 – Promote Good Stewardship

Objective 5.3 Conserve Natural Resources
Tactics 5.3.2 Decrease Water Usage by 20% by FY2010

Measure: Gallons/SGF/Year consumed on campus

Balanced Scorecard Category: Financial Perspective

Still need to reduce water usage to help preserve valuable resources

Goal 43 Gal/GSF
Actual 21 Gal/GSF
Special Presentation

Energy Consumption

Tony Schallert, Energy Manager
Metering

• **Utility Meters**
  – Duke 16
  – Gas 67
  – Water 7

• **Campus Owned Meters (Mtrs/BAS)**
  – Electric 123/78
  – Water 138/37
  – BTU 30/30
Administrative

Bar chart showing administrative costs for various buildings:
- FO & PS
- King
- Reese
- Aux Serv Bld
- Cato Hall
- FM & PS
- Foundation

Costs include:
- HW
- CHW
- Gas
- Electric
Academic
Research

The image contains a bar chart showing the research expenses for various facilities. The chart is color-coded to differentiate between different types of expenses:

- **HW**: Purple
- **CHW**: Green
- **Gas**: Red
- **Electric**: Blue

The facilities listed are:

- Burson
- Cameron Hall
- Woodward Hall
- Duke Centennial Hall
- Grigg Hall
- Bioinformatics
- EPIC Building
- Motorsports II

The bars indicate the monetary value of the research expenses for each facility.
Residence Halls
GOAL #5 – Promote Good Stewardship

Objective 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects
Tactic 5.4.2: 5% African American Participation on Capital Projects

ACTION PLAN

- Participate in events promoting utilization of HUB firms
  - Charlotte MED Week Events – “Meet the Buyers and “Meet the Primes” Trade Fairs – completed
  - NC MWBE Coordinators’ Network Professional Development Conference – November 13-14, 2014

- Establish/emphasize project specific HUB participation goals for single prime projects
  - Music Annex Building – 15% goal / 19.14% achieved
  - Football Complex Sports Lighting – 10% goal established

- Review GFE documentation for compliance before 1st tier subcontracts are awarded

- Work with internal/external groups to identify qualified contractors
GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.1: 12% HUB participation on 80% of Capital Projects

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

HUB Participation
Capital Projects > $500,000

- FY2012: 78%
- FY2013: 100%
- FY2014: 100%
- 1stQtr2015: 67%

Kennedy 2nd Floor Reno Modular Buildings Phase XII

Total Projects Completed
Projects with 12% HUB Participation

STATUS
Facilities Management Strategic Planning Session – First Quarter FY2015

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation
Tactic 5.4.2: 5% African American Participation on Capital Projects
Measure: Total Capital Dollars awarded to African American Contractors divided by Total Contract Dollars
Lead: Capital Projects
Balanced Scorecard Category: Financial Perspective
Facilities Management Strategic Planning Session – First Quarter FY2015

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Businesses (HUB) Participation

Tactic 5.4.3: 15% overall HUB participation on Informal contracts $30,000 and above

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

Lead: Capital Projects

Balanced Scorecard Category: Financial Perspective

HUB Participation
Informal Projects > $30,000

15% GOAL

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Informal Project Dollars</th>
<th>Informal Project Dollars w/HUB Firms</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2012</td>
<td>$3,000,000</td>
<td>$1,400,000</td>
</tr>
<tr>
<td>FY2013</td>
<td>$3,500,000</td>
<td>$1,650,000</td>
</tr>
<tr>
<td>FY2014</td>
<td>$4,000,000</td>
<td>$1,600,000</td>
</tr>
<tr>
<td>1st Qtr 2015</td>
<td>$2,000,000</td>
<td>$779,000</td>
</tr>
</tbody>
</table>

47% 47% 40% 38%
Facilities Management Strategic Planning Session – First Quarter FY 2015
GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

| Tactic 5.4.4: | 13% overall HUB participation on informal projects below $30,000 including 3% African American participation. |
| Measure:     | Total Percentage of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts |

| Tactic 5.4.5: | 3% African American participation on Informal projects below $30,000 |
| Measure:     | Total African American contract dollars (Construction only) divided by Total Contract Dollars |

ACTION PLANS FOR IMPROVEMENT

NEW IMPROVEMENTS
Design Services’ HUB participation improvement is currently focused on expanding our outreach to new African American contractors & vendors.

Design Services and Facilities Information Systems are working to improve HUB reporting of contractors & vendors via ARCHIBUS Strategic Quarterly Reports.


ONGOING IMPROVEMENTS
All Coordinators are encouraged to reach out to new vendors for work on our Under $30K projects - Ongoing.

- Project Coordinators continue to review and discuss HUB contractors and vendors at Design Services weekly meetings.
- Amanda Caudle acts as advisor for other Coordinators.
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services
Balanced Scorecard Category: Internal Business Process

Tactic 5.4.4: 13% overall HUB participation on informal projects below $30,000 including 3% African American
Measure: Total Percentage of HUB participation on all Informal Projects below $30,000 (Construction only) divided by Total Contracts

13% Overall HUB Participation
Informal Projects Below $30,000

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>H.U.B. Contribution</th>
<th>HUB Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>$ 996,756</td>
<td>$ 89,479</td>
<td>9.0%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 1,452,202</td>
<td>$ 88,703</td>
<td>6.1%</td>
</tr>
<tr>
<td>FY '11</td>
<td>$ 3,924,102</td>
<td>$ 857,125</td>
<td>21.8%</td>
</tr>
<tr>
<td>FY '12</td>
<td>$ 2,878,027</td>
<td>$ 891,793</td>
<td>31.0%</td>
</tr>
<tr>
<td>FY '13</td>
<td>$ 2,891,003</td>
<td>$ 902,065</td>
<td>31.2%</td>
</tr>
<tr>
<td>FY '14</td>
<td>$ 1,863,533</td>
<td>$ 700,603</td>
<td>37.6%</td>
</tr>
</tbody>
</table>

QTR 1  $ 495,625  |  $ 150,457  | 30.4%
QTR 2  $ -    |  $ -   | 0.0%
QTR 3  $ -   |  $ -   | 0.0%
QTR 4  $ -    |  $ -   | 0.0%

FY '15 STATUS  $ 495,625  |  $ 150,457  | 30.4%

13% Overall HUB Participation – Summary Graph
Facilities Management Strategic Planning Session – First Quarter FY 2015

GOAL #5 – Promote Good Stewardship

Objective: 5.4: Improve Historically Underutilized Business (HUB) Participation

Lead: Design Services

Balanced Scorecard Category: Internal Business Process

**Tactic 5.4.5:** 3% African American participation on Informal projects below $30,000

**Measure:** Total African American contract dollars divided by Total Contract Dollars

### 3% African American Participation Informal Projects Below $30,000

<table>
<thead>
<tr>
<th>QUARTERLY REVIEW</th>
<th>Value of Contracts under 30K</th>
<th>African Am. Contribution</th>
<th>African Am. Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY '09</td>
<td>$ 996,756</td>
<td>$ 40,894</td>
<td>4.1%</td>
</tr>
<tr>
<td>FY '10</td>
<td>$ 1,452,202</td>
<td>$ 73,987</td>
<td>5.1%</td>
</tr>
<tr>
<td>FY '11</td>
<td>$ 3,924,102</td>
<td>$ 77,377</td>
<td>2.0%</td>
</tr>
<tr>
<td>FY '12</td>
<td>$ 2,878,027</td>
<td>$ 46,475</td>
<td>1.6%</td>
</tr>
<tr>
<td>FY '13</td>
<td>$ 2,891,003</td>
<td>$ 115,219</td>
<td>4.0%</td>
</tr>
<tr>
<td>FY '14</td>
<td>$ 1,863,533</td>
<td>$ 103,513</td>
<td>5.6%</td>
</tr>
<tr>
<td>QTR 1</td>
<td>$ 495,625</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 2</td>
<td>-</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 3</td>
<td>-</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td>QTR 4</td>
<td>-</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td>FY '15 STATUS</td>
<td>$ 495,625</td>
<td>-</td>
<td>0.0%</td>
</tr>
</tbody>
</table>